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Longwoods International was engaged by the Colorado Tourism Office to conduct a program of visitor research for the 2017 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.
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.
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
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 5,834 Colorado overnight visitors in 2017 who completed a basic 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 + / – 2%.

From that initial pool of Colorado visitors, we recruited 1,494 respondents to complete a more extensive survey about their trip to the state that gathered detailed information on regional travel, trip planning sources, trip experiences and other areas of interest.

Travel USA® also identified and surveyed 2,589 Colorado day visitors in 2017.

Colorado’s overnight visitor numbers are tracked to a baseline established in 1992 using the annual rate of change in market share data (i.e., Colorado’s share of all U.S. trips, projected to the U.S. population).
Highlights
On a national basis, travel and tourism showed modest gains in 2017:

- Domestic trip volume rose by 2%, which maintains the growth pattern that began in 2009 after the economic recession and the downturn in travel that accompanied it.
- Visits to friends and relatives and business trips were responsible for the improvement, rising 5% and 2%, respectively, while marketable leisure trips were essentially flat.
- Within the marketable leisure segment, special event, touring, outdoor, resort and combined business-leisure segments showed some improvement.
- However, that growth was counterbalanced by declines in the numbers of people taking city, theme park, cruise and casino trips.
Colorado continued to break records in leisure visitor volume and visitor expenditures in 2017.

Colorado welcomed 37.9 million overnight visitors in 2017, up very slightly from 2016, and a new benchmark:

- Within the leisure sector, visitor volumes for marketable leisure trips rose 2% and trips to visit friends and relatives grew by 1%, to reach new highs of 18.9 million and 15.1 million visitors respectively.
- For the second year in a row, business travel to Colorado contracted, falling by 7% to 3.9 million.

Touring, outdoor and special event trip segments continued to add to previous years’ strong gains; while resort and casino trips softened, and city trips to the state remained stable at the high point achieved a year earlier.

By keeping pace with the national trend, Colorado’s overall share of marketable trips remained at 3.1% for the year.

In 2017, Colorado continued to lead all states as the top destination for overnight ski trips, with a 21% share of those trips nationwide.
Colorado visitors on overnight trips spent a record $15.3 billion, a 4% improvement over 2016.

The growth in spending was entirely attributable to the marketable leisure segment which rose 10% to $9.1 billion. In contrast, expenditures among VFR visitors remained flat from year-to-year at $4.6 billion, while business travelers’ spending fell by 8% to $1.7 billion.

Four of the main business sectors that are associated with travel and tourism participated in the overall spending growth, reflecting gains of between 2% and 9% versus 2016:

- Visitors’ spending on lodging and recreation/sightseeing/attractions grew the most, by 8% and 9%, respectively, while restaurant food/beverage sales rose by 5% and purchases in retail establishments improved 2%.

- Expenditures on local transportation were unchanged from year-to-year, likely reflecting relatively stable gas prices over the period.
Day travel to and within Colorado also increased, topping 46.8 million trips in 2017. Those daytrippers spent a record $3.5 billion, a 3% improvement over 2016.

In 2017, a typical leisure trip to Colorado lasted 4.1 nights, the same trip length as in 2016.

Visitors’ high trip satisfaction ratings and their very positive image ratings of Colorado confirm that the state is delivering an above-average experience to visitors:

- Far better than the typical destination in many important respects that drive repeat visitation, such as perceived excitement, opportunities for sightseeing and recreation, delivering unique experiences and a great family atmosphere.

In summary, 2017 was another banner year for Colorado tourism, featuring strong, continued growth in marketable leisure visitors and their spending in the state.
Key Findings
National Trends in Travel

- On a national basis, overall travel volume increased by 2% in 2017. Growth varied by segment: VFR (visits to friends/relatives) and business travel showed some improvement, while marketable leisure travel was flat:
  - Visits to friends and relatives rose 5% and business trips were up 2% versus 2016
  - Marketable trips stalled after 7 straight years of increases.
- Looking at the marketable leisure trip segments of interest to Colorado, we observed the following national trends in 2017:
  - Special event, outdoor, touring and combined business-leisure trips each grew by between 3% and 11% year over year
  - The segments showing declines included city and ski trips.
National Trends in Travel

- When we look at longer term trends since the start of tracking in 1994, we find that the segments with the highest rate of nationwide growth have been city trips, followed by special event and touring trips, while lower growth was evident for outdoor and business-leisure trips.

- After strong growth in the ’80s and ’90s, casino travel has leveled off in the past decade.

- The only trip segment showing long-term decline has been business travel, which peaked between 1998 and 2000, then contracted with successive sharp dips in 2002-2003, 2008-2009 and 2013.
Overnight travel to Colorado in 2017 was essentially flat, reflecting a slight rise in leisure travel and a counterbalancing decrease in business trips:

- Colorado welcomed 37.9 million visitors in 2017, compared to 37.7 million in 2016
  - Marketable trips rose 2% to a record high 18.9 million visits
  - Visits to friends and relatives grew by 1% to a new high of 15.1 million trips
  - The only soft point was business travel which fell 7% to 3.9 million trips, continuing to lose ground after a peak in 2015.
- There was continued growth in day travel to and within Colorado, which jumped 5% to 46.8 million trips in 2017.
Colorado welcomed the following number of visitors in each of the state’s core “marketable” overnight travel segments:

<table>
<thead>
<tr>
<th>Segment</th>
<th>2016</th>
<th>2017</th>
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<tbody>
<tr>
<td>Touring trips</td>
<td>4,310,000</td>
<td>4,500,000</td>
</tr>
<tr>
<td>Outdoor trips</td>
<td>3,900,000</td>
<td>4,050,000</td>
</tr>
<tr>
<td>Special event trips</td>
<td>2,630,000</td>
<td>2,730,000</td>
</tr>
<tr>
<td>City trips</td>
<td>1,740,000</td>
<td>1,680,000</td>
</tr>
<tr>
<td>Combined business-leisure trips</td>
<td>1,210,000</td>
<td>1,250,000</td>
</tr>
<tr>
<td>Country resort trips</td>
<td>1,510,000</td>
<td>1,379,000</td>
</tr>
<tr>
<td>Casino</td>
<td>940,000</td>
<td>830,000</td>
</tr>
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Colorado’s Key Segments

- Colorado recorded the following year-over-year changes in the various segments shown above:
  - Consistent with the national growth trends, Colorado attracted significantly more touring, outdoor, special event and combined business-leisure visitors in 2017 than in 2016.
  - And Colorado welcomed fewer casino visitors, which nationwide showed a downward trend too.
  - Colorado city trips remained stable in 2016, despite declining slightly across the country.
  - While country resort trips rose slightly on an national basis, they dipped in Colorado in 2017.
Colorado’s Key Segments

- Longer term trends in these segments are as follows:
  - The last 3 years have been “breakout” years for touring trips to Colorado. After over 20 years of struggling to regain momentum following a low point in ’95, the number of touring trips finally shot up dramatically to eclipse the benchmark set in ’92, and continue to rise.
  - The longer term pattern for outdoor trips to Colorado seems to be following the national growth trend, with small increments annually. The last 7 years have seen new records for this type of travel in Colorado.
  - The national growth trend for city trips is positive in recent years and this has extended to Colorado as well.
  - Upward momentum in special event trips resumed for both Colorado and the nation as a whole in 2016 and continued in 2017, with the longer term trend looking positive.
  - After peaking in 2013, casino trips to Colorado have gradually declined. The general nationwide trend has been basically flat to downward over the past decade.
  - Since around 2007, country resort travel to Colorado and nationwide has increased in popularity after a long no-growth period. The dip in 2017 is just off the record set in 2016.
  - The volume of business-leisure travel to Colorado and nationally remains quite flat over the long term.
With low growth in marketable trips both nationally and to Colorado, Colorado’s overall share of the national market for this discretionary type of travel has remained unchanged from year to year:

- Colorado’s market share of marketable trips remained at 3.1% in 2017

- Colorado maintained its first place ranking among the 50 states for overnight ski trips with an 21.1% share in 2017. This was up from a 18.7% share in 2016.

- These overnight leisure and business travel volume estimates are based on trips taken by individuals 18 years of age or older, and include 12.2 million trips by residents of Colorado.

- Colorado had a 2.8% share of day trips nationwide in 2017, very slightly higher than it did in 2016 (2.7%).
Domestic visitors spent $18.8 billion in 2017 while in Colorado on overnight and day trips, an increase of 4% over the previous year.

Overnight visitors’ expenditures improved by 4% to $15.3 billion.

The increase was reflected mainly among leisure visitors on marketable trips:

- People visiting Colorado on overnight marketable leisure trips spent a record $9.1 billion, 10% more than in 2016.

- In contrast, people visiting friends and relatives spent 1% less, bringing the total expenditures for that segment to $4.6 billion for the year.

- And overnight business travelers spent $1.7 billion in the state, 8% less than the prior year.

Day visitors’ spending improved to $3.5 billion in 2017, up 3% versus 2016.

- Colorado residents, the majority (70%) of day visitors, accounted for 67% of day visitors’ expenditures in the state.
The increase in expenditures by overnight visitors was spread across four of the five main business sectors linked to travel and tourism, with each of those sectors showing year-over-year gains of between 2% and 8%.

- Spending on accommodations rose 8% to $4.5 billion, reflecting a combination of higher occupancy and room rates.
- Expenditures on food and beverage gained 5%, reaching $3.3 billion.
- In 2017, overnight visitors spent $2.3 billion on recreation, sightseeing and attractions, 7% more than the year before.
- And travelers’ retail purchases edged ahead by 2% to $1.9 billion in 2017.
- Spending on local transportation on Colorado trips continues to be the 2nd largest expenditure for visitors. However, these expenditures remained relatively flat in 2017 at $3.3 billion.
Visitors who stay in commercial accommodations tend to spend more on things apart from lodging than those staying with friends/relatives or in other types of accommodations:

- in 2017, 75% of all travel spending in the state was attributable to visitors staying in commercial lodging
- people staying in private homes and vacation properties contributed 17% of all travel expenditures
- only 5% of expenditures were accounted for by people staying in private or public campgrounds
- the remaining 3% was contributed by people staying in other types of accommodations
- these proportions are much the same as we observed in 2016
In 2017, the typical Colorado visitor on a marketable leisure trip spent, on average, $481 per person in the state. In comparison, the typical business visitor spent $431, and a person on a VFR trip spent an average of only $302.

Per capita spending was down slightly in each of the main segments, with marketable leisure and VFR segments declining by 6% and 3% respectively, and people visiting on business trips spending 1% less per person.

The marketable trip segments with the highest per capita spending in 2017 were people on ski trips who spent $1248 per person, followed by people on combined business-leisure trips ($502), touring vacationers ($486), special event ($422), and city visitors ($421).

Colorado visitors with more limited expenditures included those on outdoor ($399), country resort ($395), or casino trips ($237).
The per person expenditures of Colorado vacationers in both marketable and VFR segments continue to be significantly higher than their respective national norms:

- $481 on marketable leisure trips to Colorado vs. $365 nationally
- $302 on Colorado VFR trips vs. $238 nationally

In 2017, business travelers to Colorado also spent more than business travelers to the typical destination ($431 compared to $404 nationally).

The average expenditures of Colorado day visitors during 2017 remained at $75, slightly above national average of $70.

The strong rise in overnight leisure visitor spending in the past 3 years pushed the inflation-adjusted total well above parity against the 1992 benchmark.

After hitting a low point during the recent recession, the overall level of expenditures by business visitors continues to inch closer to parity with the inflation-adjusted 1997 benchmark, though it still remains slightly below that level.
Sources of Business

- In 2017, most Colorado tourists (63%) originated in the West, consisting of the Mountain, West North Central and West South Central census regions:
  - Up sharply from 56% the previous year, and reversing the decline that began from a peak of 71% in 2011
  - With corresponding losses in people coming from most other regions, particularly the Pacific, South and Northeast regions in 2017
- The Pacific, South and Mid-West regions each accounted for 1 in 10 Colorado overnight tourists, with half that number coming from the Northeast.
- The top state source of vacationers continued to be Colorado in 2017:
  - providing 33% of overnight leisure travelers, and reflecting the same upward trend as the West region
- The top out-of-state markets for overnight Colorado vacations were California, Texas and Florida, followed by:
  - Illinois
  - Arizona
  - New York
  - Kansas
  - New Mexico
  - Wyoming
Sources of Business

The top urban areas that yielded vacationers in 2017 were generally the same primary markets recorded the year before:

- Denver
- Colorado Springs – Pueblo
- Los Angeles
- New York City
- Albuquerque – Santa Fe
- Chicago
- Dallas – Ft. Worth
- Phoenix
- Salt Lake City
- Grand Junction
- San Francisco-Oakland-San Jose
- Houston
Sources of Business

- Most Colorado day trips in 2017 (70%) originated within the state itself, up from 2016 (62%).

- Most of the remaining day trippers visited from neighboring states such as Wyoming, Arizona, Kansas, New Mexico, and Nebraska.

- More distant places also appear on the list of states providing day visitors, including California, Texas, Florida and New York. Residents of those states included Colorado on a day trip from a neighboring state or while passing through the region on a longer trip.

- In 2017, the top urban sources of Colorado day trips continued to be instate, i.e., Denver, Colorado Springs/Pueblo and Grand Junction/Montrose. The main regional out-of-state markets were Albuquerque/Santa Fe and Cheyenne-Scotts Bluff:
  - Other long haul markets made the “top ten” list (e.g., LA, New York City, etc.), simply because of their size, but they should not be regarded as primary targets for marketing of day travel.
Colorado’s Overnight Leisure Travel Profile

- Demographically, Colorado’s overnight leisure visitors in 2017 were similar to the national norm in a few respects:
  - Marital status - - 6 in 10 are married
  - Employment status
  - Education, with two-thirds having a college degree
  - Household income
- There were a number of slight differences between Colorado overnight vacationers and American vacationers in general - Colorado visitors tended to be:
  - Skewed male
  - Slightly older (average of 46 years old vs. 45 nationally)
  - Living in smaller households with fewer children
  - More often white/Caucasian, and less likely to be African-American
- Just over 4 in 10 Colorado vacationers reported being AAA members, and 1 in 4 said they belonged to AARP, about the same proportions as travelers nationwide.
In 2017, the demographic profile of people taking day trips to or within Colorado resembled that of daytrippers nationally in terms of:

- marital status – a majority are married/living with a partner

The chief differences for Colorado daytrippers versus the national average were:

- an even gender split vs. a norm skewed female
- slightly older, with an average of 46 years old vs. a norm of 45
- slightly smaller households and fewer children
- slightly more upscale in terms of employment status, education and income
- more likely to be white/Caucasian, and less likely to be African-American, which is consistent with population distribution
Reflecting its geographic location and distance from main markets, Colorado tends to be a mid to longer haul trip for many vacationers, with one-quarter of visitors (25%) traveling 500 to 1,000 miles and a similar proportion (26%) traveling over 1,000 miles to reach Colorado.

Given the travel distances involved, it is not surprising that Colorado vacationers tend to plan their travel further in advance than American travelers in general:

- In 2016, about 6 in 10 (58%) of leisure travelers started planning their Colorado trip at least 2 months before travel, compared to one half of leisure travelers to the typical destination.

Colorado vacationers also tend to seek out trip-related information from a broader than average range of sources. In 2017, the formal sources of information people used most often to plan their Colorado trip included lodging (15%), airlines/commercial carriers (13%), and several types of online sites, led by online travel agencies (Expedia, Orbitz, Hotels.com, etc.) (16%), destination websites (13%) and travel company websites, e.g., airlines, lodging, transportation (10%).
About 1 in 10 indicated they used social media or an auto club/AAA, while somewhat fewer cited books, lodging sharing websites, travel agents or visitor bureaus as sources to help them gather information.

Reflecting the relatively long planning cycle for many Colorado leisure trips, over 4 in 10 (43%) trips were also booked at least 2 months ahead of travel.

Vacationers most often booked their trip to Colorado using sources such as hotels/resorts, online travel agencies and airlines, each mentioned by just under 2 in 10 travelers.

About 1 in 10 said they used travel company websites to assist with their bookings, while half that number mentioned using a travel agent, lodging sharing website, auto club/AAA or destination websites for this purpose.

As we noted for the planning phase of travel, Colorado vacationers were more likely than the norm to use most of these sources for booking their travel as well.
Mobile communication devices and computers have significantly increased in market penetration over the past decade. It is therefore not surprising that laptops, tablets and smartphones are now commonplace tools for accessing trip-related information both prior to and during travel.

Colorado vacationers are now slightly more likely to be using a laptop (44%) than a desktop computer (38%) to help plan their travel, followed by a smartphone (34%) and/or tablet (16%).

When vacationers are actually on their trip, the smartphone rises to the fore as a planning tool (71%), well ahead of laptops (29%) or tablets (27%).

Use of mobile devices in either context is slightly less prevalent among Colorado visitors than the national norm for leisure travelers.
The top “official” publications used by leisure visitors for planning their travel were the Colorado state map and the Colorado Vacation Guide, followed by the Visitors Guide to Denver, Colorado Ski Country USA Guide, and the Bicycling and Scenic Byways Map.

The main places or means by which people acquired these “official” publications in 2017 were online download (most often from colorado.com), a Colorado or other Welcome Centre in person, ordering by phone/online from the source, or the visitor’s hotel/lodging.

In 2017, the “official” websites that tourists most often visited for trip planning purposes were the state/CTO’s own website – www.colorado.com - followed at some distance by www.codot.gov, www.visitdenver.org, and www.skicolorado.org.

A sizeable majority of those visiting one of these sites indicated they were mainly looking for more information about the destination, rather than needing help on their destination decision.

However, the corollary is that over a third said they were using the website to help them make up their mind on a destination for their trip.
People generally found the official websites using a search engine or by general surfing. A few people also cited word of mouth recommendations from friends/relative, mentions in media articles/programs, brochures or advertising.

Vacationers using the Internet to plan their Colorado trip were most often looking for information on accommodations and directions on getting to/around the state, followed by information on local activities/attractions, restaurants, transportation options, and cities/towns to visit. Very few people sought out information on packaged tours.

About 6 in 10 vacationers who used both the Internet (websites and/or social media) and “official” publications for trip planning felt that the Internet provided more helpful information. Almost all of the remainder found both equally helpful. Only a small number (3%) felt that publication were the more helpful sources of information.
Use of social media such as Facebook, Twitter, Instagram, etc., for Colorado trip planning remained at a relatively low level -- about 11% in 2017 among vacationers, comparable to the national norm.

At the same time, a majority of travelers indicated they use social media in the broader travel-related context, i.e., not related to the planning of a specific trip.

Usage of “social media” to converse about travel in general softened somewhat from year to year, reflecting decreases in usage across many of the more “involving” types of activities/behaviors measured in the survey.

In 2017, 7 in 10 (71%) Colorado leisure visitors and slightly fewer American vacationers in general (68%) indicated that they recently engaged in some travel-related activity via social media (a list of 14 common activities was provided), down from 77% and 72%, respectively in 2016.
The most common way that people in 2017 used social media “in the past 3 months” in this general travel context for both Colorado leisure visitors and those visiting the average destination were:

- Posting travel photos and videos on social media websites
- Reading travel reviews
- Looking at other people’s travel photos
- Learning about travel deals/promotions

The general participation levels in these activities remained about the same from year to year.
As we have seen in prior years, people were less inclined to take part in social media activities requiring more active involvement, such as:

- Connecting with others interested in travel
- Seeking out or giving travel advice via social networking
- Following a destination/attraction on Facebook/Twitter
- Tweeting about a trip
- Reading/writing a travel blog or contributing travel reviews
- Subscribing to a travel newsletter

In 2017 we see fairly sharp year to year declines in participation in almost all of these activities.
When asked which other destinations they were considering for their trip apart from Colorado, the vast majority of vacationers (79%) indicated they only considered Colorado and no other place. Among the remainder, the top alternative states mentioned were California (5%), Arizona (2%) and Utah (2%).

The top reasons leisure visitors gave for choosing Colorado over another destination were related to the mountains/their scenic beauty and having friends/relatives in the state, followed by activities/things to do in the state. People less frequently cited the climate, a specific event, Colorado’s cities/towns, easy access, and deals/affordability.
Vacation trips to Colorado in 2017 were the same in length as they were in 2016:

- In each year, the average Colorado leisure trip lasted 4.1 nights away from home.
- The typical U.S. leisure trip also remained stable at 3.7 nights.

The amount of time on that overall trip that was spent in Colorado rose slightly – in 2017 Colorado vacationers spent 3.8 of those 4.1 trip nights in the state, up from 3.6 nights a year earlier.

In 2017 as in the previous year, just under 6 in 10 out-of-state vacationers drove to the state, while most of the remainder flew in:

- About 3 in 10 non-Colorado residents rented a vehicle while visiting.
- Among those vacationers who flew in, the majority arrived at Denver International Airport (86%), with most of the remainder split among Colorado Springs (6%), Eagle/Vail (4%) or Aspen (2%) Airports.
Use of commercial accommodations (hotel, motel, inn, B & B) on Colorado vacationers’ trips was at a similar level as the year before:

- About 7 in 10 stayed in commercial accommodations
- 1 in 4 stayed with friends/relatives
- About 1 in 10 rented a home, condo or cottage/cabin, or stayed in a campground, while a similar number stayed at a second home/timeshare.

Expressed in terms of room nights spent in Colorado, the breakout looks somewhat different, reflecting the high proportion of VFR travel to the state, and those travelers’ longer stays versus people on marketable trips:

- Just under 40% of room nights are spent in commercial accommodations and a similar proportion in the homes of friends/relatives
- The remaining room-nights are spread fairly evenly among rentals, second homes and campsites/other lodging options
The average party size for Colorado vacationers in 2017 returned to 2.9 from 3.1 a year earlier, consisting of 2.3 adults and 0.6 children:
- Comparable to the national norm.

The travel party of Colorado leisure visitors most often included a spouse/partner (69%), and occasionally a child, another relative, or a friend:
- About 2 in 10 Colorado vacationers visited on their own

Colorado leisure travel tends to peak in summer, and this continued to be the case in 2017:
- There was little change in seasonal distribution of travel to the state from year to year
The most popular place to visit for Colorado vacationers is the Denver Metro Region - in 2017, about 6 in 10 vacationers spent at least some time there and 46% spent at least one night.

Three regions also attract considerable numbers of visitors -- 1 in 4 leisure visitors spent time in the Mountain Towns and Ski Resorts, Pikes Peak Region and/or the Northern Front Range in 2017.

About 1 in 7 visited the Western Slope Region, while 1 in 20 took in the Eastern Plains or San Luis Valley.

As a general rule, about 8 in 10 people spending time in a region are also staying overnight.

The regions rank somewhat differently in terms of how long visitors tend to stay, led by the Western Slope with guests staying there almost 5 nights, followed by Mountain Towns & Ski Resorts, Northern Front Range, Pikes Peak Region and Denver Metro at about 3 nights, then San Luis Valley and Eastern Plains with shorter stays.
About 2 in 10 vacationers traveled on/experienced at least one of the state’s Scenic & Historic Byways:

- The most popular in 2017 were Trail Ridge Road through Rocky Mountain National Park, Top of the Rockies National Scenic Byway, Collegiate Peaks National Scenic Byway, Peak to Peak Byway, Lariat Loop and San Juan Skyway

In the Travel USA™ survey, respondents are asked about their participation in 40+ sightseeing, recreation, sports, and entertainment activities while on their trip.

In 2017, the top activities for Colorado leisure visitors were:

- Shopping (30%)
- Hiking/backpacking (25%)
- Visiting a national or state park (24%)
- Fine dining (21%)
- Visiting a famous landmark or historic site (20%)
- Visiting a bar or nightclub (15%)
Other activities that somewhat fewer vacationers engaged in included:

- Outdoor recreational pursuits such as swimming, camping, mountain climbing, skiing/snowboarding, fishing and biking
- Museums and art galleries
- Touring/visiting breweries and wineries
- Casinos
- Festivals/fairs
- Local cultural venues for theater, dance, etc.
- Attractions such as zoos and theme parks
- Visiting a spa
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 2017 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.

The types of activities that Colorado vacationers engaged in on trips during 2017 were not markedly different from their list of pastimes in 2016.
When vacationers were asked to identify which of several specific interests they had on their trip, they most frequently listed an interest in historic places (28%), followed by cultural activities and attractions (19%).

Between 1 in 10 and 1 in 8 said they had particular interest in culinary, beer or marijuana-related experiences.

Only between 2% and 7% of vacationers indicated their trips specifically revolved around eco-tourism, wineries/wine tastings, traveling with grand-children, a wedding, religious travel, agritourism, or medical tourism.

The level of interest in many of the latter very specialized areas contracted from year to year, with the slack taken up by marijuana-focused tourism, which was included in our survey for the first time in 2017.

Versus the national norm, Colorado vacationers seem more interested in activities/types of travel related to historic places, marijuana tourism, eco and beer-related tourism.
Over 8 in 10 (84%) Colorado leisure visitors in 2017 indicated they were “very satisfied” with the overall trip experience they had, a higher level of satisfaction than the year before (80%).

And approximately 7 in 10 were strongly positive about the friendliness of local people they encountered, the sights/attractions they visited, the quality of accommodations and food and cleanliness:

- Also higher scores than in 2016

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 more positive than the national norm about their overall experience, about sightseeing/attractions, cleanliness, and the friendliness of locals; but otherwise approximated the national norm.
The Trip Experience

- For both Colorado and destinations across America, the vast majority of vacationers have visited at some point in the past:
  - 87% of Colorado visitors claim to have visited previously, including 64% who indicated they did so in the previous year.
  - The proportion saying they visited Colorado in the past year was lower in 2017 than in 2016 (73%)
  - These proportions are equivalent to the national norm
- The average Colorado vacationer has visited the state previously on 23 occasions, including 6 times in the past 5 years:
  - This is skewed a great deal by people visiting friends/relatives
In 2017, almost half (47%) of Colorado’s outdoor vacationers were residents of the state:

- Among the top three leisure segments, outdoor trips have the highest proportion originating instate.
- Most outdoor trips to Colorado (60%) involved a trip of less than 500 miles from home.

Colorado’s outdoor vacationers in 2017 had the following characteristics:

- Skewed male (57%).
- Slightly older than outdoor vacationers nationally (average age of 44 vs. 42 nationwide) and older than reported the previous year (41 years).
- More upscale in terms of education and income than the norm for outdoor vacationers.
The trip characteristics of this segment in 2017:

Among Colorado’s three key vacation segments, outdoor vacationers were the least likely to use a travel agent or an online travel agency for Colorado trip planning/booking, though similar to the US norm for the outdoor segment.

The group with the shortest trip planning/booking window – just over half (54%) said they started planning 2 or more months ahead of travel, and only 36% booked some aspect of their trip this far in advance.

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 AARP.

Trip length in 2017 was the shortest of the three segments at 4.1 nights.

But longer than the national norm for outdoor trips (3.2 nights).

Larger travel party size than for the typical Colorado vacation (3.5 people vs. 2.9), though less than the national outdoor trip norm (3.8).

Largely a drive vacation (78%) with relatively little fly-in (only 17%).

Relative to other segments, much greater use of campgrounds and less use of commercial accommodations.
The most popular regions for outdoor vacationers for overnight stays and general visitation in 2017 were Mountain Towns & Ski Resorts and the Western Slope.

The top expressed motivations and considerations for choosing Colorado among this segment were related to the mountains/scenic beauty, activities to pursue in the state and climate.

In 2017, the most popular activities and interests for Colorado outdoor vacationers included:

- Hiking/backpacking (55%)
- Camping (35%)
- Visiting a national/state park (35%)
- Fishing (19%)
- Shopping (19%)
Colorado’s outdoor vacationers occasionally experienced:
- Historic places/historic tourism
- Cultural tourism (museums, galleries, theater, etc.)
- Mountain climbing
- Biking
- Water activities like swimming, boating
- Eco-tourism

Outdoor vacationers were mainly repeat visitors (87% in 2017), with many (65%) having visited in the past year (in addition to the trip profiled for this research)

They also expressed a high level of overall satisfaction with their Colorado trip:
- Over 8 in 10 (84%) said they were “very satisfied” with their experience, which is comparable to the U.S. norm for outdoor trips
In 2017, a majority of Colorado touring vacationers (71%) came from out-of-state:

- The same as we observed in 2016
- One half of touring trips to Colorado involved a trip of 500+ miles from home

Touring vacationers visiting Colorado tended to be older than the average Colorado vacationer and older than the national norm for touring trips (48 vs. 46 years old in each case):

- The average age of Colorado touring vacationers rose back to the typical 48 years in 2017

With respect to other demographics and the U.S. norm, touring vacationers in 2017:

- Had an even gender split
- Were slightly above average in terms of income
- Had similar levels of education, and membership in AAA and AARP
Reflecting a longer than average trip compared to touring trips nationwide, Colorado touring trips tend to be planned and booked further in advance.

And they were the segment most likely to use an online travel agency for both trip planning and booking.

Their use of other internet resources, social media and mobile devices was typical for their segment nationally.

The average Colorado touring trip in 2017 was 4.4 nights away from home, which was longer than the typical U.S. touring trip (3.3 nights) or a Colorado vacation in general (4.1 nights):

- This trip length was shorter than in 2016 (4.8 nights)
Segment Profiles – Touring Trips

- The typical party size for Colorado touring trips in 2017 was about the same as the average for leisure trips generally (2.8 vs. 2.9 people); which is slightly below the national touring norm (3.0).

- Most Colorado touring trips in 2017 involved the family vehicle:
  - Two-thirds arrived in their own car/truck
  - About 2 in 10 flew in, then rented a car for their touring
  - These proportions have remained fairly stable for several years

- In 2017, touring vacationers continued to be one of the visitor segments with the highest use of commercial accommodations.

- The top areas visited by touring vacationers in 2017 included Denver and Pikes Peak regions.

- Major considerations for these travelers when selecting Colorado included Colorado’s mountains/scenic beauty, things to do in the state, Colorado’s towns/cities, and accessibility/being easy to get to.
Variety of experiences and activities seems to be the hallmark of touring vacations nationwide. And Colorado touring trips are no exception.

The most popular activities and specific interests for Colorado touring vacationers in 2017 were:

- Visiting a national or state park (49%)
- Visiting a landmark or historic site (44%)
  - 6 in 10 said they were particularly interested in historic places on their trip
- Shopping (39%)

Compared to the other key leisure segments, touring vacationers were the group most likely participate in or visit:

- Cultural activities and attractions, such as museums, art galleries, theater, etc.
- Culinary experiences, and winery tours/wine tasting
- Marijuana tourism
- Attractions like zoos and theme parks
- Casinos
Segment Profiles – Touring Trips

- In addition, Colorado touring vacationers frequently participated in fine dining, brewery tours/tastings, nightlife, and outdoor activities such as hiking/backpacking, swimming, mountain climbing, camping, etc.

- Colorado touring vacationers are the major segment least likely to have visited the state previously:
  - Nonetheless the proportion is still very high – 7 in 10 said they had visited at some point in the past, including 4 in 10 in the past year

- Judging by their very high rating scores for overall trip satisfaction, people who visited Colorado on touring trips had an excellent experience:
  - 86% said they were “very satisfied” with their overall experience
  - Which is higher than touring vacationers’ overall satisfaction scores nationwide
Most overnight ski trips originate out-of-state – accounting for approximately 7 in 10 of those trips in 2017, which is similar to prior years.

About half of Colorado ski trips were 500+ miles from home in 2017.

Compared to norms, Colorado ski vacationers’ demographics were as follows in 2017:

- A strong male skew – 64%
- Older than Colorado visitors in general (48 vs. 46 years) and older than the national ski norm (44 years)
- More upscale in terms of income and education
- Similar level of membership in AAA as the national norm
- Higher levels of membership in AARP
Colorado skier vacationers exceeded the average with respect to:

- Advance planning and booking of their travel -- three-quarters began the planning process at least 2 months ahead of departure, and 6 in 10 booked something this far in advance too
- Use of travel agencies for trip planning and booking
- Use of www.colorado.com for trip planning
- Use of smartphones and laptops on their trip
- Use of escorted tours and prepaid packages

The average Colorado ski trip involved 5.2 nights away from home in 2017, up slightly from 2016 (4.7 nights)

- Nationwide, ski trips were considerably shorter (3.7 nights)
Segment Profiles – Ski Trips

- The typical Colorado ski party numbered 4.0 individuals, which is substantially more than the Colorado leisure trip in general (2.9 people):
  - Nonetheless, about the same as the national ski norm (3.9)
- Consistent with prior years, somewhat more ski vacationers from out-of-state drove their own vehicle to get to Colorado than flew in (54% vs. 38% respectively).
- The most popular types of accommodations used by ski vacationers in 2017 were:
  - Resort and other hotels (40%)
  - Rentals (27%)
  - Second homes/time shares (18%)
- The top regional destinations within the state for this segment in 2017 were Mountain Towns & Ski Resorts and Denver.
- When asked about reasons for selecting Colorado, this group was most likely to focus on the mountains, activities available, and climate.
Skiers tend to be mainly focused on their primary sporting activity and the types of experiences associated with ski locales, so their level of participation in other pastimes/activities is more limited than in other leisure segments.

In 2017, the most popular activities that ski vacationers participated in or visited during their Colorado trip, apart from skiing itself, included:

- Shopping (25%)
- Fine dining (23%)
- Nightlife such as a bar or nightclub (16%)
- Cultural activities (13%)
- Visiting a brewery (14%)
- Hiking/backpacking (8%)
- Spa (8%)
- Swimming (7%)
- National/state park (7%)
The vast majority (87%) of ski vacationers had visited Colorado before, including 69% who came within the past year:

- Proportions which are similar to the national norm for ski trips

Overall trip satisfaction seems to be high – 82% of Colorado ski vacationers indicated they were “very satisfied” with their overall trip experience:

- Slightly better than skiers’ ratings of the typical destination nationwide
In the detailed Visitor Survey, we asked respondents to rate Colorado on an overall basis as “a place they would really enjoy visiting again”, and on a variety of individual image dimensions.

In order to help analyze this extensive dataset and to communicate the results, we used multivariate analysis to:

- reduce the list of 74 attributes to 13 conceptual factors
- determine which factors and items are most predictive of interest in visiting Colorado again

Because this is your detailed image among past year visitors, we call this your “product delivery”.
In order for Colorado to be considered for a repeat visit, it must be perceived, first and foremost, to be an exciting place and one that adults will enjoy:

- a good *family atmosphere* (i.e., lots for the family to do and plenty of things for kids to enjoy)
- an *exciting* place is a once-in-a-lifetime destination that offers a sense of fun and adventure
- an *adult destination* is one that is appealing to adults traveling alone and couples

Five factors are also relatively important determinants of destination choice:

- A *worry-free* atmosphere, which means perceived safety, plus a sense of relaxation, welcoming atmosphere and general friendliness
Product Delivery

- **Popularity** – people like to travel to places that are well-known and that they see being advertised

- Opportunities for **sightseeing**, especially the variety of things to see and do

- **Unique**, with interesting scenery, experiences, cultures and customs

- **Entertainment** options, ranging from shopping to live performances, casinos and nightlife

- For Colorado to be on consumers’ radar for a repeat visit, several aspects are of moderate importance:
  - **Climate**
  - **Skiing** amenities
Of least importance at this stage of the repeat visit decision-making process is Colorado’s image for:

- **Sports and recreation**
- **Affordability**
- The availability of **luxurious** accommodations and fine dining

Nonetheless, we know from other “path to purchase” research that affordability tends to move closer to the top of the priority list, the closer consumers are to making up their minds on a destination, be it Colorado as a place to visit again or another destination, as the cost and time/travel distance factors play a greater role in travel decisions.
As we have seen with people’s trip satisfaction ratings, Colorado appears to be delivering an outstanding product to visitors, which is confirmed by rating scores on the two overall measures in the image battery:

- About three quarters of vacationers agree strongly that they would “really enjoy visiting Colorado again”, and over half do the same when asked about Colorado’s “vacation value for money”
- Both are higher levels of agreement than for the average state destination

Colorado is also given much higher ratings than the norm in several specific areas, including areas that are top drivers of interest in visiting again:

- Family atmosphere
- Excitement
- Sightseeing, including not just the mountains, but also urban areas, famous landmarks, historic sites, gardens/parks, and overall variety of things to see/do
- Uniqueness
- Climate
- Opportunities for sports and recreation
The main barriers to considering Colorado for another trip, relative to the norm, are related to cost and distance:

- considerably fewer Colorado visitors believe Colorado is “not too far away” than feel this way about the average destination

- Although travel distance is the main part of the equation, some people are also concerned about the cost of getting to Colorado and the cost of accommodations once there.
In order to assess visitors’ attitudes towards the issue of the legalization of marijuana sales/use in terms of tourism, we asked for people’s perceptions of states who had legalized in three contexts:

- Does legalization affect how people regard these states as sellers of general goods/services?
- Does legalization affect perceptions of these states as a place to live and work?
- Does legalization affect attitudes towards the states as places to visit on vacation?

In 2017, we continue to see that legalization has either a neutral or net positive effect on attitudes in each area:

- Just under 6 in 10 leisure travelers nationwide said they feel the same with the knowledge that these states are allowing marijuana sales/use, and most of the remainder were positive about buying goods, living/working or visiting these places. Only about 1 in 10 indicated that the legalization had created negative perceptions in these areas.
There were some slight differences in opinions and changes from year-to-year among specific sub-groups and in certain contexts:

- People are slightly less likely to choose the positive response in 2017 than previously, however, most of this change went to the neutral position rather than the negative.

- Although Colorado leisure visitors were more positive across each dimension than U.S. leisure travelers as a whole in 2016, this has evened out during 2017.

- Within the Colorado visitor group, non-residents are substantially more positive than instate visitors, particularly in the “consider visiting on vacation” context.

- Among visitors, we observe some slightly greater resistance in the “live and work” and “buying goods/services” contexts than for “visiting on vacation”.
Detailed Findings
Size & Structure of the U.S. Travel Market
Structure of the U.S. Travel Market — 2017 Overnight Trips

- Marketable Pleasure Trips: 47%
- Visits to Friends/Relatives: 43%
- Business Trips: 10%

Base: Overnight Person-Trips

- All Overnight Trips
- Visiting Friends/Relatives
- Marketable Trips
- Business Trips

Percent Change '17 vs. '16
U.S. Overnight Marketable Trip Trends — 2017 Travel Year

Special Event: +11%
Outdoors: +4%
Touring: +3%
Resort: +3%
Business/Leisure: +3%
Ski: -2%
Theme park: -6%
City: -7%
Casino: -11%
Cruise: -14%

Percent Change `17 vs. `16
U.S. Marketable Trips
— Special Event, Casino & City Trips

Millions of Trips

Special Event  Casino  City

0 20 40 60 80 100 120 140 160

'94 '95 '96 '97 '98 '99 '00 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17
U.S. Marketable Trips — Touring & Outdoor Trips

Millions of Trips

- Touring
- Outdoor

Years: '94 to '17
U.S. Marketable Trips — Business/Leisure, Resort* & Ski Trips

* Combines Country and Beach starting in 2007 and Resort plus Golf starting in 2013
Size & Structure of Colorado’s Travel Market
Day & Overnight Trips to Colorado in 2017

Total Trips = 84.7 Million

- Day Trips: 55% (46.8 Million)
- Overnight Business: 5% (3.9 Million)
- Overnight Leisure: 40% (34.0 Million)
Size of Colorado’s Travel Market — 2017 Overnight Trips

Total Trips = 37.9 Million

- Marketable Leisure Trips: 50% (18.9 Million)
- Visits to Friends/Relatives: 40% (15.1 Million)
- Business Trips: 10% (3.9 Million)
Main Purpose of 2017 Overnight Leisure Trips vs. the U.S. Norm

- Visiting friends/relatives: 43% (Colorado) vs. 48% (US Norm)
- Touring: 14% (Colorado) vs. 10% (US Norm)
- Outdoors: 13% (Colorado) vs. 7% (US Norm)
- Special event: 9% (Colorado) vs. 9% (US Norm)
- City trip: 6% (Colorado) vs. 5% (US Norm)
- Ski/Snowboarding: 6% (Colorado) vs. 5% (US Norm)
- Business-Leisure: 4% (Colorado) vs. 5% (US Norm)
- Resort: 6% (Colorado) vs. 3% (US Norm)
- Casino: 4% (Colorado) vs. 2% (US Norm)
- Theme park: 4% (Colorado) vs. 1% (US Norm)
- Cruise: 2% (Colorado) vs. 1% (US Norm)
Main Purpose of 2017 Overnight Business Trips vs. the U.S. Norm

Base: Overnight Business Trips

- Conference/convention:
  - Colorado: 36%
  - US Norm: 35%

- Other business:
  - Colorado: 64%
  - US Norm: 65%
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 2017
Overnight Business Trips to Colorado — 1994 to 2017

![Bar chart showing millions of trips from 1994 to 2017 with a decrease of 7%](chart.png)
Overnight Outdoor Trips to Colorado

Millions of Trips

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Overnight Business-Leisure Trips to Colorado
Overnight Special Event Trips to Colorado
Overnight Resort Trips to Colorado

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Overnight City Trips to Colorado

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Overnight Casino Trips to Colorado

Millions of Trips

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Day Trips To/Within Colorado

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Travel and Tourism Spending in Colorado
Total Travel Spending in Colorado in 2017

Total = $18.8 Billion

Overnight Visitors 81% ($15.3 Billion)

Day Visitors 19% ($3.5 Billion)
Total Travel Spending in Colorado in 2017

Overall Total = $18.8 Billion

Total Overnight = $15.3 Billion

- Denver Metro: 36% ($563 Billion)
- Other Colorado: 64% ($9.7 Billion)

Total Day = $3.5 Billion

- Denver Metro: 26% ($0.92 Billion)
- Other Colorado: 74% ($2.57 Billion)
Total Travel Spending in Colorado — Overnight Visitors

2016 Total= $14.7 Billion
- Colorado Residents 19% ($2.7 Billion)
- Out-of-State Visitors 81% ($12.0 Billion)

2017 Total= $15.3 Billion
- Colorado Residents 23% ($3.5 Billion)
- Out-of-State Visitors 77% ($11.8 Billion)
Total Travel Spending in Colorado — Day Visitors

2016 Total = $3.4 Billion

- Out-of-State Visitors: 36% ($1.2 Billion)
- Colorado Residents: 64% ($2.2 Billion)

2017 Total = $3.5 Billion

- Out-of-State Visitors: 33% ($1.2 Billion)
- Colorado Residents: 67% ($2.3 Billion)
Total Spending in 2017 by Sector — Overnight Visitors

Total Spending = $15.3 Billion

- Accommodations: 30% ($4.5 Billion)
- Transportation: 21% ($3.3 Billion)
- Eating/Drinking: 21% ($3.3 Billion)
- Recreation: 15% ($2.3 Billion)
- Retail: 13% ($1.9 Billion)
Total Spending in 2017 by Sector — Day Visitors

Total Spending = $3.5 Billion

- Eating/Drinking: 34% ($1,239 Million)
- Retail: 28% ($929 Million)
- Transportation: 19% ($632 Million)
- Recreation: 20% ($690 Million)
Overnight Travel Spending in 2017 By Sector — Denver vs. Other Colorado Regions

Base: Overnight Visitors

<table>
<thead>
<tr>
<th>Sector</th>
<th>Millions of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>$1,701</td>
</tr>
<tr>
<td>Food/Beverage</td>
<td>$2,202</td>
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<tr>
<td>Transportation</td>
<td>$1,594</td>
</tr>
<tr>
<td>Retail</td>
<td>$1,245</td>
</tr>
<tr>
<td>Recreation</td>
<td>$1,753</td>
</tr>
</tbody>
</table>

Denver vs. Colorado Regions

- **Accommodation**: $1,701 vs. $2,836
- **Food/Beverage**: $1,065 vs. $2,202
- **Transportation**: $1,594 vs. $1,709
- **Retail**: $688 vs. $1,245
- **Recreation**: $536 vs. $1,753
Ground Transportation Expenditures — Overnight Visitors

Total = $3.3 Billion

- Gasoline: 39% ($1,286 Million)
- Rentals: 31% ($1,017 Million)
- Fares: 11% ($382 Million)
- Other: 12% ($386 Million)
- Repairs: 3% ($97 Million)
- Parking: 4% ($135 Million)
Retail Expenditures — Overnight Visitors

Total = $1.9 Billion

- Groceries/Drugs: 38% ($738 Million)
- Marijuana Products: 15% ($287 Million)
- Gifts/Souvenirs: 14% ($279 Million)
- Alcohol: 11% ($206 Million)
- Antiques/Crafts: 6% ($119 Million)
- Clothing/Sports Equipment: 8% ($150 Million)
- Other: 8% ($154 Million)
- Other: 8% ($150 Million)

$738 Million
$287 Million
$279 Million
$206 Million
Recreation Expenditures in 2017 — Overnight Visitors

Total = $2.3 Billion

- Ski-related: 37%, $849 Million
- Other: 58%, $1 317 Million
- Gaming*: 5%, $123 Million

*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 2017 by Type of Accommodations — Overnight Trips

Total = $15.3 Billion

- Commercial Lodging: 75%
- Vacation Home: 8%
- Campground: 5%
- Private Home: 9%
- Other: 3%
Total Spending in 2017 by Purpose of Trip — Overnight Visitors

Total = $15.3 Billion

- Visits to Friends/Relatives: 30% ($4.5 Billion)
- Touring: 14% ($2.2 Billion)
- Ski: 13% ($2.1 Billion)
- Business: 11% ($1.7 Billion)
- Outdoors: 11% ($1.6 Billion)
- Special Event: 8% ($1.2 Billion)
- Other Pleasure: 13% ($2.0 Billion)
Spending Versus Overnight Visitor Volumes in 2017

- VFR: 30 Percent Expenditures, 40 Visitor Volumes
- Ski: 13 Expenditures, 10 Visitor Volumes
- Business: 11 Expenditures, 12 Visitor Volumes
- Touring: 14 Expenditures, 11 Visitor Volumes
- Outdoors: 11 Expenditures, 11 Visitor Volumes
- Special Event: 8 Expenditures, 7 Visitor Volumes
- Other Pleasure: 13 Expenditures, 16 Visitor Volumes

Chart showing expenditures and visitor volumes for different categories.
Actual Travel Expenditures on Overnight Trips — 1992 to 2017

Total Spending Up 4%
Inflation Adjusted Travel Expenditures — Overnight 1992 to 2017

Billions of Dollars

Leisure

Business

'92 9.3 8.7 8.5 7.8 7.8 7.9 8.6 9.3 9.6 9.0 8.5 8.7 9.0 9.0 9.5 11.2 12.7 13.2 13.6
'97 2.2 2.1 2.0 2.0 1.6 1.6 1.6 1.9 2.0 1.4 1.2 1.2 1.3 1.5 1.9
'99 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'00 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'01 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'02 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'03 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'04 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'05 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
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'15 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'16 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
'17 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

- Leisure
- Business

Longwoods
INTERNATIONAL
40 YEARS TOGETHER
Expenditures Per Person by Trip Purpose

Base: Overnight Trips

- Ski: $1,248
- Combined Business-Leisure: $502
- Touring: $486
- Marketable: $481
- Business: $431
- Special Event: $422
- City: $421
- Outdoors: $399
- Country Resort+Golf: $395
- VFR: $302
- Casino: $237

Average Expenditure
Expenditures Per Person Per Day by Trip Purpose

Base: Overnight Trips

- Ski: $248
- City: $209
- Special Event: $149
- Marketable: $138
- Touring: $134
- Business: $127
- Combined Business-Leisure: $122
- Country Resort+Golf: $112
- Outdoors: $105
- Casino: $103
- VFR: $73

Average Expenditure

Ski City Special Event Marketable Touring Business Combined Business-Leisure Country Resort+Golf Outdoors Casino VFR
Expenditures Per Person

Base: All Trips

- **Marketable**: Average expenditure in Colorado is $431, with a US Norm of $365.
- **Business**: Average expenditure in Colorado is $404, with a US Norm of $404.
- **VFR**: Average expenditure in Colorado is $302, with a US Norm of $238.
- **Day trips**: Average expenditure in Colorado is $75, with a US Norm of $72.

Average Expenditure

- **Colorado**
- **US Norm**
Expenditures on Day Trips

Billions of Dollars

<table>
<thead>
<tr>
<th>Year</th>
<th>Dollars (in billions)</th>
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<tbody>
<tr>
<td>'08</td>
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</tr>
<tr>
<td>'09</td>
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<td>'14</td>
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<td>'15</td>
<td>3.1</td>
</tr>
<tr>
<td>'16</td>
<td>3.4</td>
</tr>
<tr>
<td>'17</td>
<td>3.5</td>
</tr>
</tbody>
</table>

3% growth
2017 Leisure Travel Profile
Sources of Leisure Travel
Regional Sources of Business

Base: Overnight Leisure Trips

Percent

West *

Pacific

`97 `99 `00 `01 `02 `03 `04 `05 `06 `07 `08 `09 `10 `11 `12 `13 `14 `15 `16 `17

67 63 61 67 61 63 65 67 70 70 71 71 69 64 62 60 56 63

10 12 15 12 14 12 13 10 10 12 9 10 10 9 13 13 14 16 11

*Mountain, West North Central and West South Central census divisions
Regional Sources of Business

Base: Overnight Leisure Trips

Percent

'97 '99 '00 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17

Mid-West

South

125
Regional Sources of Business

Base: Overnight Leisure Trips

North-East*

*New England and Middle Atlantic census divisions
State Sources Of Overnight Trips

Base: Overnight Leisure Trips

- Colorado: 29% (2016), 33% (2017)
- California: 12% (2016), 9% (2017)
- Texas: 7% (2016), 6% (2017)
- Florida: 4% (2016), 4% (2017)
- Arizona: 3% (2016), 2% (2017)
- New York: 3% (2016), 5% (2017)
- Kansas: 2% (2016), 3% (2017)
- New Mexico: 2% (2016), 2% (2017)
- Wyoming: 2% (2016), 1% (2017)

2017 vs 2016
State Sources Of Day Trips

Base: Day Leisure Trips

- Colorado
- California
- Texas
- Wyoming
- Florida
- New Mexico
- Arizona
- New York
- Illinois
- Kansas
- Nebraska
Urban Sources of Overnight Trips

Base: Overnight Leisure Trips

- **Denver, CO**: 2017: 23, 2016: 21
- **Colorado Springs-Pueblo, CO**: 2017: 8, 2016: 7
- **Los Angeles, CA**: 2017: 6, 2016: 5
- **New York, NY**: 2017: 5, 2016: 3
- **Albuquerque-Santa Fe, NM**: 2017: 2, 2016: 3
- **Chicago, IL**: 2017: 3, 2016: 3
- **Dallas-Ft. Worth, TX**: 2017: 2, 2016: 2
- **Phoenix, AZ**: 2017: 2, 2016: 2
- **Salt Lake City, ID/UT**: 2017: 2, 2016: 2
- **Grand Junction-Montrose, CO**: 2017: 2, 2016: 2

Legend: 
- ▶️ 2017
- ▹ 2016
Urban Sources of Overnight Trips (Cont’d)

Base: Overnight Leisure Trips

San Francisco-Oakland-San Jose, CA
Houston, TX
Kansas City, KS
Wichita-Hutchinson Plus, KS
Washington, DC
Tampa-St. Petersburg-Sarasota, FL
Minneapolis-St. Paul, MN
Boston, MA
Austin, TX
St. Louis, IL/MO

Percent

0  10  20  30

2017  2016
Urban Sources of Day Trips

Base: Day Leisure Trips

- Denver, CO 52
- Colorado Springs-Pueblo, CO 15
- Albuquerque-Santa Fe, NM 3
- Los Angeles, CA 5
- Grand Junction-Montrose, CO 2
- Cheyenne-Scottsbluff, NE/WY 1
- New York, NY 3
- Phoenix, AZ 1
- Houston, TX 1
- Salt Lake City, ID/UT 1

Percent 2017 vs 2016
Instate Overnight Leisure Trips

Percent of Overnight Leisure Trips Originating in Colorado
Visitor Profile
Gender

Base: Overnight Leisure Trips

Male
- Colorado: 53%
- US Norm: 48%

Female
- Colorado: 47%
- US Norm: 52%
Age

Base: Overnight Leisure Trips

Average Age Colorado = 46.1
Average Age U.S. Norm = 44.9

18-24 years
13 (Colorado) 13 (US Norm)
25-44 years
36 (Colorado) 39 (US Norm)
45-64 years
33 (Colorado) 32 (US Norm)
65+ years
19 (Colorado) 16 (US Norm)

Percent
0 20 40 60

Colorado  US Norm
Marital Status

Base: Overnight Leisure Trips

- Married/with partner: Colorado 60%, US Norm 59%
- Never married: Colorado 25%, US Norm 27%
- Divorced/widowed/separated: Colorado 14%, US Norm 14%
Household Size

Base: Overnight Leisure Trips

- **1 member**: 23%
- **2 members**: 35%
- **3 members**: 15%
- **4+ members**: 21%

<table>
<thead>
<tr>
<th>Percent</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-20</td>
<td>0-20</td>
<td>0-20</td>
</tr>
<tr>
<td>20-40</td>
<td>20-40</td>
<td>20-40</td>
</tr>
<tr>
<td>40-60</td>
<td>23</td>
<td>23</td>
</tr>
</tbody>
</table>

**Notes:**
- **Base:** Overnight Leisure Trips
- **Legend:**
  - **Yellow**: Colorado
  - **Blue**: US Norm
Children in Household

Base: Overnight Leisure Trips

- No Children Under 18: Colorado 62%, US Norm 57%
- Any child between 13-17: Colorado 19%, US Norm 16%
- Any child between 6-12: Colorado 21%, US Norm 20%
- Any child under 6: Colorado 17%, US Norm 15%

Percent

- Colorado
- US Norm
Employment

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Category</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time/self-employed</td>
<td>52</td>
<td>52</td>
</tr>
<tr>
<td>Part-time</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Not employed/retired/other</td>
<td>40</td>
<td>38</td>
</tr>
</tbody>
</table>
**Education**

Base: Overnight Leisure Trips

- **Post-graduate**: Colorado 25%, US Norm 22%
- **College graduate**: Colorado 40%, US Norm 41%
- **Some college**: Colorado 23%, US Norm 23%
- **High school or less**: Colorado 11%, US Norm 14%

**Legend**

- **Yellow**: Colorado
- **Blue**: US Norm
Base: Overnight Leisure Trips

- $100K+: 21% (Colorado), 20% (US Norm)
- $75K-$99.9K: 17% (Colorado), 16% (US Norm)
- $50K-$74.9K: 23% (Colorado), 23% (US Norm)
- $30K-$49.9K: 19% (Colorado), 20% (US Norm)
- Under $30K: 20% (Colorado), 21% (US Norm)
Race

Base: Overnight Leisure Trips

- **White**: 88% (Colorado: 88%, US Norm: 82%)
- **African-American**: 3% (Colorado: 10%, US Norm: 8%)
- **Other**: 9% (Colorado: 9%, US Norm: 10%)

Percent
Hispanic Background

Base: Overnight Leisure Trips

Yes

No

Percent

Colorado  US Norm
Membership in Auto/Travel Association

Base: Overnight Leisure Trips

AAA

AARP

National Motor Club

Better World Club

Percent

Colorado

US Norm

0 10 20 30 40 50

Longwoods

40 YEARS TOGETHER
Percent Who Are Male

Base: Overnight Leisure Trips
Percent Who Earn Over $75,000

Base: Overnight Leisure Trips

<table>
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<tr>
<th>Year</th>
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<td>41</td>
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<td>2015</td>
<td>39</td>
</tr>
<tr>
<td>2016</td>
<td>41</td>
</tr>
<tr>
<td>2017</td>
<td>38</td>
</tr>
</tbody>
</table>
Percent With College Education

Base: Overnight Leisure Trips
Gender

Base: Day Leisure Trips

- **Male**
  - Colorado: 50
  - US Norm: 46

- **Female**
  - Colorado: 50
  - US Norm: 54

Percent

- **Colorado**
- **US Norm**
Average A4e Colorado = 46.4

18-24
13
10

25-44
39
39

45-64
32
33

65 or older
19
15

Average Age U.S. Norm = 44.9

Base: Day Leisure Trips
Marital Status

Base: Day Leisure Trips

- **Married / with Partner**
  - Colorado: 62
  - US Norm: 58

- **Never Married**
  - Colorado: 23
  - US Norm: 26

- **Divorced/Widowed/Separated**
  - Colorado: 15
  - US Norm: 16

---

**Percent**

- **Colorado**
- **US Norm**
Household Size

Base: Day Leisure Trips

- 1 member: 24% (Colorado), 22% (US Norm)
- 2 members: 37% (Colorado), 34% (US Norm)
- 3 members: 26% (Colorado), 18% (US Norm)
- 4+ members: 21% (Colorado), 18% (US Norm)
Children in Household

Base: Day Leisure Trips

- No child under 18: 61% (US Norm: 55%)
- Any child between 13-17 yrs: 16% (US Norm: 20%)
- Any child between 6-12 yrs: 22% (US Norm: 20%)
- Any child under 6 yrs: 18% (US Norm: 16%)

Percent

- Colorado
- US Norm
Income

Base: Day Leisure Trips

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100K+</td>
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<tr>
<td>$75K-$99.9K</td>
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<td>$30K-$49.9K</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Under $30K</td>
<td>22</td>
<td>27</td>
</tr>
</tbody>
</table>
Education

Base: Day Leisure Trips

- **Post Graduate**
  - Colorado: 23
  - US Norm: 19

- **College Graduate**
  - Colorado: 42
  - US Norm: 40

- **Some College**
  - Colorado: 23
  - US Norm: 25

- **High School or Less**
  - Colorado: 12
  - US Norm: 16

Percent

- **Colorado**
- **US Norm**
Employment

Base: Day Leisure Trips

- **Full-time**: 52% (Colorado), 49% (US Norm)
- **Part-time**: 9% (Colorado), 10% (US Norm)
- **Not employed for pay**: 39% (Colorado), 41% (US Norm)
Race

Base: Day Leisure Trips

- White: 89 (Colorado), 83 (US Norm)
- African-American: 3 (Colorado), 7 (US Norm)
- Other: 8 (Colorado), 10 (US Norm)

Percent

[Bar chart showing the distribution of day leisure trips by race, with Colorado and US Norm comparison]
Hispanic Background

Base: Day Leisure Trips

Yes
- Colorado: 10%
- US Norm: 9%

No
- Colorado: 90%
- US Norm: 91%
Trip Planning & Booking
Length of Trip Planning

Base: Overnight Leisure Trips

- More than 1 year in advance:
  - Colorado: 4%
  - U.S. Norm: 4%

- 6-12 months:
  - Colorado: 20%
  - U.S. Norm: 16%

- 3-5 months:
  - Colorado: 20%
  - U.S. Norm: 17%

- 2 months:
  - Colorado: 18%
  - U.S. Norm: 16%

- 1 month or less:
  - Colorado: 30%
  - U.S. Norm: 34%

- Did not plan anything in advance:
  - Colorado: 12%
  - U.S. Norm: 15%
Trip Planning Information Sources

Base: Overnight Leisure Trips

- Advice from relatives or friends: 17%
- Online travel agencies: 16%
- Hotel or Resort: 15%
- Airline/commercial carrier: 15%
- Destination websites: 13%
- Social Media: 11%
- Travel company websites: 10%
- Auto Club/AAA: 9%
- Travel guide/other books: 6%

Colorado vs U.S. Norm
Trip Planning Information Sources (Cont’d)

Base: Overnight Leisure Trips

- Lodging sharing websites: Colorado 6, U.S. Norm 5
- Travel Agent/Company: Colorado 5, U.S. Norm 5
- Visitor bureau/govt tourism office: Colorado 5, U.S. Norm 5
- Magazine articles/ad: Colorado 3, U.S. Norm 2
- 1-800/1-888 number: Colorado 2, U.S. Norm 2
- TV program/ad: Colorado 2, U.S. Norm 2
- Radio show/ad: Colorado 2, U.S. Norm 2
- Newspaper articles/ad: Colorado 2, U.S. Norm 2
- Travel/ski show or exhibition: Colorado 6, U.S. Norm 5

Legend:
- Yellow: Colorado
- Blue: U.S. Norm

Base: Overnight Leisure Trips
Length of Trip Booking

Base: Overnight Leisure Trips

- More than 1 year in advance: 2%
- 6-12 months: 7%
- 3-5 months: 16%
- 2 months: 18%
- 1 month or less: 32%
- Did not book anything in advance: 26%
Method of Booking

Base: Overnight Leisure Trips

- Hotel or Resort: 18 (Colorado), 17 (U.S. Norm)
- Airline/commercial carrier: 17 (Colorado), 12 (U.S. Norm)
- Online travel agencies: 17 (Colorado), 15 (U.S. Norm)
- Travel company websites: 10 (Colorado), 8 (U.S. Norm)
- Travel Agent/Company: 6 (Colorado), 8 (U.S. Norm)
- Lodging sharing websites: 6 (Colorado), 6 (U.S. Norm)
- Auto Club/AAA: 4 (Colorado), 6 (U.S. Norm)
- Destination websites: 4 (Colorado), 5 (U.S. Norm)
- 1-800/1-888 number: 3 (Colorado), 4 (U.S. Norm)
- Visitor bureau/govt tourism: 2 (Colorado), 1 (U.S. Norm)
- Travel/ski show or exhibition: 1 (Colorado), 2 (U.S. Norm)

Color codes:
- Yellow: Colorado
- Blue: U.S. Norm

Note: Percentages are approximate.
Use of Devices for Trip Planning

Base: Overnight Leisure Trips

- Used Any Device (Net): Colorado 84, U.S. Norm 88
- Home (Desktop) Computer: Colorado 38, U.S. Norm 41
- Laptop: Colorado 44, U.S. Norm 49
- Smartphone: Colorado 34, U.S. Norm 36
- Tablet: Colorado 16, U.S. Norm 17

Percent

- Colorado
- U.S. Norm
Use of Devices During Trip

Base: Overnight Leisure Trips

- Used Any Device (Net): 84% (Colorado) vs 87% (US Norm)
- Tablet: 27% (Colorado) vs 30% (US Norm)
- Laptop: 29% (Colorado) vs 34% (US Norm)
- Smartphone: 71% (Colorado) vs 74% (US Norm)
<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used any social media for travel-related purposes</td>
<td>68</td>
</tr>
<tr>
<td>Posted travel photos/video online</td>
<td>34</td>
</tr>
<tr>
<td>Read travel reviews online</td>
<td>30</td>
</tr>
<tr>
<td>Looked at travel photos/video online</td>
<td>28</td>
</tr>
<tr>
<td>Learned about travel deals/events</td>
<td>25</td>
</tr>
<tr>
<td>Read a travel blog</td>
<td>22</td>
</tr>
<tr>
<td>Connected with others interested in travel</td>
<td>12</td>
</tr>
</tbody>
</table>
Social Media Used in the Past 3 Months (Cont’d)

Base: Overnight Leisure Trips

- Used any social media for travel-related purposes
  - Colorado: 68%, US Norm: 71%
- Contributed travel reviews
  - Colorado: 13%, US Norm: 11%
- Got travel advice via social networking
  - Colorado: 11%, US Norm: 11%
- Gave travel advice
  - Colorado: 9%, US Norm: 8%
- Followed a destination/attraction on Facebook or Twitter
  - Colorado: 9%, US Norm: 8%
- Tweeted about a trip
  - Colorado: 6%, US Norm: 7%
- Subscribed to a travel e-newsletter
  - Colorado: 6%, US Norm: 5%
- Blogged about a trip
  - Colorado: 4%, US Norm: 3%
Social Media Used in the Past 3 Months — 2017 vs. 2016

Base: Overnight Leisure Trips

- Used any social media for travel-related purposes: 2017: 71%, 2016: 77%
- Posted travel photos/video online: 2017: 35%, 2016: 36%
- Read travel reviews online: 2017: 30%, 2016: 29%
- Looked at travel photos/video online: 2017: 25%, 2016: 26%
- Learned about travel deals/events: 2017: 22%, 2016: 24%
- Read a travel blog: 2017: 14%, 2016: 15%
- Connected with others interested in travel: 2017: 13%, 2016: 16%
Social Media Used in the Past 3 Months — 2017 vs. 2016 (Cont’d)

Base: Overnight Leisure Trips

- Used any social media for travel-related purposes: 71% in 2017 vs. 77% in 2016
- Contributed travel reviews: 13% in 2017 vs. 14% in 2016
- Got travel advice via social networking: 11% in 2017 vs. 15% in 2016
- Gave travel advice: 9% in 2017 vs. 12% in 2016
- "Followed" a destination/attraction on Facebook or Twitter: 8% in 2017 vs. 13% in 2016
- Tweeted about a trip: 6% in 2017 vs. 12% in 2016
- Subscribed to a travel e-newsletter: 6% in 2017 vs. 8% in 2016
- Blogged about a trip: 4% in 2017 vs. 6% in 2016
Publications Used For Trip Planning

- Colorado State Map: 17%
- Colorado Official Vacation Guide: 8%
- Attractions/Destination Brochures: 7%
- Visitors Guide to Denver: 3%
- Colorado Ski Country USA/Colorado Hotel & Lodging Ass’n Guide: 3%
- Bicycling and Scenic Byways Map: 2%
- None of these: 70%

Percent
Places Where Publications Were Obtained

Base: Vacationers who used publications to plan trips

- Any Online: 41%
  - www.colorado.com: 15%
  - www.denver.org/www.visitdenver.com: 6%
  - Other websites: 30%
- Any Welcome/Visitor Center (in person): 21%
  - Colorado Welcome Center: 11%
  - Visit Denver Information Center: 10%
- Any Visitor Bureau (ordered by phone/online - received by mail): 15%
- Any hotel/motel/accommodations: 19%
  - Attraction/destination/resort: 11%
- Toll-free number: 11%
- Travel agent: 4%
- Travel/ski show: 3%
- Colorado Ski Country USA: 3%
Which of Publications and Websites/Social Media Were More Helpful?

Base: Used Both Websites & Publications to Plan Trip

- Websites: 62%
- Both: 35%
- Print Publications: 3%
Elements of Trip Planned Online — Leisure

- Accommodations: 59%
- Car route/locations/maps: 54%
- Local activities/attractions: 44%
- Restaurants: 43%
- Flight/train/bus/rental car: 36%
- Cities/Towns to visit: 26%
- Packaged tours/cruises: 3%

Base: Used Internet for trip planning
Internet Sites Used for Planning Trip

Base: Used Internet for trip planning

- www.colorado.com: 19
- www.codot.gov: 6
- www.denver.org/www.visitdenver.com: 4
- www.skicolorado.com: 3
- www.coloradoski.com: 1
- www.coloradobyways.org: 1
- None of these: 71

Percent
Reason for Visiting Websites --- Leisure

Base: Used specific websites for trip planning

- To obtain more information about a selected destination: 63%
- To help decide on a destination: 37%
How Websites Were Discovered — Leisure

Base: Used specific websites for trip planning

- Search engine: 91
- Surfing/browsing the internet: 24
- Family/Friends: 14
- Media article/programs: 6
- Brochures: 3
- Advertisements/commercials: 1

Percent
Other Destinations Considered For Trip Apart From Colorado — Leisure

Base: Overnight Leisure Trips

- None, just Colorado: 79
- California: 5
- Arizona: 2
- Utah: 2
- Montana: 1
- New Mexico: 1
- Nevada: 1
- Hawaii: 1
- Wyoming: 1
- Washington: 1
- Florida: 1
Stated Aspects of Greatest Interest When Choosing Colorado Over Competition

Base: Overnight Leisure Trips

- Colorado's mountains/scenic beauty: 40%
- Have relatives/friends living in Colorado: 39%
- Activities/things to do in Colorado: 29%
- Colorado's climate: 18%
- A specific event (e.g. sports, cultural): 14%
- Colorado's cities/towns: 13%
- Accessibility/Colorado is easier to get to: 11%
- Deals/offers on transportation, lodging, packages, etc.: 8%
- Colorado is less expensive: 6%
- Other reasons: 13%
Trip Characteristics
Distance Traveled

Base: Overnight Leisure Trips

- Under 100 Miles: 21%
- 100-299 Miles: 18%
- 300-499 Miles: 10%
- 500-1,000 Miles: 25%
- Over 1,000 Miles: 26%
Length of Colorado Trip

Base: Overnight Leisure Trips

Average 2017 = 4.1 Nights
Average 2016 = 4.1 Nights

- 1 night: 2017 - 18, 2016 - 22
- 2 nights: 2017 - 22, 2016 - 23
- 3-4 nights: 2017 - 27, 2016 - 29
- 5-6 nights: 2017 - 14, 2016 - 15
- 7-13 nights: 2017 - 11, 2016 - 12
- 14+ nights: 2017 - 4, 2016 - 5

Percent
Length of Trip

Base: Overnight Leisure Trips

Colorado

U.S. Norm
Length of Stay in Colorado

Base: Overnight Leisure Trips

Average 2017
= 3.8 Nights

Average 2016
= 3.6 Nights

1 night
1 night
23
24

2 nights
2 nights
23
24

3-4 nights
3-4 nights
27
27

5-6 nights
5-6 nights
13
13

7+ nights
7+ nights
14
12

Percent
Percent
2017
2016
Transportation Used on Colorado Trip

Base: Overnight Leisure Trips Originating Out of State

Personal Vehicles
- Own car/truck: 56% (2017), 57% (2016)
- Rental car: 29% (2017), 30% (2016)
- Camper/RV: 4% (2017), 6% (2016)

Commercial Vehicles
- Plane: 38% (2017), 39% (2016)
- Taxicab: 6% (2017), 15% (2016)
- Bus: 6% (2017), 8% (2016)
- Train: 6% (2017), 8% (2016)
- Online taxi service: 13% (2017), 15% (2016)
Airport of Arrival in Colorado

Base: Leisure Travelers Who Flew In

- Denver International Airport: 86%
- Colorado Springs: 6%
- Eagel/Vail: 4%
- Aspen: 2%
- Grand Junction: 1%
- Durango: 1%
- Other: 1%

Percent
Accommodations Used on Trip

* Values may add to more than 100% because of usage of multiple types of accommodations
Percent of Colorado Leisure Trip-Nights Spent in Each Type of Accommodation

Base: Those Who Stayed at least 1 night in Colorado

- Friends'/Relatives' home: 36%
- Hotel: 27%
- Rental (cabin, condo, etc.): 10%
- Own home: 8%
- Motel: 8%
- Campsite: 4%
- Inn/B+B: 3%
- Other lodging: 4%
Size of Travel Party

Base: Overnight Leisure Trips

Colorado
- Average No. of People: 2.3
  - Adults: 2.3
  - Children: 0.6
  - Total: 2.9

US Norm
- Average No. of People: 2.3
  - Adults: 2.3
  - Children: 0.6
  - Total: 2.9
Size of Travel Party

Base: Overnight Leisure Trips

Average No. of People

- **2017**
  - Adults: 2.3
  - Children: 0.6
  - Total = 2.9

- **2016**
  - Adults: 2.3
  - Children: 0.8
  - Total = 3.1
Composition of Travel Party

Base: Overnight Leisure Trips

- Spouse/Partner: 69%
- Child(ren): 33%
- Friend(s): 18%
- Other Relative(s): 10%
- Parent(s)/Grandparent(s): 9%
- Business Associates: 1%
- Just Myself: 22%
Use of Escorted Tours/Prepaid Packages

Base: Overnight Leisure Trips

Prepaid Package

Escorted Group Tour

Percent

0 2 4 6 8 10
Elements in Prepaid Packages

Base: Overnight Leisure Trips That Involved Packages

- Accommodations: 70%
- Transportation to Colorado: 62%
- Some meals: 30%
- All meals: 1%
- Transportation inside Colorado: 24%
- Entertainment/Sightseeing: 24%
- Ski equipment/Ski lift tickets: 17%
- Casino stake: 4%
Business/Leisure Trips — Number of Extra Nights Spent in Colorado

Base: Overnight Business/Leisure Trips

<table>
<thead>
<tr>
<th>Night Duration</th>
<th>Number of Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Night</td>
<td>69</td>
</tr>
<tr>
<td>2 - 6 Nights</td>
<td>13</td>
</tr>
<tr>
<td>7+ Nights</td>
<td>18</td>
</tr>
</tbody>
</table>

Share of CO Business Trips That Are Combined Business-Leisure Trips = 41%

Mean Extra Nights for Leisure: 3.5
Percent of Extra Nights Spent in Colorado: 92%
Percent of Extra Nights Spent Elsewhere: 8%
Distribution of Trips by Quarter

Base: Overnight Leisure Trips

- **January-March**: 2017: 20, 2016: 21
- **April-June**: 2017: 26, 2016: 27
- **July-September**: 2017: 31, 2016: 30
- **October-December**: 2017: 23, 2016: 22

Percent

- **2017**
- **2016**
Distribution of Trips by Quarter

Base: Overnight Leisure Trips

- **January-March:**
  - Colorado: 20%
  - US Norm: 22%

- **April-June:**
  - Colorado: 26%
  - US Norm: 26%

- **July-September:**
  - Colorado: 31%
  - US Norm: 28%

- **October-December:**
  - Colorado: 23%
  - US Norm: 24%
Distribution of Trips by Quarter — January to March

Base: Overnight Leisure Trips

Percent

'94 '95 '96 '97 '98 '99 '00 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17

16 19 22 21 18 19 19 18 21 20 21 21 18 23 23 21 22 24 25 23 19 22 21 20

Longwoods International
40 YEARS TOGETHER
Distribution of Trips by Quarter — April to June

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>'94</td>
<td>28</td>
</tr>
<tr>
<td>'95</td>
<td>24</td>
</tr>
<tr>
<td>'96</td>
<td>25</td>
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<tr>
<td>'97</td>
<td>24</td>
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<tr>
<td>'98</td>
<td>27</td>
</tr>
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<td>'99</td>
<td>29</td>
</tr>
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<td>'00</td>
<td>24</td>
</tr>
<tr>
<td>'01</td>
<td>26</td>
</tr>
<tr>
<td>'02</td>
<td>25</td>
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<td>'03</td>
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<td>'04</td>
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<td>'08</td>
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<td>'09</td>
<td>22</td>
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<td>'11</td>
<td>23</td>
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<tr>
<td>'14</td>
<td>27</td>
</tr>
<tr>
<td>'15</td>
<td>26</td>
</tr>
<tr>
<td>'16</td>
<td></td>
</tr>
<tr>
<td>'17</td>
<td></td>
</tr>
</tbody>
</table>
Distribution of Trips by Quarter — July to September

Base: Overnight Leisure Trips

Percent

'94  '95  '96  '97  '98  '99  '00  '01  '02  '03  '04  '05  '06  '07  '08  '09  '10  '11  '12  '13  '14  '15  '16  '17

35  33  31  31  34  33  34  37  37  32  30  33  35  36  29  30  30  33  28  28  31  32  30  31
Distribution of Trips by Quarter — October to December

Base: Overnight Leisure Trips

Year | Percent
--- | ---
'94 | 22
'95 | 24
'96 | 24
'97 | 21
'98 | 19
'99 | 23
'00 | 20
'01 | 19
'02 | 19
'03 | 18
'04 | 20
'05 | 19
'06 | 18
'07 | 20
'08 | 21
'09 | 21
'10 | 20
'11 | 24
'12 | 22
'13 | 27
'14 | 26
'15 | 24
'16 | 22
'17 | 23
The Trip Experience
Regions Visited

Base: Overnight Leisure Trips

- Denver Metro Area: 59%
- Mountain Towns & Ski Resorts: 27%
- Pikes Peak Region: 22%
- Northern Front Range: 22%
- Western Slope: 14%
- Eastern Plains: 6%
- San Luis Valley: 5%

Yellow bars represent Spent Time, and blue bars represent Stayed Overnight.
Number of Nights Spent by Region

Base: Overnight Leisure Trips to Each Region of 1+ Nights

- Western Slope: 4.7
- Mountain Towns & Ski Resorts: 3.5
- Northern Front Range: 3.2
- Pikes Peak Region: 3.2
- Denver Metro Area: 2.8
- San Luis Valley: 2.6
- Eastern Plains: 2.4
Places/Attractions Visited – Eastern Plains Region

Base: Overnight Leisure Trips

- Pueblo: 3
- Fort Morgan: 2
- Burlington: 2
- Colorado State Fairground (Pueblo): 2
- Rocky Ford: 2
- La Junta: 2
- Bent's Old Fort National Historic Site: 1
- Highway of Legends: 1
- Julesburg: 1
- Trinidad: 1
- Pueblo Reservoir State Park: 1
- Hunting/shooting: 1
- Santa Fe Trail: 1
- Pawnee National Grassland: 1
Places/Attractions Visited – Mountain Towns & Ski Resorts

Base: Overnight Leisure Trips

- Breckenridge: 8
- Vail/Beaver Creek: 6
- Aspen/Snowmass: 5
- Frisco: 4
- Steamboat Springs: 4
- Wolf Creek: 3
- Winter Park: 3
- Keystone: 3
- Silverton: 2
- Top of the Rockies National Scenic Byway: 2
- Copper Mountain: 2
- Buena Vista: 2
- Crested Butte: 2
- Salida: 2

Percent
Places/Attractions Visited – Mountain Towns & Ski Resorts (Cont’d)

Base: Overnight Leisure Trips

- Leadville: 2
- Ouray: 2
- Telluride: 2
- Arapahoe Basin: 2
- Collegiate Peaks National Scenic Byway: 2
- Colorado River Headwaters: 1
- Loveland Ski Area: 1
- Monarch: 1
- Eldora: 1
- Ski Cooper: 1
- Purgatory: 1
- Alpine Loop Scenic Byway: 1
- Powderhorn: 1
- Sunlight: 0

Percent

0  2  4  6  8  10
Places/Attractions Visited – National Parks & Monuments

Base: Overnight Leisure Trips

- Rocky Mountain National Park: 13
- Colorado National Monument: 5
- Trail Ridge Road: 4
- Mesa Verde National Park: 4
- Dinosaur National Monument: 3
- Black Canyon of the Gunnison National Park: 3
- Great Sand Dunes National Park: 3
- Chimney Rock National Monument: 3
- Canyon of the Ancients National Monument: 2
- Florissant Fossil Beds National Monument: 2
- Dinosaur Diamond: 1
- Brown's Canyon National Monument: 1
- Los Caminos Antiguos: 1
- West Elk Loop: 1
- Hovenweep National Monument: 0
Places/Attractions Visited – Northern Front Range

Base: Overnight Leisure Trips

- Boulder: 16
- Estes Park: 10
- Fort Collins: 10
- Longmont: 4
- Loveland: 4
- Idaho Springs: 3
- Greeley: 2
- Central City/Blackhawk: 2
- Cache La Poudre: 2
- Horsetooth Reservoir: 2

Percent

208
Places/Attractions Visited – Northern Front Range (Cont’d)

Base: Overnight Leisure Trips

- Peak to Peak Byway: 2
- Lariat Loop: 2
- Georgetown Loop Railroad: 2
- Georgetown: 2
- Red Feather Lakes/Poudre Canyon/Cache la Poudre: 1
- Mount Evans: 1
- Guanella Pass Scenic Byway: 0
- Mount Evans Scenic Byway: 0
Places/Attractions Visited – Pikes Peak Region

Base: Overnight Leisure Trips

- Colorado Springs: 20%
- Pike's Peak: 12%
- Garden of the Gods Park: 11%
- Manitou Springs: 9%
- The Broadmoor: 4%
- Canon City: 4%
- The Royal Gorge: 3%
- Colorado Springs U.S. Olympic sites: 3%
- U.S. Air Force Academy: 3%
- Cripple Creek: 2%
- Seven Falls: 2%
- Pike's Peak Cog Railway: 2%
- Gold Belt Tour: 1%
- Royal Gorge rafting: 1%
Places/Attractions Visited – San Luis Valley

Base: Overnight Leisure Trips

- Alamosa: 4
- South Fork: 3
- Crestone: 2
- Monte Vista National Wildlife Refuge: 2
- Cumbres & Toltec Scenic Railroad: 2
- Silver Thread: 1
Places/Attractions Visited – Western Slope

Base: Overnight Leisure Trips

- Durango: 7
- Colorado River: 6
- Grand Junction: 5
- Glenwood Springs: 3
- Pagosa Springs: 3
- Gunnison: 3
- Durango & Silverton Narrow Gauge Railroad: 3
- Blue Mesa Reservoir: 2
- Delta: 2
- Ouray: 2
- Montrose: 2
- Telluride: 2

Percent
Places/Attractions Visited – Western Slope (Cont’d)

Base: Overnight Leisure Trips

- Ridgway: 2
- San Juan Skyway: 2
- Cortez: 2
- Gunnison River: 1
- Bridal Veil Falls (Telluride): 1
- Trail of the Ancients: 1
- Grand Mesa Scenic and Historic Byway: 1
- Winery/Vineyard Tour: 1
- Hanging Lake (Glenwood Springs): 1
- Tracks Across Borders Byway: 1
- Lake City: 1
- Glenwood Caverns Adventure Park: 1
- Unaweep - Tabeguache Byway: 0
- Curecanti National Recreation Area: 0
- Flat Tops Trail: 0

Percent
Top Places/Attractions Visited – Denver Metro Area

Base: Overnight Leisure Trips

- 16th Street Mall: 17
- Cherry Creek Shopping Center and…: 8
- "LoDo" Lower Downtown Historic District: 8
- Denver Zoo: 7
- Red Rocks Park & Amphitheatre: 6
- Colorado Mills: 5
- Union Station: 5
- Denver Botanic Gardens: 5
- Coors Brewery: 5
- Denver Art Museum: 5

Percent
Top Places/Attractions Visited – Denver Metro Area (Cont’d)

Base: Overnight Leisure Trips

- Denver Pavilions: 5
- Colorado State Capitol: 5
- Outlets at Castle Rock: 5
- Denver Museum of Nature &…: 5
- Colorado Rockies: 4
- Larimer Square: 4
- Flatiron Crossing Mall: 4
- Park Meadows Retail Resort: 4
- Buffalo Bill's Museum/Grave: 4
- Denver's Downtown Aquarium: 3
Traveled on Scenic/Historic Byway

Base: Overnight Leisure Trips

- Any Byway: 19
- Trail Ridge Road: 4
- Top of the Rockies: 1
- Cache La Poudre - North Park: 2
- Peak to Peak: 2
- Lariat Loop: 2
- San Juan Skyway: 2
- Collegiate Peaks: 2
- Highway of Legends: 1
- Dinosaur Diamond: 1
- Silver Thread: 1
- Colorado River Headwaters: 1
- Trail of the Ancients: 1
- Grand Mesa Byway: 1

Percent
Took Scenic/Historic Byway (Cont’d)

Base: Overnight Leisure Trips

- Gold Belt Tour: 0.9
- Tracks Across Borders: 0.8
- Los Caminos Antiguos: 0.7
- Alpine Loop Scenic Byway: 0.6
- West Elk Loop: 0.6
- Unaweepe - Tabeguache: 0.5
- Guanella Pass: 0.5
- Santa Fe Trail: 0.4
- Frontier Pathways: 0.3
- Mount Evans: 0.3
- South Platte River Trail: 0.2
- Pawnee Pioneer Trails: 0.2
- Flat Tops Trail: 0.1

Percent
Activities on Trip

Base: Overnight Leisure Trips

- Shopping
- Hiking/backpacking
- National/state park
- Fine dining
- Landmark/historic site
- Bar/disco/nightclub
- Museum
- Brewery
- Swimming
- Camping
- Skiing/snowboarding
- Mountain climbing

Percent

Colorado

US Norm

218
Activities on Trip (Cont’d)

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casino</td>
<td>7</td>
</tr>
<tr>
<td>Fishing</td>
<td>5</td>
</tr>
<tr>
<td>Zoo</td>
<td>6</td>
</tr>
<tr>
<td>Spa</td>
<td>6</td>
</tr>
<tr>
<td>Art gallery</td>
<td>6</td>
</tr>
<tr>
<td>Fair/exhibition/festival</td>
<td>6</td>
</tr>
<tr>
<td>Biking</td>
<td>3</td>
</tr>
<tr>
<td>Theater</td>
<td>6</td>
</tr>
<tr>
<td>Rock/pop concert</td>
<td>5</td>
</tr>
<tr>
<td>Winery</td>
<td>4</td>
</tr>
<tr>
<td>Theme park</td>
<td>4</td>
</tr>
<tr>
<td>Dance</td>
<td>4</td>
</tr>
</tbody>
</table>
### Activities on Trip (Cont’d)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach/waterfront</td>
<td>16</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Golf</td>
<td>12</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Waterpark</td>
<td>12</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Business Meeting</td>
<td>6</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Boating/sailing</td>
<td>8</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Pro/college sports event</td>
<td>6</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Sports event for kids</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Visited Indian American Community</td>
<td>3</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Tennis</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Sports event for youths/teenagers</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Rafting</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Business Convention/ Conference</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Activities on Trip (Cont’d)

- Hunting: 2
- Birding: 2
- Trade Show: 2
- Educational Seminar: 2
- Motorcycle touring: 2
- Amateur adult sports event: 2
- Glamping: 2
- Symphony: 2
- Rodeo: 1
- Dude ranch: 1
- Opera: 1

Base: Overnight Leisure Trips

Percent

Colorado  US Norm
Other Colorado-Specific Activities on Trip*

*Asked on Colorado survey only, not National survey

Base: Overnight Leisure Trips

- Brew pub: 8
- Jogging/running: 6
- Dark skies viewing: 6
- Historic railroad: 6
- Indoor fitness center: 6
- Canoeing/Kayaking: 6
- Tour scenic byways: 5
- Excursion train ride: 5
- Farm tour: 5
- Bicycling (Road): 5
- Horseback riding: 5
- Snowmobiling: 5
- Off-Road/Mountain biking: 4
- Cross-country skiing: 4
- Car/dog/horse race: 4
- Snow-shoeing: 4
- Hot-air ballooning: 4

Percent

0 10 20 30 40

Longwoods International
40 Years Together
Activities on Trip

Percentage of Overnight Leisure Trips

- Shopping: 2017 - 30%, 2016 - 34%
- Hiking/backpacking: 2017 - 22%, 2016 - 25%
- National/state park: 2017 - 22%, 2016 - 24%
- Fine dining: 2017 - 21%, 2016 - 20%
- Landmark/historic site: 2017 - 19%, 2016 - 20%
- Bar/disco/nightclub: 2017 - 15%, 2016 - 11%
- Museum: 2017 - 13%, 2016 - 13%
- Brewery: 2017 - 13%, 2016 - 13%
- Swimming: 2017 - 13%, 2016 - 11%
- Camping: 2017 - 12%, 2016 - 10%
- Skiing/snowboarding: 2017 - 9%, 2016 - 8%

Base: Overnight Leisure Trips
Activities on Trip (Cont’d)

Base: Overnight Leisure Trips

- Mountain climbing: 7% (2017) vs 7% (2016)
- Casino: 7% (2017) vs 7% (2016)
- Fishing: 6% (2017) vs 8% (2016)
- Zoo: 6% (2017) vs 8% (2016)
- Spa: 6% (2017) vs 8% (2016)
- Art gallery: 6% (2017) vs 7% (2016)
- Fair/exhibition/festival: 6% (2017) vs 7% (2016)
- Biking: 6% (2017) vs 7% (2016)
- Theater: 5% (2017) vs 7% (2016)
- Rock/pop concert: 5% (2017) vs 6% (2016)
- Winery: 5% (2017) vs 6% (2016)
Activities on Trip (Cont’d)

Base: Overnight Leisure Trips

- Theme park: 8 (2017), 4 (2016)
- Beach/waterfront: 6 (2017), 4 (2016)
- Waterpark: n/a (2017), 4 (2016)
- Visited Indian American Community: n/a (2017), 3 (2016)
- Rafting: 4 (2017), n/a (2016)
Activities on Trip (Cont’d)

Base: Overnight Leisure Trips


2017 vs 2016
Specific Interests on Trip

Base: Overnight Leisure Trips

- Historic places: 28 (Colorado), 19 (U.S. Norm)
- Cultural activities/attractions: 12 (Colorado), 11 (U.S. Norm)
- Brewery Tours/Beer Tasting: 10 (Colorado), 7 (U.S. Norm)
- Exceptional culinary experiences: 11 (Colorado), 6 (U.S. Norm)
- Marijuana Tourism: 11 (Colorado), 2 (U.S. Norm)
- Eco-tourism: 7 (Colorado), 4 (U.S. Norm)
- Winery tours/Wine tasting: 6 (Colorado), 4 (U.S. Norm)
- Traveling with grandchildren: 6 (Colorado), 4 (U.S. Norm)
- Wedding: 4 (Colorado), 3 (U.S. Norm)
- Religious Travel: 3 (Colorado), 2 (U.S. Norm)
- Agritourism: 3 (Colorado), 2 (U.S. Norm)
- Medical Tourism: 2 (Colorado), 2 (U.S. Norm)
Specific Interests on Colorado Trip

Base: Overnight Leisure Trips

- Historic places: 28% (2017), 29% (2016)
- Cultural activities/attractions: 22% (2017), 19% (2016)
- Brewery Tours/Beer Tasting: 12% (2017), 13% (2016)
- Exceptional culinary experiences: 11% (2017), 12% (2016)
- Marijuana Tourism: n/a (2017), 11% (2016)
- Eco-tourism: 7% (2017), 10% (2016)
- Winery tours/Wine tasting: 6% (2017), 9% (2016)
- Traveling with grandchildren: 6% (2017), 9% (2016)
- Wedding: 4% (2017), 7% (2016)
- Religious Travel: 3% (2017), 5% (2016)
- Agritourism: 3% (2017), 7% (2016)
- Medical Tourism: 2% (2017), 7% (2016)
Past Visitation to Colorado

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th></th>
<th>Colorado</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever</td>
<td>87</td>
<td>88</td>
</tr>
<tr>
<td>Past Year</td>
<td>64</td>
<td>68</td>
</tr>
</tbody>
</table>
Number of Prior Overnight Leisure Trips to Colorado

Base: Prior Leisure Visitors

Average No. of Prior Trips = 22.8
Average No. of Trips in Past 5 Years = 5.9

<table>
<thead>
<tr>
<th>Trips</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Trip</td>
<td>16</td>
</tr>
<tr>
<td>2 Trips</td>
<td>8</td>
</tr>
<tr>
<td>3-4 Trips</td>
<td>12</td>
</tr>
<tr>
<td>5-6 Trips</td>
<td>9</td>
</tr>
<tr>
<td>7-10 Trips</td>
<td>14</td>
</tr>
<tr>
<td>11+ Trips</td>
<td>41</td>
</tr>
</tbody>
</table>
Year of Most Recent Colorado Overnight Leisure Trip Among Prior Visitors

![Bar Chart]

- Prior to '00
- '00 to '09
- '10
- '11
- '12
- '13
- '14
- '15
- '16
- '17

Percent

- 2
- 5
- 1
- 1
- 3
- 3
- 5
- 10
- 38
- 32
Profiles of Colorado’s Key Travel Segments
Instate Trips — By Segment

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Segment</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors</td>
<td>47</td>
<td>43</td>
</tr>
<tr>
<td>Ski</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>Touring</td>
<td>29</td>
<td>29</td>
</tr>
</tbody>
</table>

Percent
Travel Distance — % Who Traveled 500+ Miles to Visit Colorado

Base: Overnight Leisure Trips

- Touring: 50%
- Outdoors: 40%
- Ski: 48%

Percent
Average Age

Base: Overnight Leisure Trips

- **Touring**
  - Colorado: 48
  - US Norm: 46

- **Outdoors**
  - Colorado: 44
  - US Norm: 42

- **Ski**
  - Colorado: 48
  - US Norm: 44

Average in Years

**Colorado**    **US Norm**
Average Age

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>48</td>
<td>45</td>
</tr>
<tr>
<td>Outdoors</td>
<td>44</td>
<td>41</td>
</tr>
<tr>
<td>Ski</td>
<td>48</td>
<td>43</td>
</tr>
</tbody>
</table>

Average in Years

2017  2016
Percent Who Are Male

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>Outdoors</td>
<td>57</td>
<td>49</td>
</tr>
<tr>
<td>Ski</td>
<td>64</td>
<td>57</td>
</tr>
</tbody>
</table>

Legend: 
- Yellow: Colorado 
- Blue: US Norm
Percent Who Are Male

Base: Overnight Leisure Trips

- **Touring**: 2017: 52%, 2016: 54%
- **Outdoors**: 2017: 57%, 2016: 59%
- **Ski**: 2017: 64%, 2016: 56%
Percent With Income $75K+

Base: Overnight Leisure Trips

- **Touring**: 30% (US Norm) vs. 42% (Colorado)
- **Outdoors**: 29% (US Norm) vs. 40% (Colorado)
- **Ski**: 37% (US Norm) vs. 51% (Colorado)
Percent With Income $75K+

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>42</td>
<td>41</td>
</tr>
<tr>
<td>Outdoors</td>
<td>40</td>
<td>41</td>
</tr>
<tr>
<td>Ski</td>
<td>51</td>
<td>59</td>
</tr>
</tbody>
</table>
Percent Who Are College Graduates

Base: Overnight Leisure Trips

- **Touring**: 64% (Colorado), 65% (US Norm)
- **Outdoors**: 67% (Colorado), 60% (US Norm)
- **Ski**: 79% (Colorado), 72% (US Norm)

Legend:
- **Yellow**: Colorado
- **Blue**: US Norm
Percent Who Are College Graduates

Base: Overnight Leisure Trips

- **Touring**: 64% (2017) vs. 71% (2016)
- **Outdoors**: 67% (2017) vs. 69% (2016)
- **Ski**: 79% (2017) vs. 85% (2016)

2017 vs. 2016
Use of Travel Agents

Base: Overnight Leisure Trips

For Trip Planning

- Touring: 5 (Colorado), 7 (US Norm)
- Outdoors: 3 (Colorado), 3 (US Norm)
- Ski: 6 (Colorado), 5 (US Norm)

For Trip Booking

- Touring: 5 (Colorado), 7 (US Norm)
- Outdoors: 4 (Colorado), 4 (US Norm)
- Ski: 7 (Colorado), 5 (US Norm)

Percent

- Yellow: Colorado
- Blue: US Norm
Use of Online Travel Agency for Trip Planning & Booking

Base: Overnight Leisure Trips

For Trip Planning
- Touring
  - Outdoors: 11%
  - Ski: 16%
  - US Norm: 23%
- Touring
  - Outdoors: 11%
  - Ski: 16%
  - US Norm: 24%

For Trip Booking
- Touring
  - Outdoors: 12%
  - Ski: 16%
  - US Norm: 23%
- Touring
  - Outdoors: 11%
  - Ski: 18%
  - US Norm: 23%

Percent
- Colorado
- US Norm
Use of Colorado-Specific Material for Trip Planning/During Trip

- **Colorado.com**
  - Touring Outdoors: 12%
  - Ski Touring Outdoors: 29%

- **CO State Vacation Guide**
  - Touring Outdoors: 12%
  - Ski Touring Outdoors: 11%

- **Bicycling/Scenic Byways Map**
  - Touring Outdoors: 8%
  - Ski Touring Outdoors: 2%

Base: Overnight Leisure Trips

Percent

0 10 20 30 40
Trip Planning Cycle —
% Planning 2+ Months in Advance

Base: Overnight Leisure Trips

- **Touring**
  - Colorado: 68%
  - US Norm: 62%
- **Outdoors**
  - Colorado: 54%
  - US Norm: 53%
- **Ski**
  - Colorado: 74%
  - US Norm: 62%

**Percent**
- **Colorado**
- **US Norm**
Trip Booking Cycle —
% Booking 2+ Months in Advance

Base: Overnight Leisure Trips

- **Touring**: 46%
- **Outdoors**: 36%
- **Ski**: 57%

Percent
Stated Aspects of Greatest Interest When Choosing Colorado Over Competition

- Colorado's mountains/scenic beauty: 72%
- Activities/things to do in Colorado: 53%
- Colorado's cities/towns: 24%
- Accessibility/easier to get to: 25%
- Have relatives/friends in Colorado: 21%
- Colorado's climate: 42%
- Deals/offers: 31%
- Colorado is less expensive: 24%
- A specific event: 13%

Percentages are represented in a bar chart, with categories on the y-axis and percent interest on the x-axis. The categories are color-coded for clarity: Touring (yellow), Outdoors (green), and Ski (blue).
Use of Devices for Trip Planning

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th></th>
<th>Tablet</th>
<th>Smartphone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>19</td>
<td>38</td>
</tr>
<tr>
<td>Outdoors</td>
<td>16</td>
<td>37</td>
</tr>
<tr>
<td>Ski</td>
<td>13</td>
<td>29</td>
</tr>
</tbody>
</table>

Percent

- **Colorado**
- **US Norm**
Use of Devices for Trip Planning

Home (Desktop) Computer
- Touring
- Outdoors
- Ski

Laptop
- Touring
- Outdoors
- Ski

Base: Overnight Leisure Trips

Percent
Colorado
US Norm
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th></th>
<th>Tablet</th>
<th>Smartphone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>32</td>
<td>75</td>
</tr>
<tr>
<td>Outdoors</td>
<td>24</td>
<td>70</td>
</tr>
<tr>
<td>Ski</td>
<td>31</td>
<td>73</td>
</tr>
<tr>
<td></td>
<td>31</td>
<td>76</td>
</tr>
</tbody>
</table>

Percent

- Colorado
- US Norm
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips

- **Touring**: 34% (Colorado), 30% (US Norm)
- **Outdoors**: 30% (Colorado), 23% (US Norm)
- **Ski**: 36% (Colorado), 33% (US Norm)

**Percent**

- **Colorado**
- **US Norm**
Use of Social Media in the Past 3 Months

Base: Overnight Leisure Trips

- **Read a Travel Blog**
  - Touring
  - Outdoors
  - Ski

- **Learned about Travel Deals/Events**
  - Touring
  - Outdoors
  - Ski

Percent

- **Colorado**
- **US Norm**

Longwoods International
40 Years Together
Percent Who Are Members of AAA/AARP

AAA
- Touring: 41%, 45%
- Outdoors: 42%, 40%
- Ski: 48%, 50%

AARP
- Touring: 24%, 28%
- Outdoors: 17%, 24%
- Ski: 19%, 26%

Percent
- Yellow: Colorado
- Blue: US Norm
Length of Colorado Trip

Touring
- 2017: 4.4
- 2016: 4.8

Outdoors
- 2017: 4.1
- 2016: 4.5

Ski
- 2017: 5.2
- 2016: 4.7

Base: Overnight Leisure Trips

Average Number of Nights

2017 2016
Length of Trip

Base: Overnight Leisure Trips

- **Touring**
  - Colorado: 4.4
  - US Norm: 3.3

- **Outdoors**
  - Colorado: 4.1
  - US Norm: 3.2

- **Ski**
  - Colorado: 5.2
  - US Norm: 3.7

Average Number of Nights

- **Colorado**
- **US Norm**
Size of Travel Party

Base: Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Activity</th>
<th>Colorado</th>
<th>US Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>2.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Outdoors</td>
<td>3.5</td>
<td>3.8</td>
</tr>
<tr>
<td>Ski</td>
<td>4.0</td>
<td>3.9</td>
</tr>
</tbody>
</table>
Transportation Used on Colorado Trip

Base: Overnight Leisure Trips

- **Own car/truck**
  - Touring: 64% (2016: 67%)
  - Outdoors: 73% (2016: 78%)
  - Ski: 54% (2016: 54%)

- **Plane**
  - Touring: 21% (2016: 25%)
  - Outdoors: 17% (2016: 18%)
  - Ski: 38% (2016: 37%)

2017 vs 2016
Transportation Used on Trip

Base: Overnight Leisure Trips

Own car/truck

<table>
<thead>
<tr>
<th>Activity</th>
<th>Colorado</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>64%</td>
<td>67%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td>Ski</td>
<td>70%</td>
<td></td>
</tr>
</tbody>
</table>

Plane

<table>
<thead>
<tr>
<th>Activity</th>
<th>Colorado</th>
<th>U.S. Norm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touring</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Ski</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>

Percent

- Colorado
- U.S. Norm
Accommodations Used on Trip

* Values may add to more than 100% because of usage of multiple types of accommodations
Percent of Colorado Trip-Nights Spent in Each Type of Accommodations

Base: Overnight Leisure Trips

- **Hotel/Motel/Inn/B+B**: 58%
  - Touring: 29%
  - Outdoors: 35%
- **Home of friends/relatives (not paid for)**: 16%
  - Touring: 13%
  - Outdoors: 11%
- **Rental**: 13%
  - Touring: 13%
  - Outdoors: 19%
  - Ski: 26%
- **2nd Home/Time Share**: 10%
  - Touring: 10%
  - Outdoors: 12%
  - Ski: 26%
- **Campsite**: 1%
  - Touring: 1%
- **Other**: 3%
  - Touring: 2%
  - Outdoors: 2%
  - Ski: 1%
Escorted Group Tours/Prepaid Packages on Colorado Trip

Base: Overnight Leisure Trips

Escorted Tour
- Touring: 4%
- Outdoors: 2%
- Ski: 20%

Prepaid Package
- Touring: 5%
- Outdoors: 3%
- Ski: 19%

Percent
Regions Spent Time In

Base: Overnight Leisure Trips

- Denver Metro Area: Touring 46, Outdoors 34, Ski 41
- Pike's Peak Region: Touring 32, Outdoors 23, Ski 22
- Northern Front Range: Touring 24, Outdoors 15, Ski 7
- Western Slope: Touring 22, Outdoors 28, Ski 6
- Mountain Towns and Ski Resorts: Touring 18, Outdoors 37, Ski 64
- San Luis Valley: Touring 8, Outdoors 1, Ski 6
- Eastern Plains: Touring 4, Outdoors 4, Ski 3

*Values may add to more than 100% because of usage of multiple types of accommodations.
Regions Stayed Overnight

Base: Overnight Leisure Trips

- Denver Metro Area
  - Touring: 24%
  - Outdoors: 27%
  - Ski: 35%

- Pike’s Peak Region
  - Touring: 10%
  - Outdoors: 25%
  - Ski: 19%

- Northern Front Range
  - Touring: 4%
  - Outdoors: 13%
  - Ski: 18%

- Western Slope
  - Touring: 6%
  - Outdoors: 19%
  - Ski: 22%

- Mountain Towns and Ski Resorts
  - Touring: 6%
  - Outdoors: 16%
  - Ski: 34%

- San Luis Valley
  - Touring: 1%
  - Outdoors: 7%

- Eastern Plains
  - Touring: 3%
  - Outdoors: 3%
  - Ski: 4%

*Values may add to more than 100% because of usage of multiple types of accommodations*
Traveled on Scenic/Historic Byway

Base: Overnight Leisure Trips

- Touring: 19%
- Outdoors: 19%
- Ski: 10%
Activities on Colorado Trip in 2017

Base: Overnight Leisure Trips

- National/state park: 49%
  - Touring: 7%
  - Outdoors: 35%
  - Skiing: 32%

- Landmark/historic site: 44%
  - Touring: 4%
  - Outdoors: 17%
  - Skiing: 23%

- Shopping: 39%
  - Touring: 19%
  - Outdoors: 25%
  - Skiing: 20%

- Hiking/backpacking: 55%
  - Touring: 8%
  - Outdoors: 33%
  - Skiing: 14%

- Fine dining: 25%
  - Touring: 11%
  - Outdoors: 23%
  - Skiing: 11%
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- **Museum**: 24% (Touring), 12% (Outdoors), 12% (Skiing)
- **Brewery**: 17% (Touring), 17% (Outdoors), 14% (Skiing)
- **Swimming**: 14% (Touring), 14% (Outdoors), 12% (Skiing)
- **Bar/nightclub**: 12% (Touring), 11% (Outdoors), 16% (Skiing)
- **Art gallery**: 5% (Touring), 3% (Outdoors), 11% (Skiing)
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- Mountain climbing: 10 touring, 10 outdoors, 14 skiing
- Camping: 1 touring, 10 outdoors, 35 skiing
- Casino: 1 touring, 5 outdoors, 8 skiing
- Fair/exhibition/festival: 1 touring, 5 outdoors, 8 skiing
- Visited Indian American Community: 4 touring, 8 outdoors, 8 skiing

Percent
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- Winery
  - Touring: 7
  - Outdoors: 4
  - Skiing: 2

- Spa
  - Touring: 7
  - Outdoors: 6
  - Skiing: 8

- Theme park
  - Touring: 6
  - Outdoors: 2
  - Skiing: 0

- Zoo
  - Touring: 1
  - Outdoors: 4
  - Skiing: 1

- Biking
  - Touring: 5
  - Outdoors: 14
  - Skiing: 3
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- Beach/waterfront: 5
- Skiing/snowboarding: 10
- Fishing: 19
- Rock/pop concert: 3
- Golf: 4

Percent

- Touring
- Outdoors
- Skiing

Longwoods International
40 Years Together
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- Theater: Touring 4, Outdoors 3, Skiing 1
- Rafting: Touring 0, Outdoors 4, Skiing 6
- Motorcycle touring: Touring 1, Outdoors 1, Skiing 0
- Waterpark: Touring 3, Outdoors 3, Skiing 1
- Dance: Touring 3, Outdoors 3, Skiing 1
Activities on Colorado Trip in 2017 (Cont’d)

Base: Overnight Leisure Trips

- Boating/sailing: Touring (3), Outdoors (0), Skiing (9)
- Symphony: Touring (0), Outdoors (1), Skiing (3)
- Attended Professional/college sports event: Touring (2), Outdoors (2), Skiing (1)
- Birding: Touring (2), Outdoors (0), Skiing (5)
- Glamping: Touring (0), Outdoors (2), Skiing (5)
Specific Interests on Trip in 2017

Base: Overnight Leisure Trips

- Historic places, sites and landmarks: 58%
- Cultural activities and attractions: 37%
- Marijuana tourism: 17%
- Brewery tours/beer tasting: 14%
- Exceptional culinary experiences: 12%
- Eco-tourism: 14%
- Winery tours/wine-tasting: 8%
- Agritourism: 3%
- Traveling with grandchildren: 6%

Percent
- Touring
- Outdoors
- Ski

274
Satisfaction With Overall Trip Experience — % Very Satisfied

Base: Overnight Leisure Trips

- **Touring**: 86% (Colorado), 82% (US Norm)
- **Outdoors**: 84% (Colorado), 82% (US Norm)
- **Ski**: 82% (Colorado), 78% (US Norm)

Percent

- **Colorado**
- **US Norm**
Past Visitation

Base: Overnight Leisure Trips

Ever Visited

- Touring: 71%
- Outdoors: 87%
- Ski: 87%

Visited in Past Year

- Touring: 39%
- Outdoors: 65%
- Ski: 69%

Percent

- Colorado
- US Norm
Colorado’s Product Delivery
Travel Motivators — What’s Important in Motivating a Repeat Visit

- Family Atmosphere
- Exciting
- Adult Atmosphere
- Worry Free
- Popular
- Sightseeing
- Unique
- Entertainment
- Climate
- Skiing
- Affordable
- Sports and Recreation
- Luxurious

*Importance*

*A measure of the degree of association between ratings of Colorado on each factor and for being a place “I would really enjoy visiting again”*
## Most Important Individual Dimensions

<table>
<thead>
<tr>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good place to relax</td>
</tr>
<tr>
<td>Safe to travel anywhere</td>
</tr>
<tr>
<td>Unique vacation experience</td>
</tr>
<tr>
<td>Interesting place</td>
</tr>
<tr>
<td>Good for families</td>
</tr>
<tr>
<td>Good vacation packages</td>
</tr>
<tr>
<td>A real adventure</td>
</tr>
<tr>
<td>Interesting local people</td>
</tr>
<tr>
<td>Children would enjoy</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
</tbody>
</table>
Colorado’s Overall Product Delivery

Base: Overnight Pleasure Trips

Enjoy Visiting Again

- Colorado: 73%
- U.S. Norm: 64%

Value for Money

- Colorado: 54%
- U.S. Norm: 52%
Colorado’s Product Delivery

Base: Overnight Pleasure Trips

- Family Atmosphere
- Exciting
- Adult Atmosphere
- Worry Free
- Popular
- Sightseeing
- Unique
- Entertainment
- Climate
- Skiing
- Affordable
- Sports and Recreation
- Luxurious

Percent Who Strongly Agree

- Colorado
- U.S. Norm

Percentages range from 43% to 70%.
Colorado’s Perceived Product Strengths vs. U.S. Norm

Base: Overnight Pleasure Trips

- A real adventure: 18
- Truly beautiful scenery: 18
- Good for viewing wildlife/birds: 12
- Interesting small towns/villages: 12
- Excellent climate overall: 12
- Children would enjoy: 12
- Excellent fishing: 11
- Unique vacation experience: 11
- An exciting place: 10
- Well-known landmarks: 10
- Must-see destination: 10
- Popular with vacationers: 9

Difference in Percent Who Strongly Agree
Colorado’s Perceived Product Strengths vs. U.S. Norm (Cont’d)

Difference in Percent Who Strongly Agree

- Lots to see and do: 9
- Different cultures/ways of life: 8
- Safe to travel anywhere: 8
- Beautiful gardens and parks: 7
- Good for an adult vacation: 7
- Interesting customs/traditions: 7
- Good place to relax: 6
- Excellent museums/art galleries: 6
- Great for theater and the arts: 5
- Interesting cities: 5
- Interesting fairs/festivals/events: 5
Colorado’s Perceived Product Weaknesses vs. U.S. Norm

Base: Overnight Pleasure Trips

- Not too far away: -27
- Affordable to get to: -10
- Affordable accommodations: -5

Difference in Percent Who Strongly Agree
Attitudes on Legalization of Marijuana
How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

**U.S. Norm**
- Consider buying goods/services made there: 30% More Positive, 58% Same, 12% More Negative
- Consider living/working there: 33% More Positive, 56% Same, 11% More Negative
- Consider visiting on a vacation: 30% More Positive, 59% Same, 12% More Negative

**CO Leisure Visitors**
- Consider buying goods/services made there: 31% More Positive, 56% Same, 13% More Negative
- Consider living/working there: 30% More Positive, 56% Same, 14% More Negative
- Consider visiting on a vacation: 34% More Positive, 57% Same, 9% More Negative
How does the knowledge that some states have legalized the sale/use of marijuana affect how you view these states?

Base: Overnight Leisure Travelers

**CO Visitors – CO Residents**
- Consider buying goods/services made there: More Positive 25, Same 63, More Negative 13
- Consider living/working there: More Positive 24, Same 64, More Negative 12
- Consider visiting on a vacation: More Positive 26, Same 65, More Negative 9

**CO Visitors – Non-Residents**
- Consider buying goods/services made there: More Positive 35, Same 53, More Negative 13
- Consider living/working there: More Positive 33, Same 52, More Negative 15
- Consider visiting on a vacation: More Positive 38, Same 53, More Negative 9
Appendix:
Key Terms Defined
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- 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

- **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.

**Marketable Trips:** Include all leisure trips, with the exception of visits to friends/relatives