



Colorado Travel Year 2017

Final Report

June, 2018



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Background and Purpose

- Longwoods International was engaged by the Colorado Tourism Office to conduct a program of visitor research for the 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.

Background and Purpose

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

Method

➤ Overview

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

Method

➤ Visitor Research

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

Method

- Travel USA® is conducted quarterly and the travel patterns of a randomly selected sample of adult (18+) panel members are identified.
- From these quarterly studies we identified 5,834 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 $\pm 1.0\%$, based on statistical probability. When comparing results on a year-to-year basis, the interval is $\pm 2\%$,
 - 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



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. .

Highlights

- 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.

Highlights

- 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.

Highlights

- 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.

Colorado Travel in 2017

- 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's Key Segments

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

| | 2016 | 2017 |
|---------------------------------|-----------|-----------|
| Touring trips | 4,310,000 | 4,500,000 |
| Outdoor trips | 3,900,000 | 4,050,000 |
| Special event trips | 2,630,000 | 2,730,000 |
| City trips | 1,740,000 | 1,680,000 |
| Combined business-leisure trips | 1,210,000 | 1,250,000 |
| Country resort trips | 1,510,000 | 1,379,000 |
| Casino | 940,000 | 830,000 |

Colorado's Key Segments

- Colorado recorded the following year-over-year changes in the various segments shown above:
 - Consistent with the national growth trends, Colorado attracted significantly more 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.

Market Share

- 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%).

Expenditures

- 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

Expenditures

- 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.

Expenditures

- 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

Expenditures

- 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).

Expenditures

- 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.

Colorado's Day Trip Profile

- In 2017, the demographic profile of people taking day trips to or within Colorado resembled that of daytrippers nationally in terms of:
 - 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

Trip Planning & Booking

- Reflecting its geographic location and distance from main markets, Colorado tends to be a mid to longer haul trip for many vacationers, 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%).

Trip Planning & Booking

- 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.

Trip Planning & Booking

- Mobile communication devices and computers have significantly increased in market penetration over the past decade. It is therefore not surprising that laptops, tablets and smartphones are now commonplace tools for accessing trip-related information both prior to and during travel.
- Colorado vacationers are now slightly more likely to be using a laptop (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.

Trip Planning & Booking

- 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.

Trip Planning & Booking

- 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.

Trip Planning & Booking

- 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.

Trip Planning & Booking

- 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.

Trip Planning & Booking

- As we have seen in prior years, people were less inclined to take part in social media activities requiring more active involvement, such as:
 - 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.

Trip Planning & Booking

- 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.

Overnight Leisure Trip Characteristics

- 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.

Overnight Leisure Trip Characteristics

- 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

Overnight Leisure Trip Characteristics

- 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 Trip Experience

- 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.

The Trip Experience

- 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%)

The Trip Experience

- 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

The Trip Experience

- Relative to leisure travelers in general, vacationers coming to Colorado more often took part in activities and pastimes related to the mountains, such as visiting the national and state parks, hiking/backpacking, skiing, camping, mountain climbing, etc.
- Colorado tourists in 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.

The Trip Experience

- When vacationers were asked to identify which of several specific interests they had on their trip, they most frequently listed an interest in historic places (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.

The Trip Experience

- 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

Segment Profiles – Outdoor Trips

- 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

Segment Profiles – Outdoor Trips

- 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

Segment Profiles – Outdoor Trips

- 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%)

Segment Profiles – Outdoor Trips

- 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

Segment Profiles – Touring 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

Segment Profiles – Touring Trips

- Reflecting a longer than average trip compared to touring trips nationwide, Colorado touring trips tend to be planned and booked further in advance.
- And they were the segment most likely to use an online travel agency for both trip planning and booking.
- Their use of other internet resources, social media and mobile devices was typical for their segment nationally.
- The average Colorado touring trip in 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.

Segment Profiles – Touring Trips

- Variety of experiences and activities seems to be the hallmark of touring vacations nationwide. And Colorado touring trips are no exception.
- The most popular activities and specific interests for Colorado touring vacationers in 2017 were:
 - Visiting a national or state park (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

Segment Profiles – Ski Trips

- 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

Segment Profiles – Ski Trips

- 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.

Segment Profiles – Ski Trips

- Skiers tend to be mainly focused on their primary sporting activity and the types of experiences associated with ski locales, so their level of participation in other pastimes/activities is more limited than in other leisure segments.
- In 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%)

Segment Profiles – Ski Trips

- 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

Product Delivery

- 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”.

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

Product Delivery

- 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.

Product Delivery

- 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

Product Delivery

- 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.

Attitudes Regarding Marijuana Sales/Use

- In order to assess visitors' attitudes towards the issue of the legalization of marijuana sales/use in terms of tourism, we asked for people's perceptions of states who had legalized in three contexts:
 - Does legalization affect how people regard these states as sellers of general goods/services?
 - Does legalization affect perceptions of these states as a place to live and work?
 - Does legalization affect attitudes towards the states as places to visit on vacation?
- In 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.

Attitudes Regarding Marijuana Sales/Use

- There were some slight differences in opinions and changes from year-to-year among specific sub-groups and in certain contexts:
 - 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”.



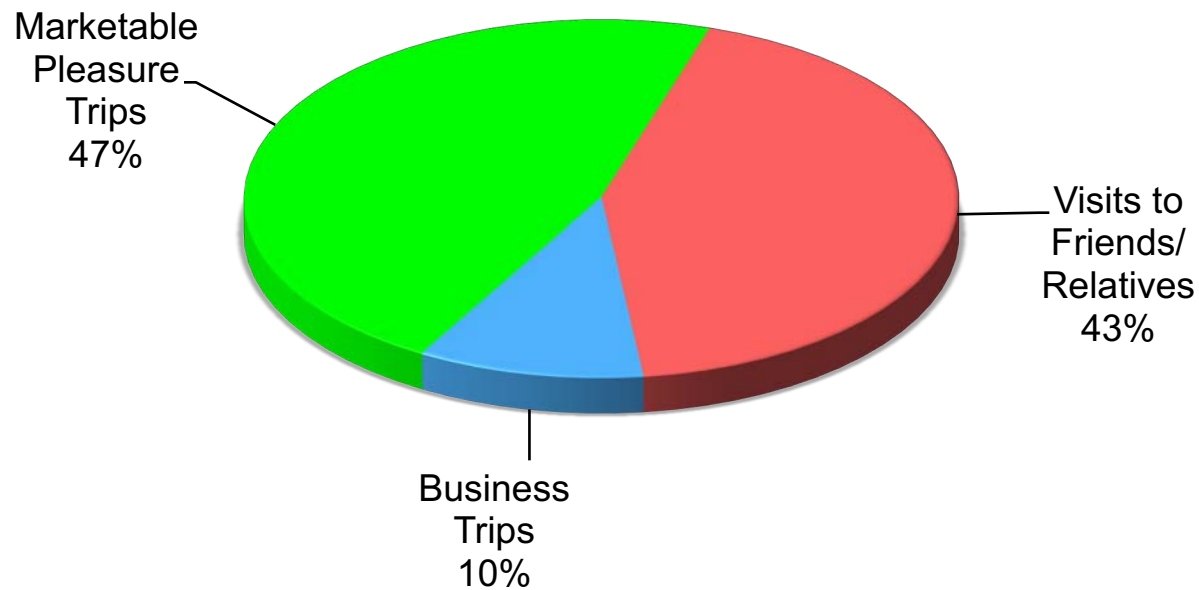
Detailed Findings



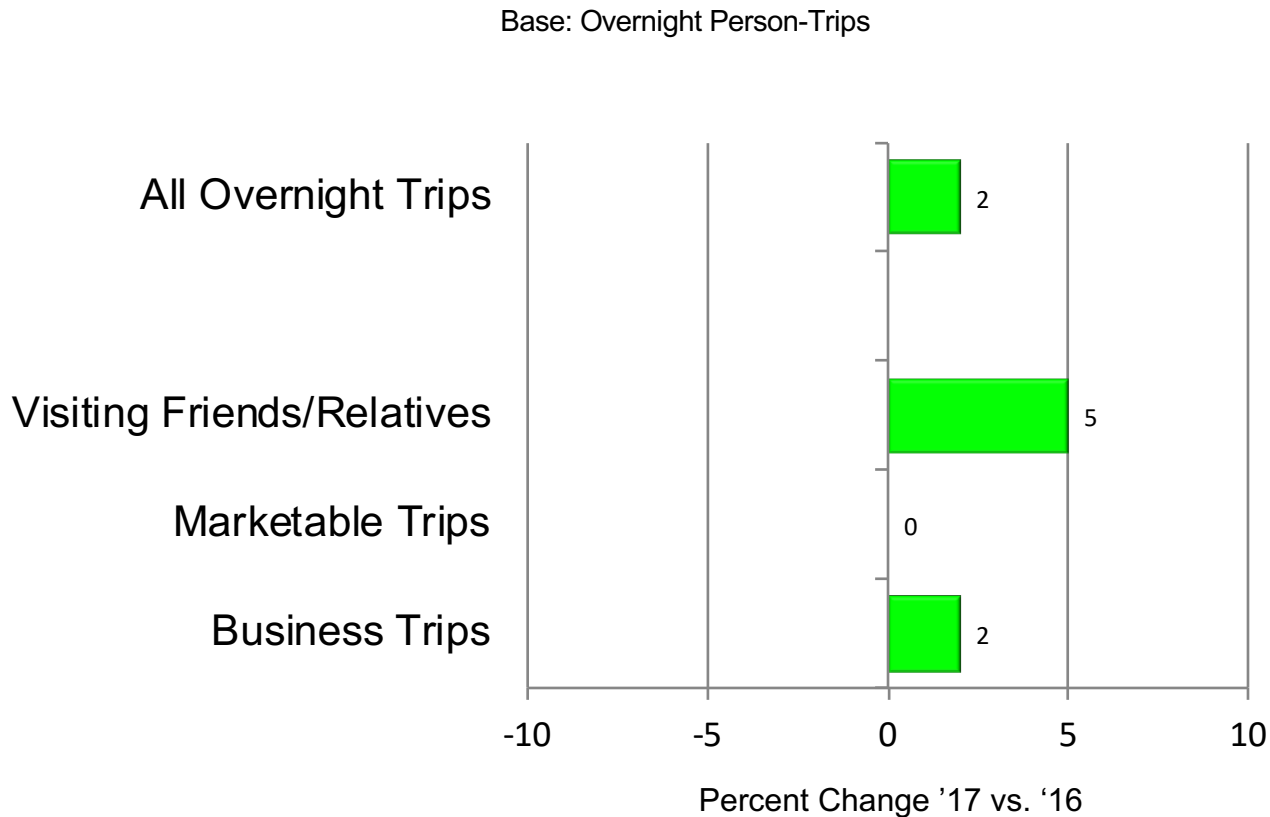
Size & Structure of the U.S. Travel Market



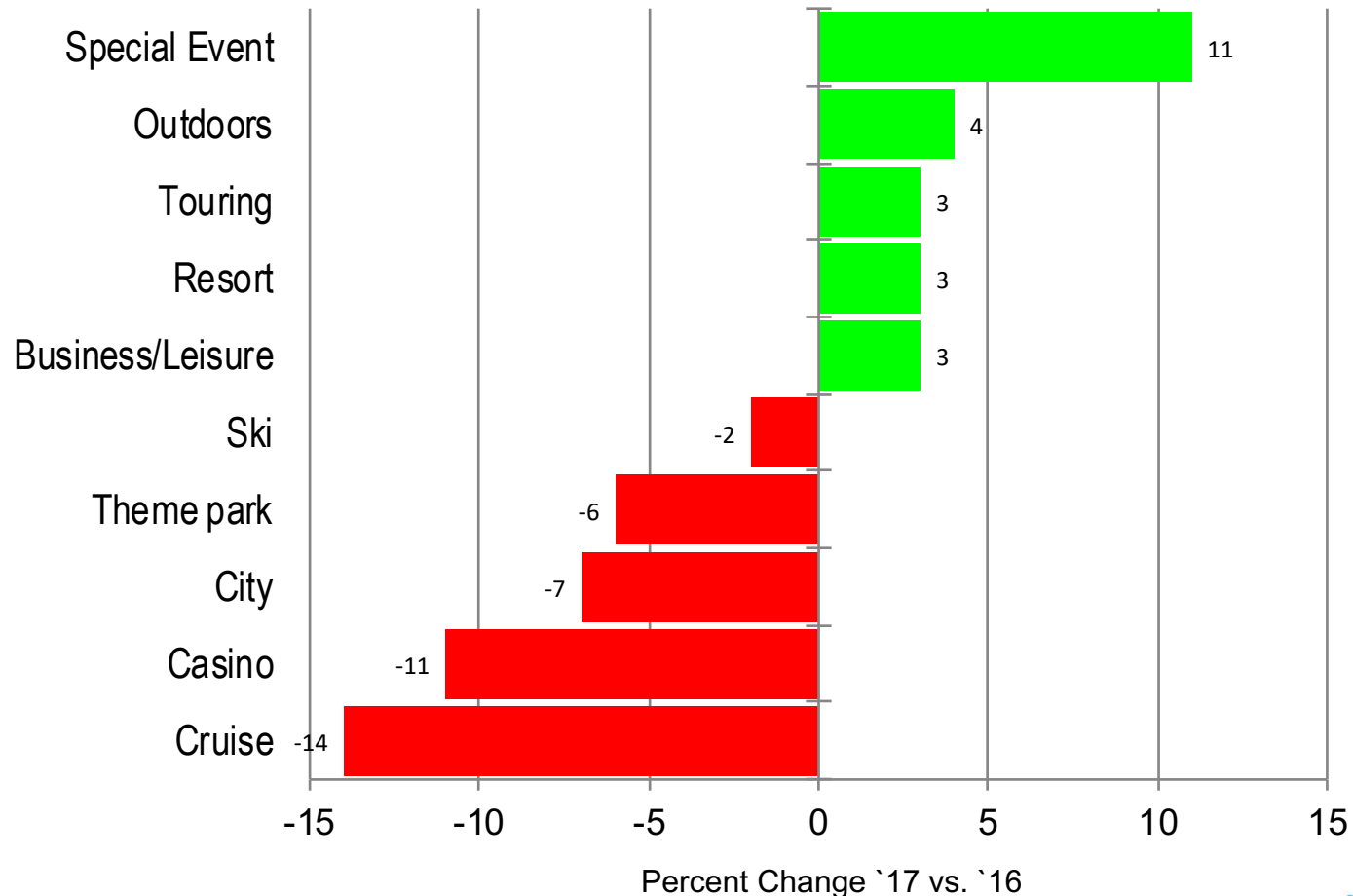
Structure of the U.S. Travel Market — 2017 Overnight Trips



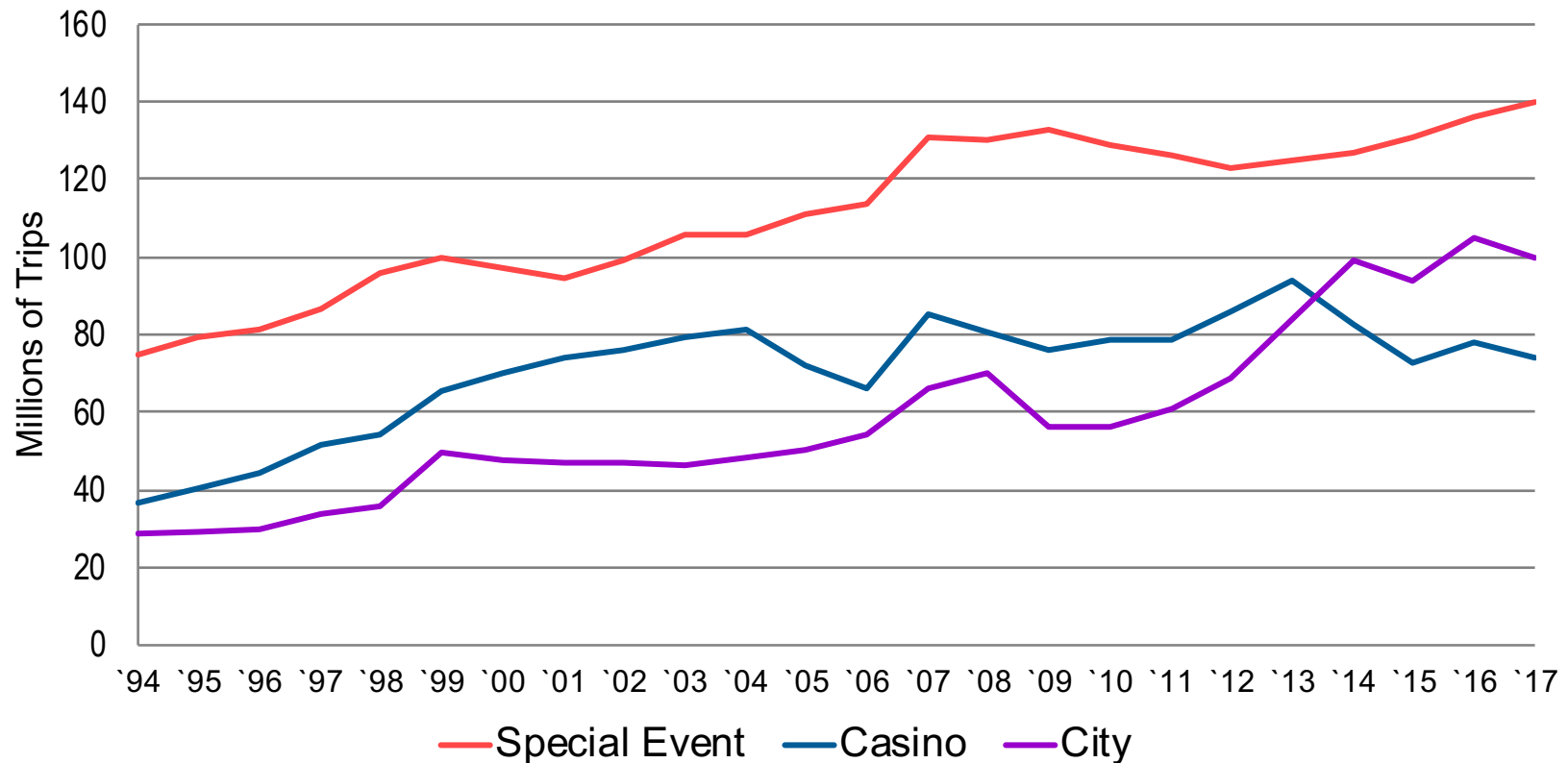
U.S. Market Trends for Overnight Trips — 2017 vs. 2016



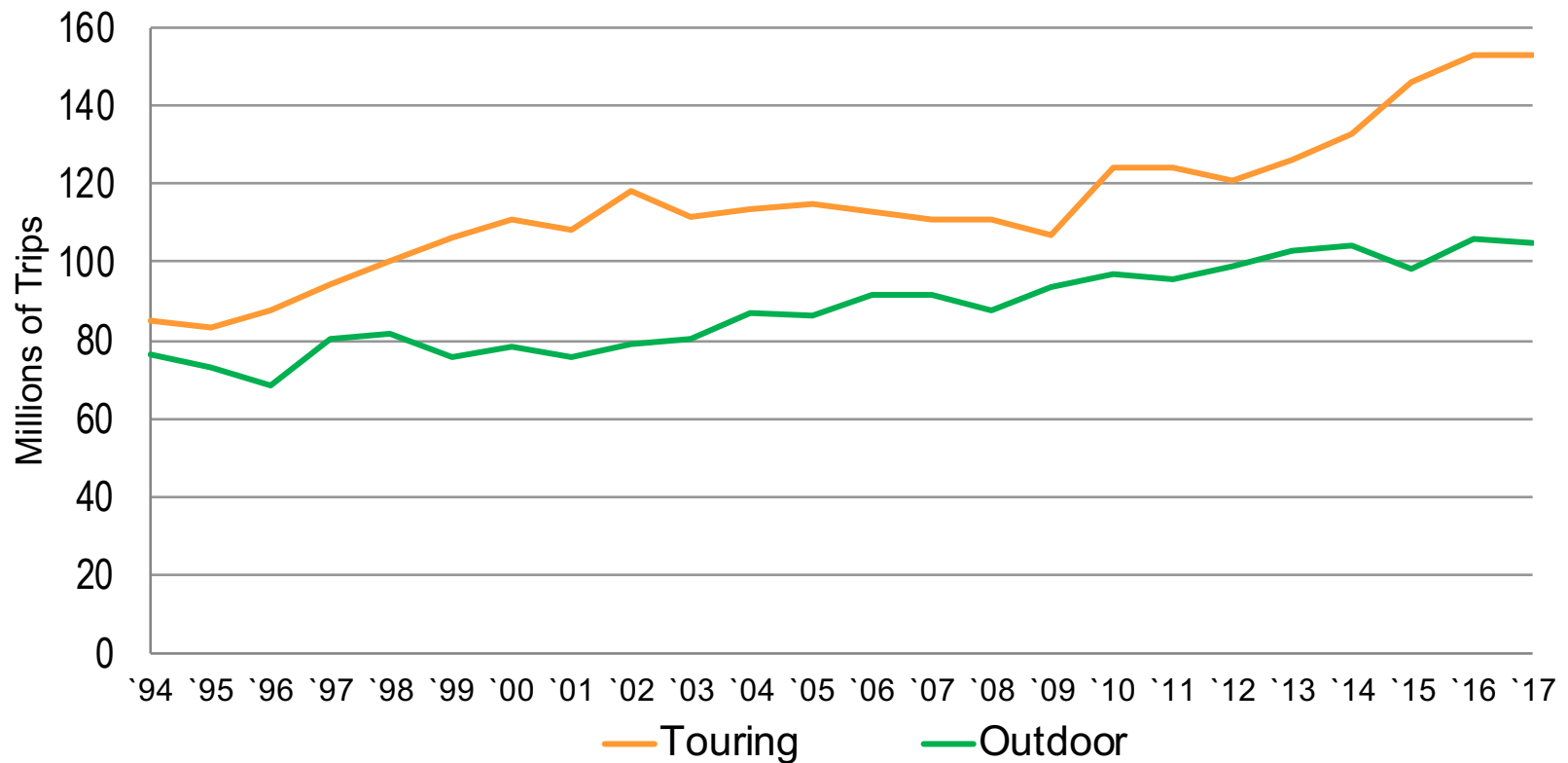
U.S. Overnight Marketable Trip Trends — 2017 Travel Year



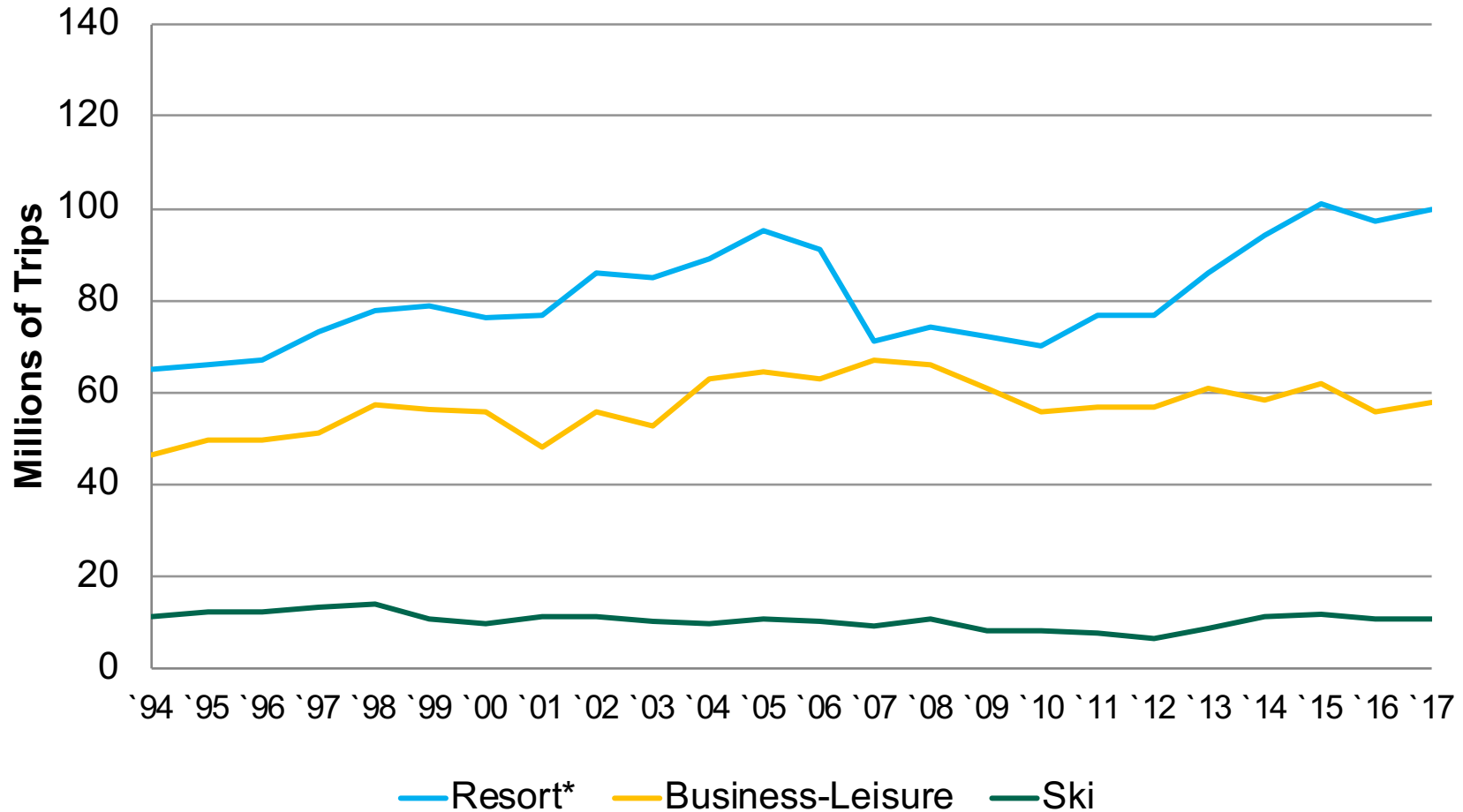
U.S. Marketable Trips — Special Event, Casino & City Trips



U.S. Marketable Trips — Touring & Outdoor Trips

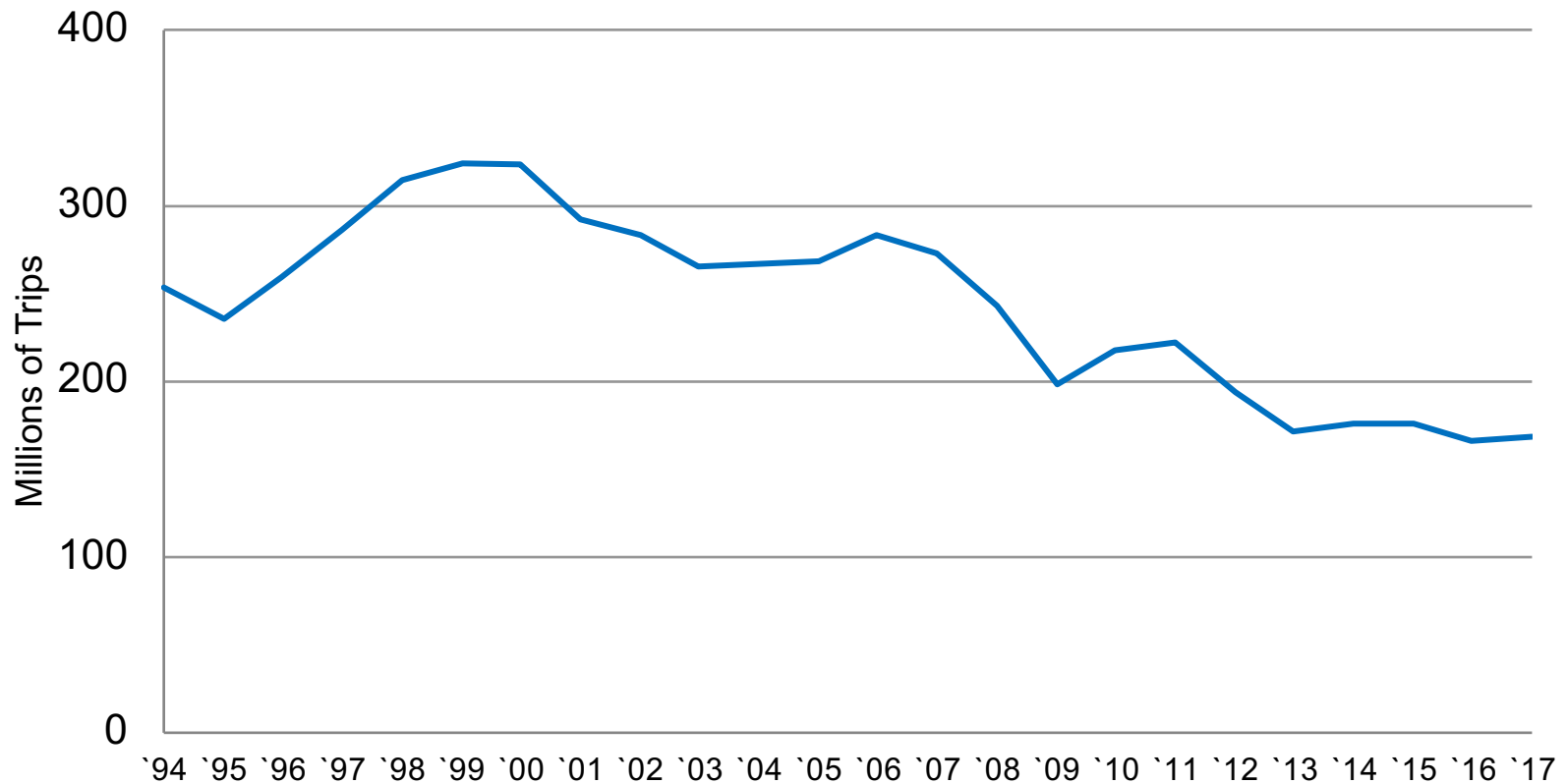


U.S. Marketable Trips — Business/Leisure, Resort* & Ski Trips



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

U.S. Business Trips



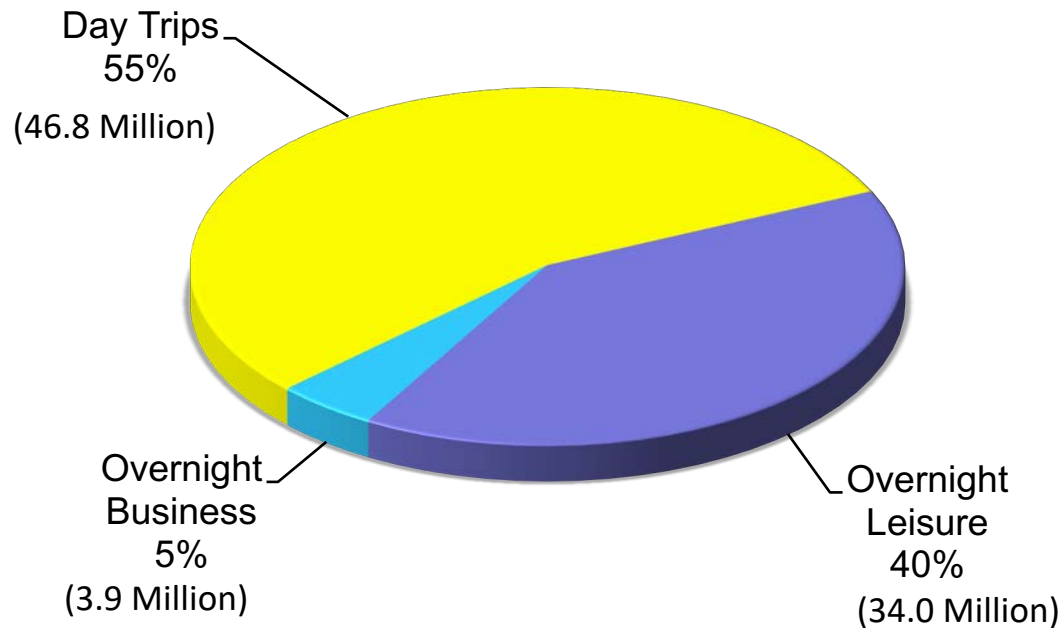


Size & Structure of Colorado's Travel Market



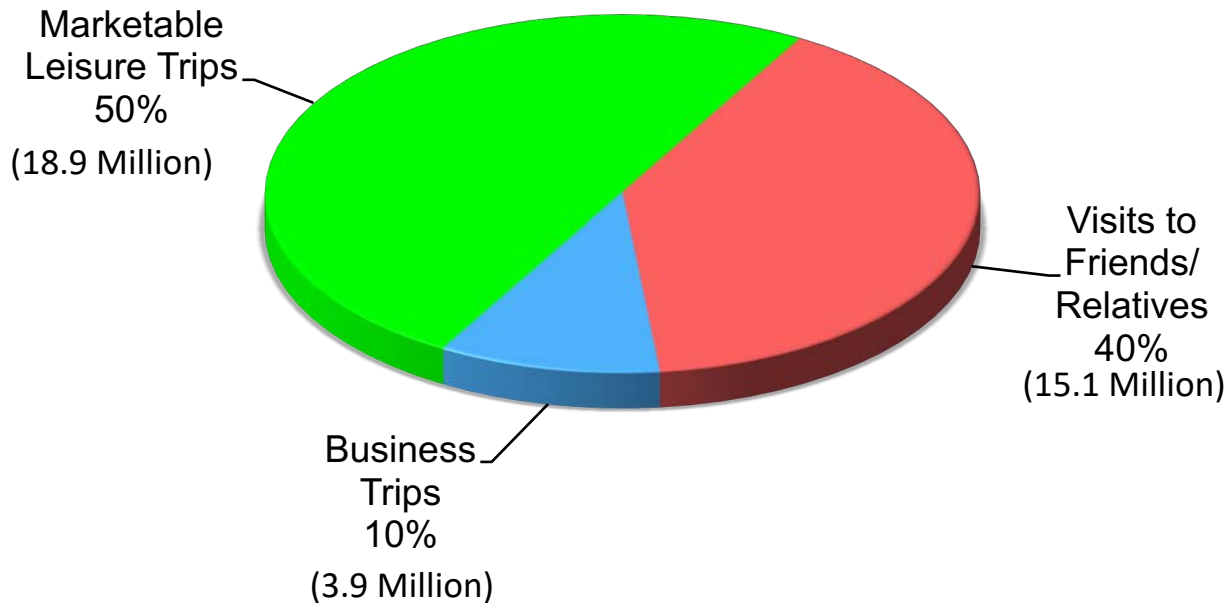
Day & Overnight Trips to Colorado in 2017

Total Trips = 84.7 Million

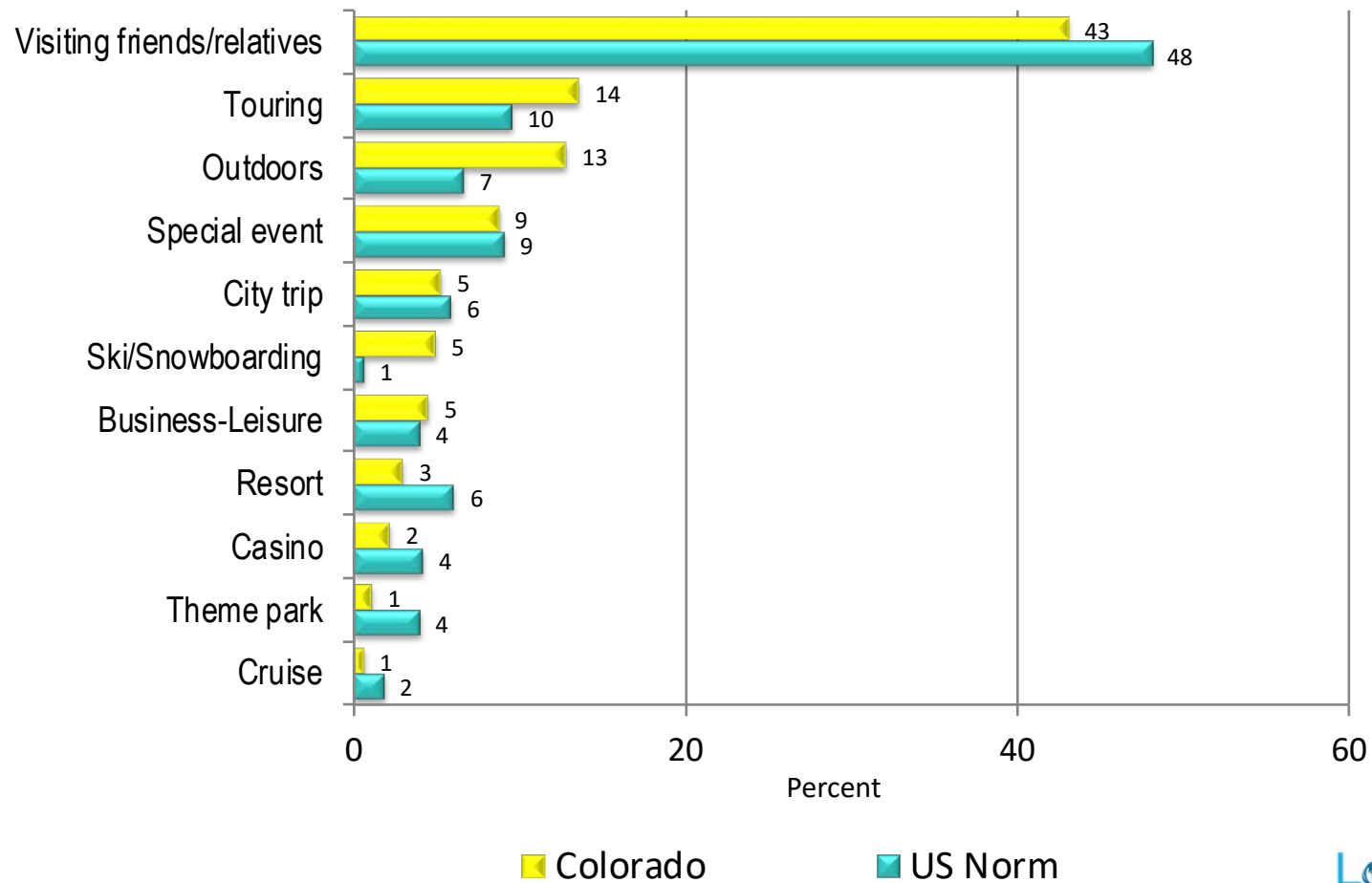


Size of Colorado's Travel Market — 2017 Overnight Trips

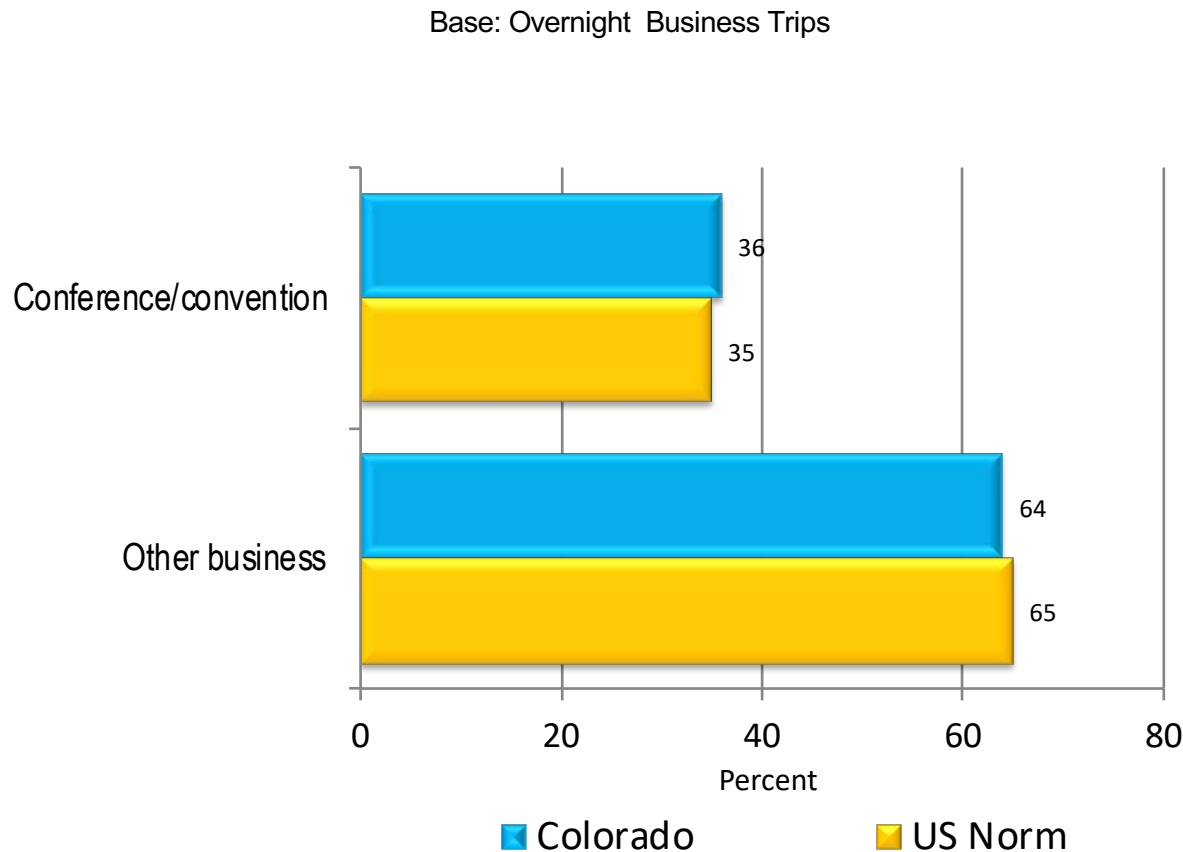
Total Trips = 37.9 Million



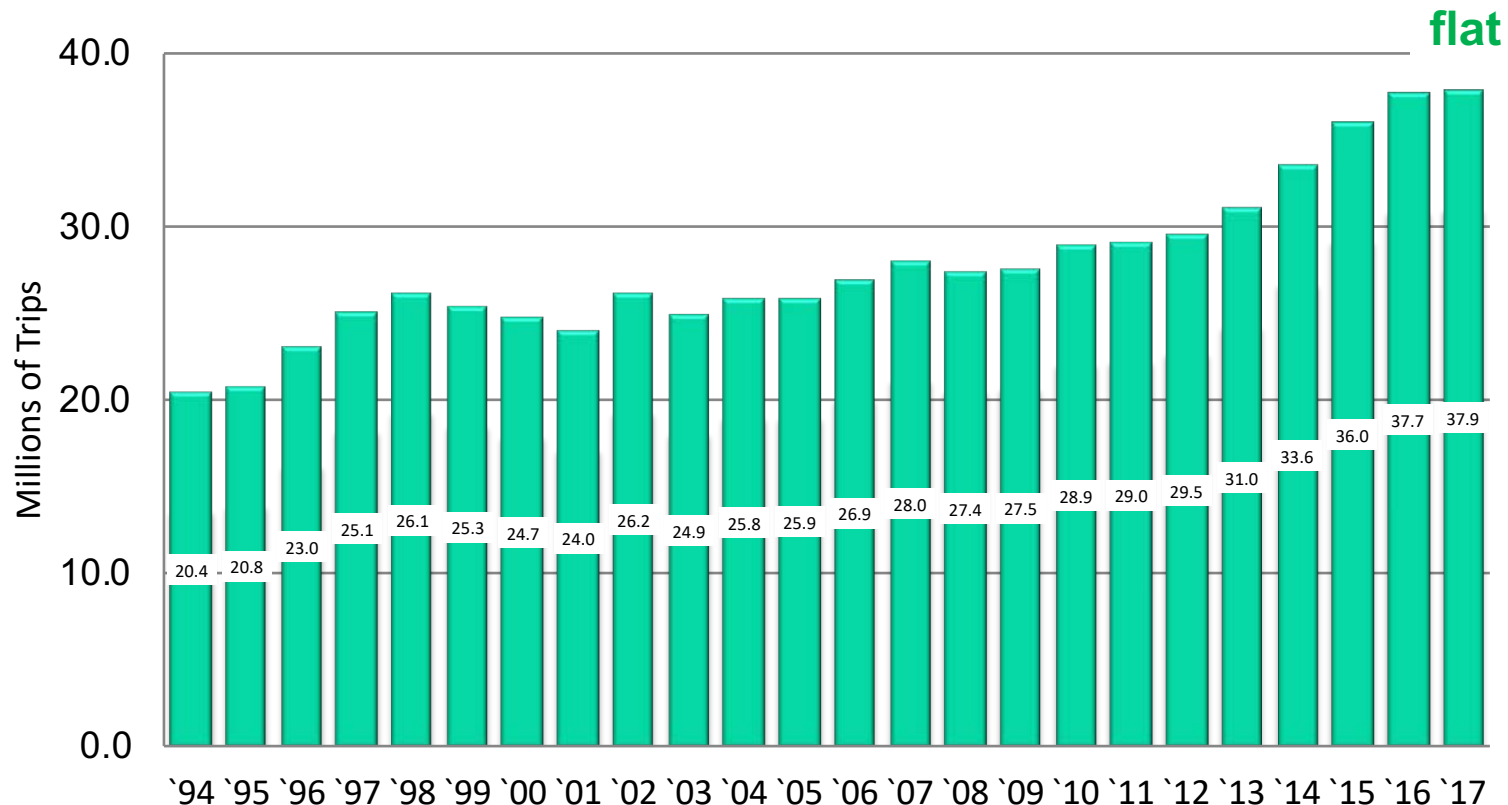
Main Purpose of 2017 Overnight Leisure Trips vs. the U.S. Norm



Main Purpose of 2017 Overnight Business Trips vs. the U.S. Norm

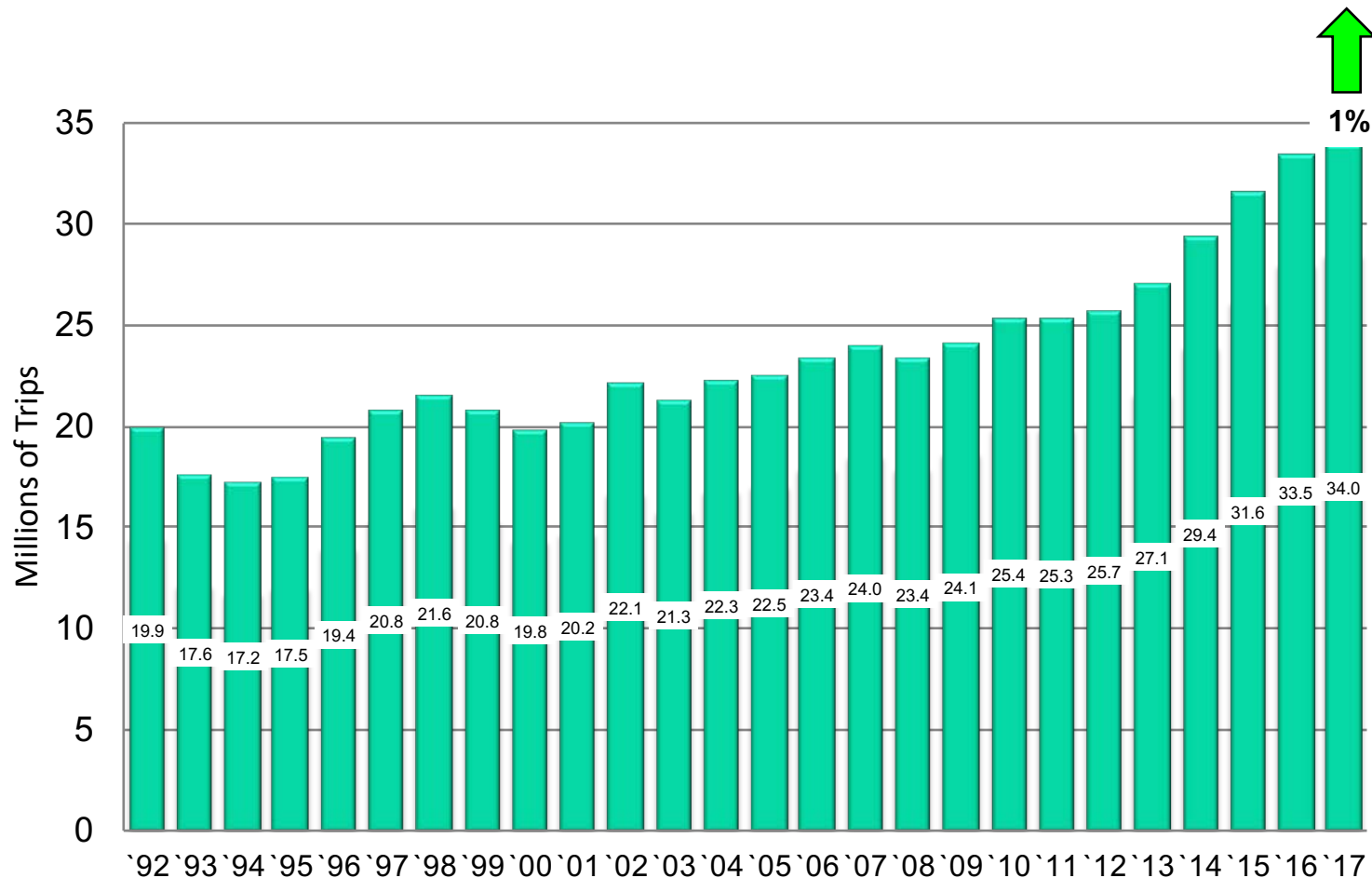


Overnight Trips to Colorado — 1994 to 2017

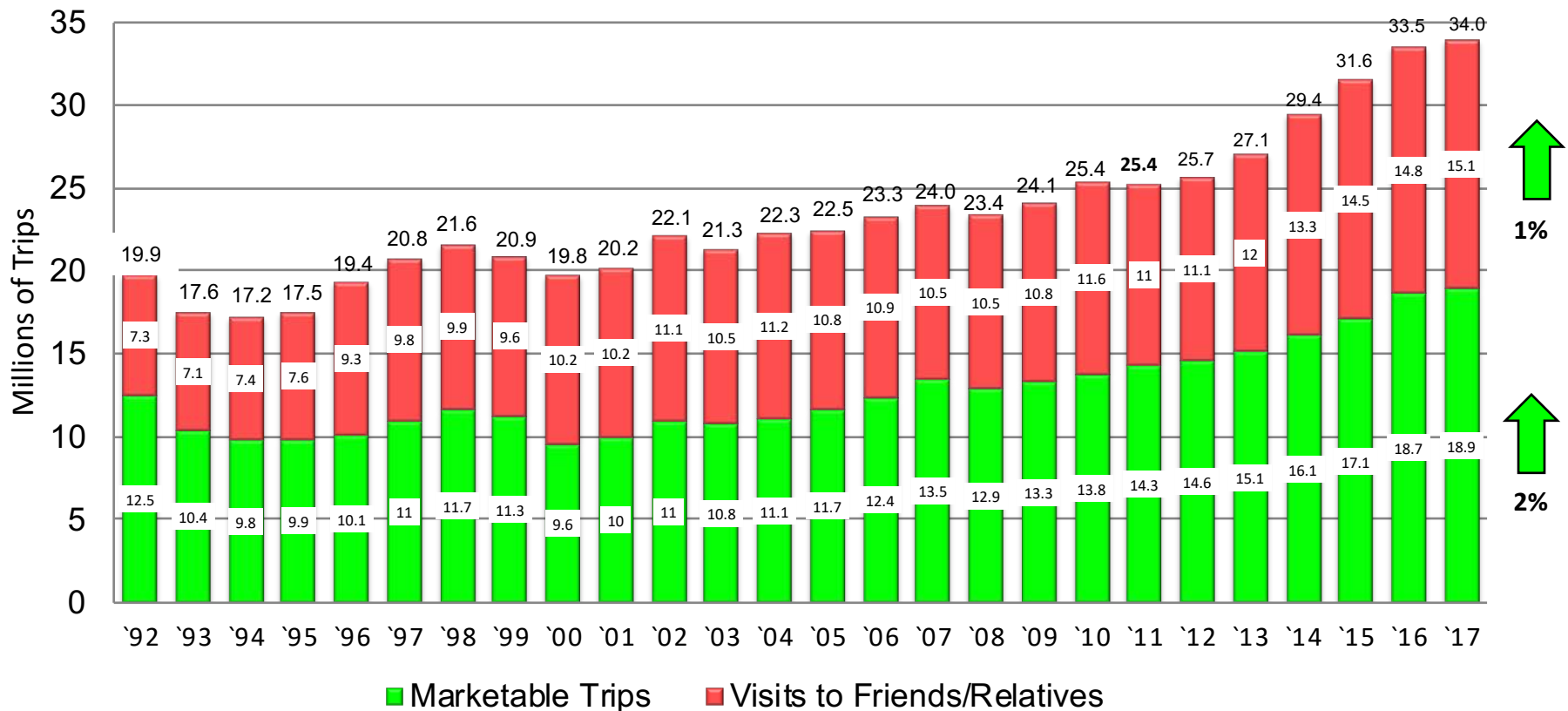


Note: Referencing this and subsequent charts showing annual trends, the Travel USA® survey was standardized for Leisure travel starting in 1992, so all charts about Leisure travel begin with that year. Questions about business trips were added in 1994; so charts about business travel or that show a total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

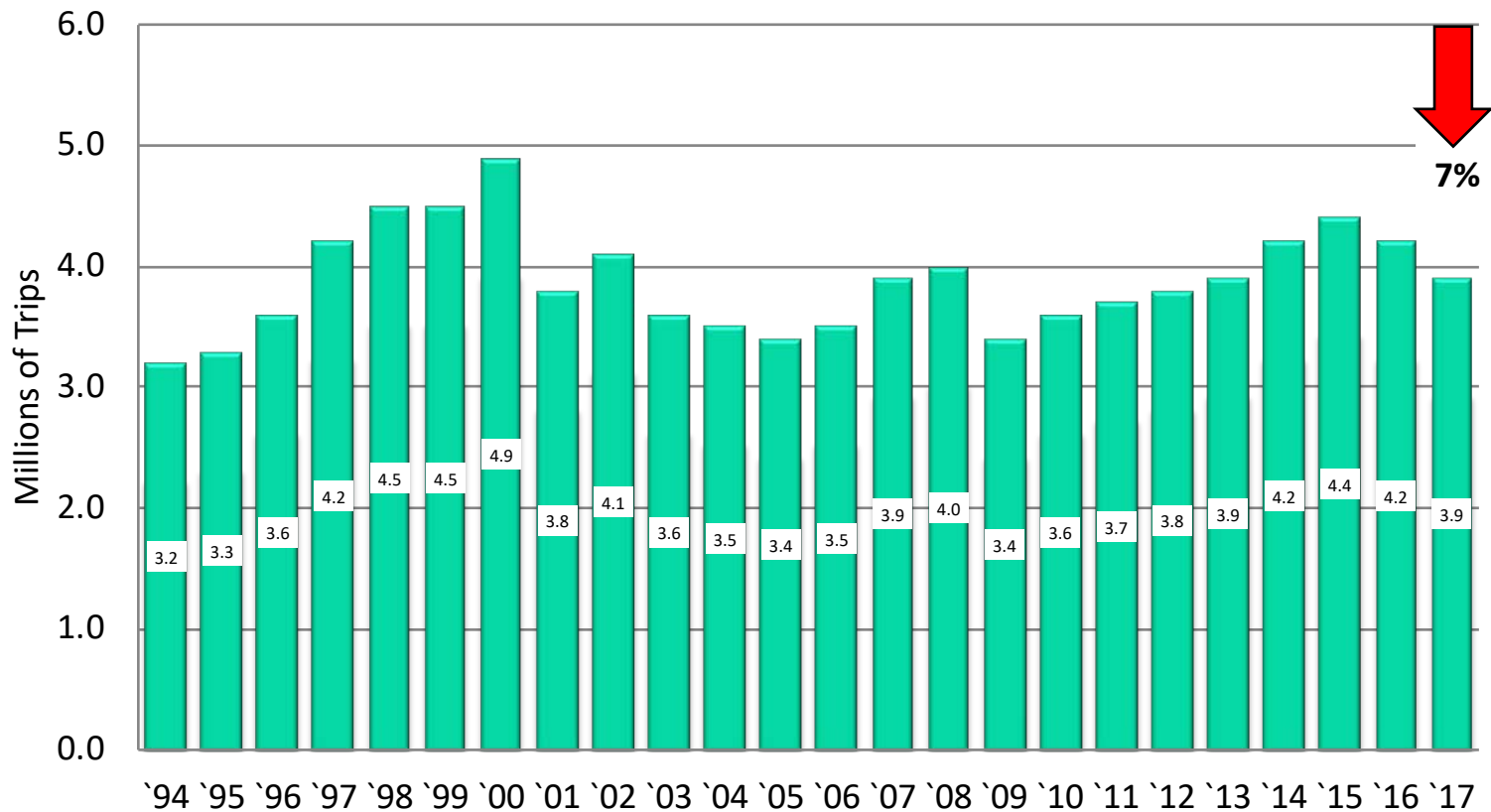
Overnight Leisure Trips to Colorado — 1992 to 2017



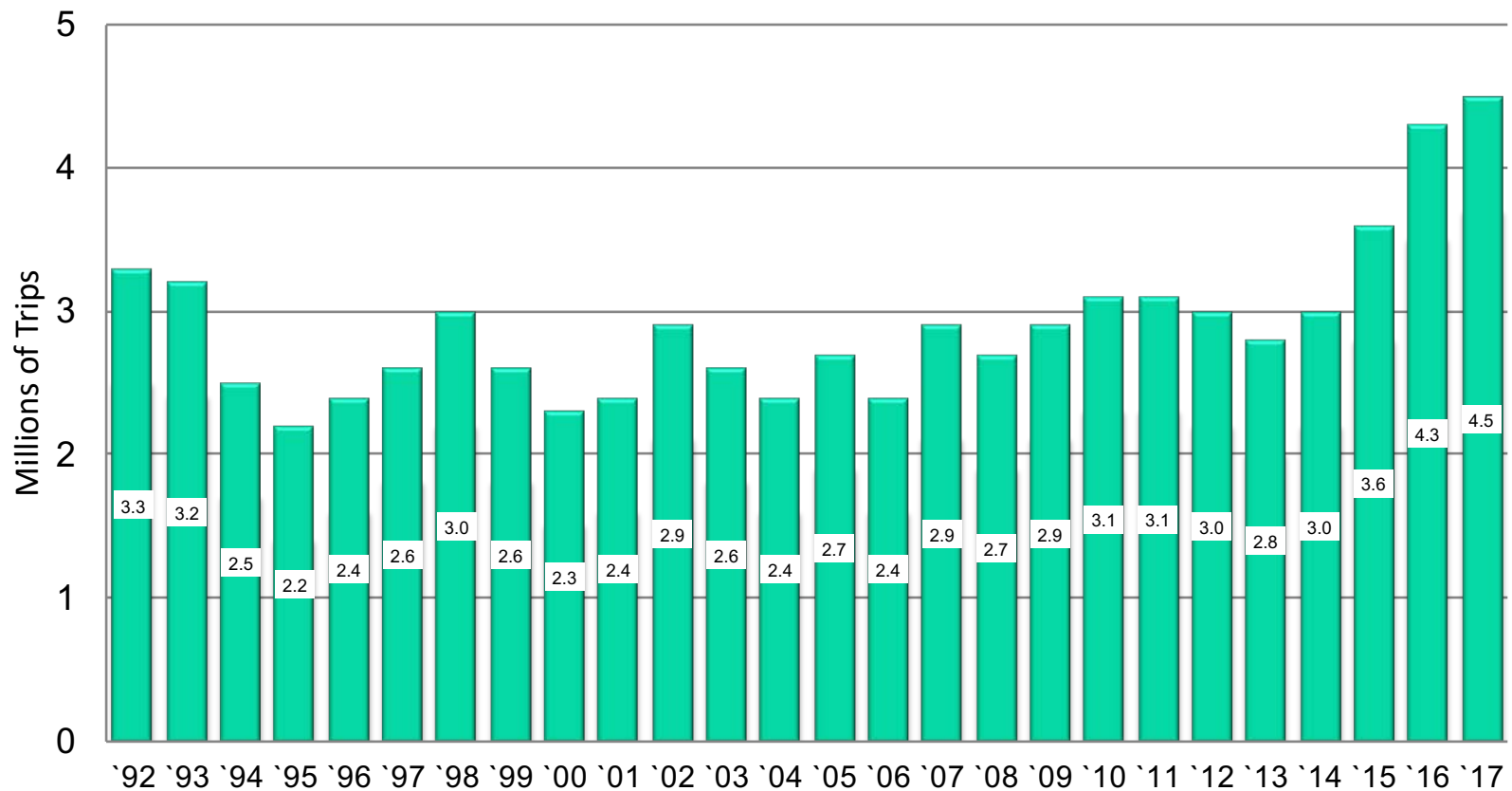
Structure of Colorado's Overnight Leisure Travel Market



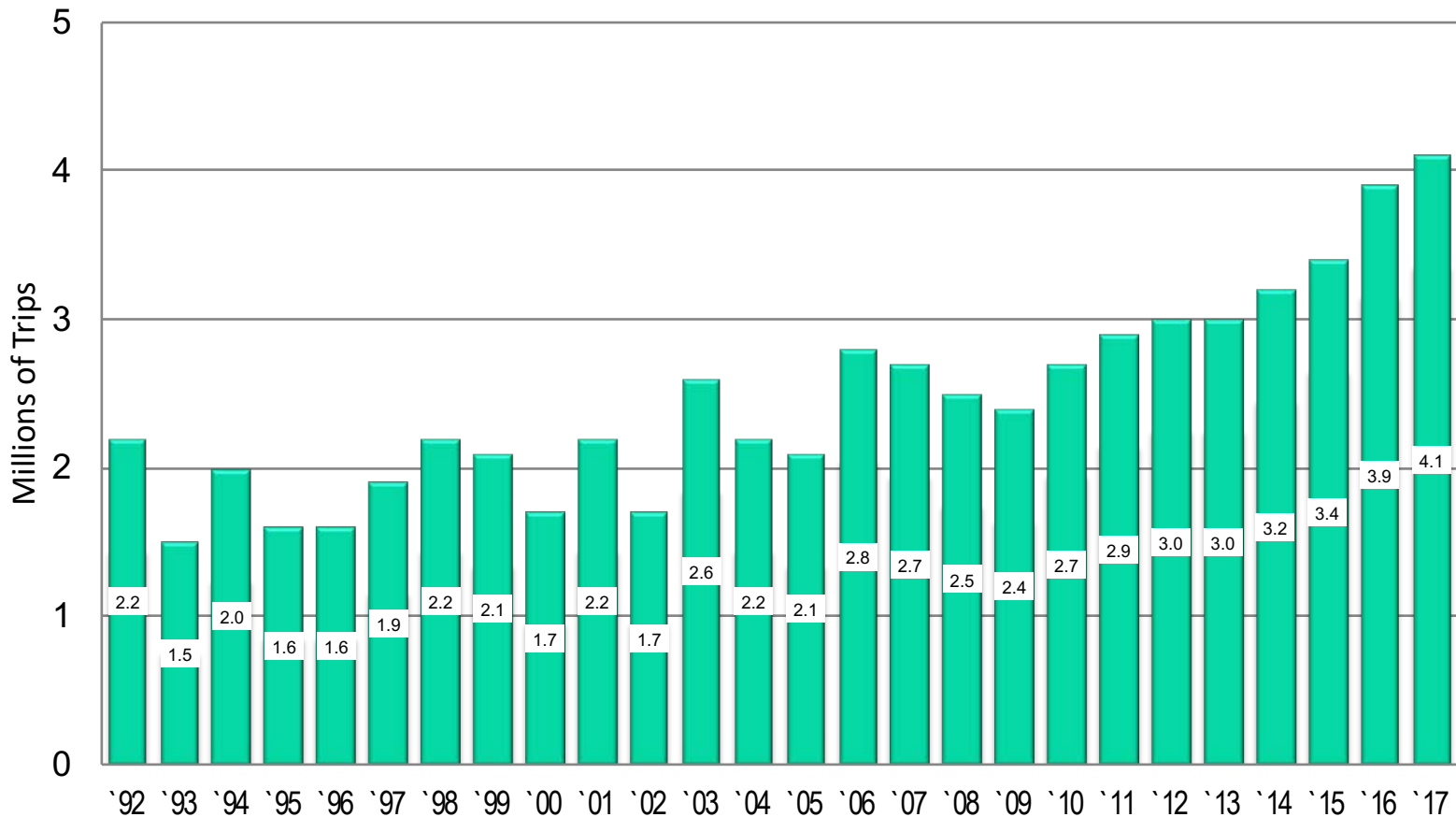
Overnight Business Trips to Colorado — 1994 to 2017



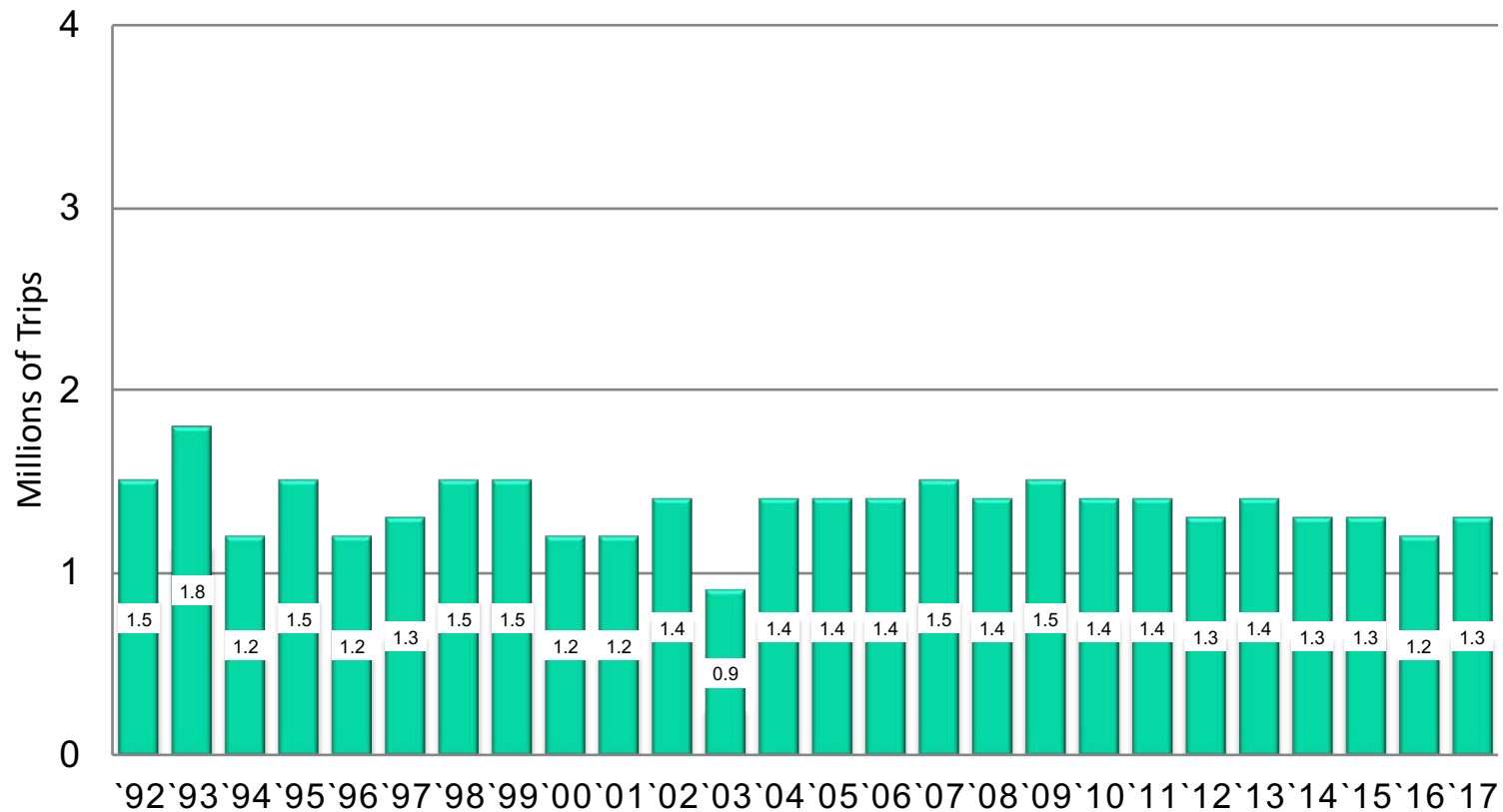
Overnight Touring Trips to Colorado



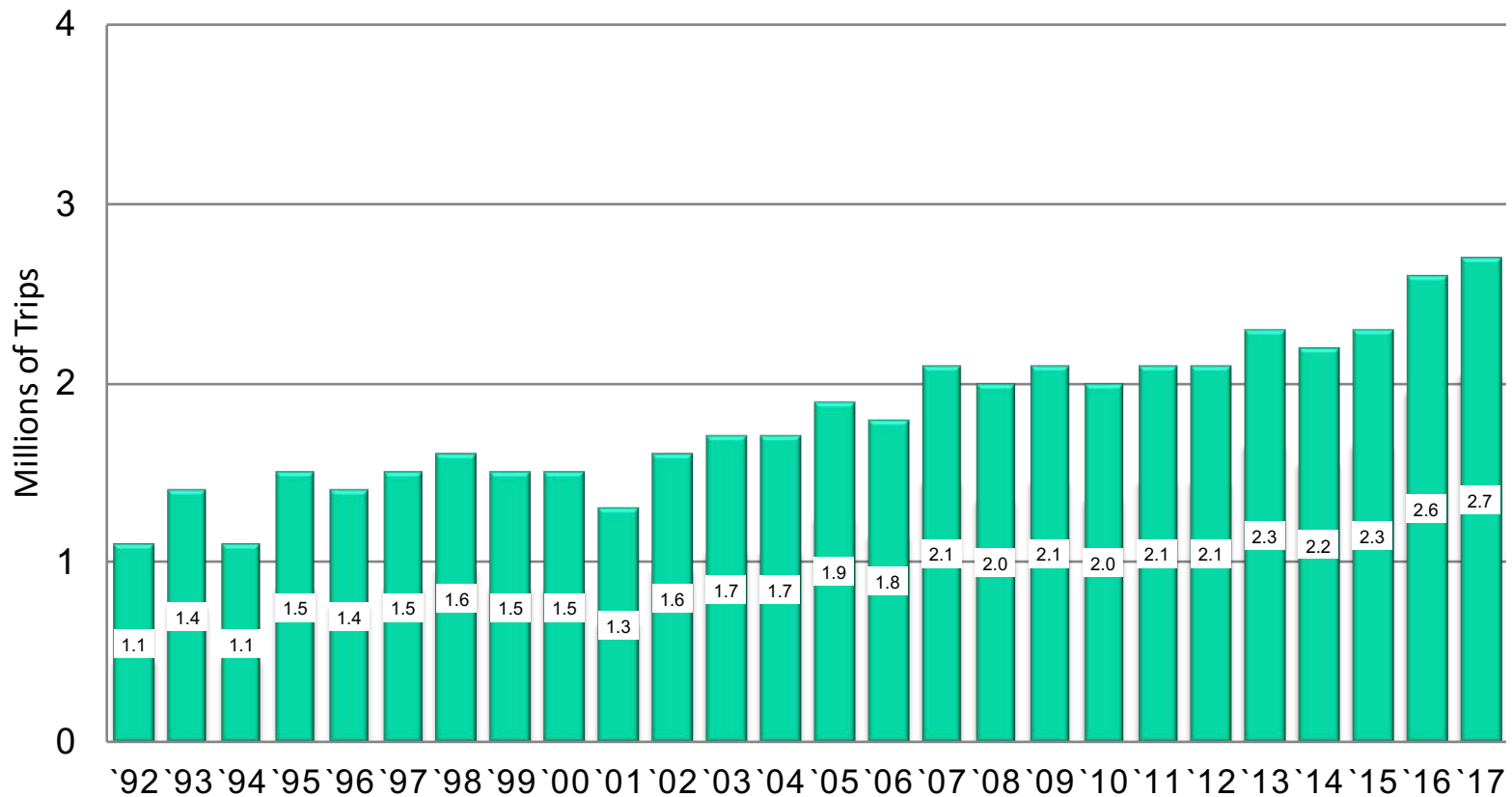
Overnight Outdoor Trips to Colorado



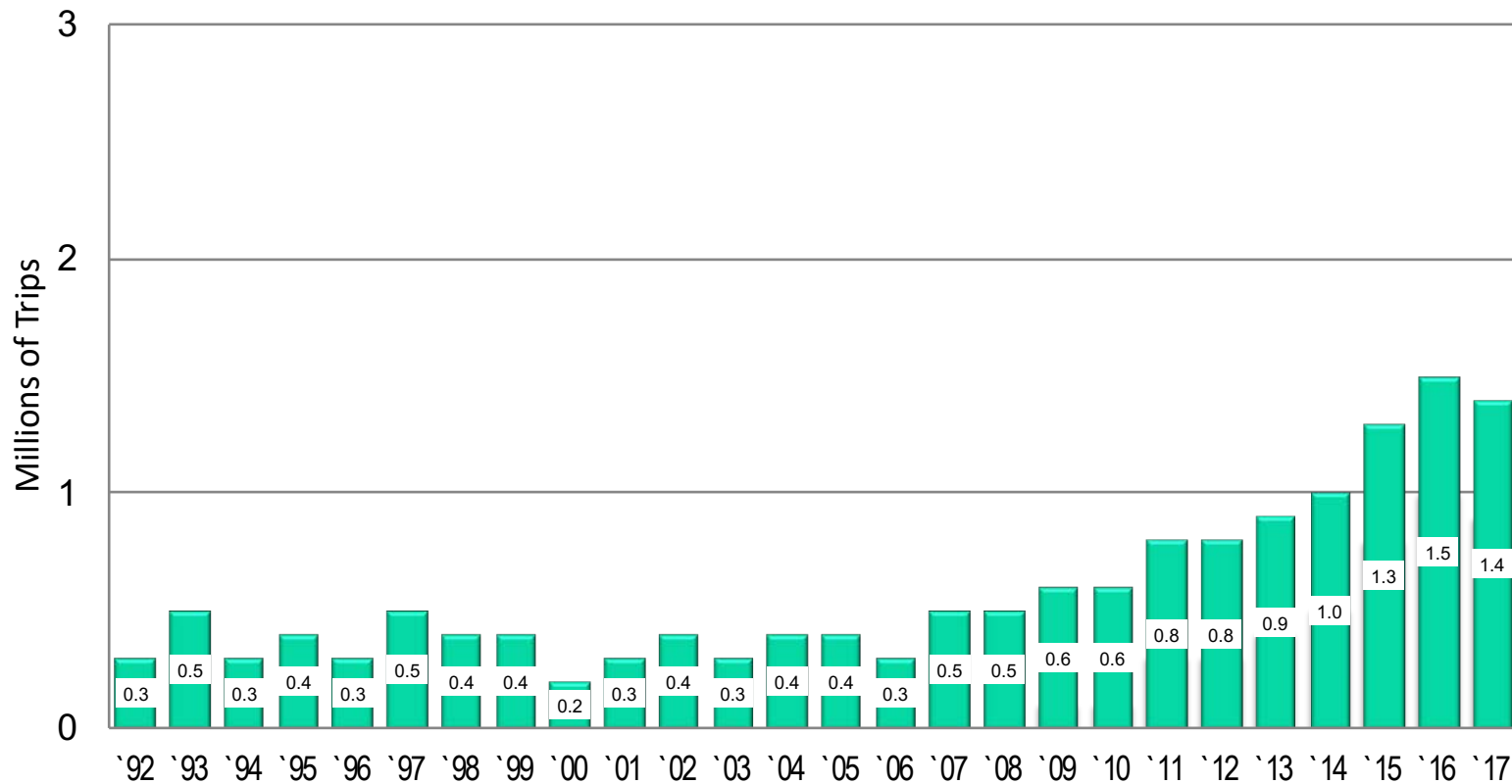
Overnight Business-Leisure Trips to Colorado



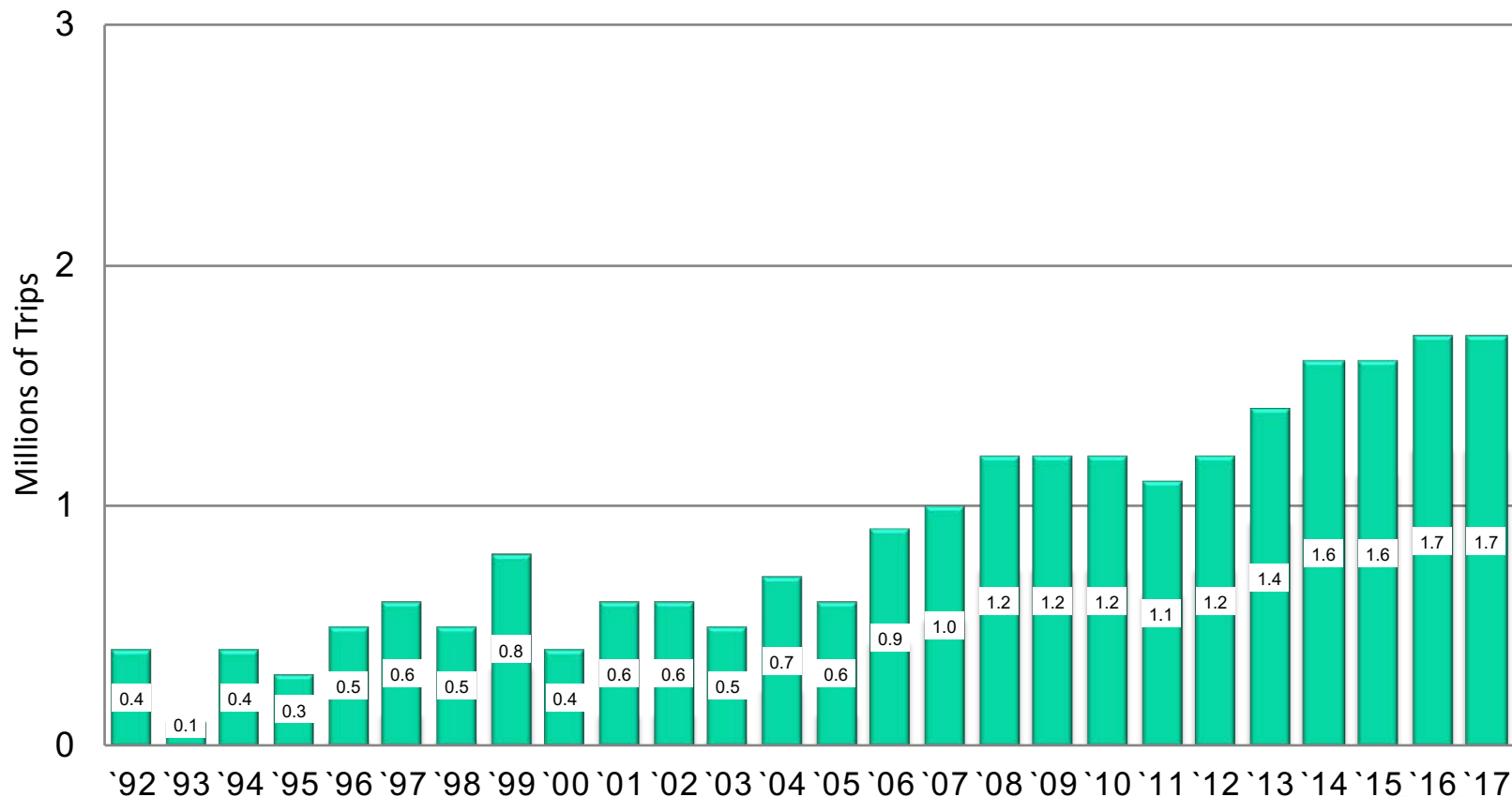
Overnight Special Event Trips to Colorado



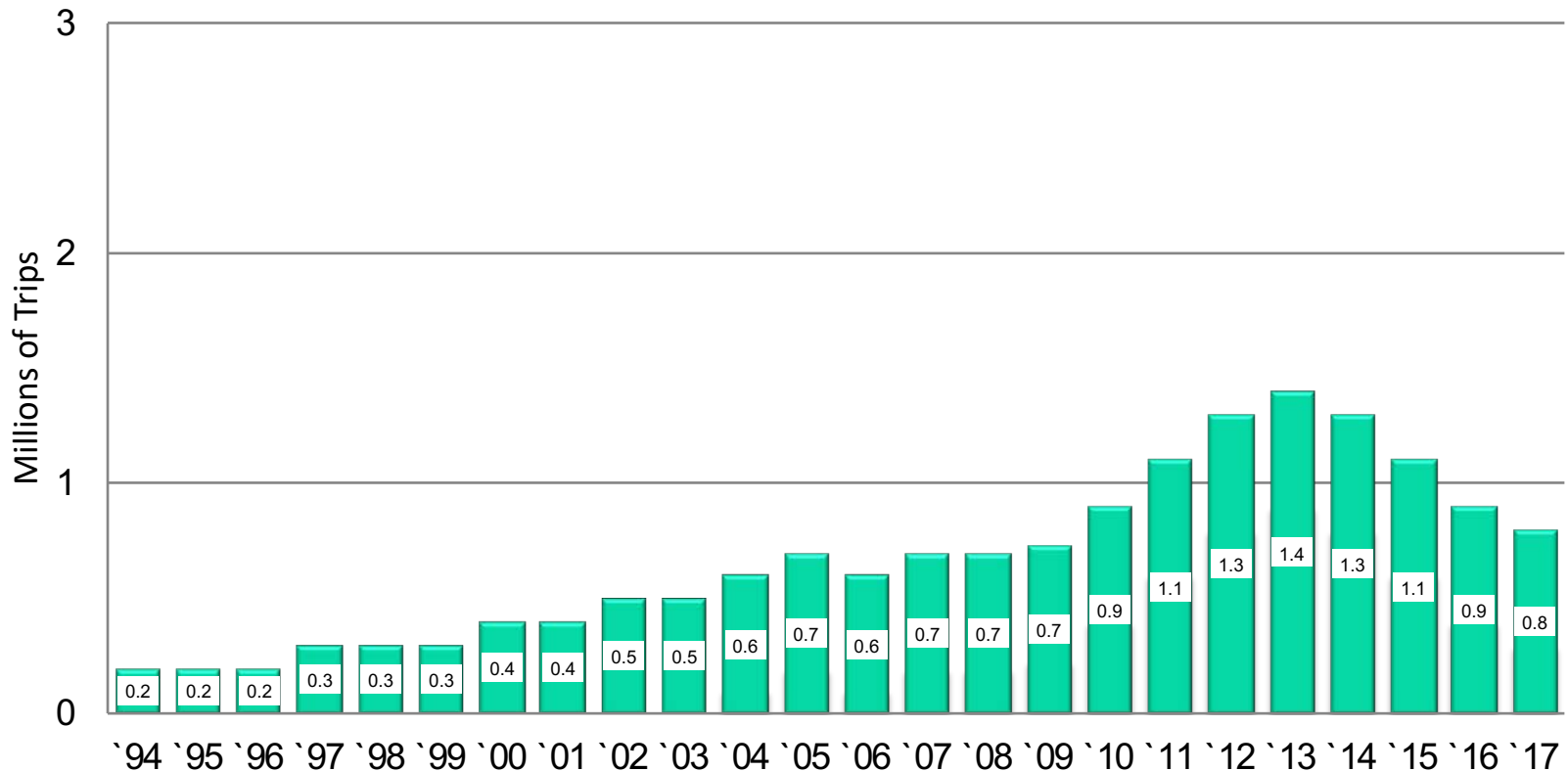
Overnight Resort Trips to Colorado



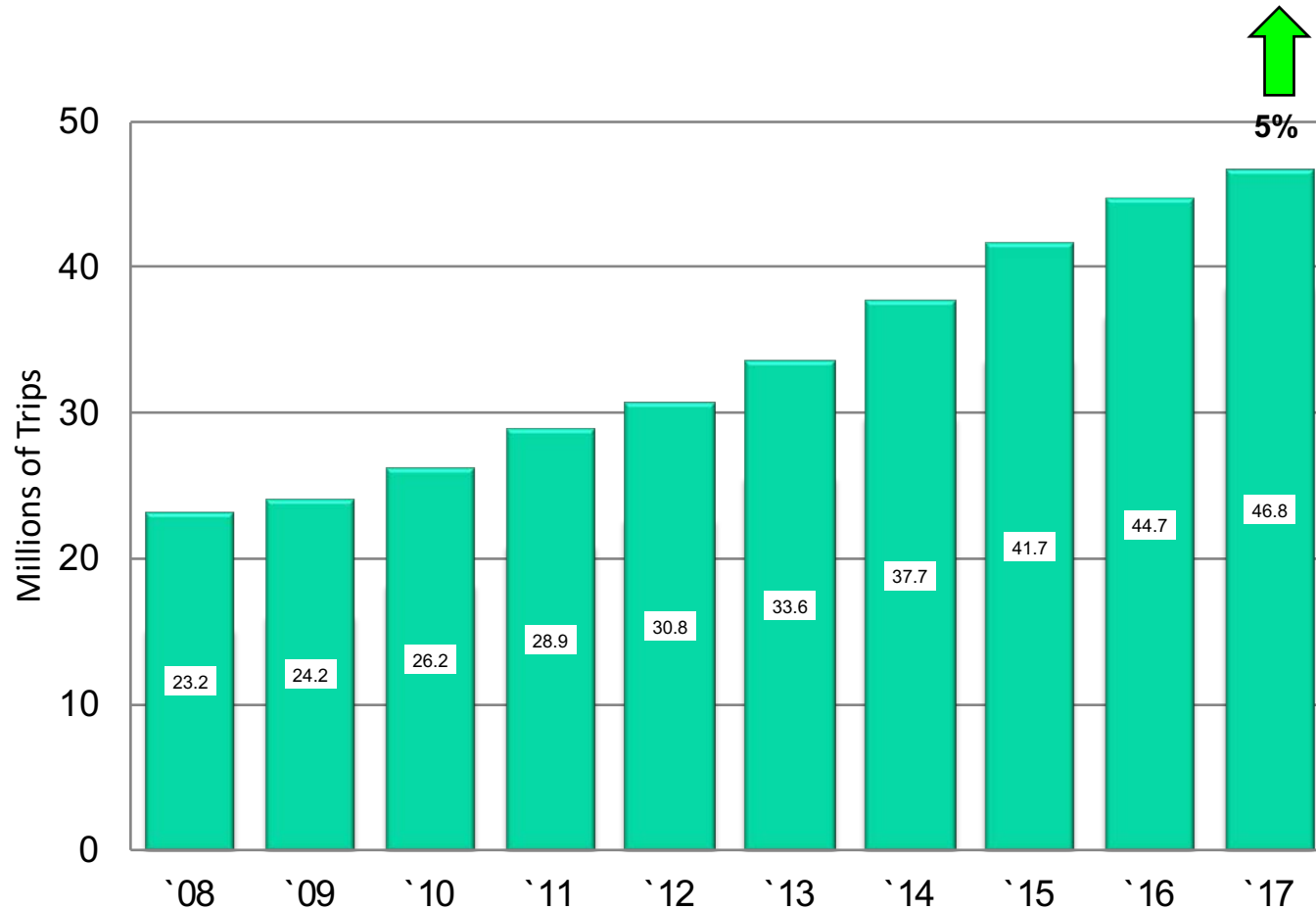
Overnight City Trips to Colorado



Overnight Casino Trips to Colorado



Day Trips To/Within Colorado

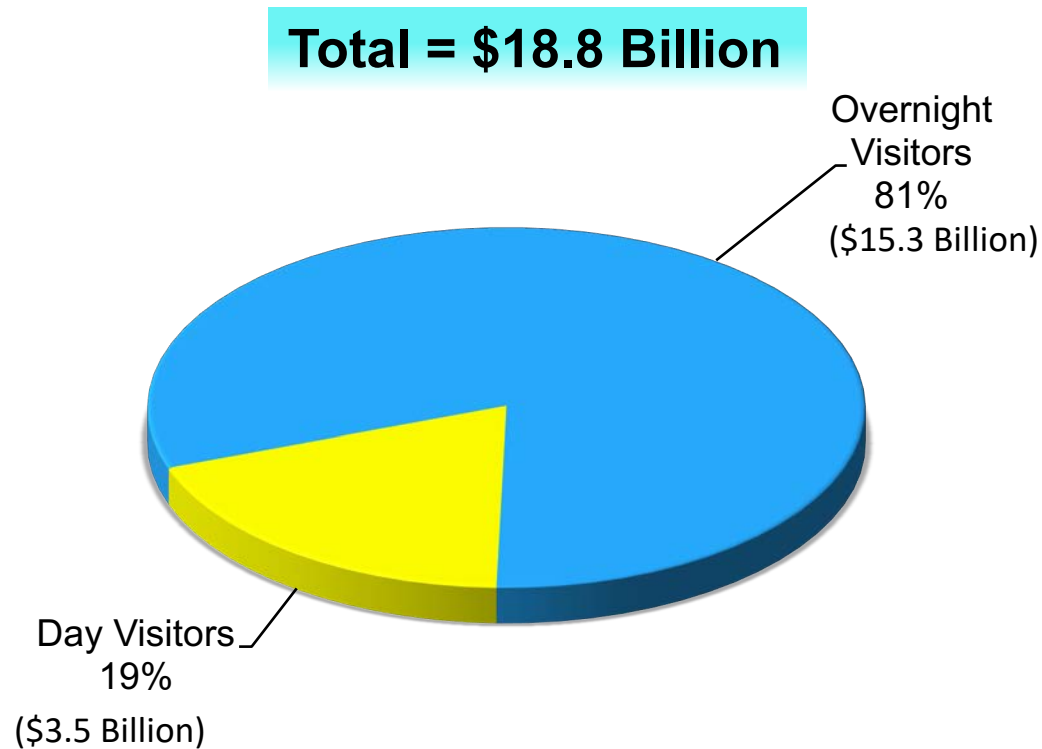




Travel and Tourism Spending in Colorado



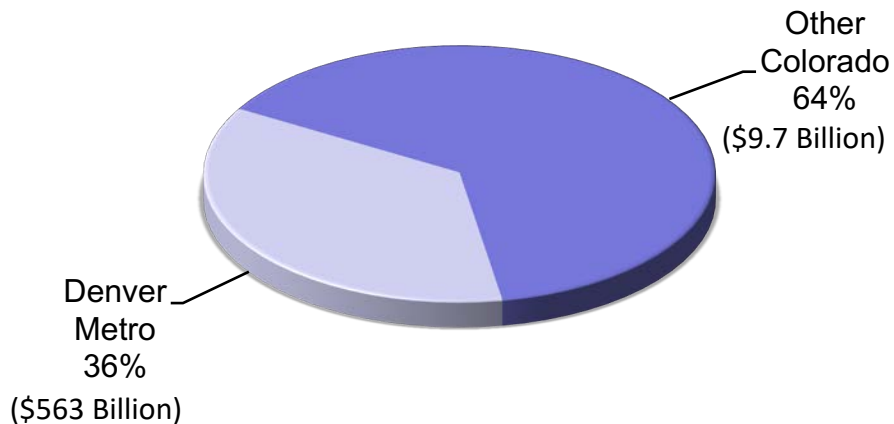
Total Travel Spending in Colorado in 2017



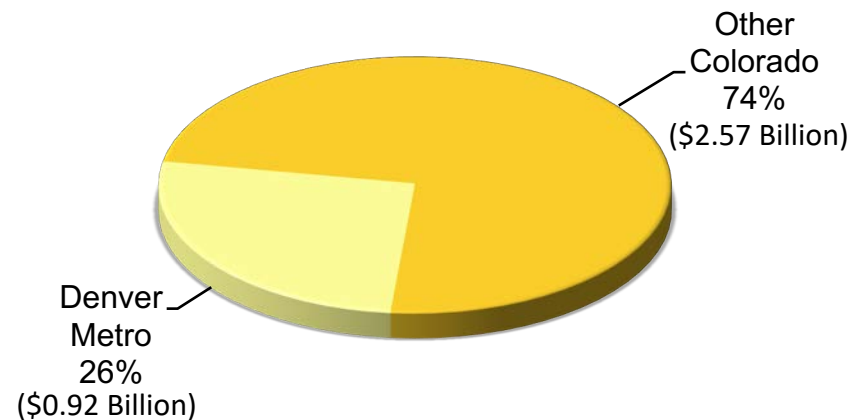
Total Travel Spending in Colorado in 2017

Overall Total = \$18.8 Billion

Total Overnight = \$15.3 Billion

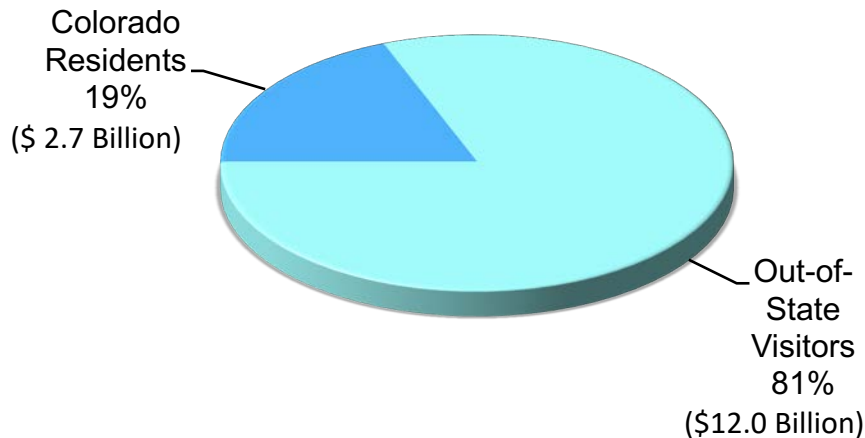


Total Day = \$3.5 Billion

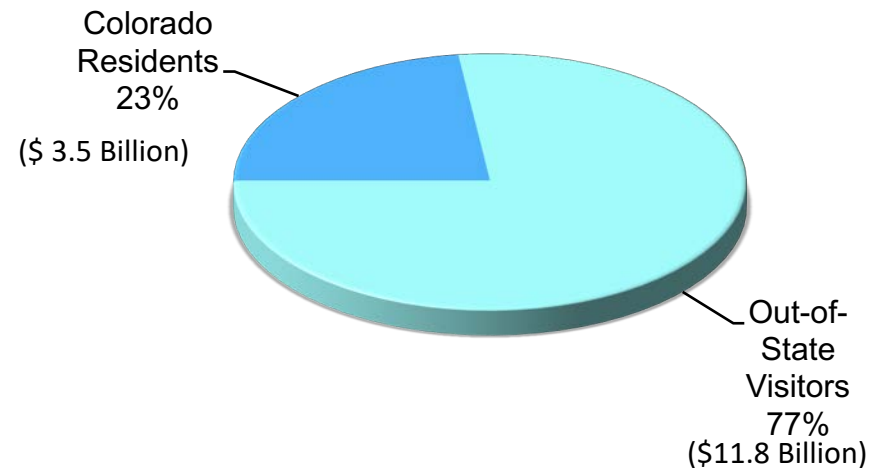


Total Travel Spending in Colorado — Overnight Visitors

2016 Total= \$14.7 Billion

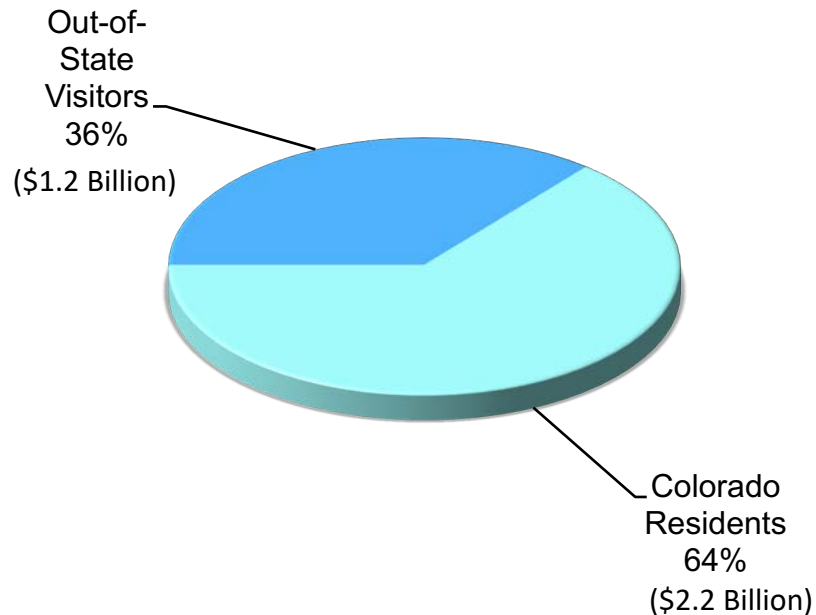


2017 Total= \$15.3 Billion

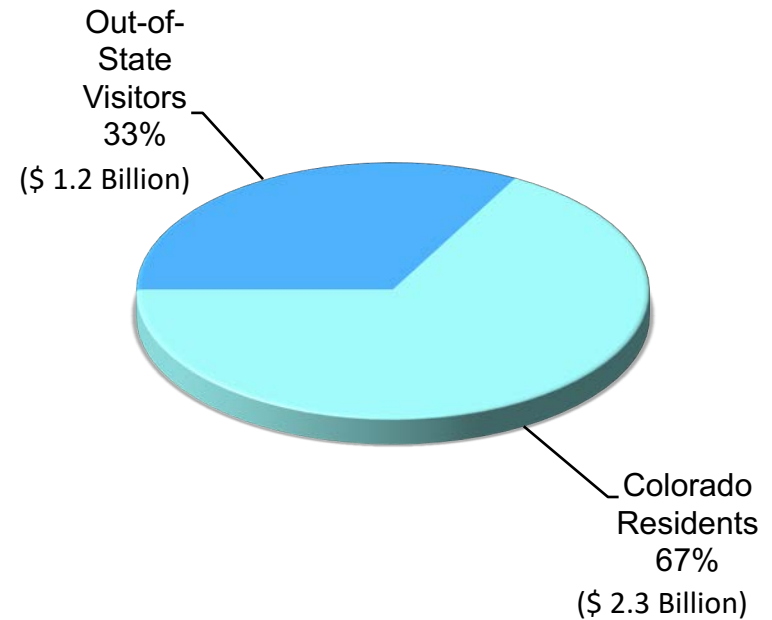


Total Travel Spending in Colorado — Day Visitors

2016 Total = \$3.4 Billion

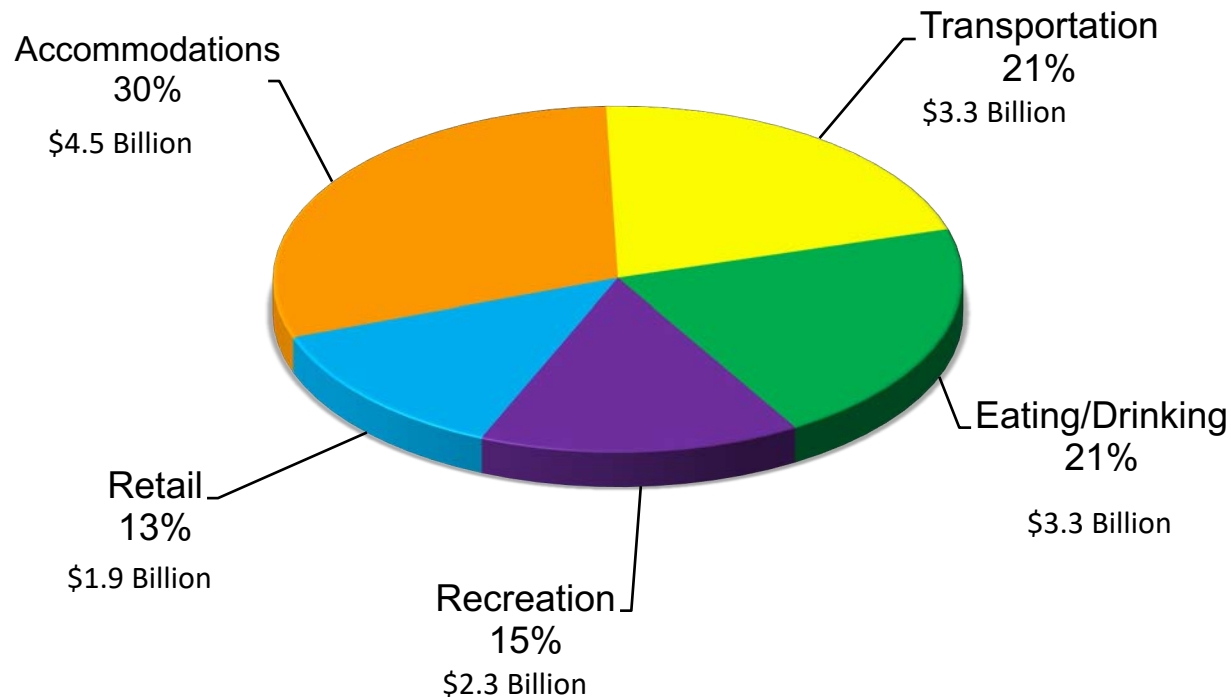


2017 Total = \$3.5 Billion



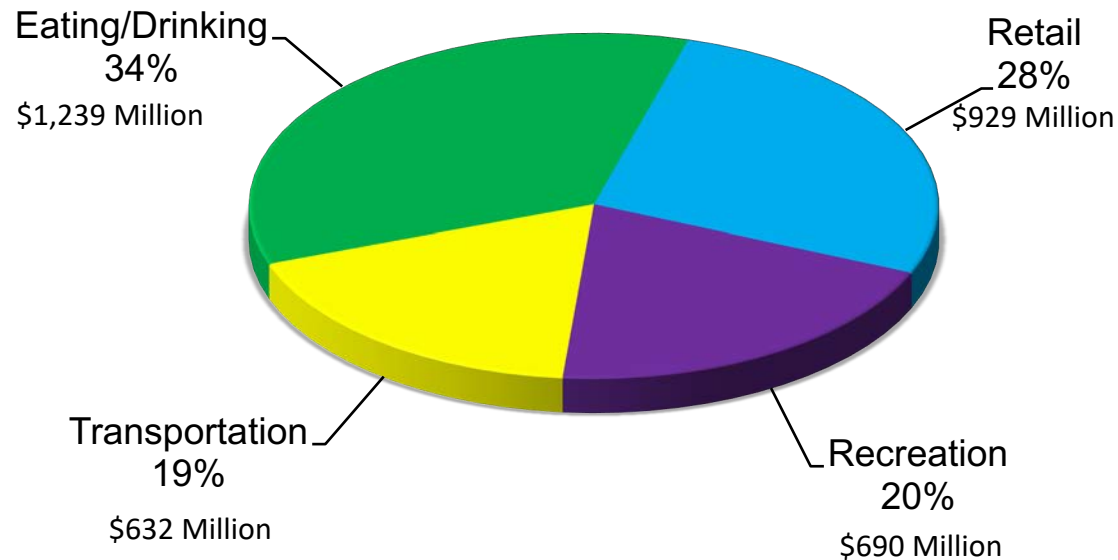
Total Spending in 2017 by Sector — Overnight Visitors

Total Spending = \$15.3 Billion



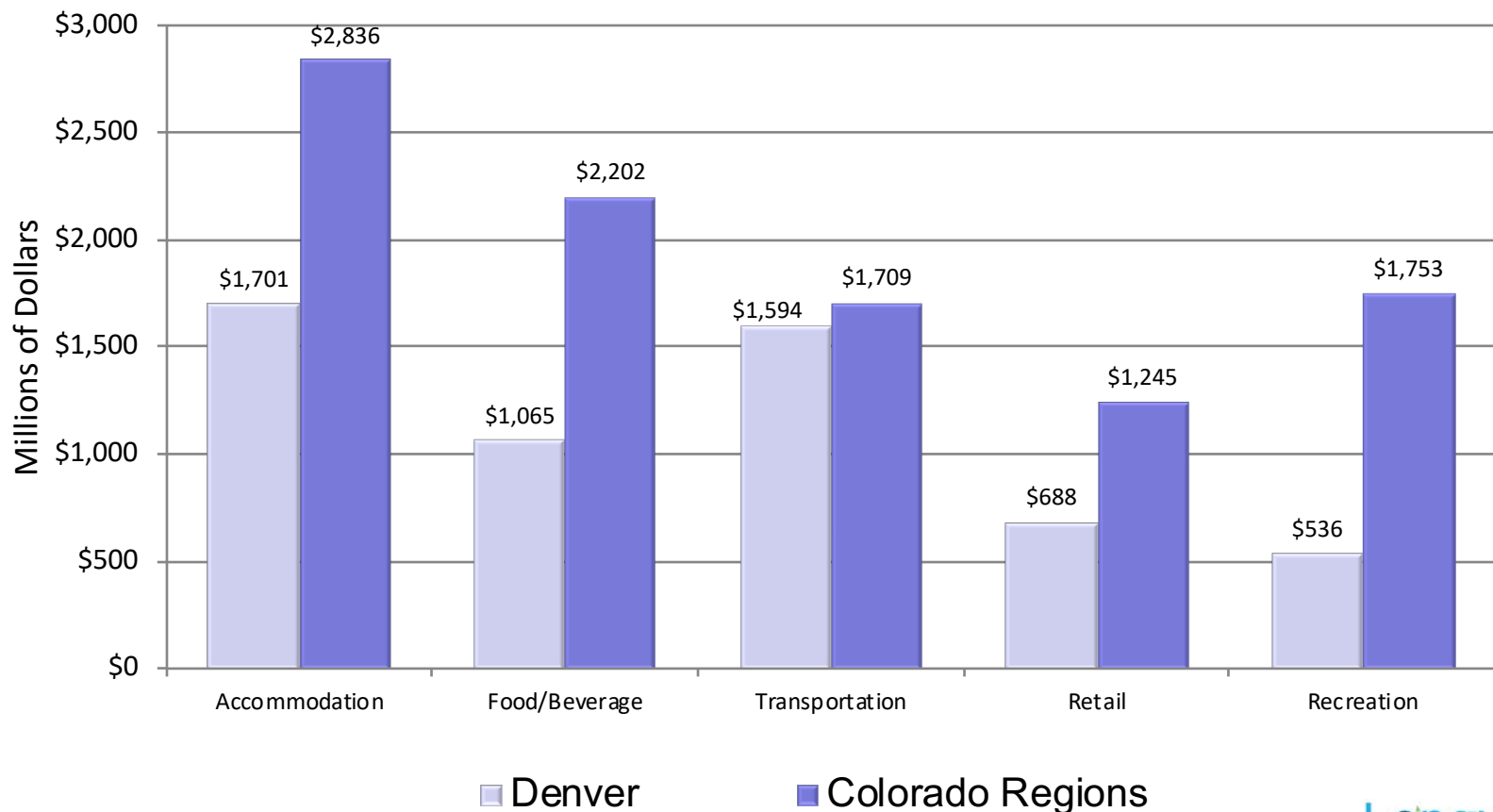
Total Spending in 2017 by Sector — Day Visitors

Total Spending = \$3.5 Billion

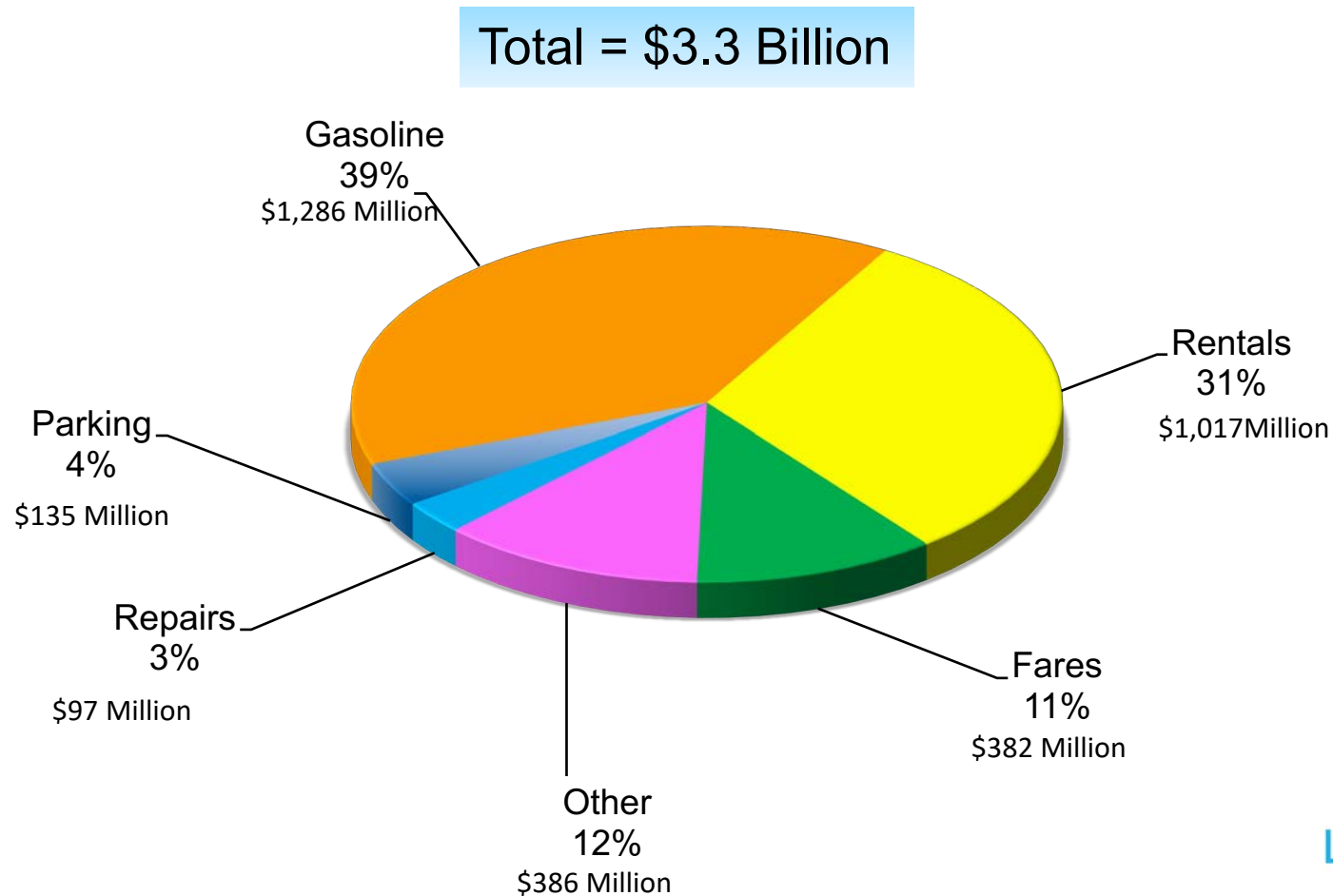


Overnight Travel Spending in 2017 By Sector — Denver vs. Other Colorado Regions

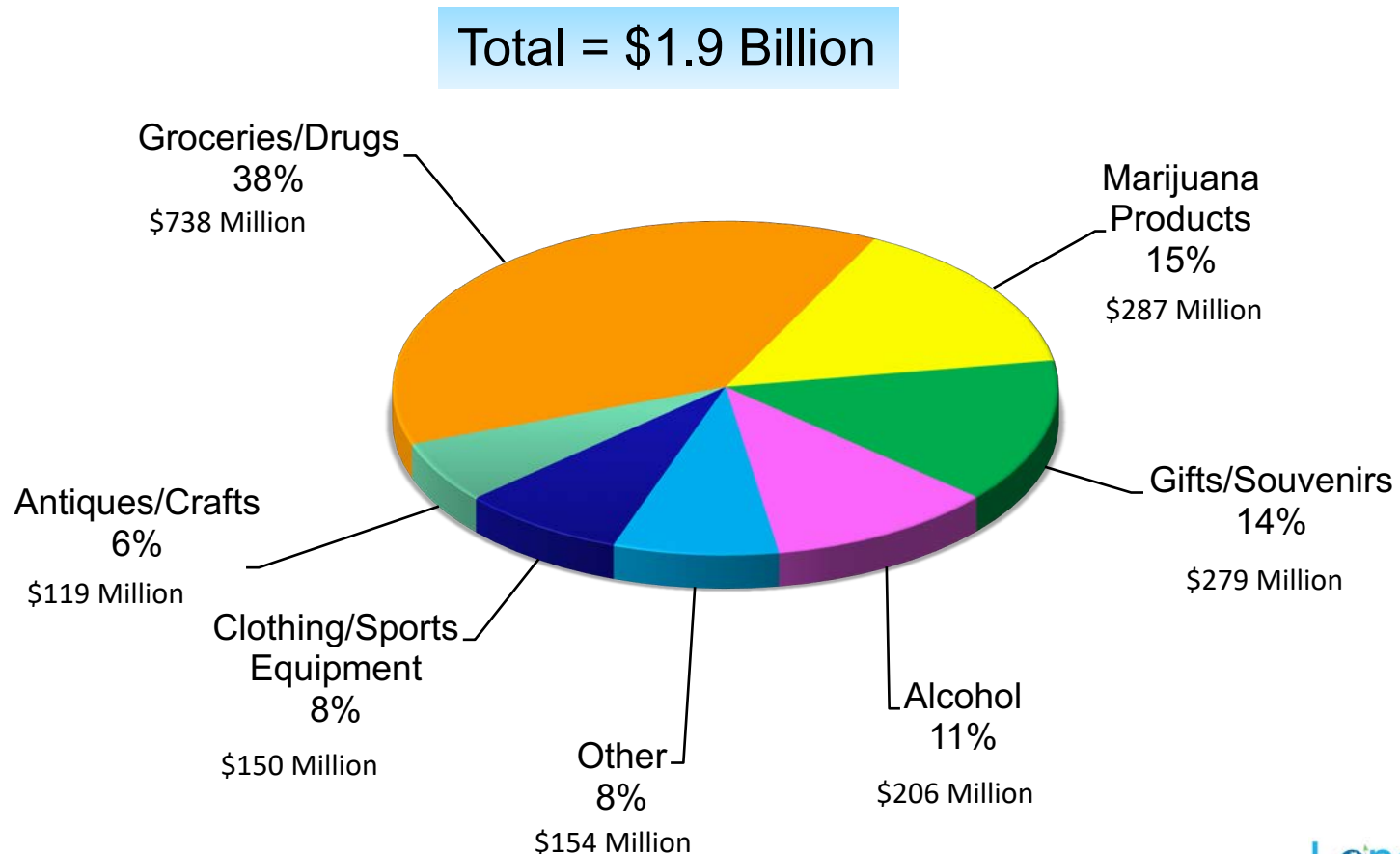
Base: Overnight Visitors



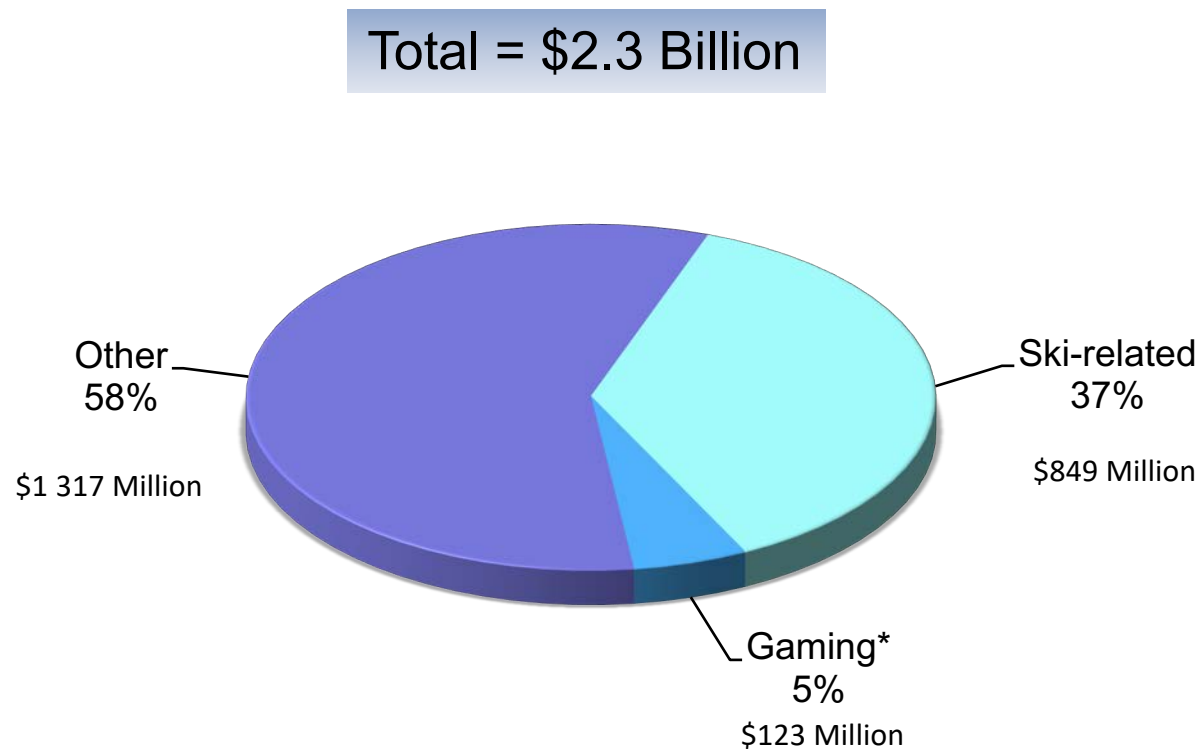
Ground Transportation Expenditures — Overnight Visitors



Retail Expenditures — Overnight Visitors

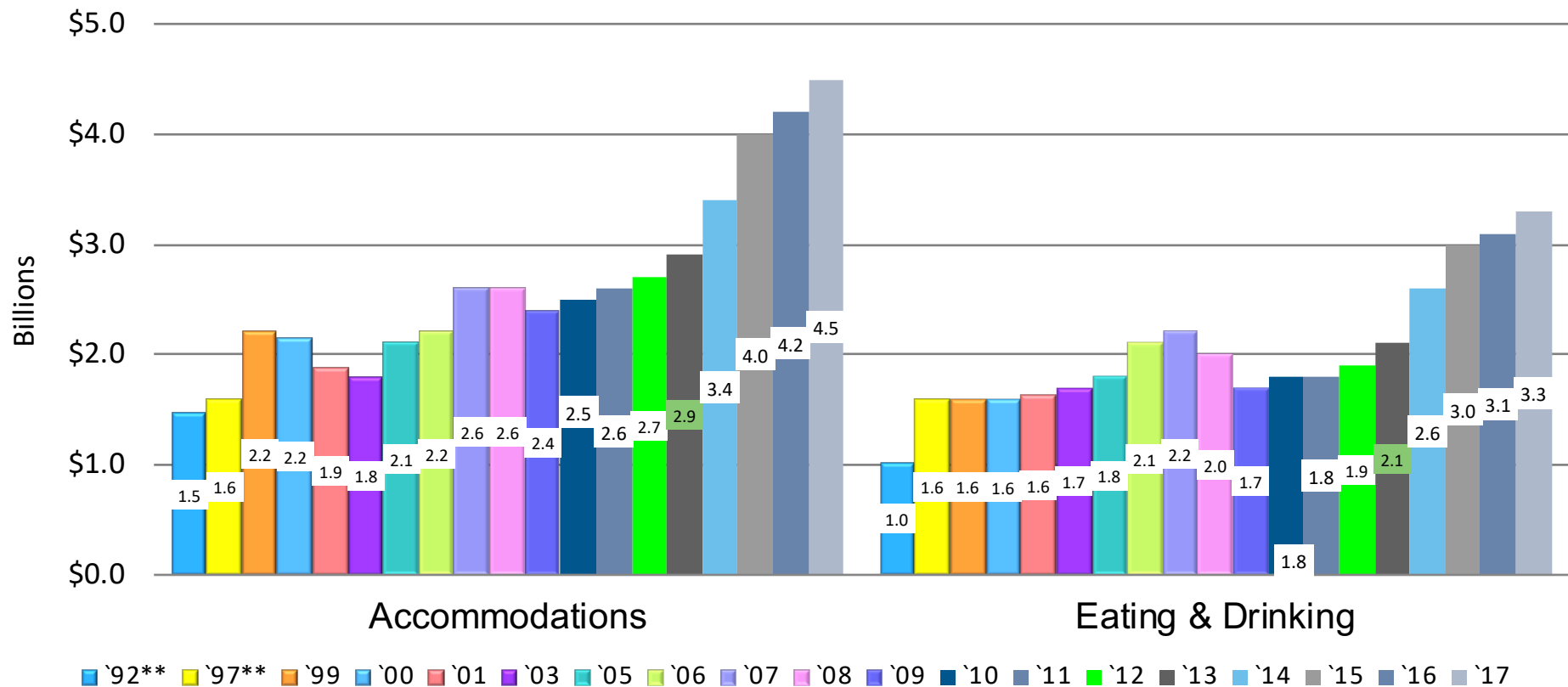


Recreation Expenditures in 2017 — Overnight Visitors

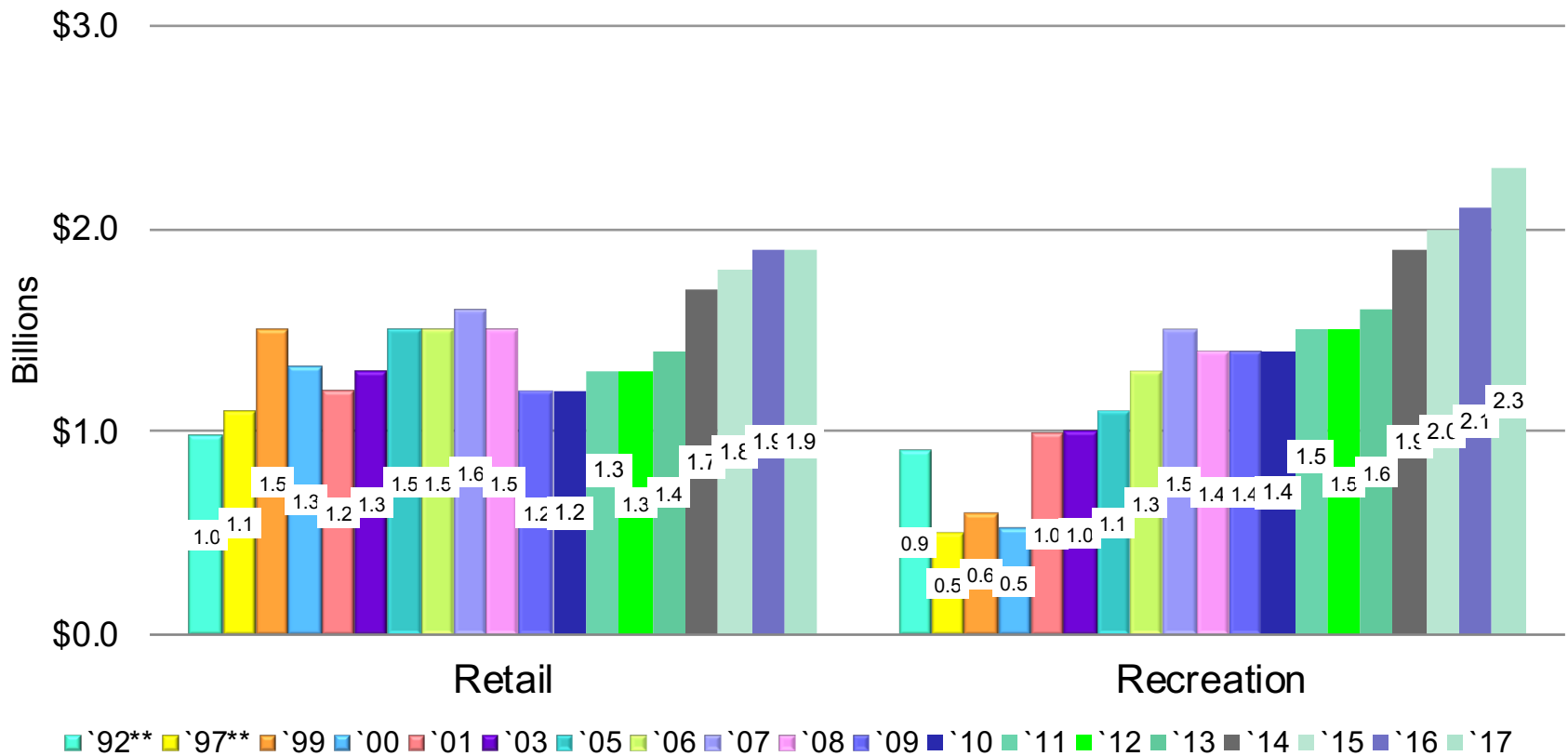


*Gaming expenditures are routinely included in the "Recreation" category, one of the five standard groupings used by economists to analyze travel and tourism expenditures.

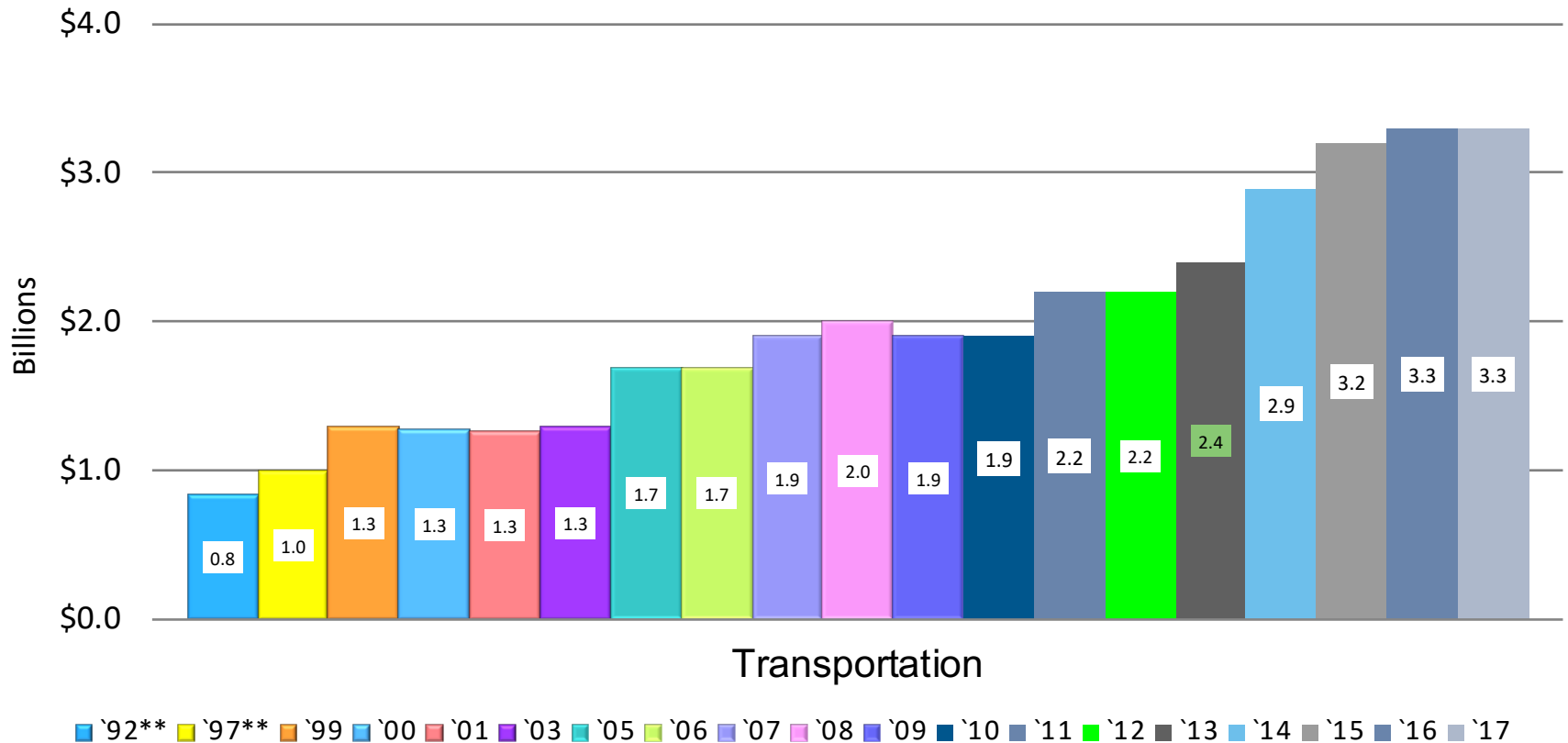
Colorado Expenditure Tracking — Overnight Visitors



Colorado Expenditure Tracking — Overnight Visitors

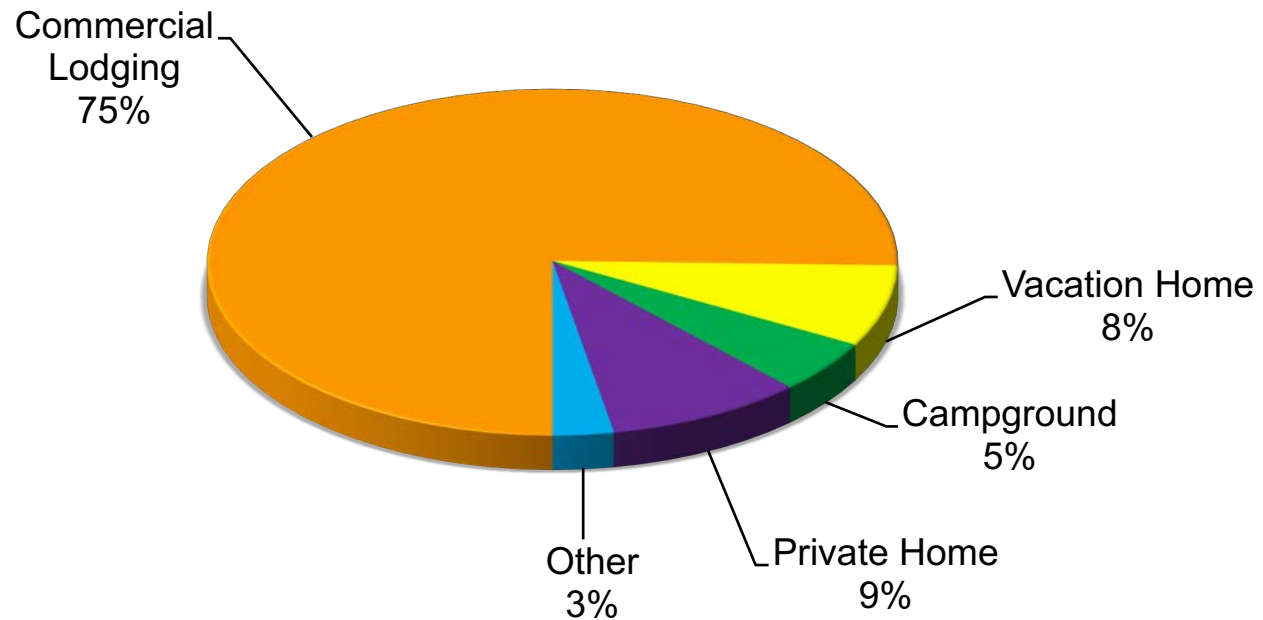


Colorado Expenditure Tracking — Overnight Visitors



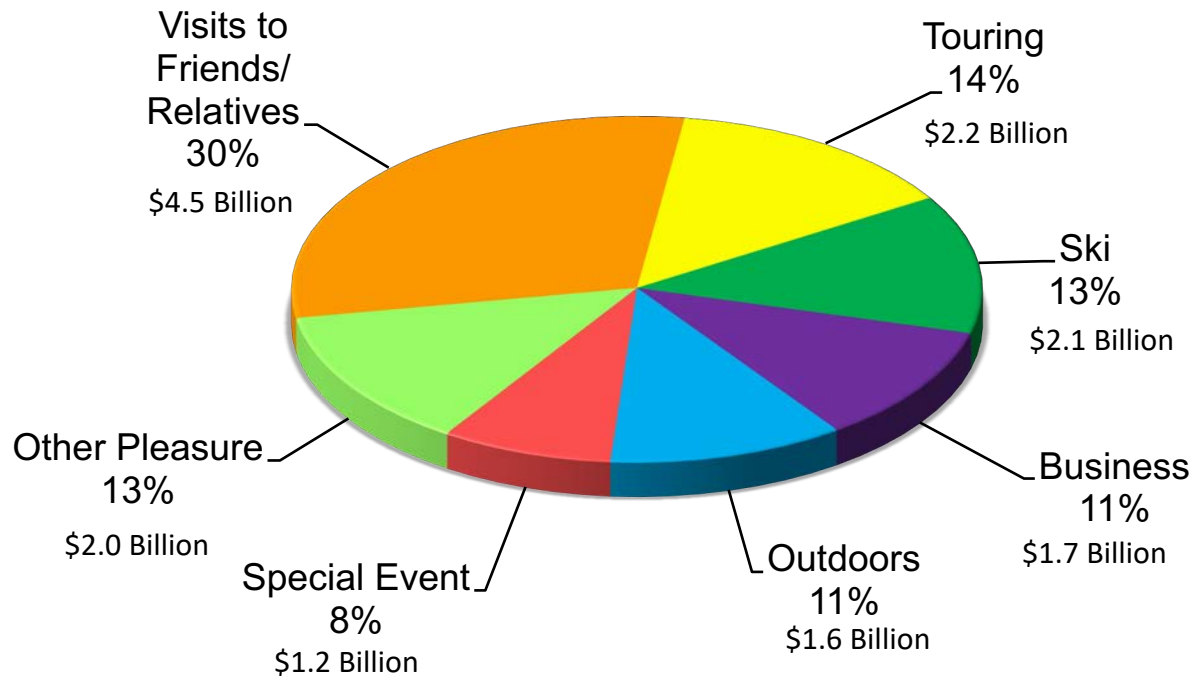
Total Spending in 2017 by Type of Accommodations — Overnight Trips

Total = \$15.3 Billion

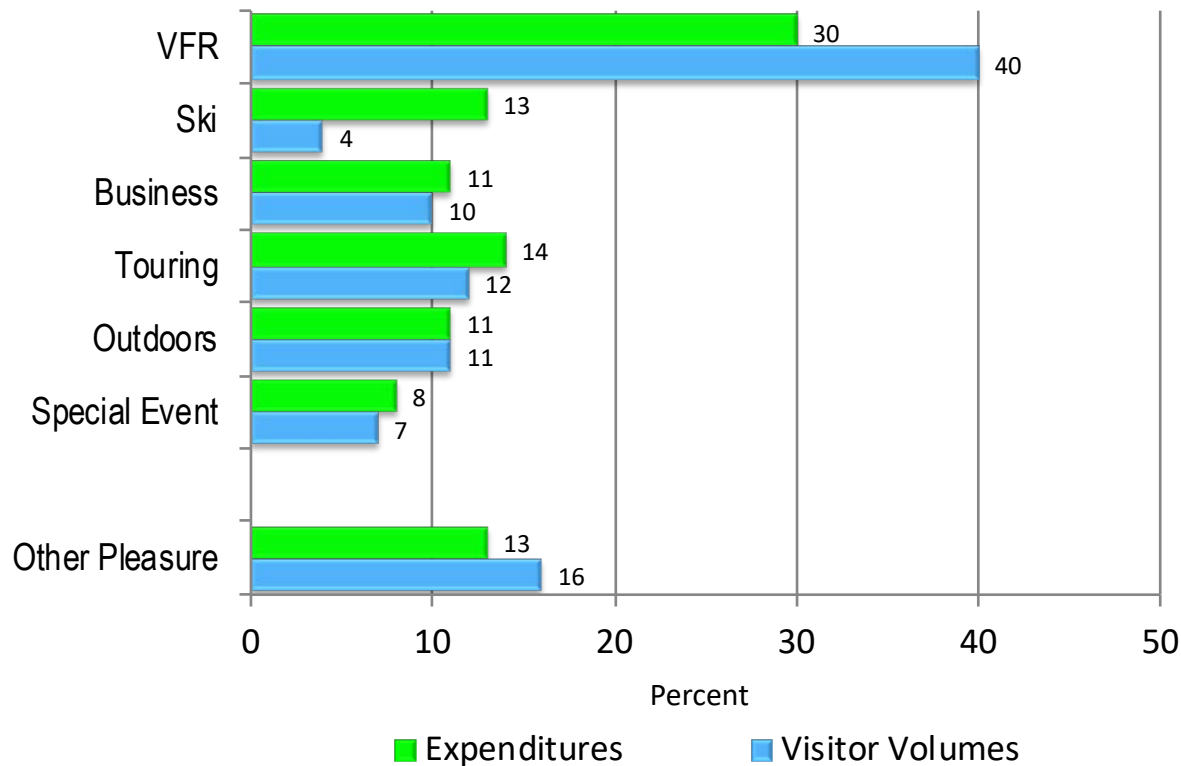


Total Spending in 2017 by Purpose of Trip — Overnight Visitors

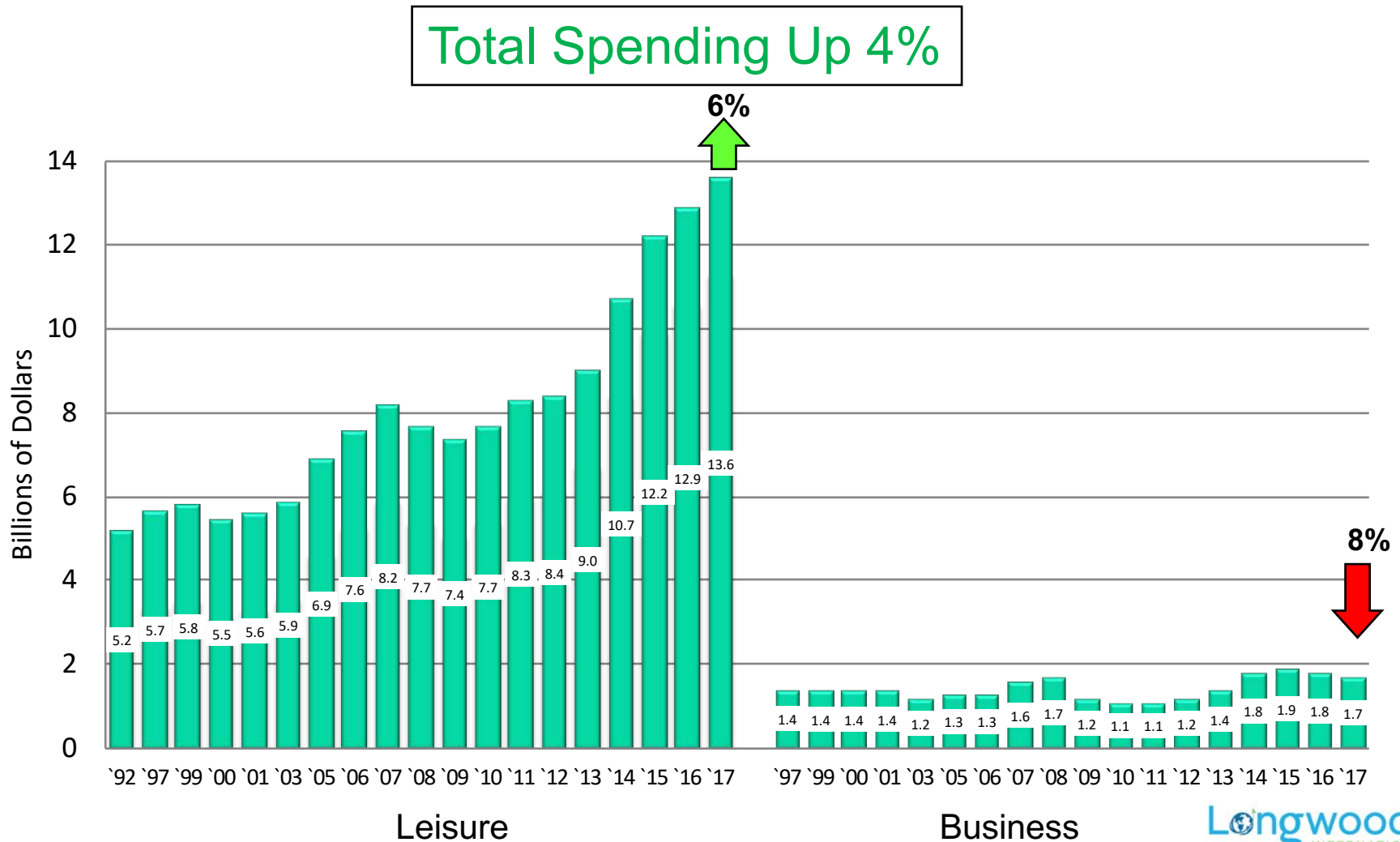
Total = \$15.3 Billion



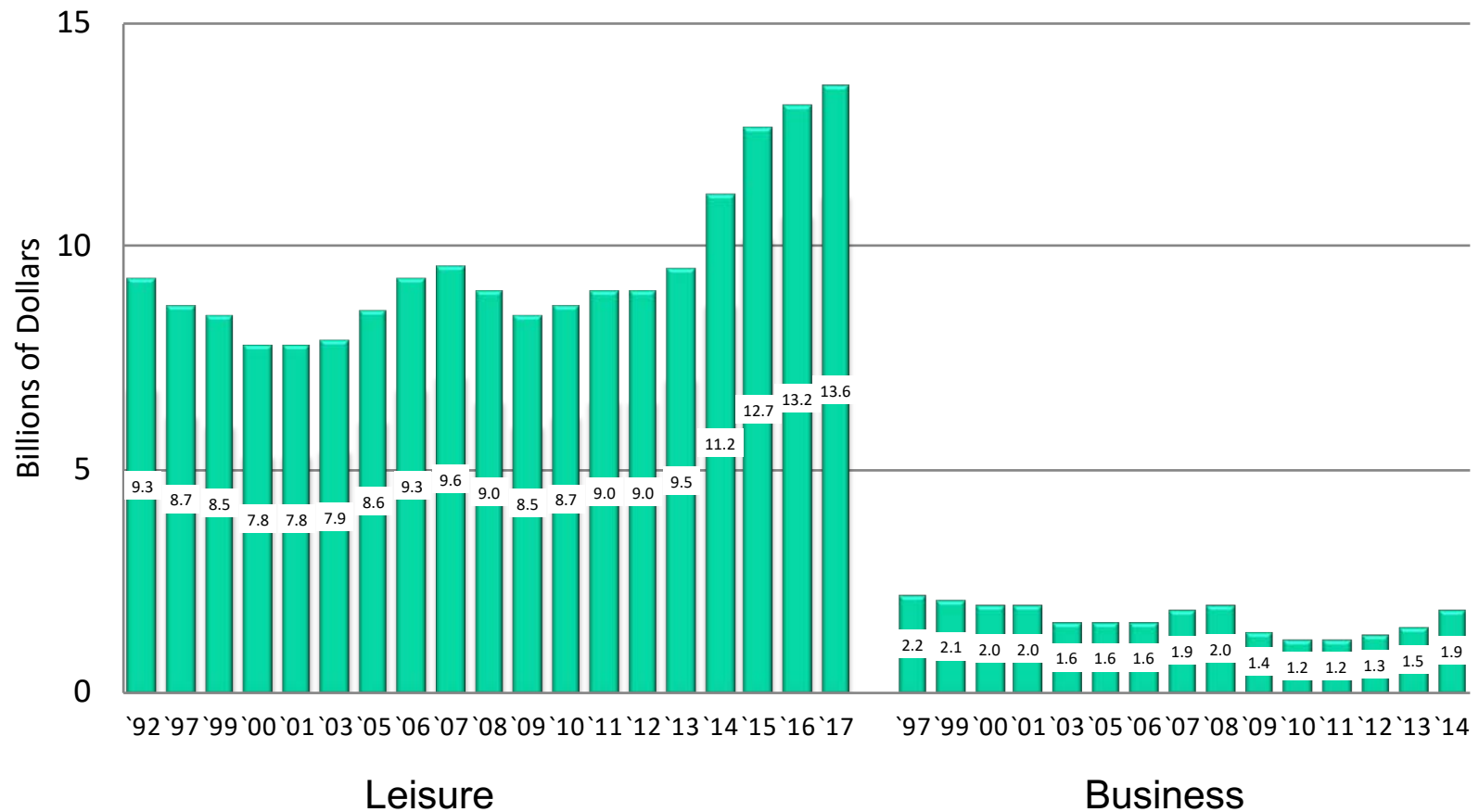
Spending Versus Overnight Visitor Volumes in 2017



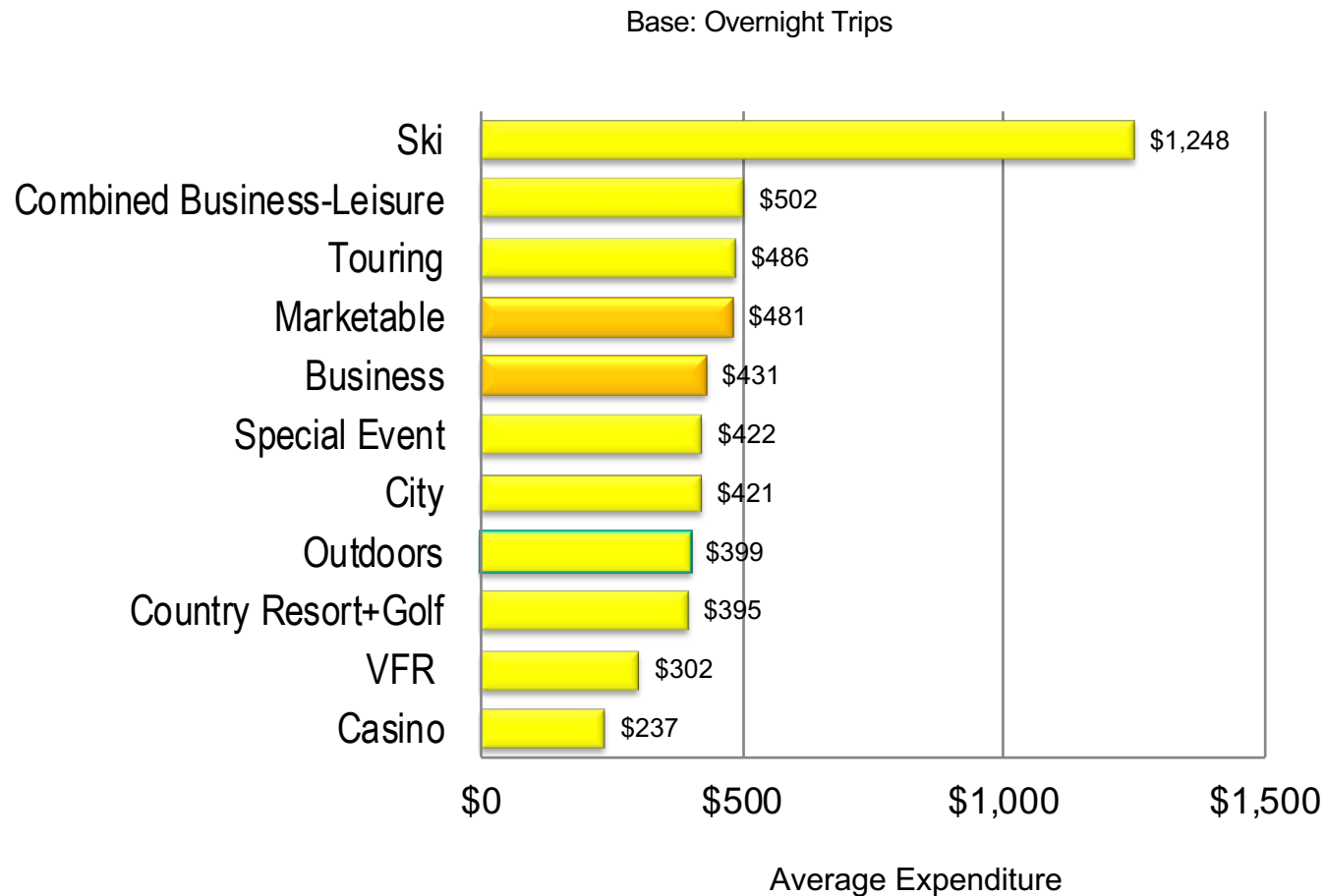
Actual Travel Expenditures on Overnight Trips — 1992 to 2017



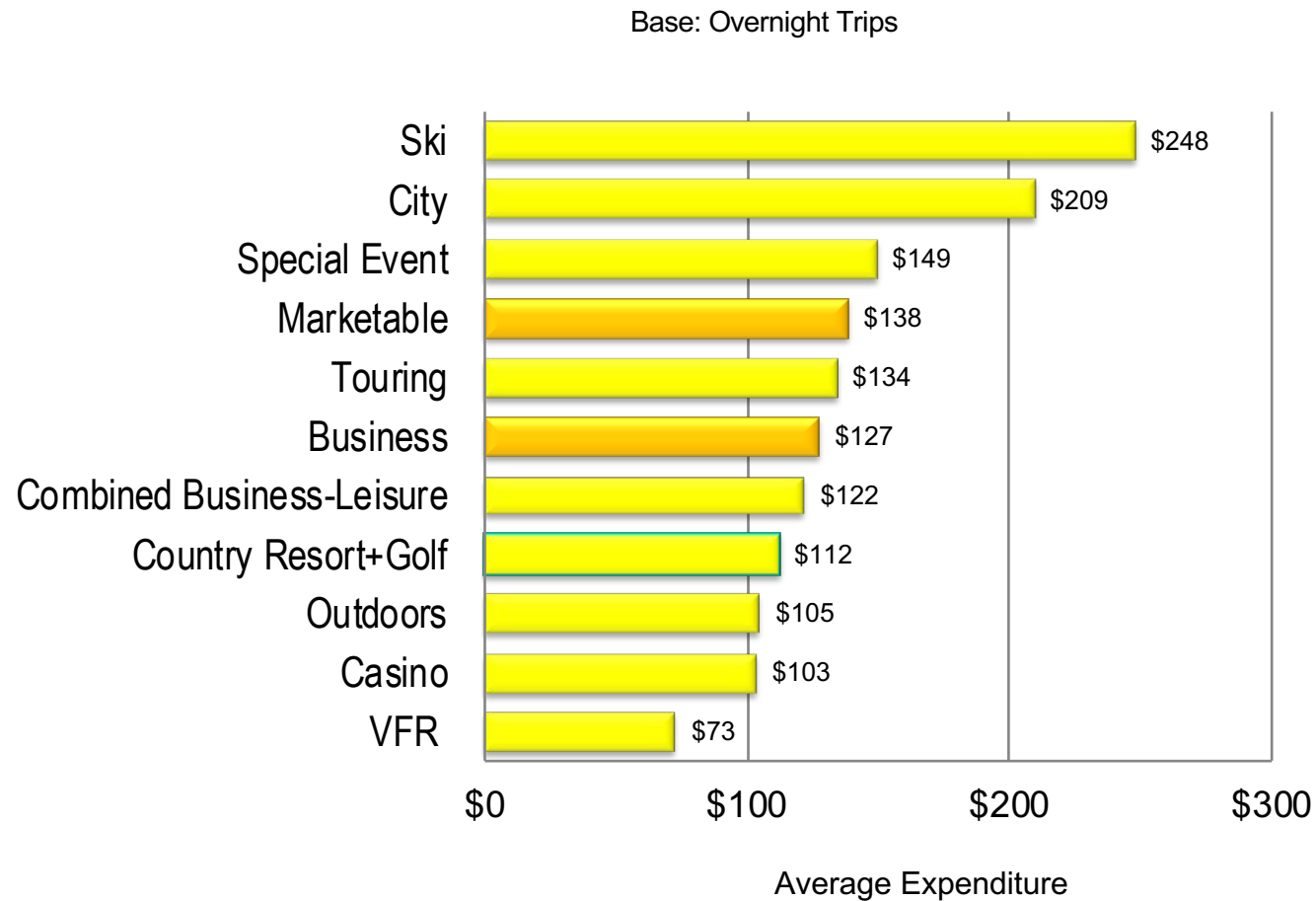
Inflation Adjusted Travel Expenditures — Overnight 1992 to 2017



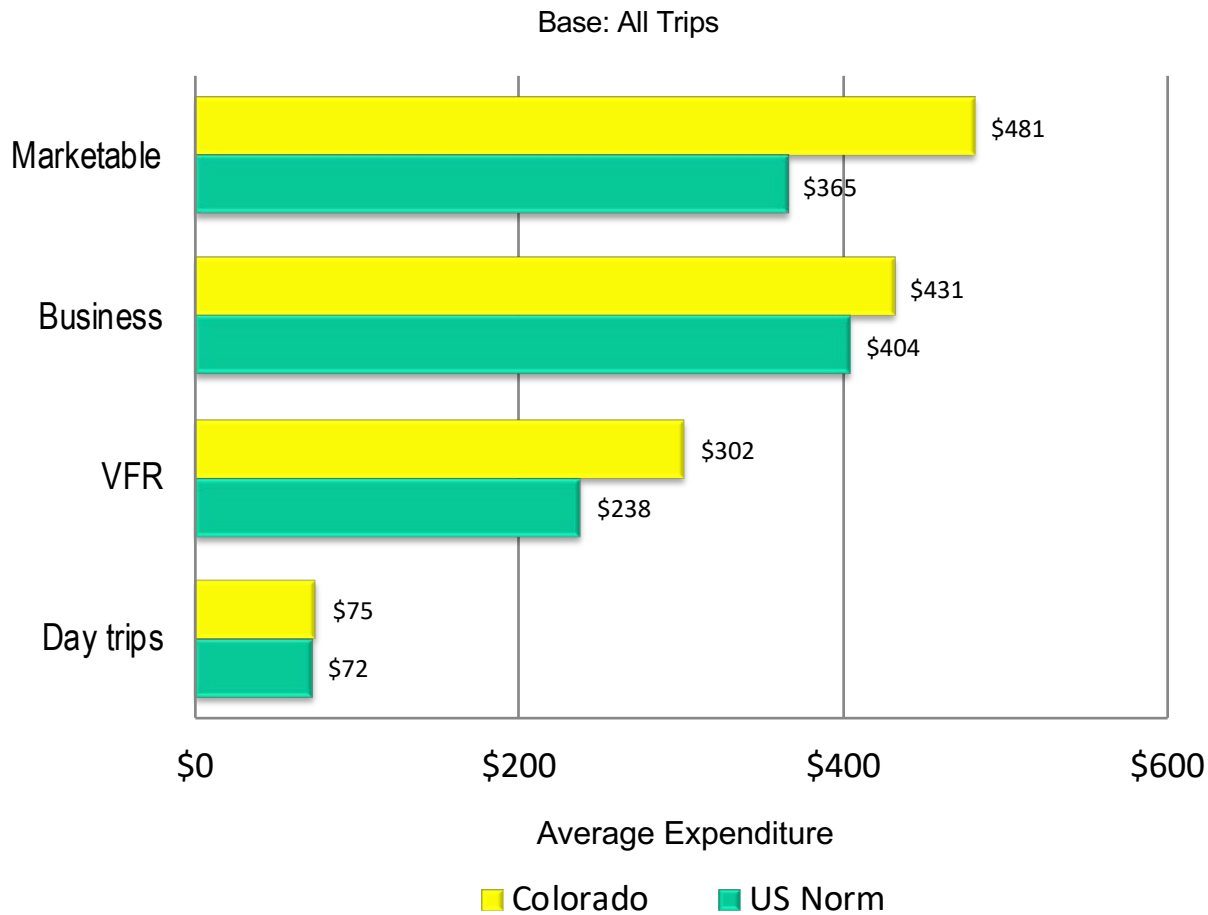
Expenditures Per Person by Trip Purpose



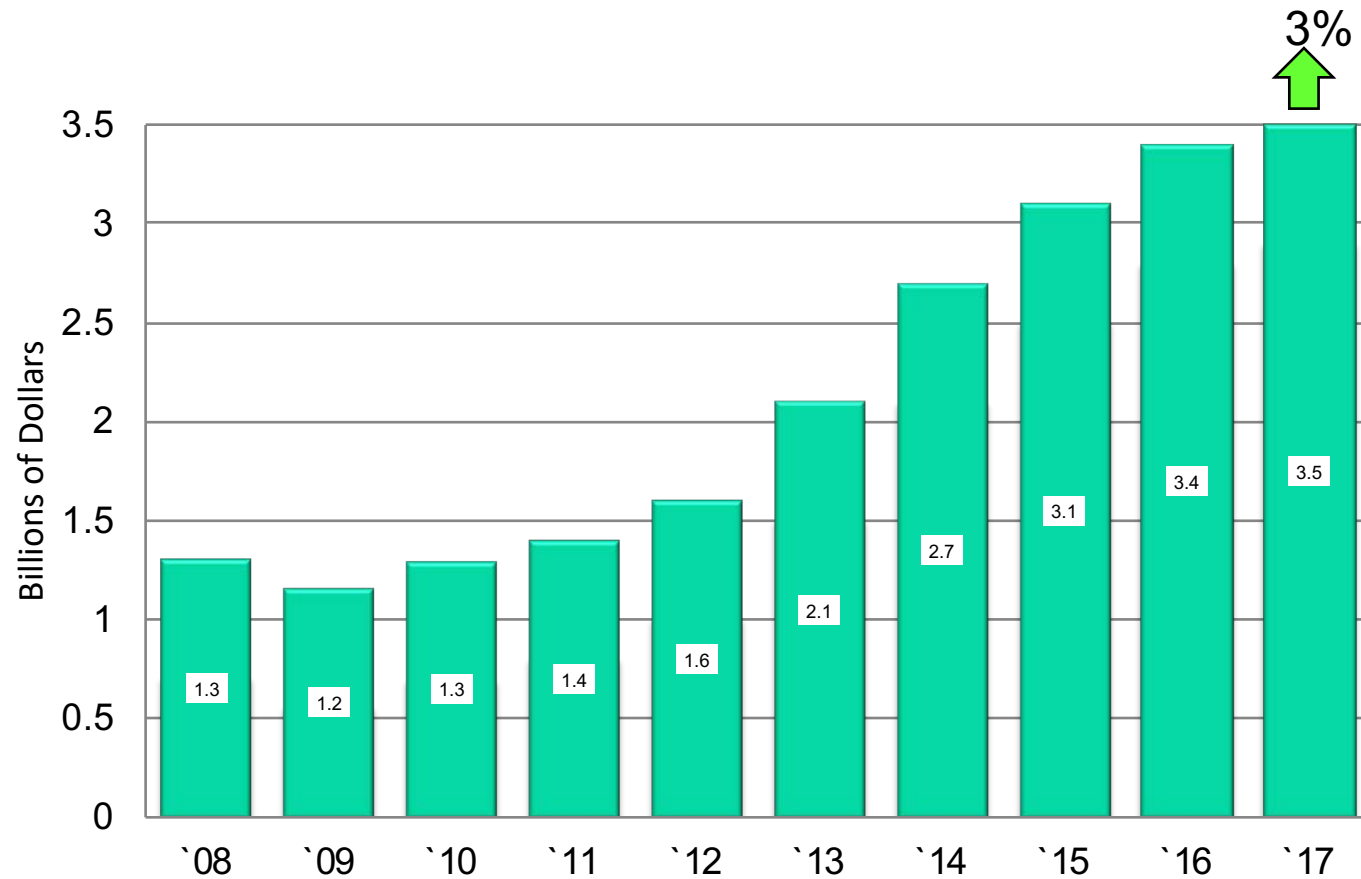
Expenditures Per Person Per Day by Trip Purpose



Expenditures Per Person



Expenditures on Day Trips



2017 Leisure Travel Profile



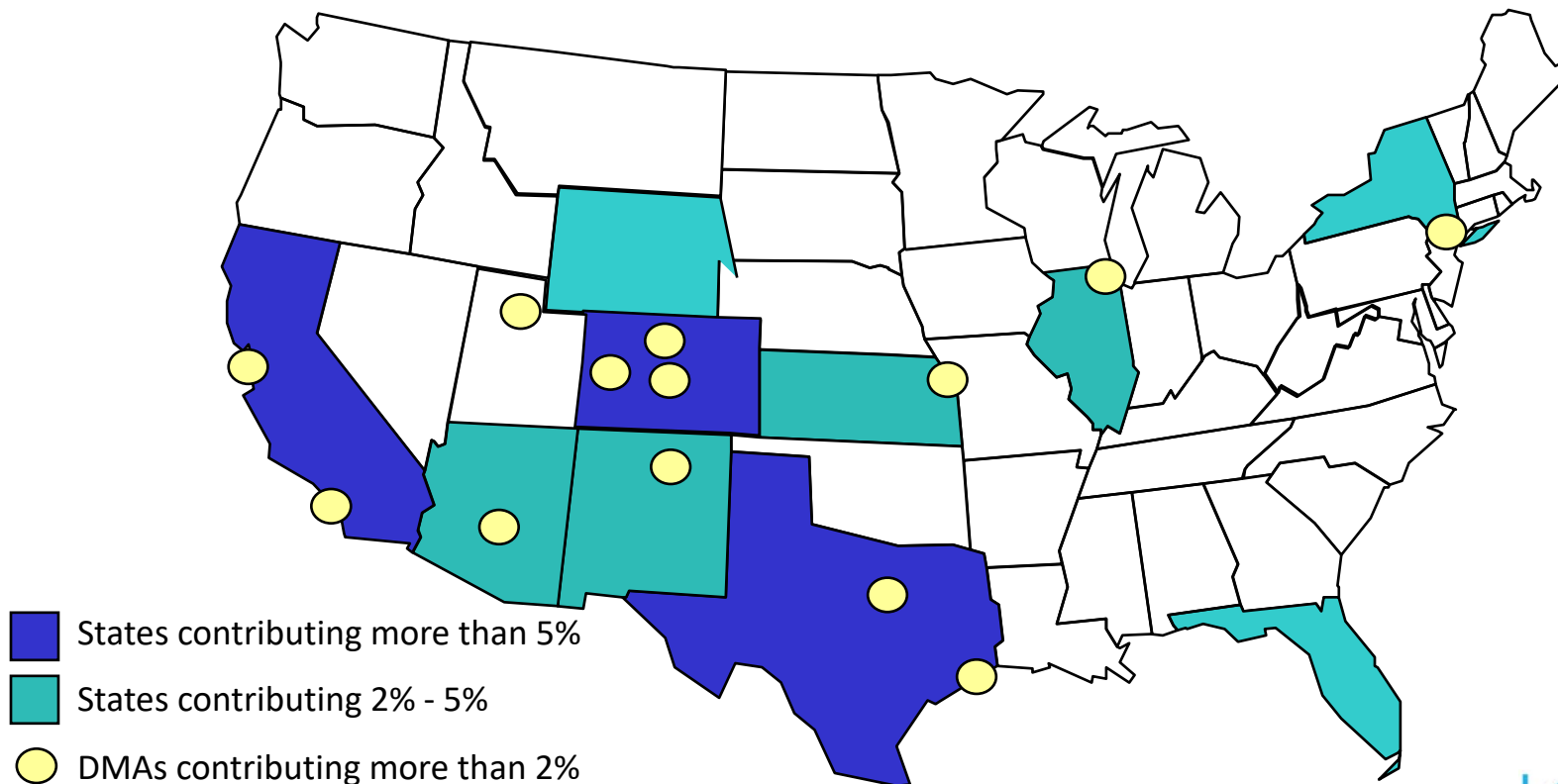


Sources of Leisure Travel



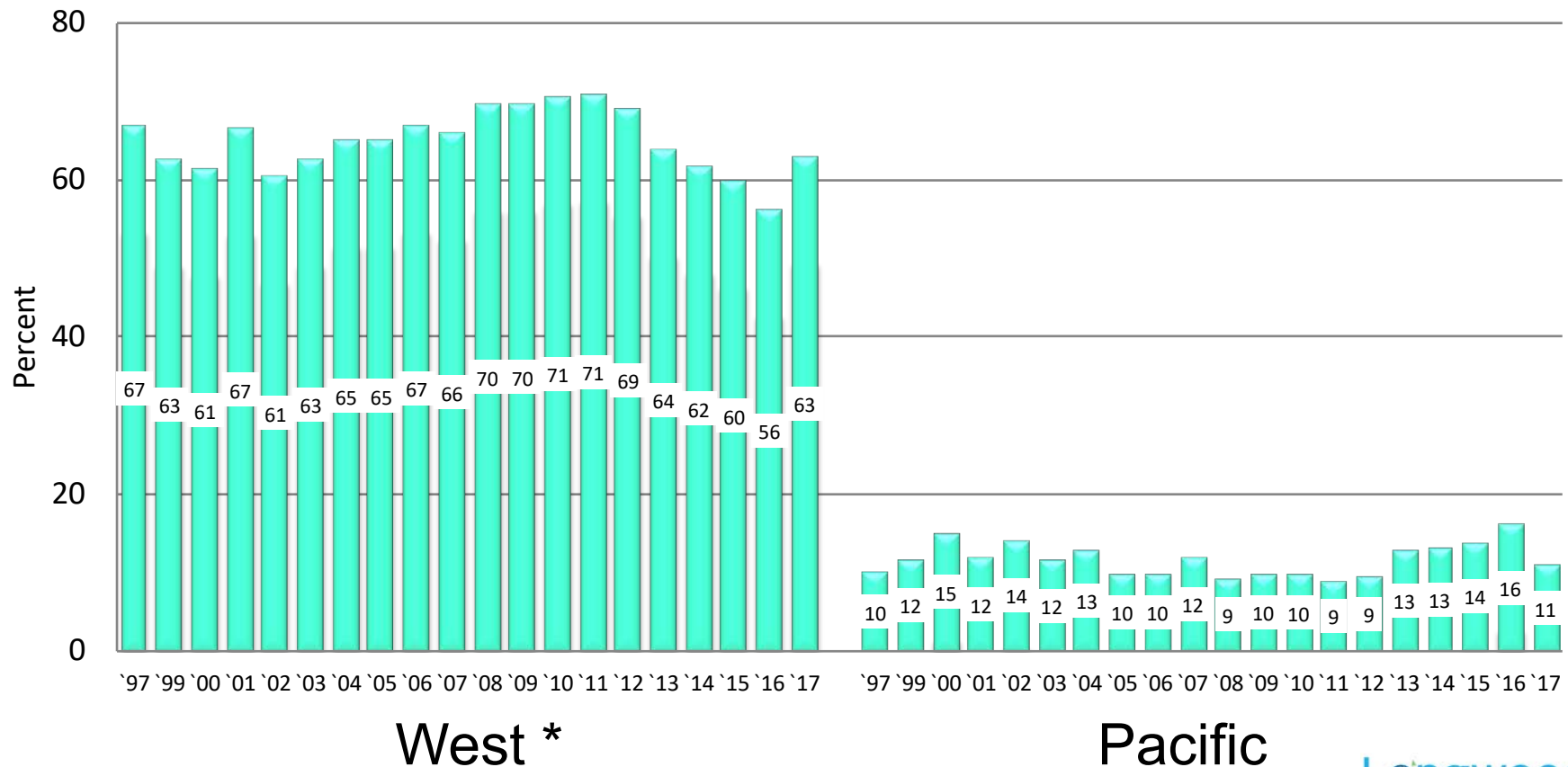
Sources of Business

Base: Overnight Leisure Trips



Regional Sources of Business

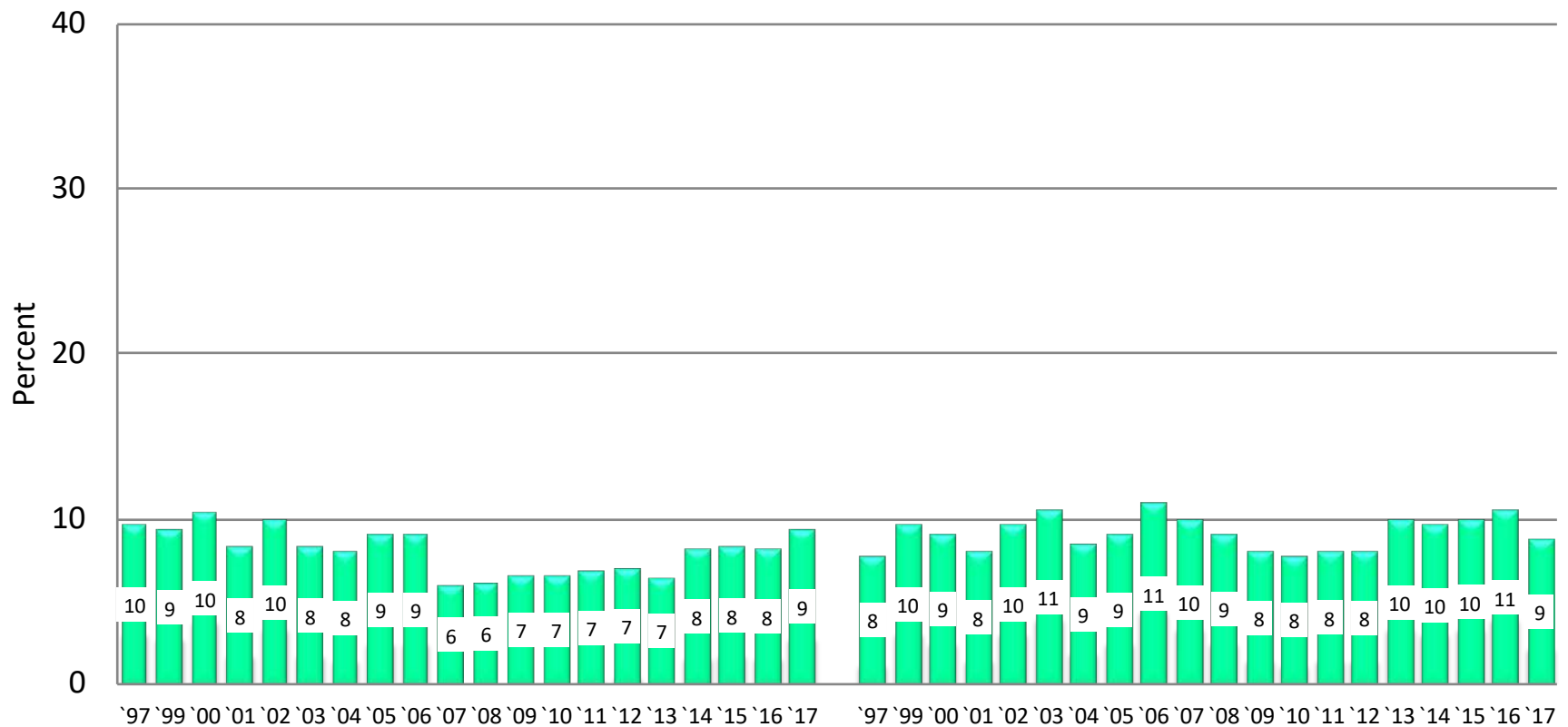
Base: Overnight Leisure Trips



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

Regional Sources of Business

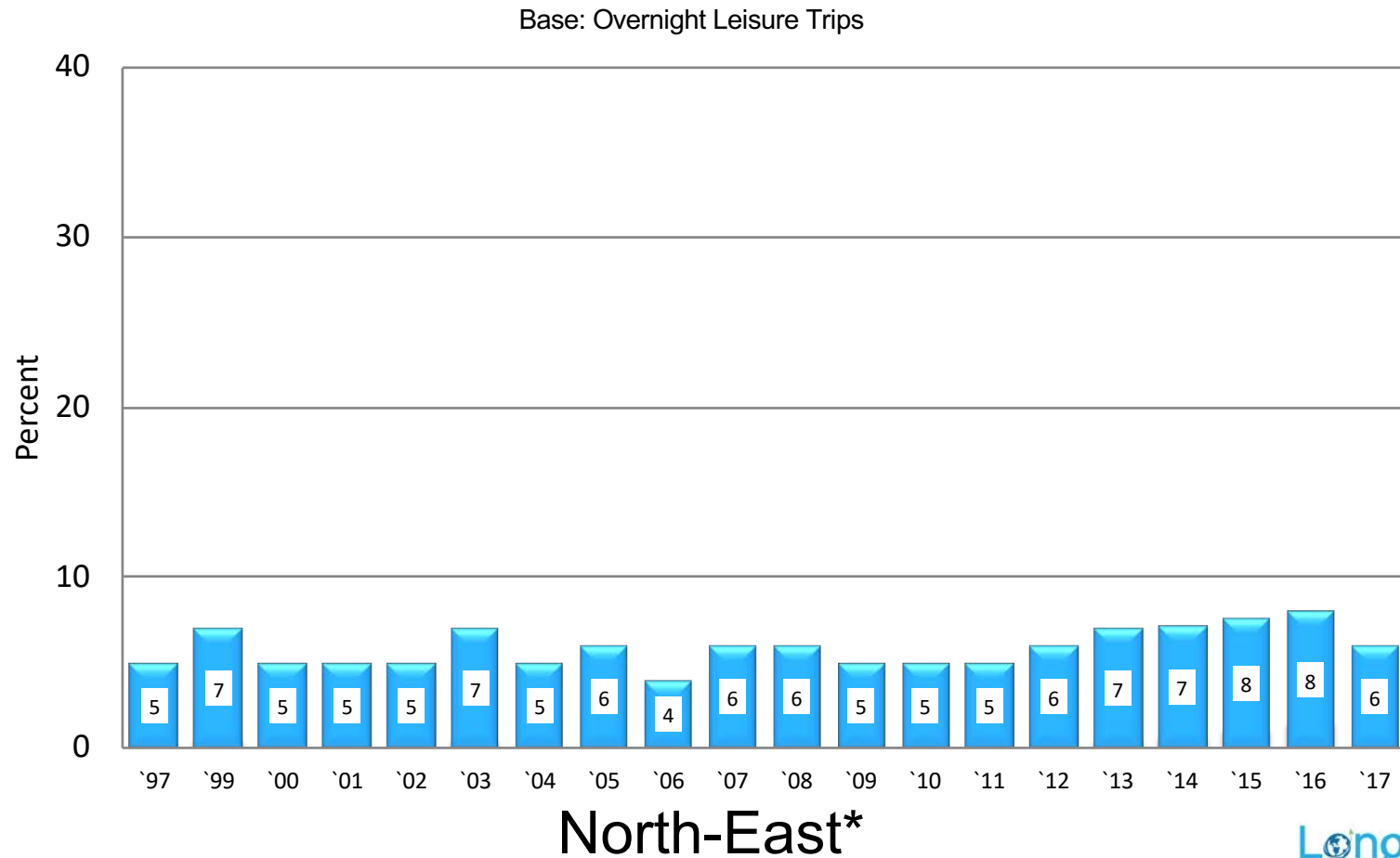
Base: Overnight Leisure Trips



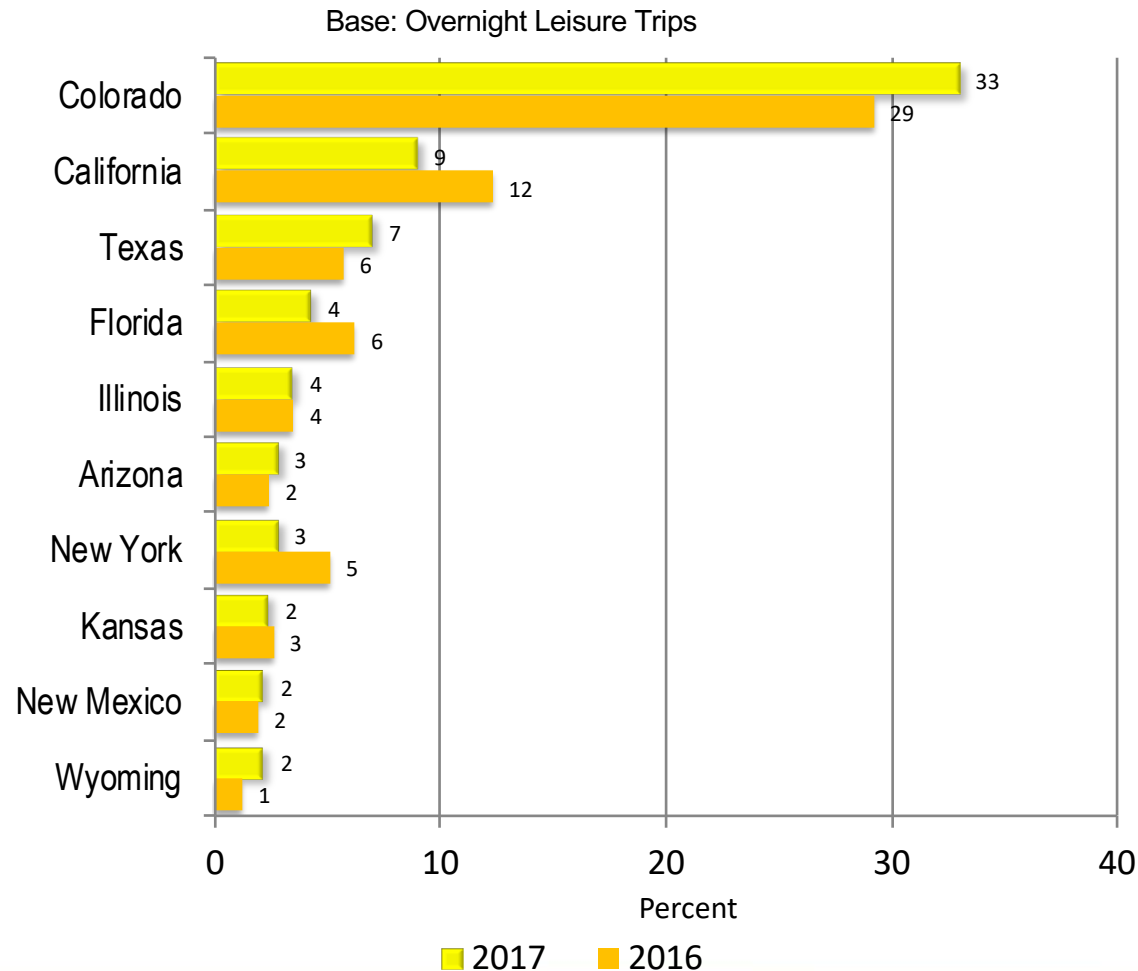
Mid-West

South

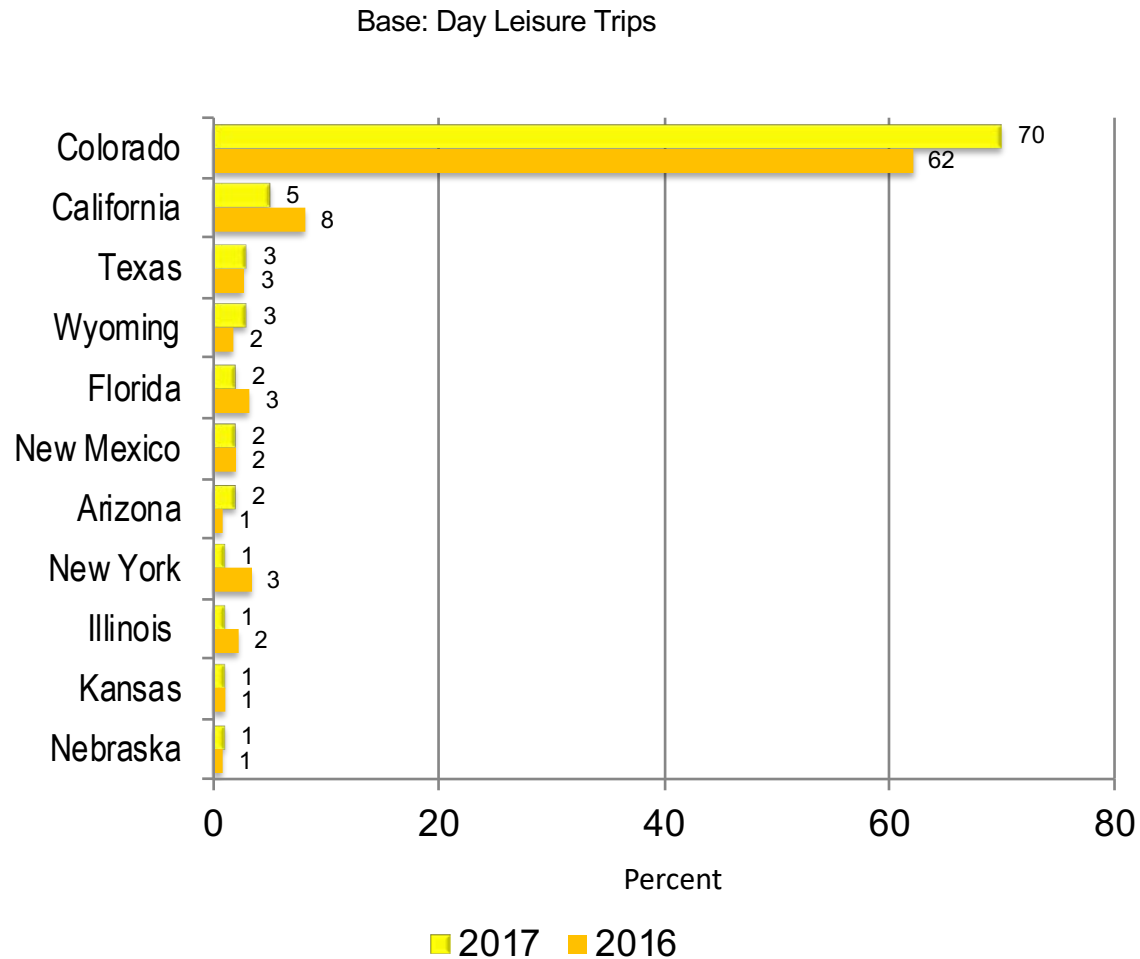
Regional Sources of Business



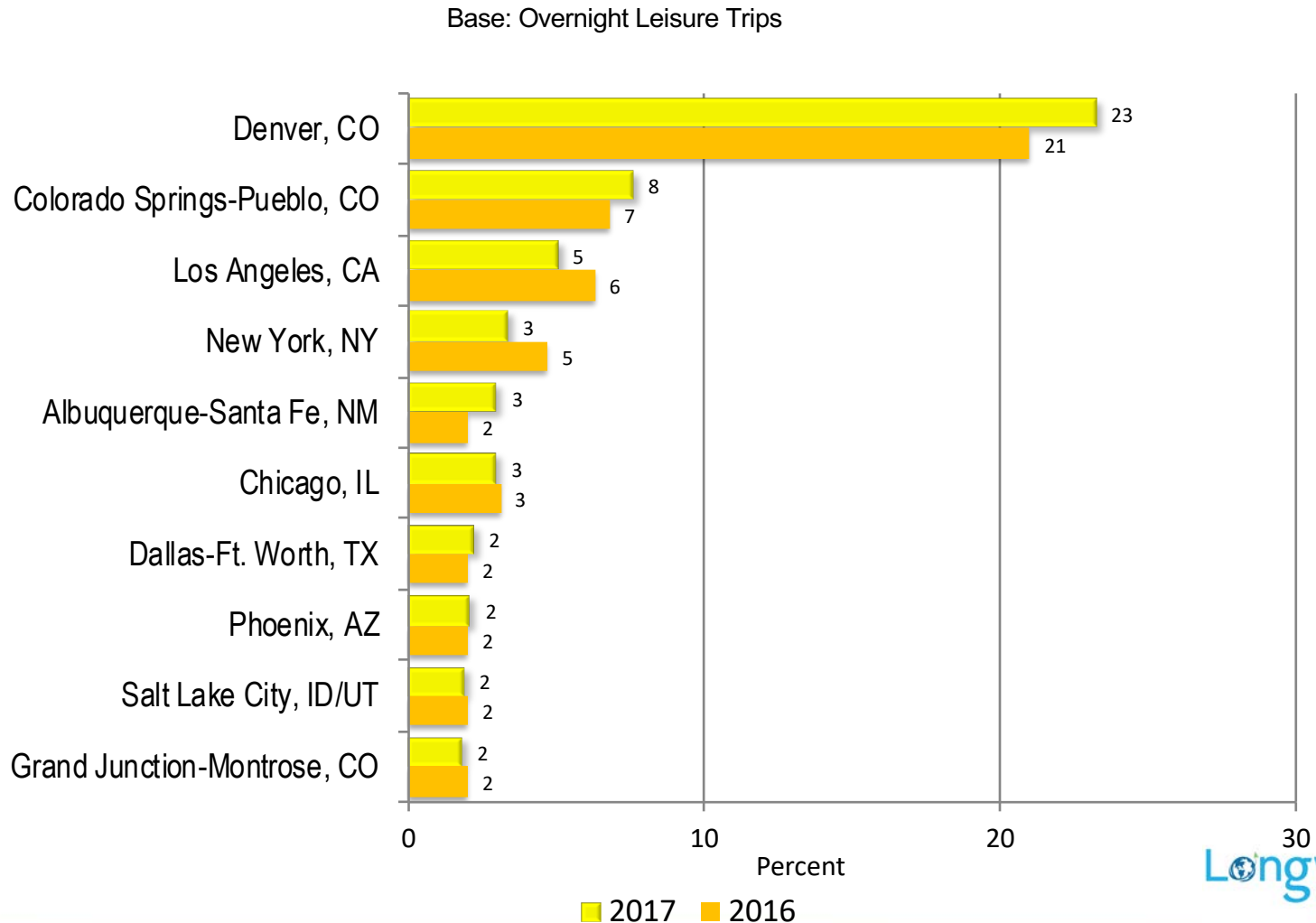
State Sources Of Overnight Trips



State Sources Of Day Trips



Urban Sources of Overnight Trips

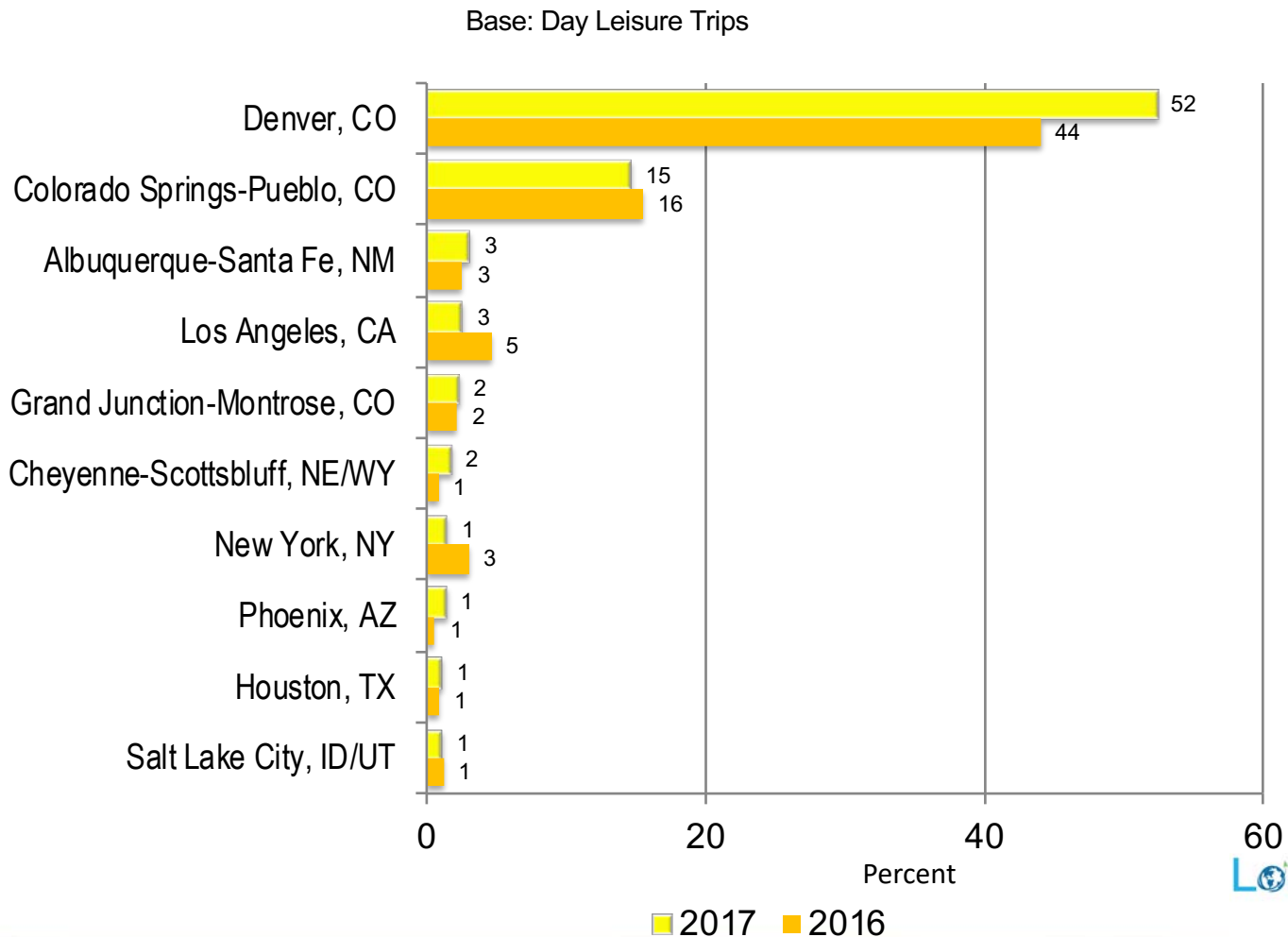


Urban Sources of Overnight Trips (Cont'd)

Base: Overnight Leisure Trips

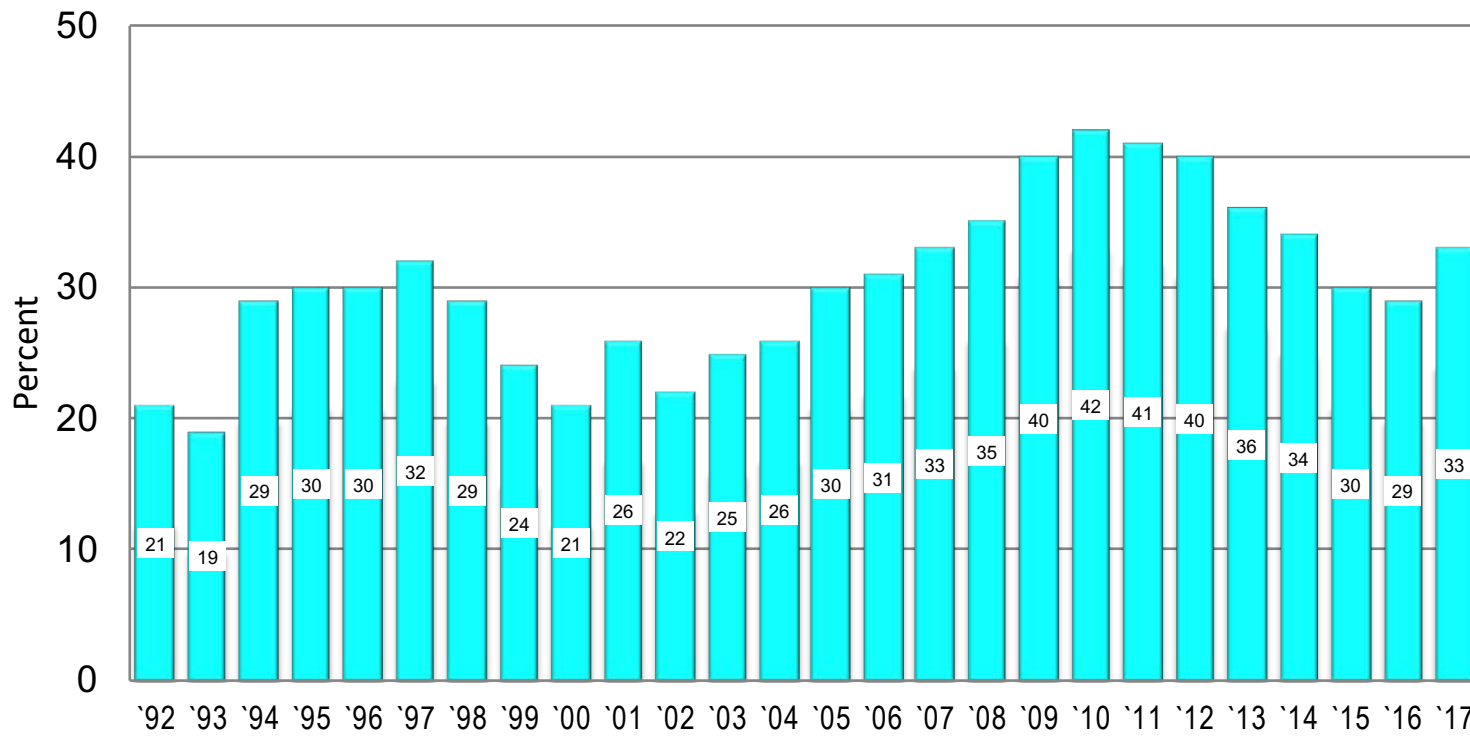


Urban Sources of Day Trips



Instate Overnight Leisure Trips

Percent of Overnight Leisure Trips Originating in Colorado

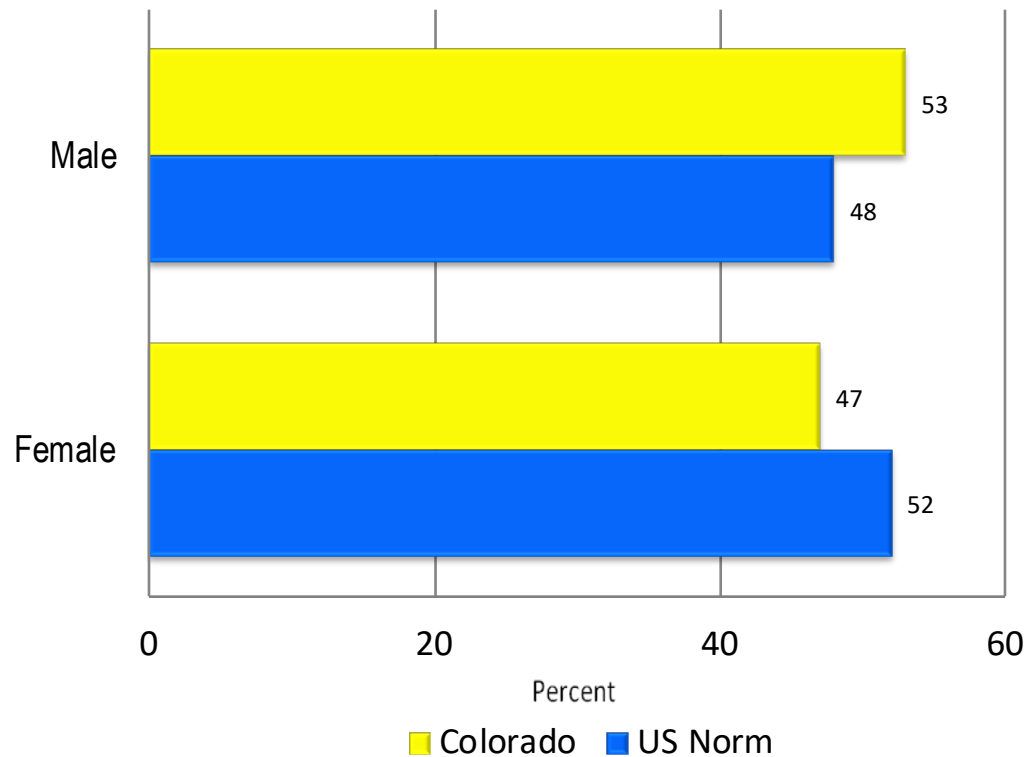


Visitor Profile



Gender

Base: Overnight Leisure Trips

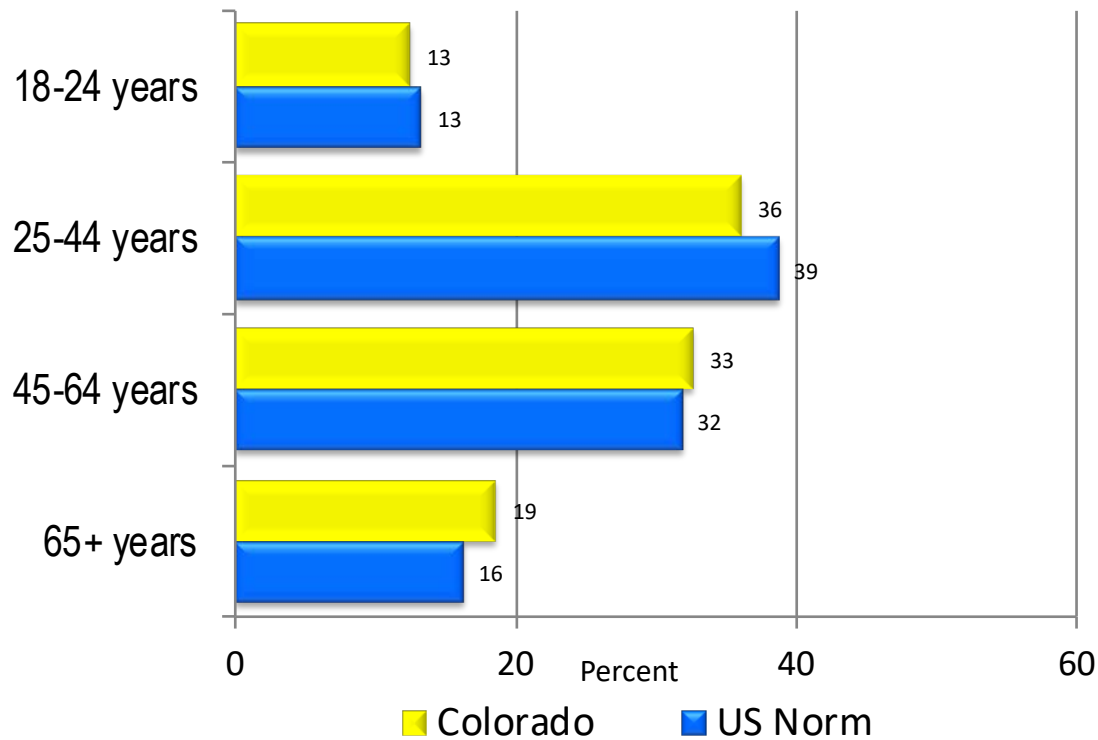


Age

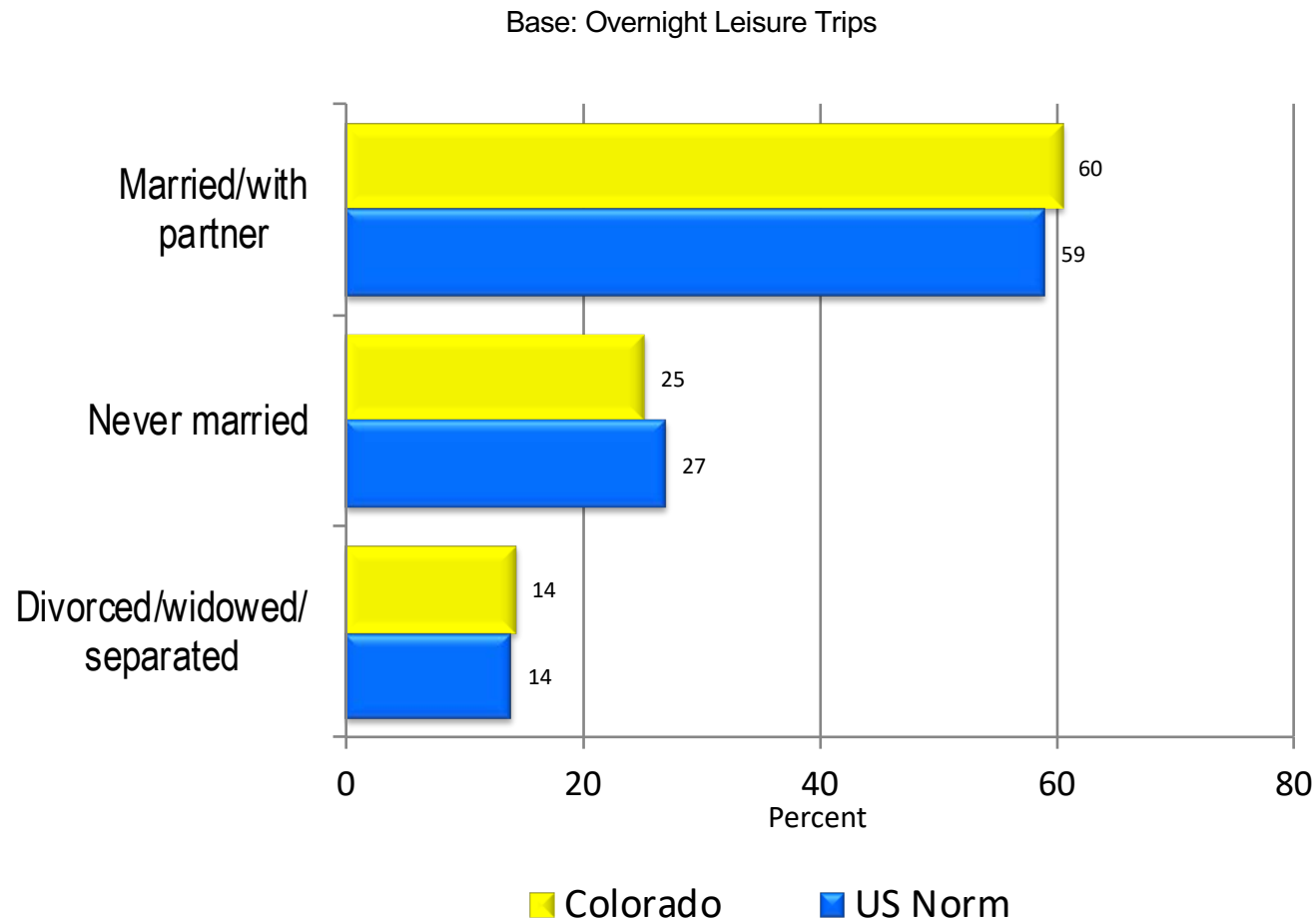
Base: Overnight Leisure Trips

**Average Age Colorado
= 46.1**

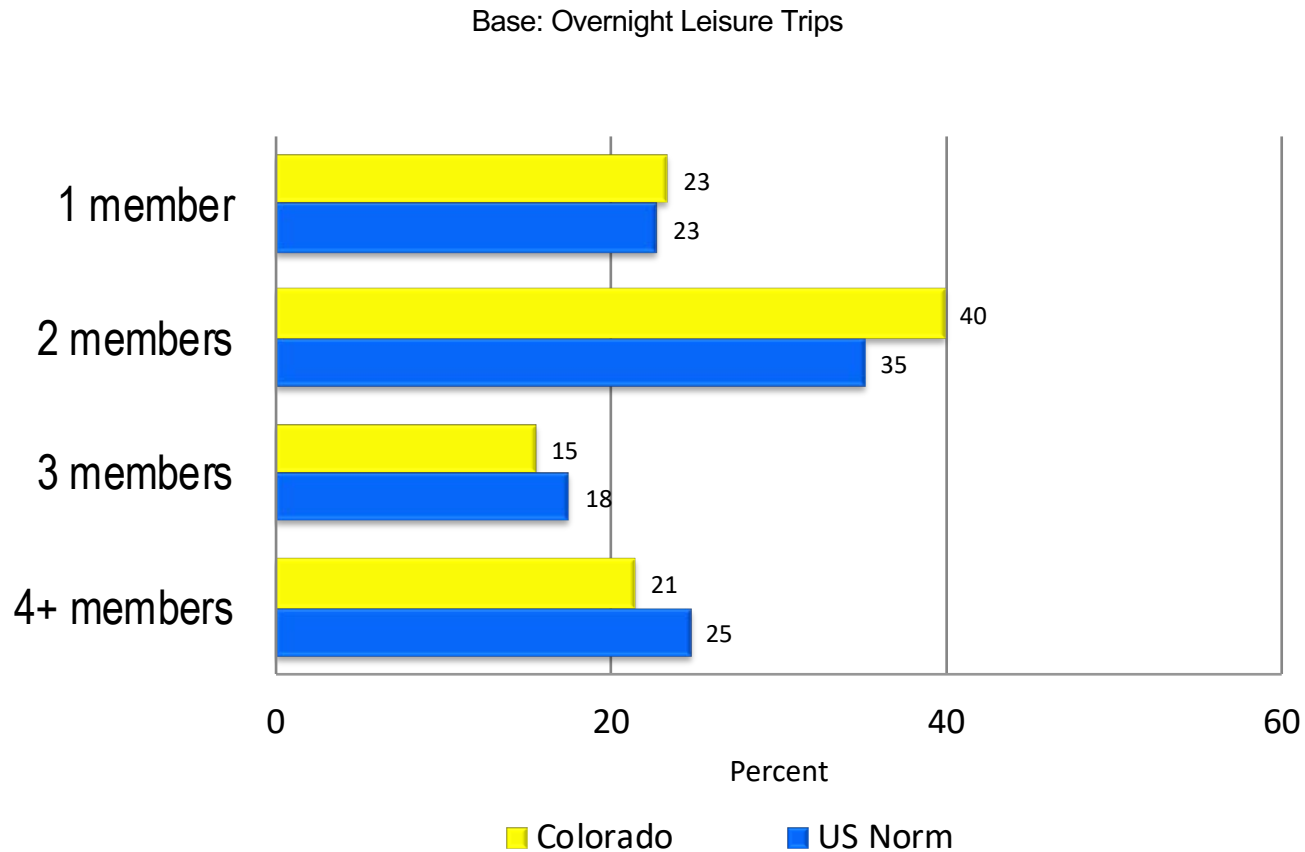
**Average Age U.S. Norm
= 44.9**



Marital Status

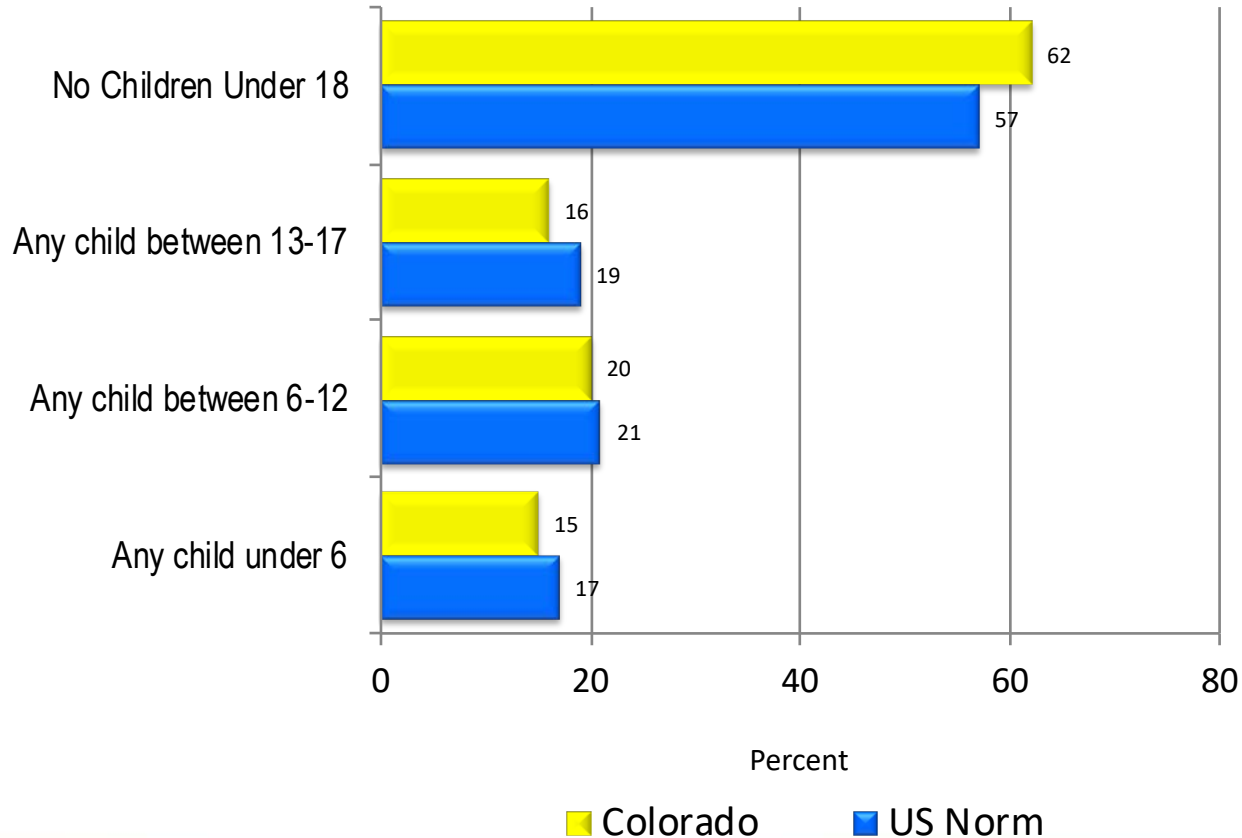


Household Size

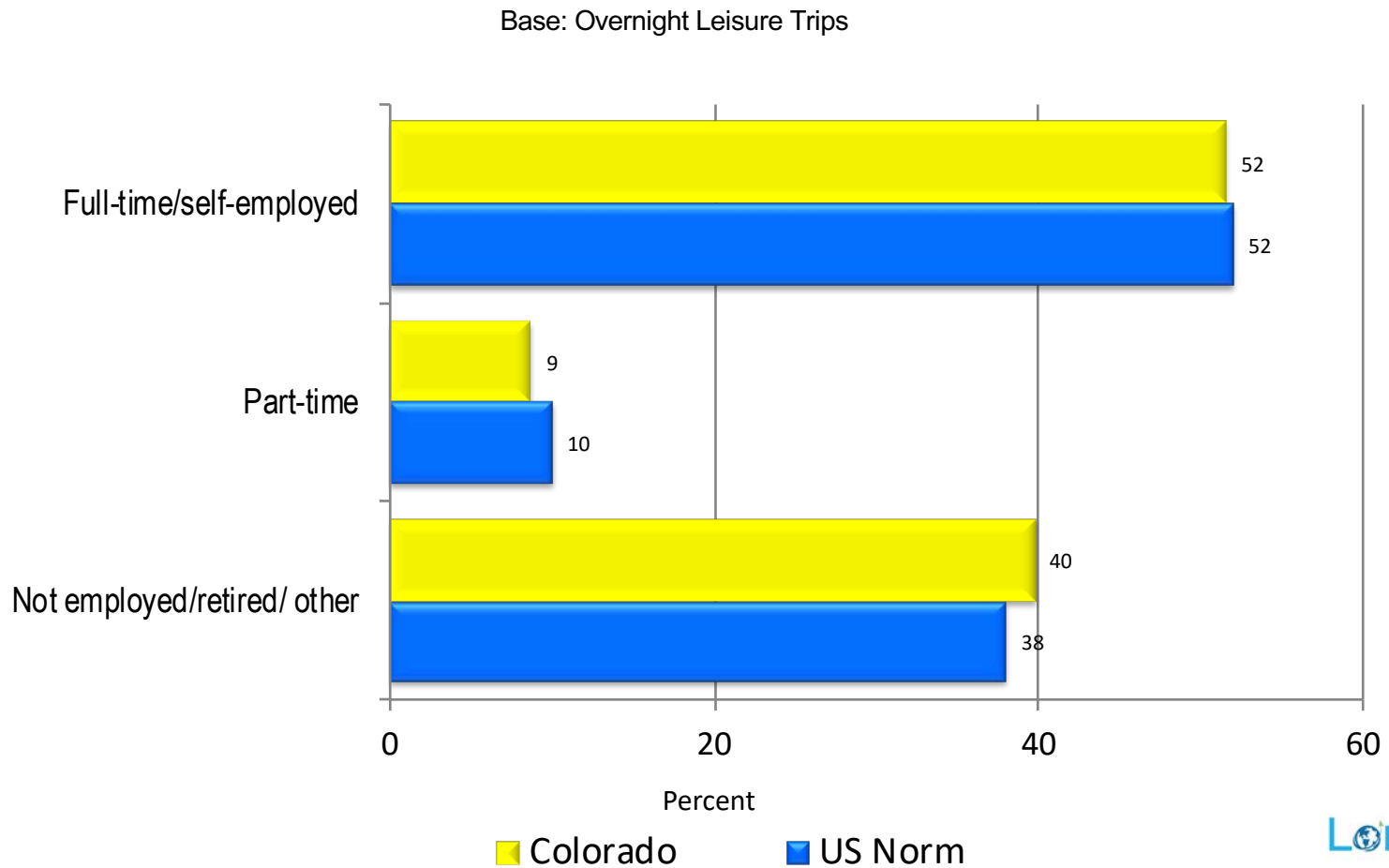


Children in Household

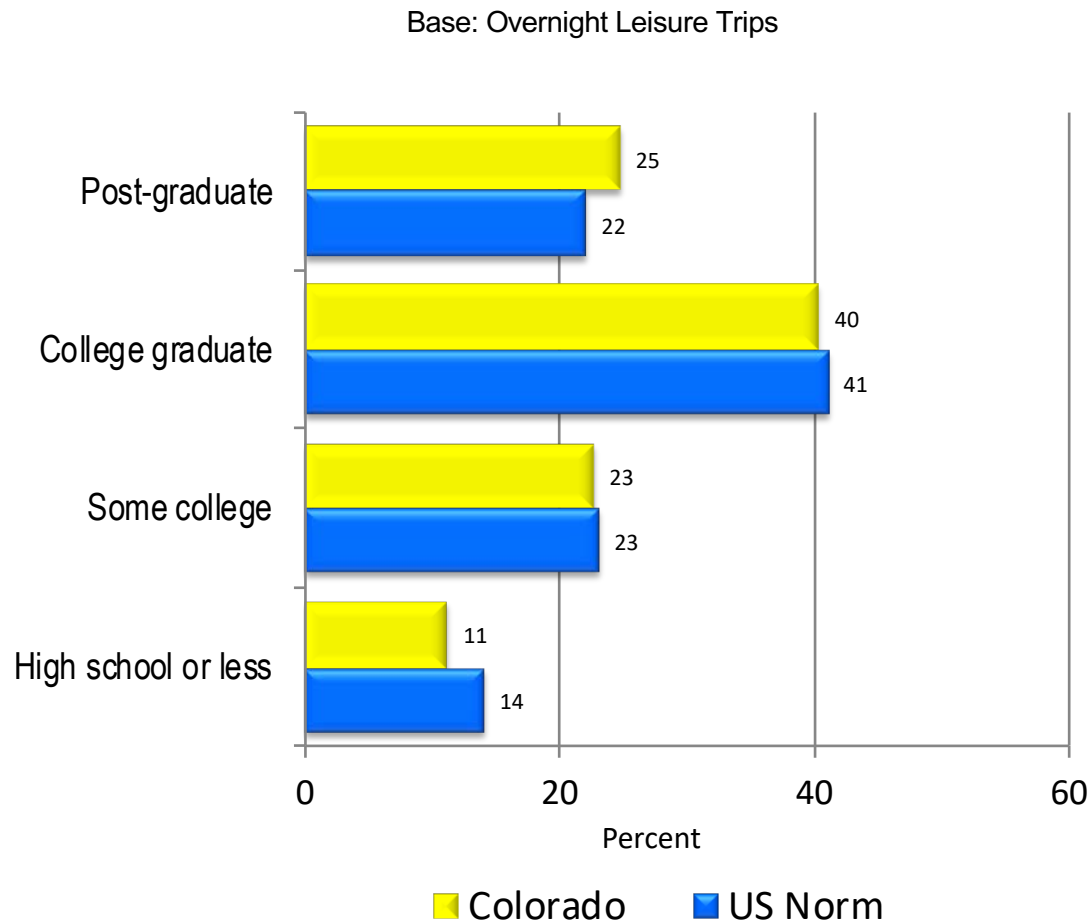
Base: Overnight Leisure Trips



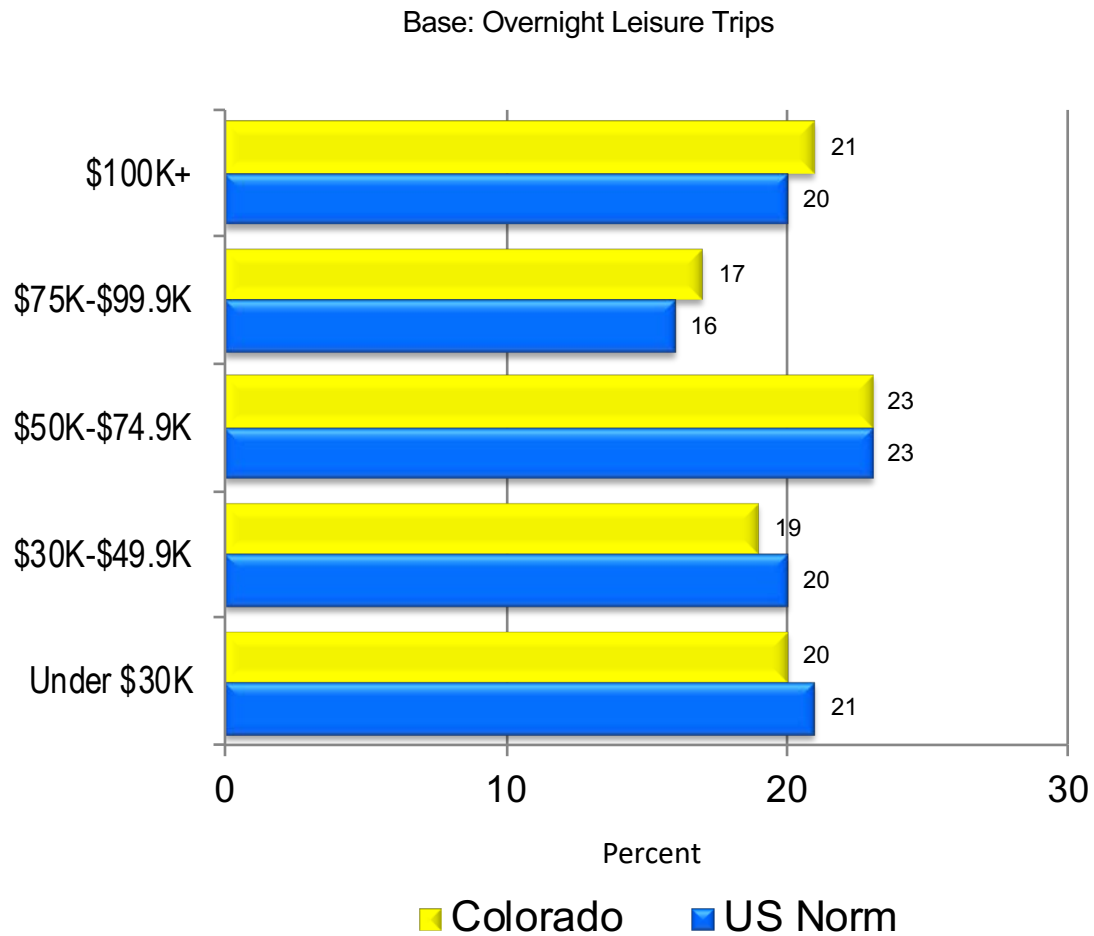
Employment



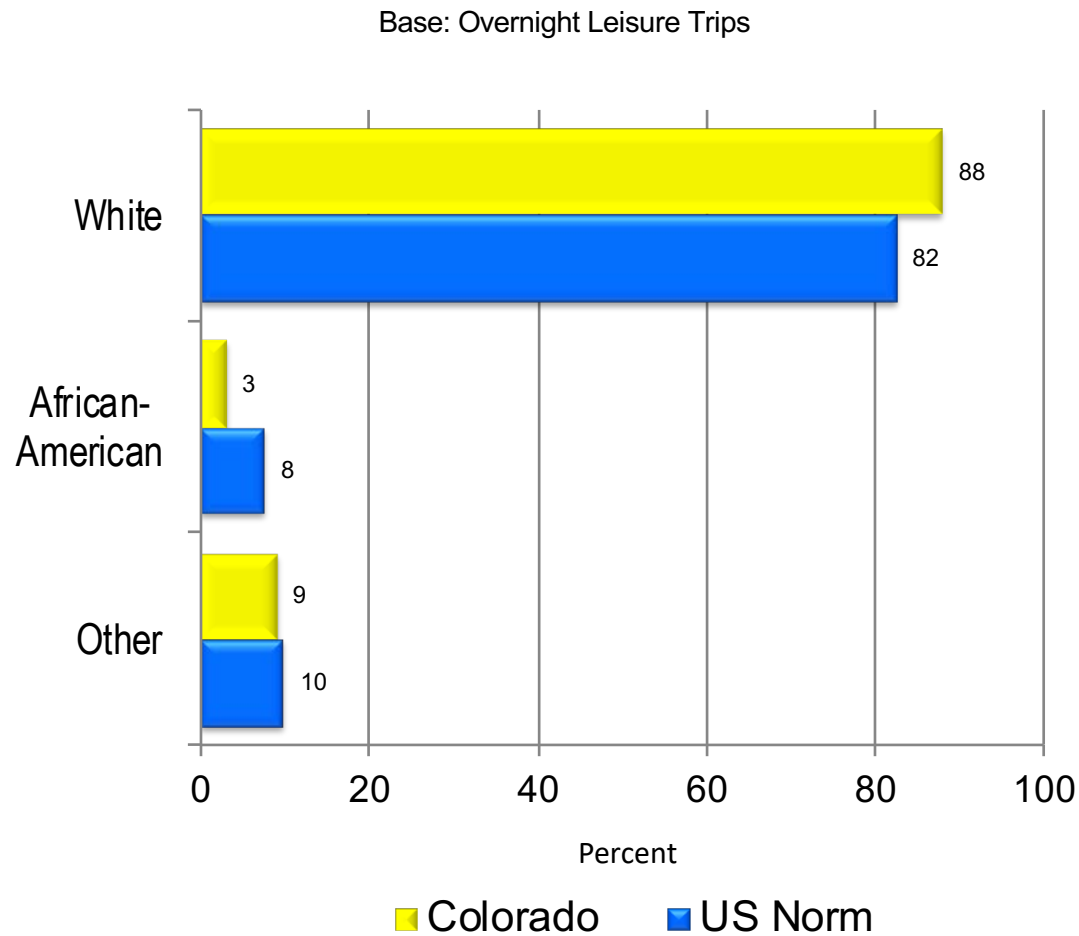
Education



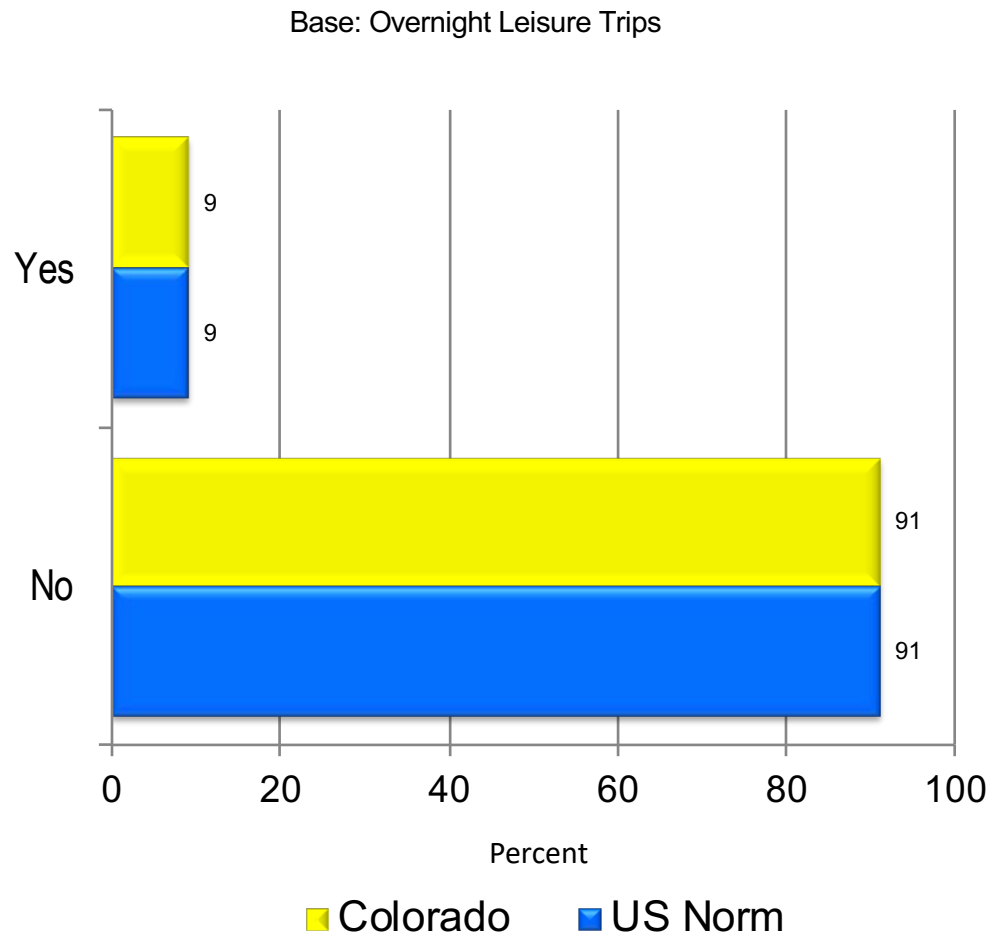
Income



Race

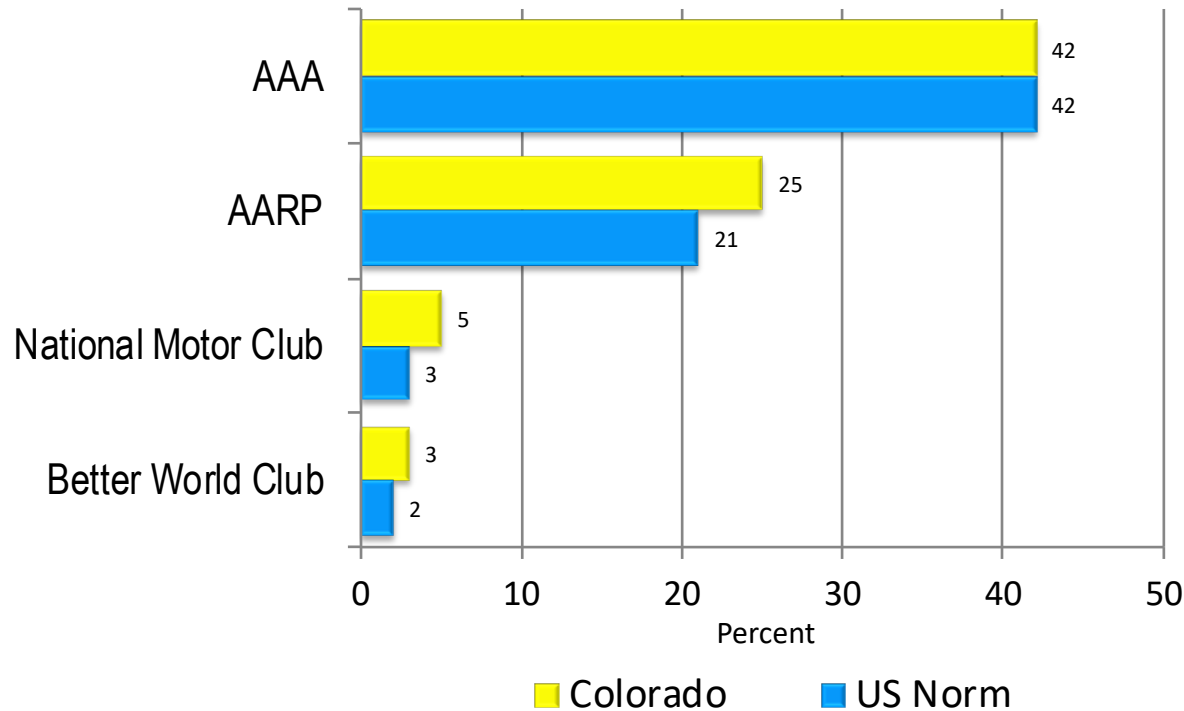


Hispanic Background



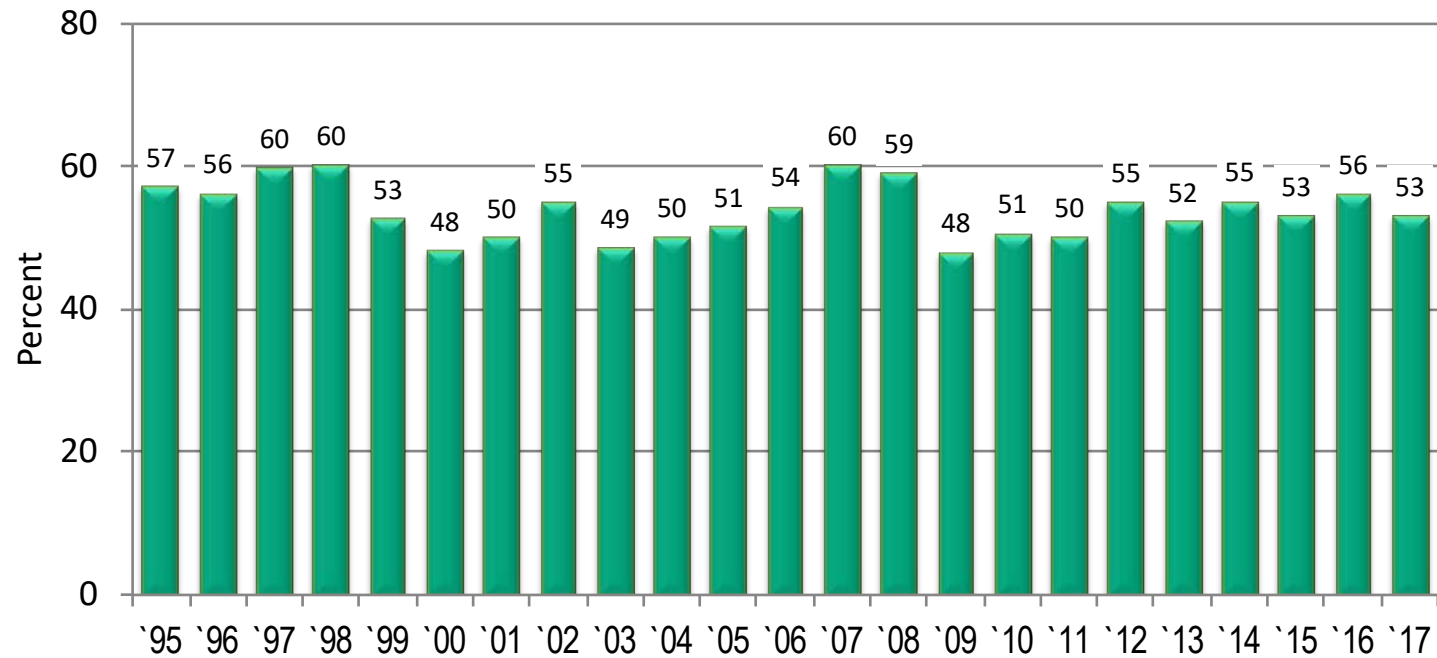
Membership in Auto/Travel Association

Base: Overnight Leisure Trips



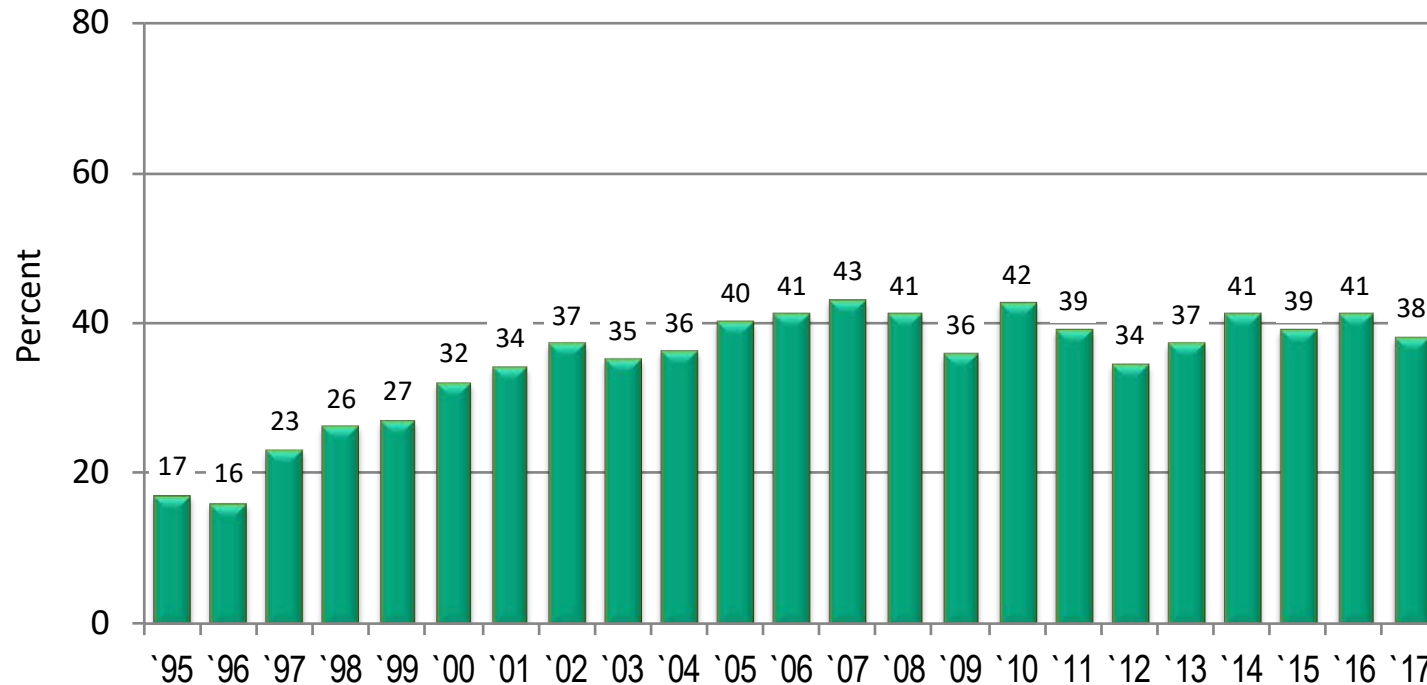
Percent Who Are Male

Base: Overnight Leisure Trips



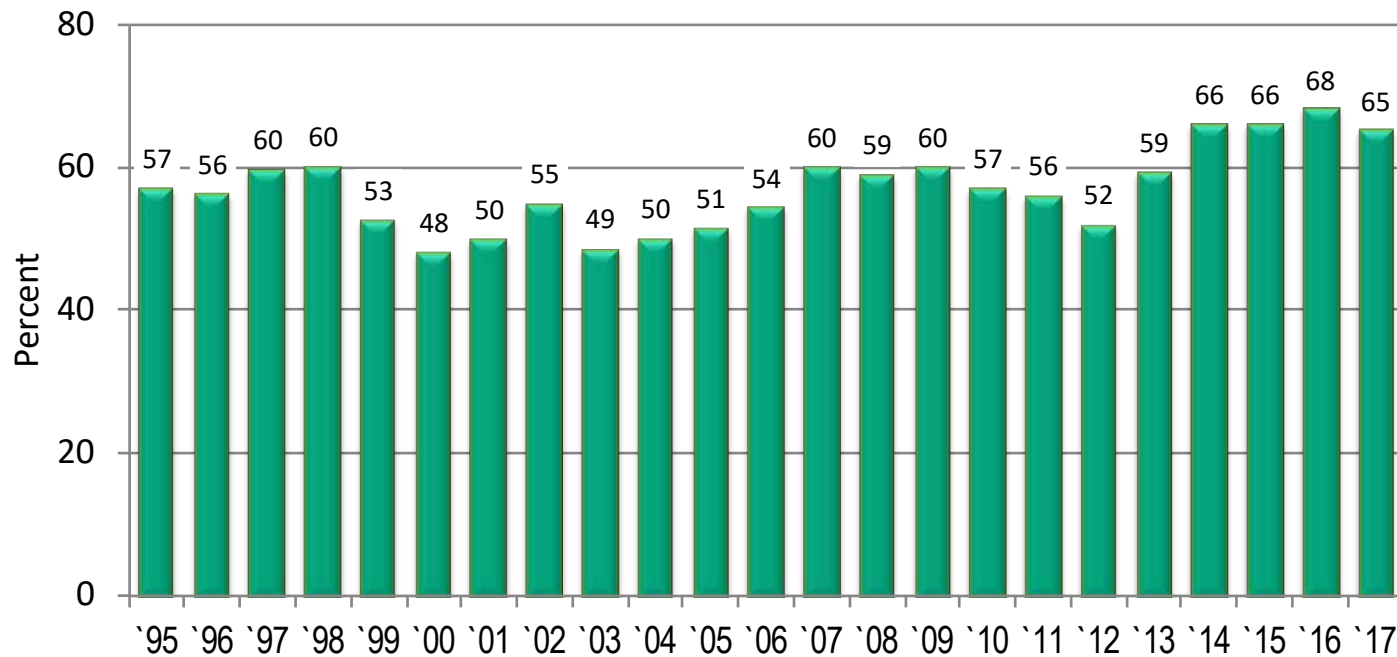
Percent Who Earn Over \$75,000

Base: Overnight Leisure Trips

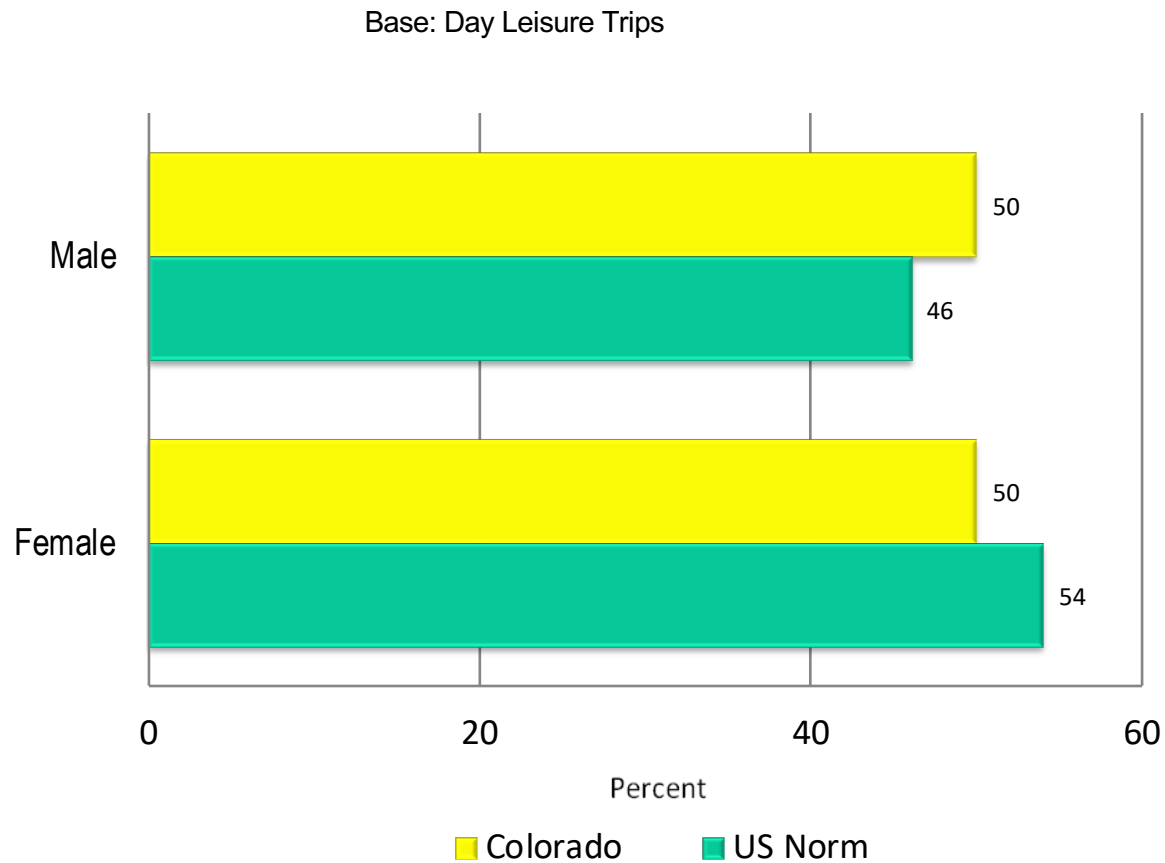


Percent With College Education

Base: Overnight Leisure Trips



Gender

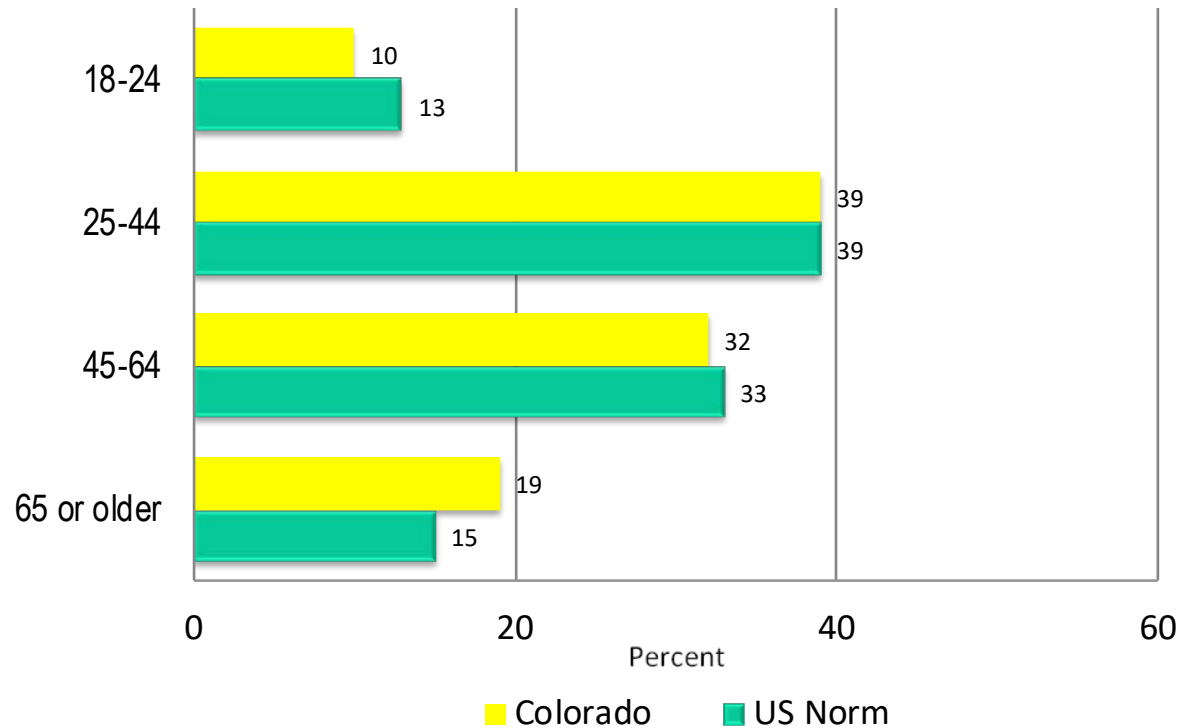


Age

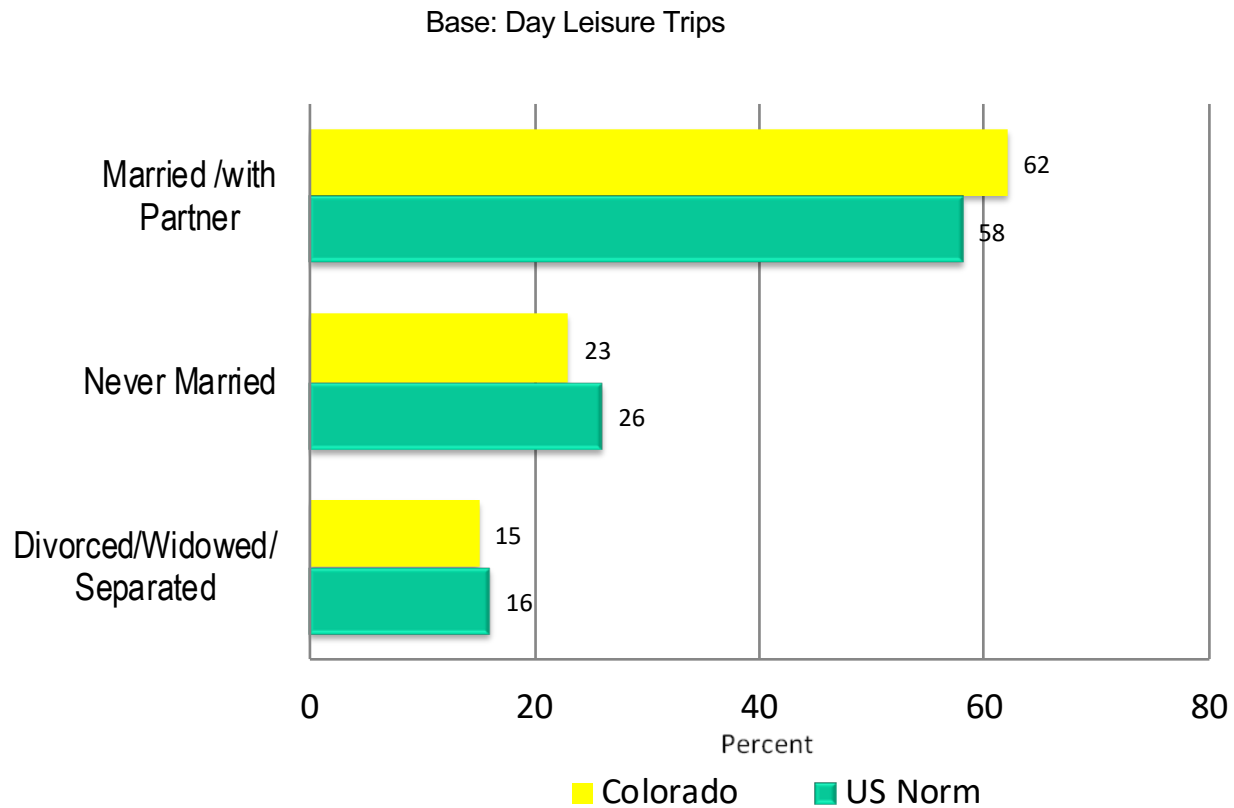
Base: Day Leisure Trips

**Average Age Colorado
= 46.4**

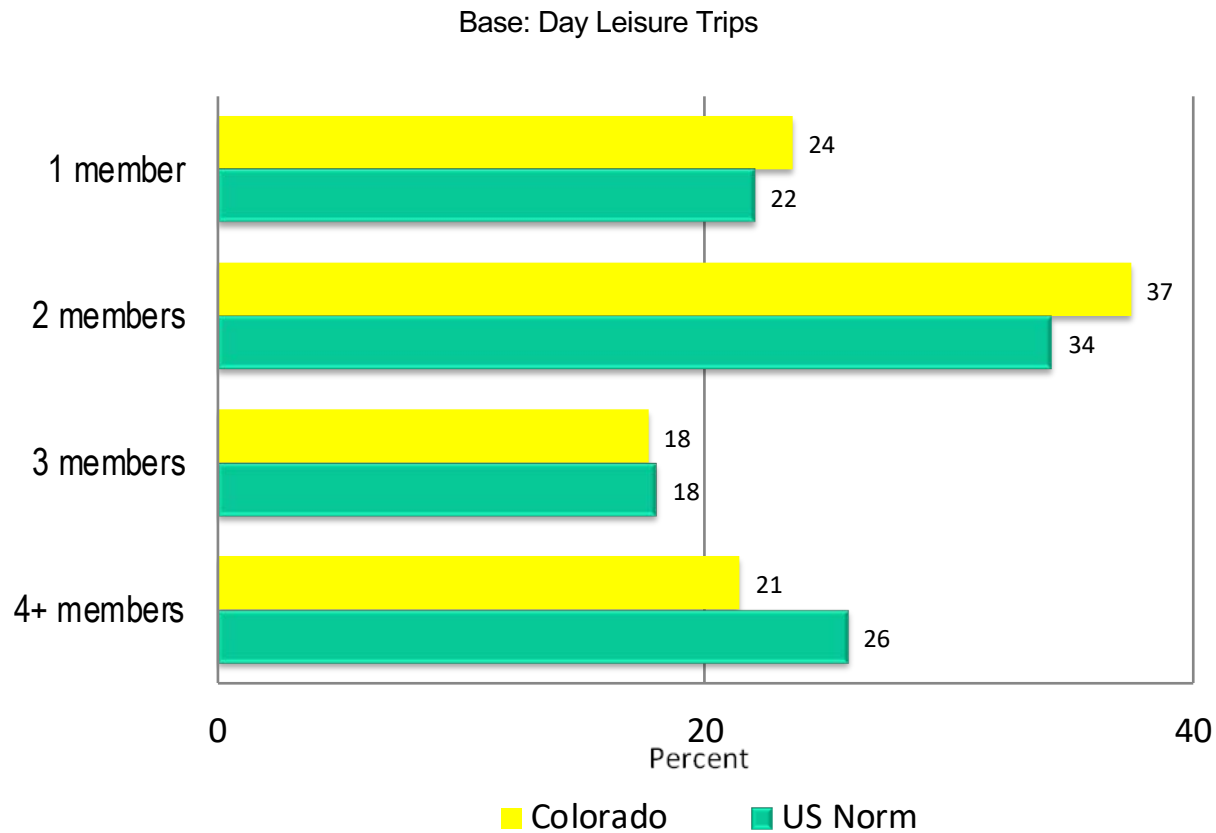
**Average Age U.S. Norm
= 44.9**



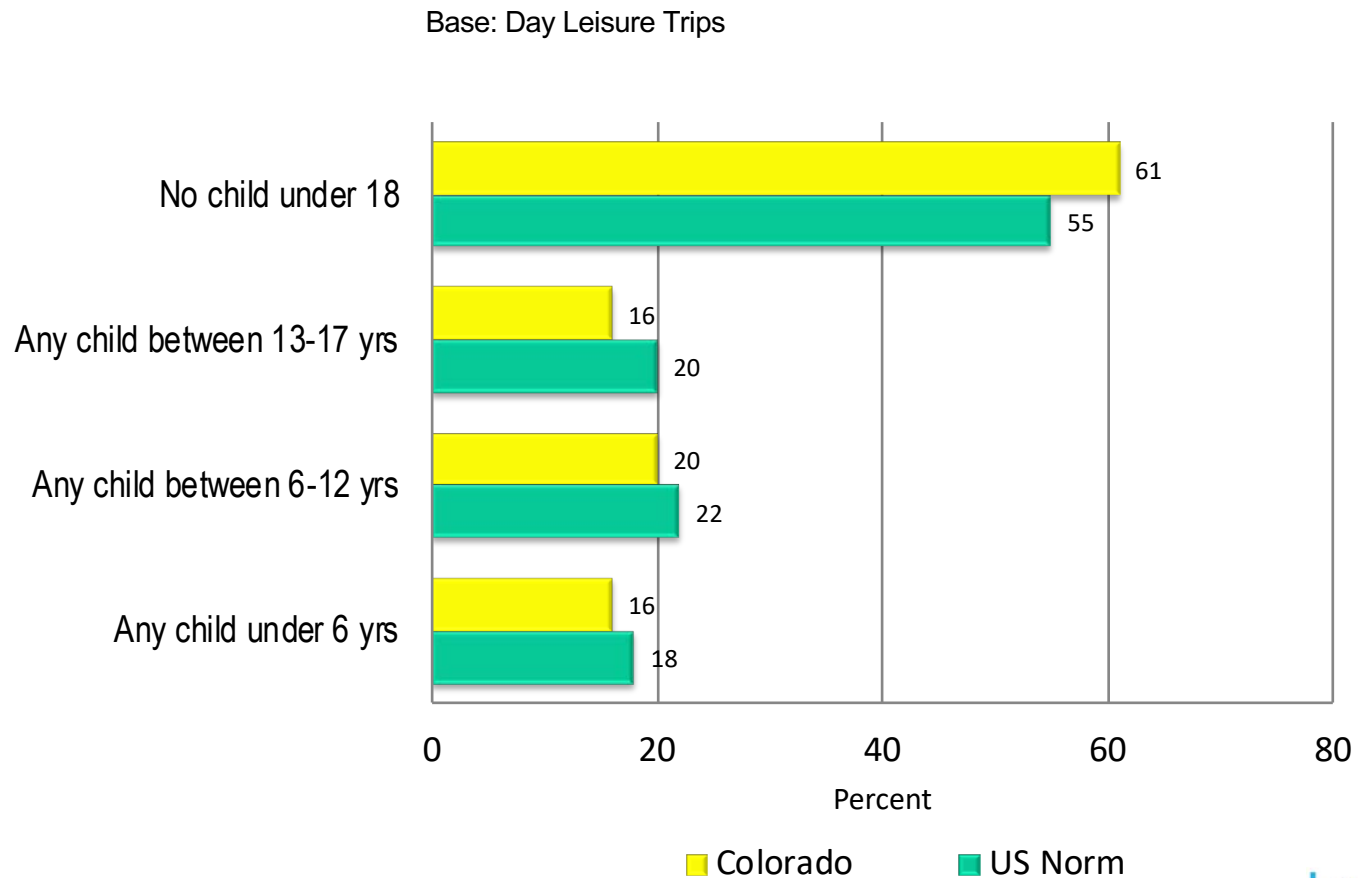
Marital Status



Household Size

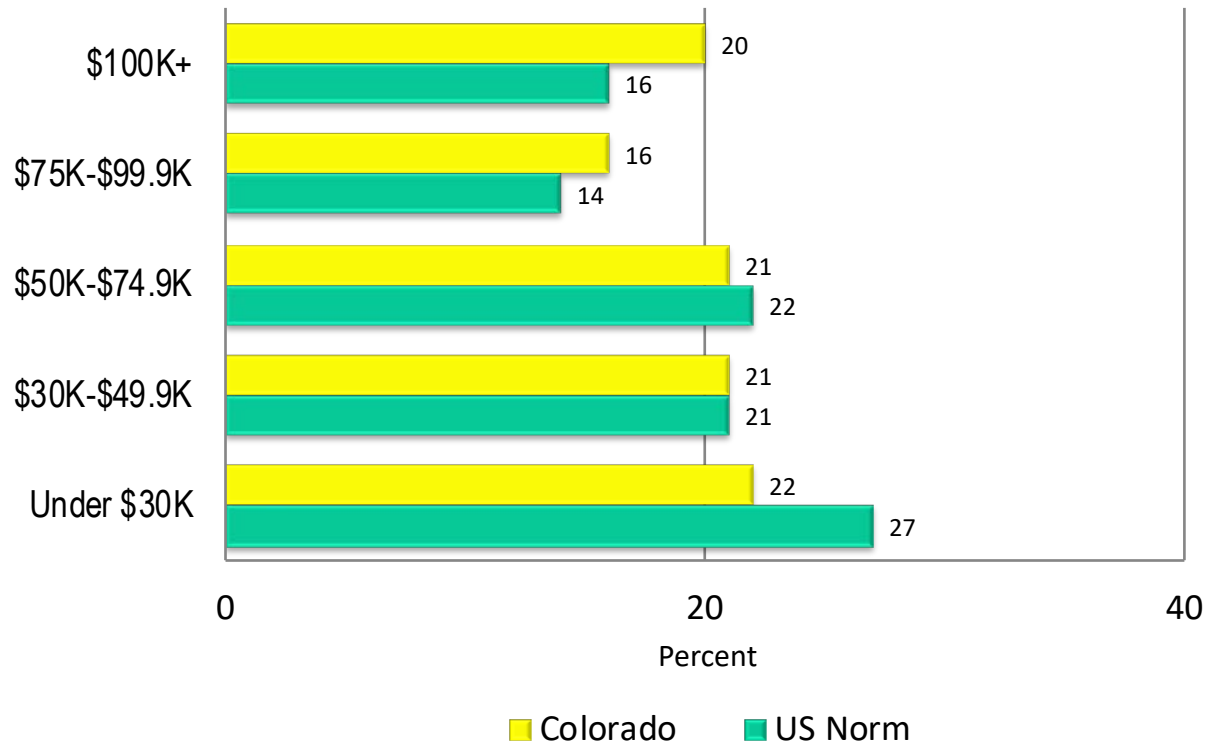


Children in Household

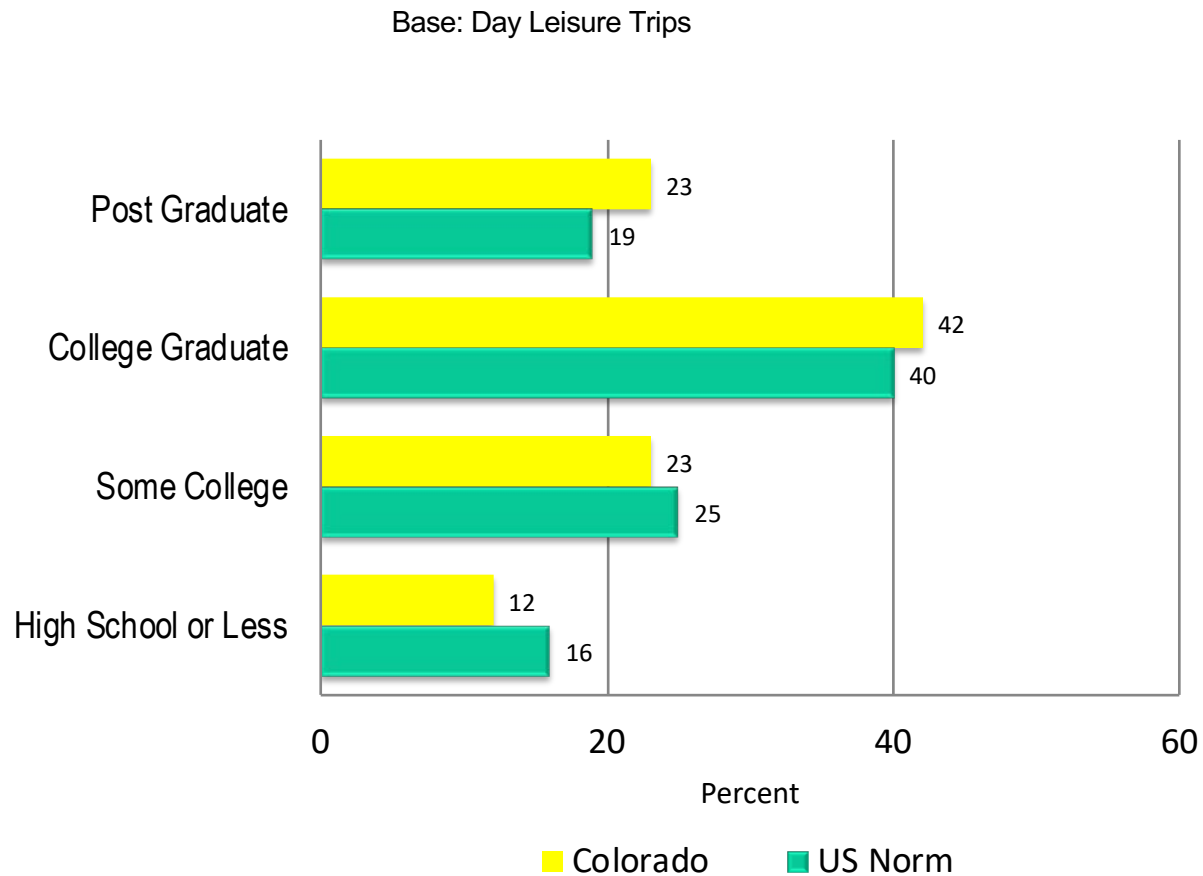


Income

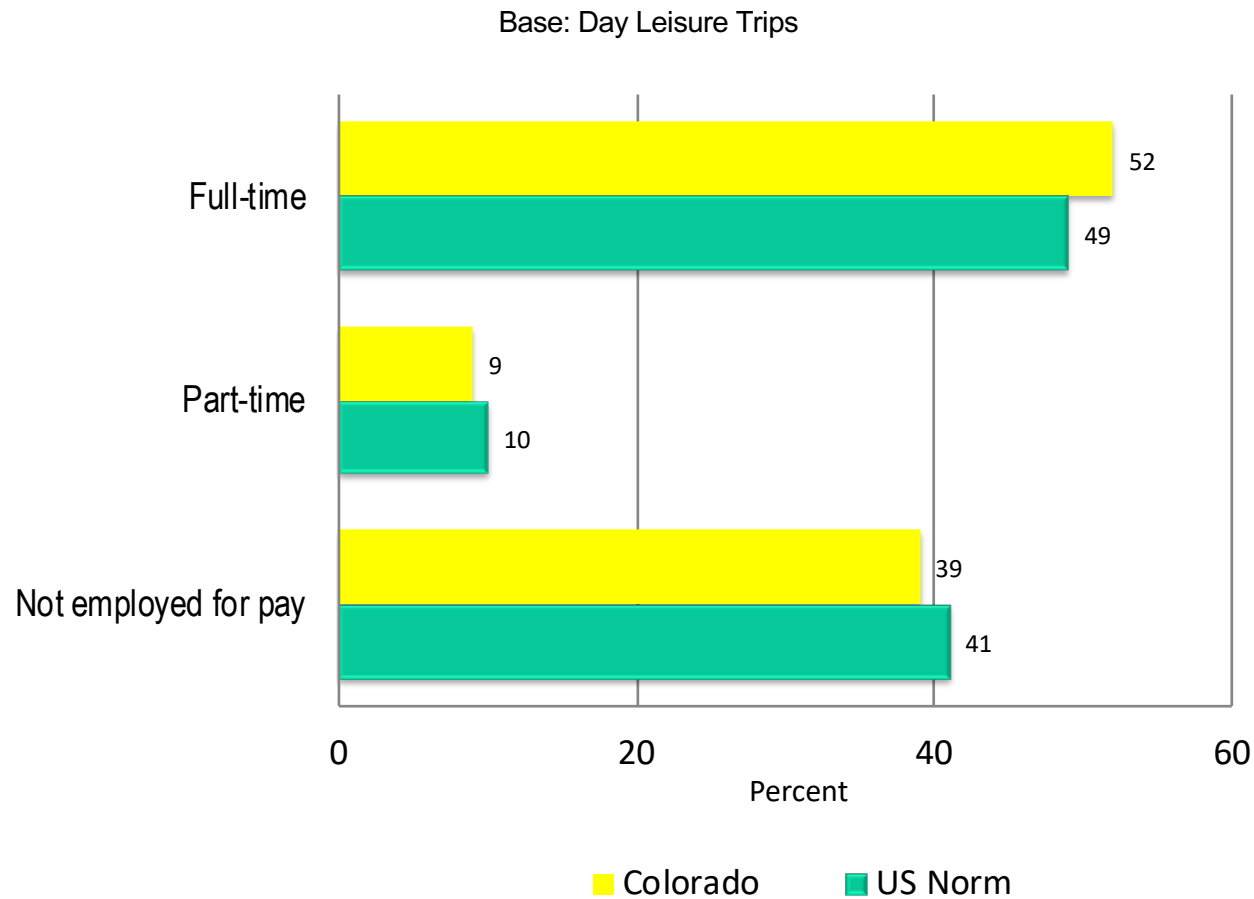
Base: Day Leisure Trips



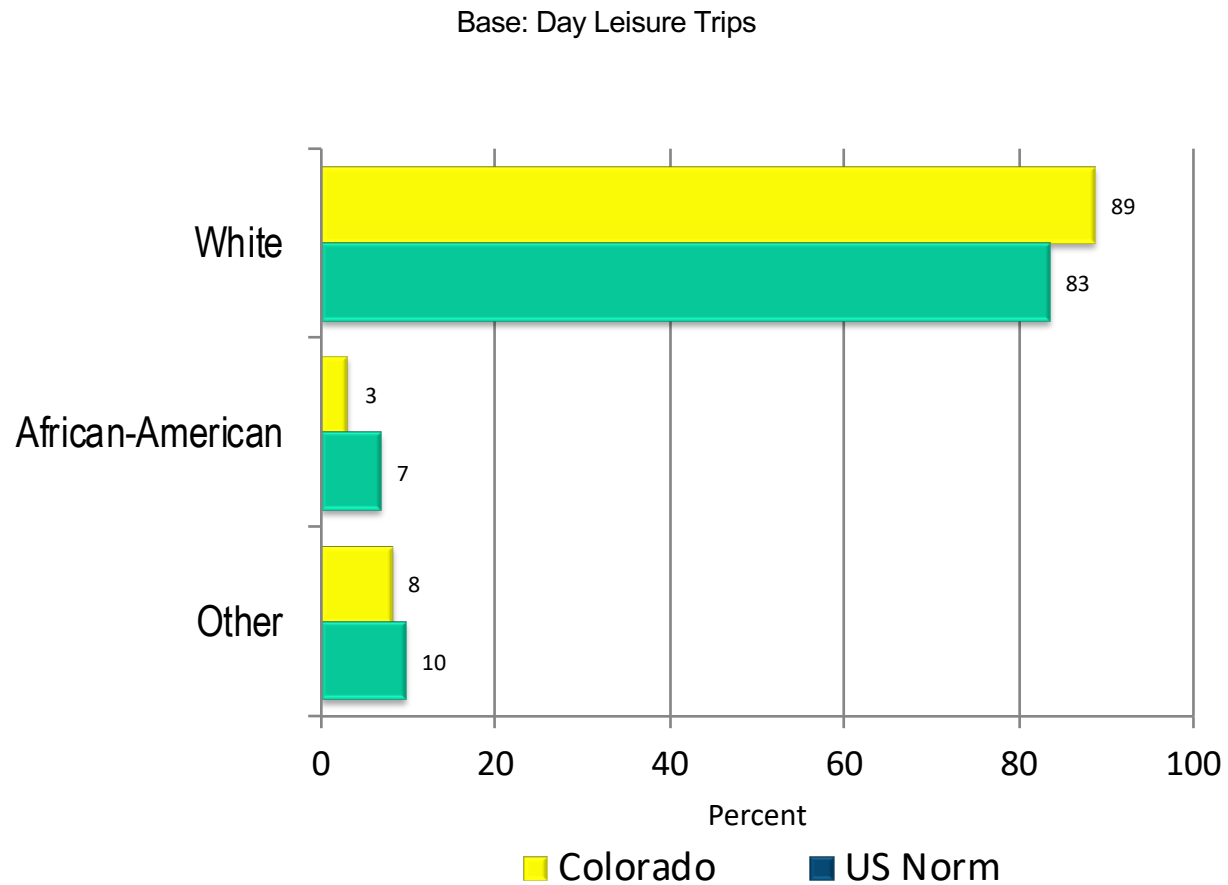
Education



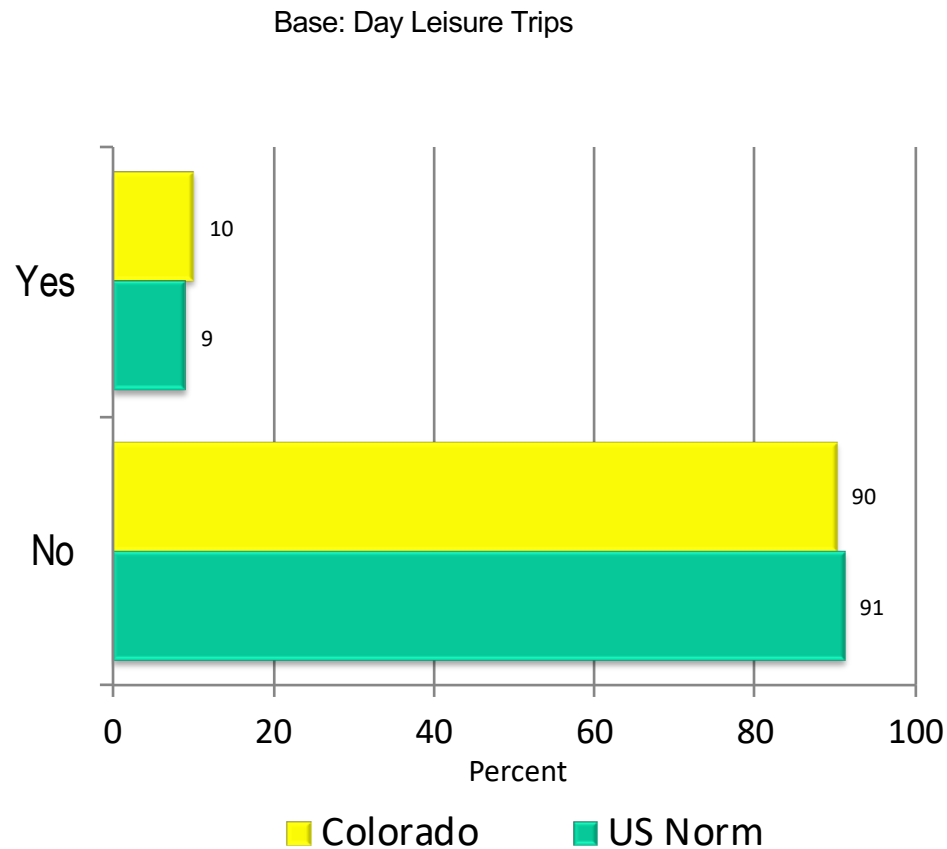
Employment



Race



Hispanic Background



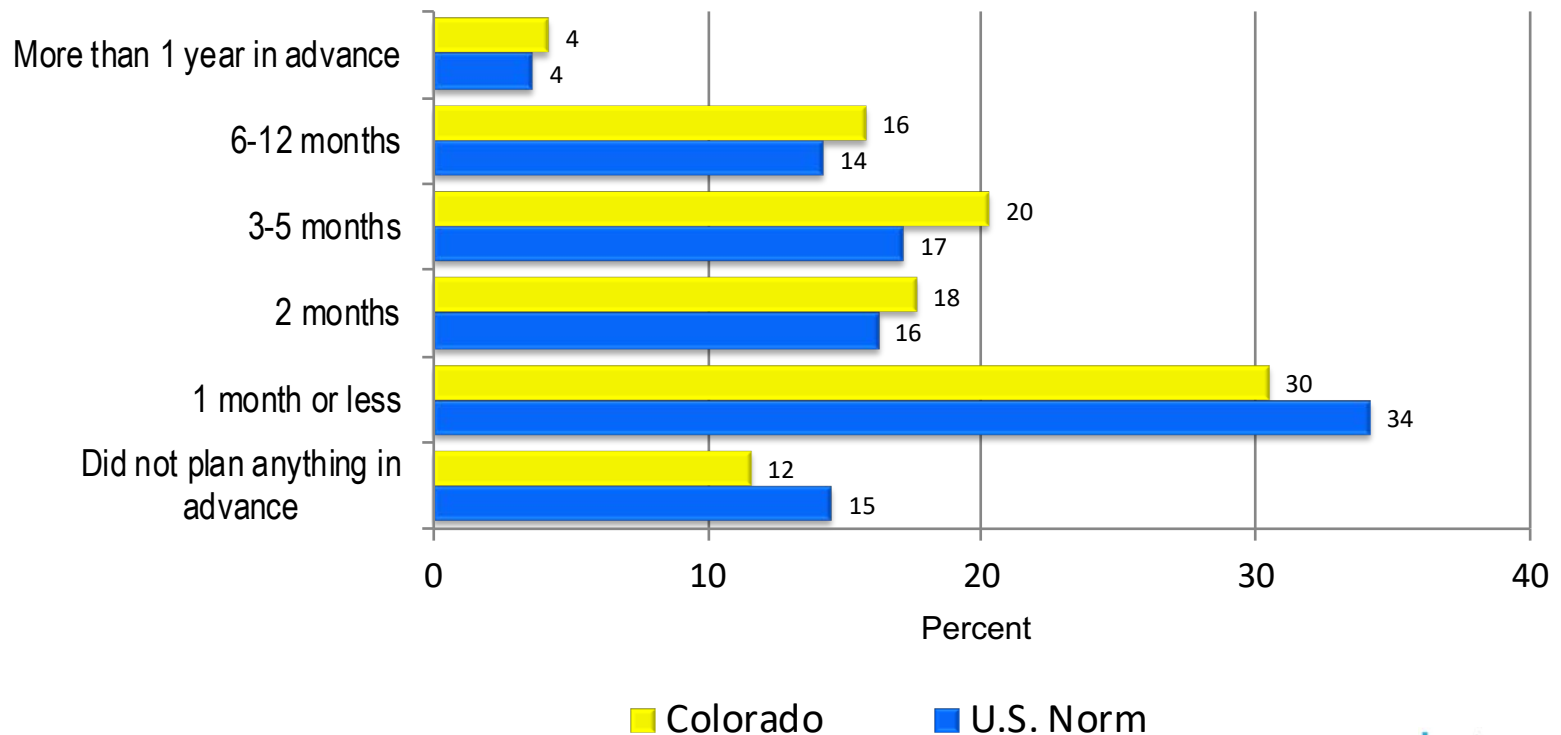


Trip Planning & Booking



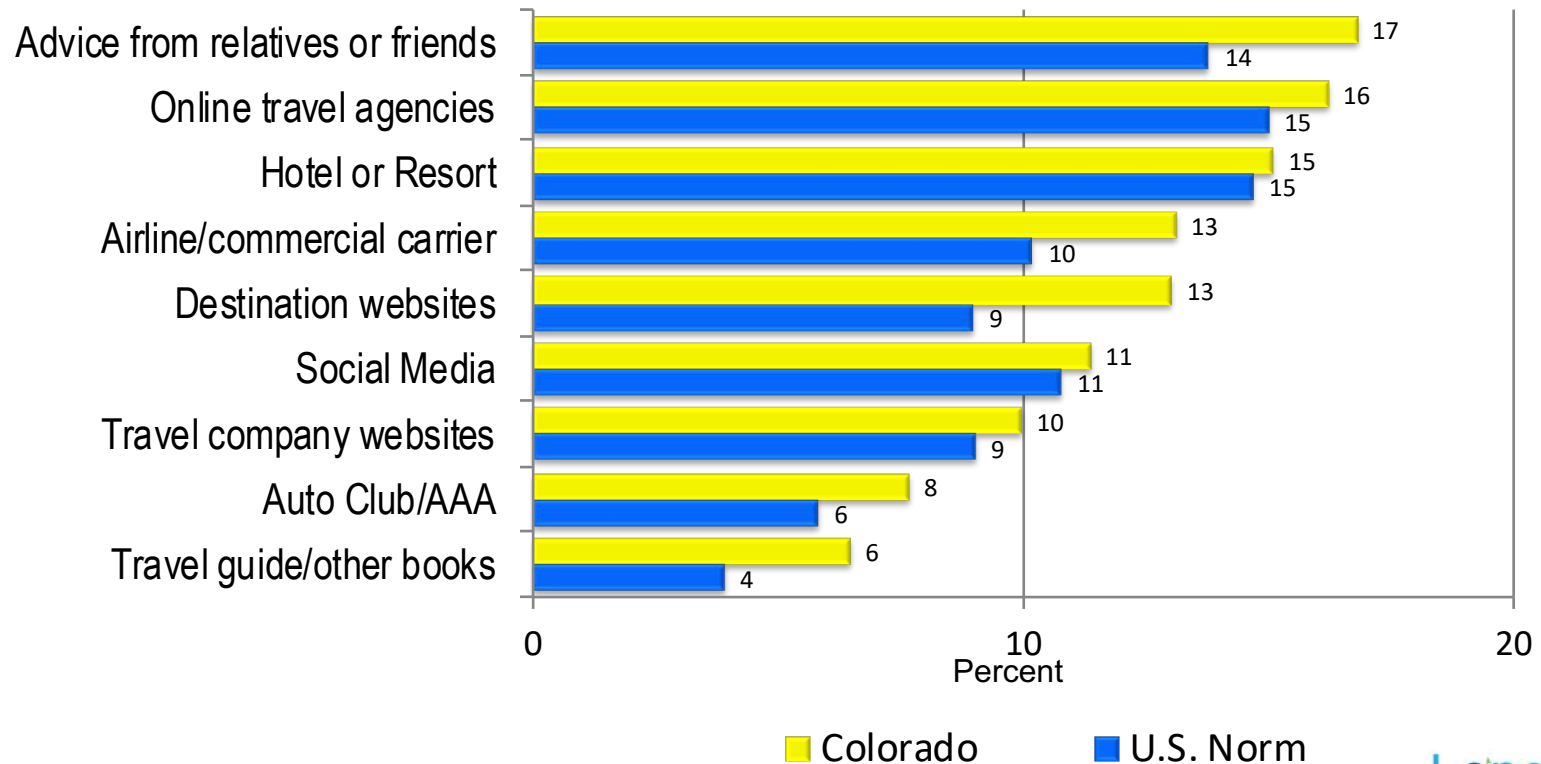
Length of Trip Planning

Base: Overnight Leisure Trips



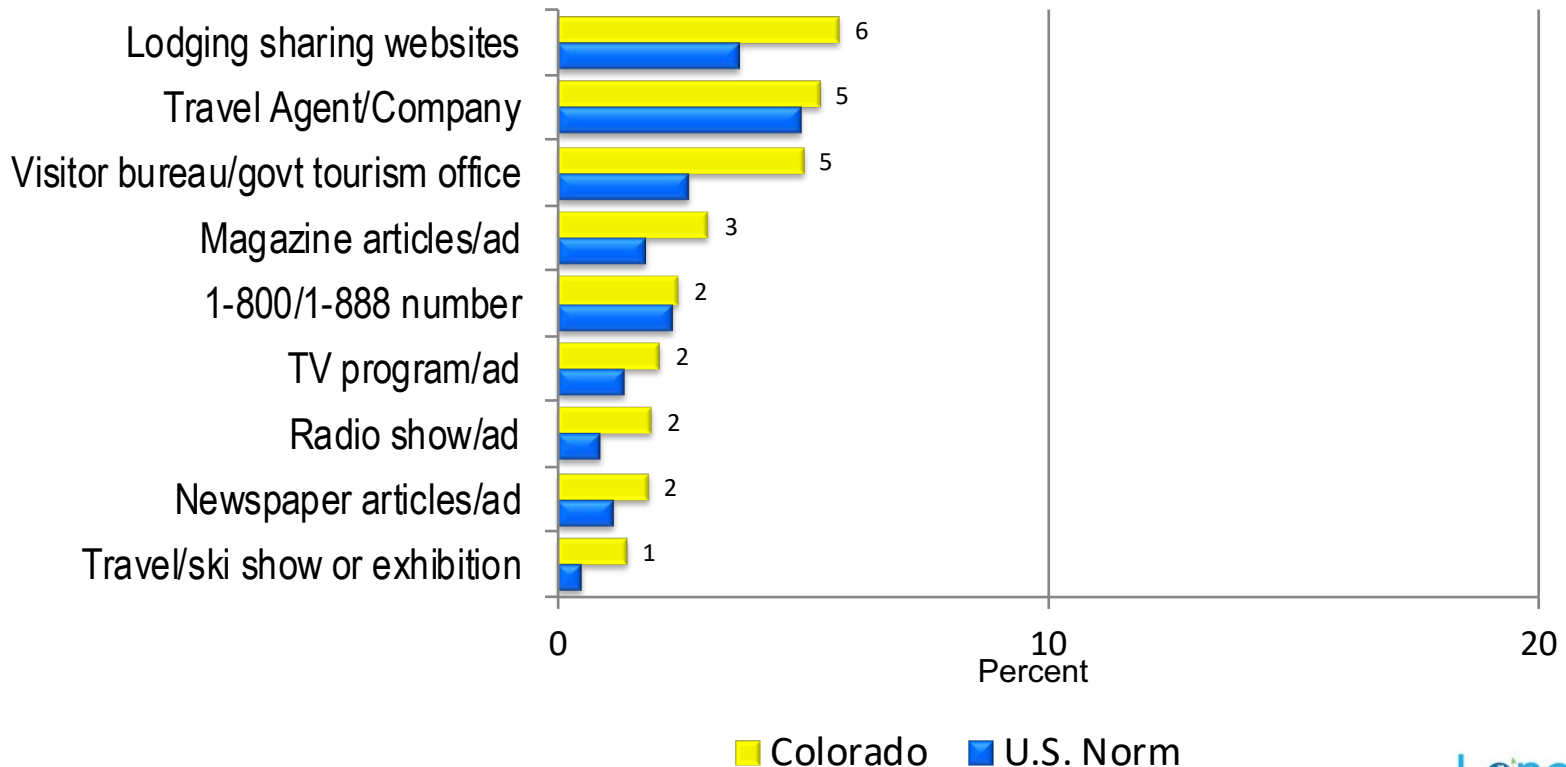
Trip Planning Information Sources

Base: Overnight Leisure Trips



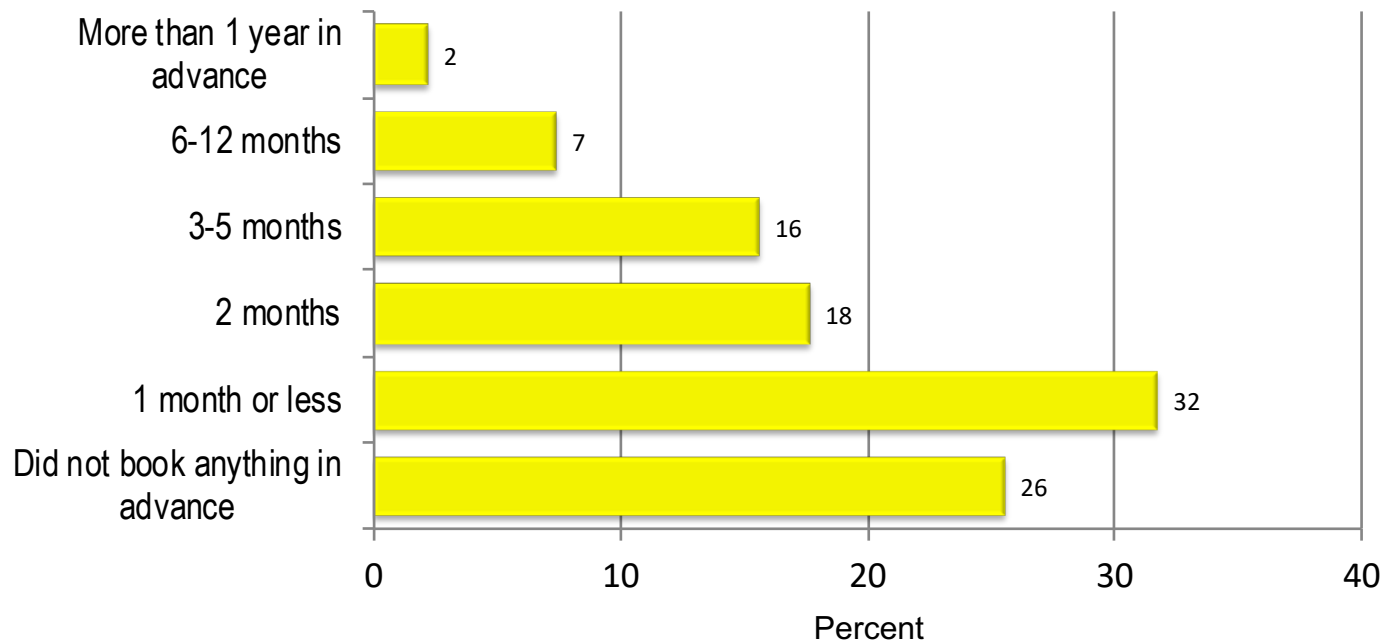
Trip Planning Information Sources (Cont'd)

Base: Overnight Leisure Trips

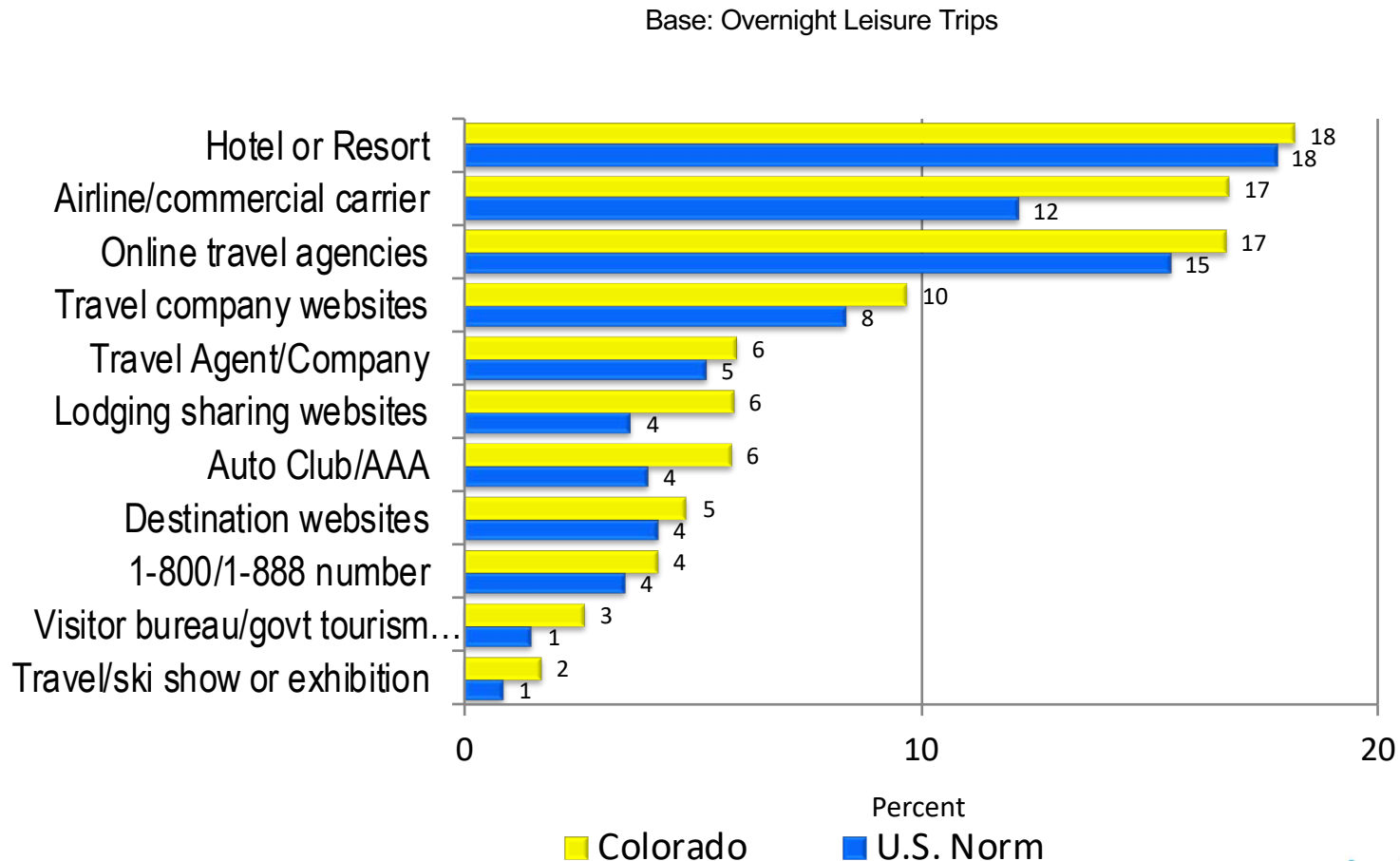


Length of Trip Booking

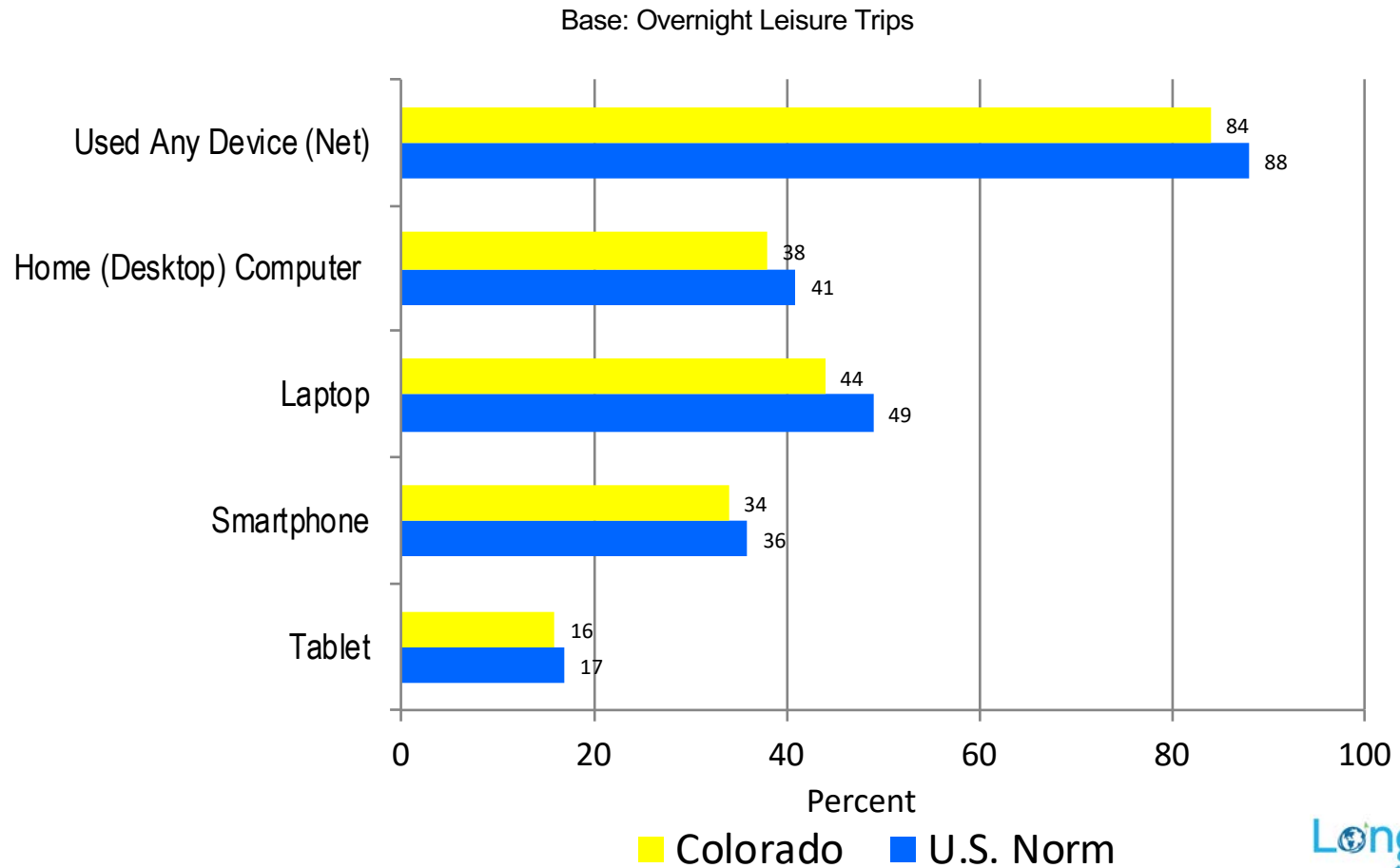
Base: Overnight Leisure Trips



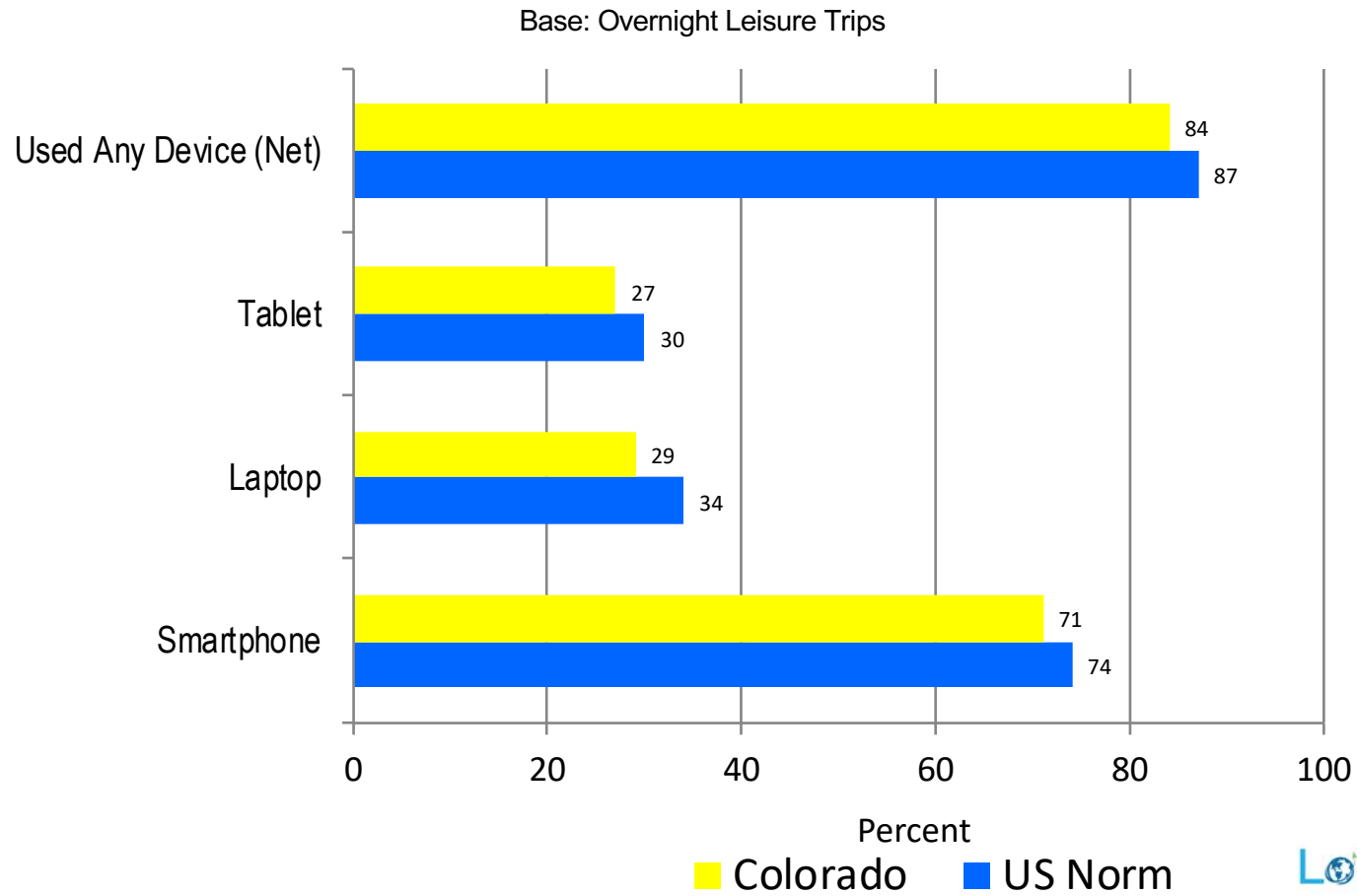
Method of Booking



Use of Devices for Trip Planning

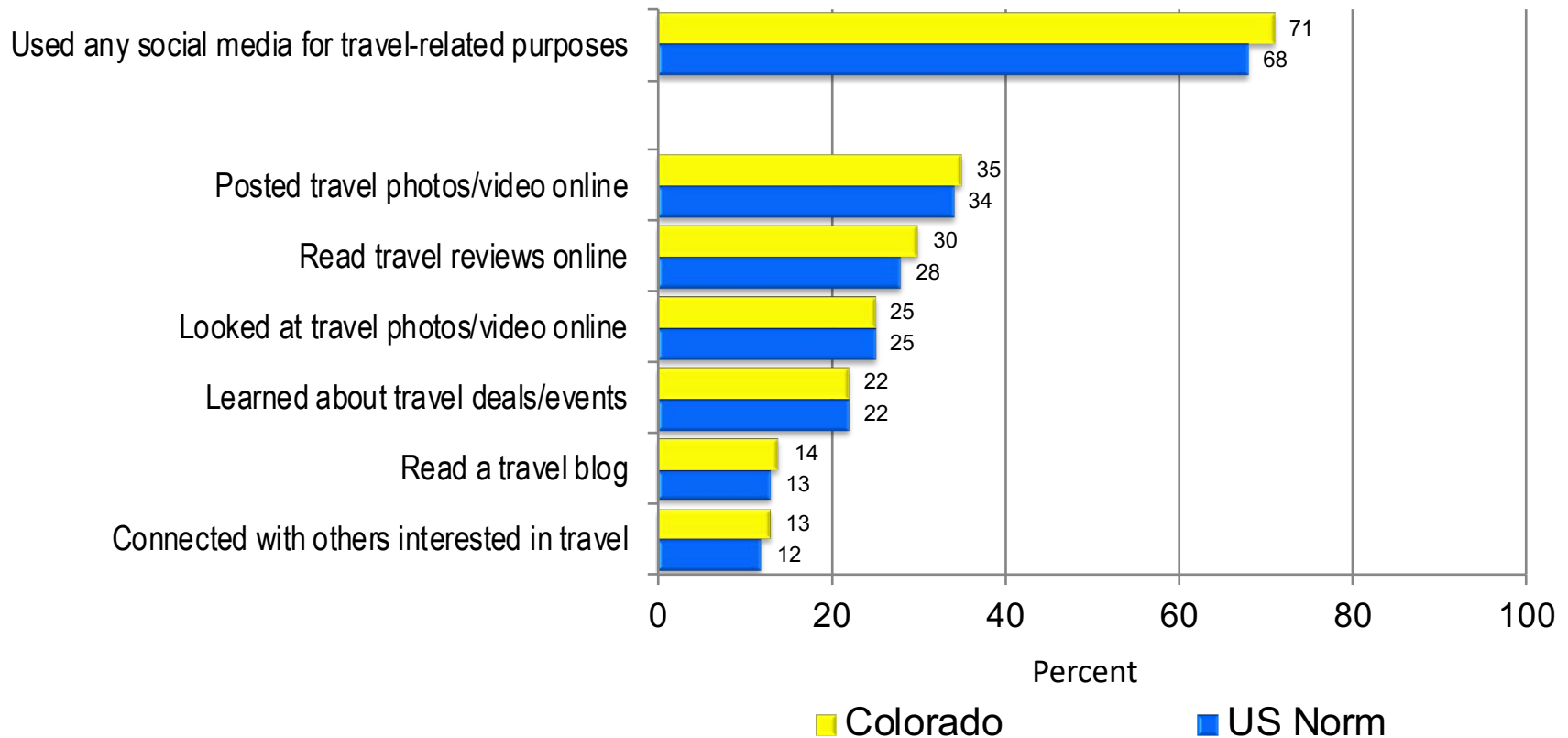


Use of Devices During Trip



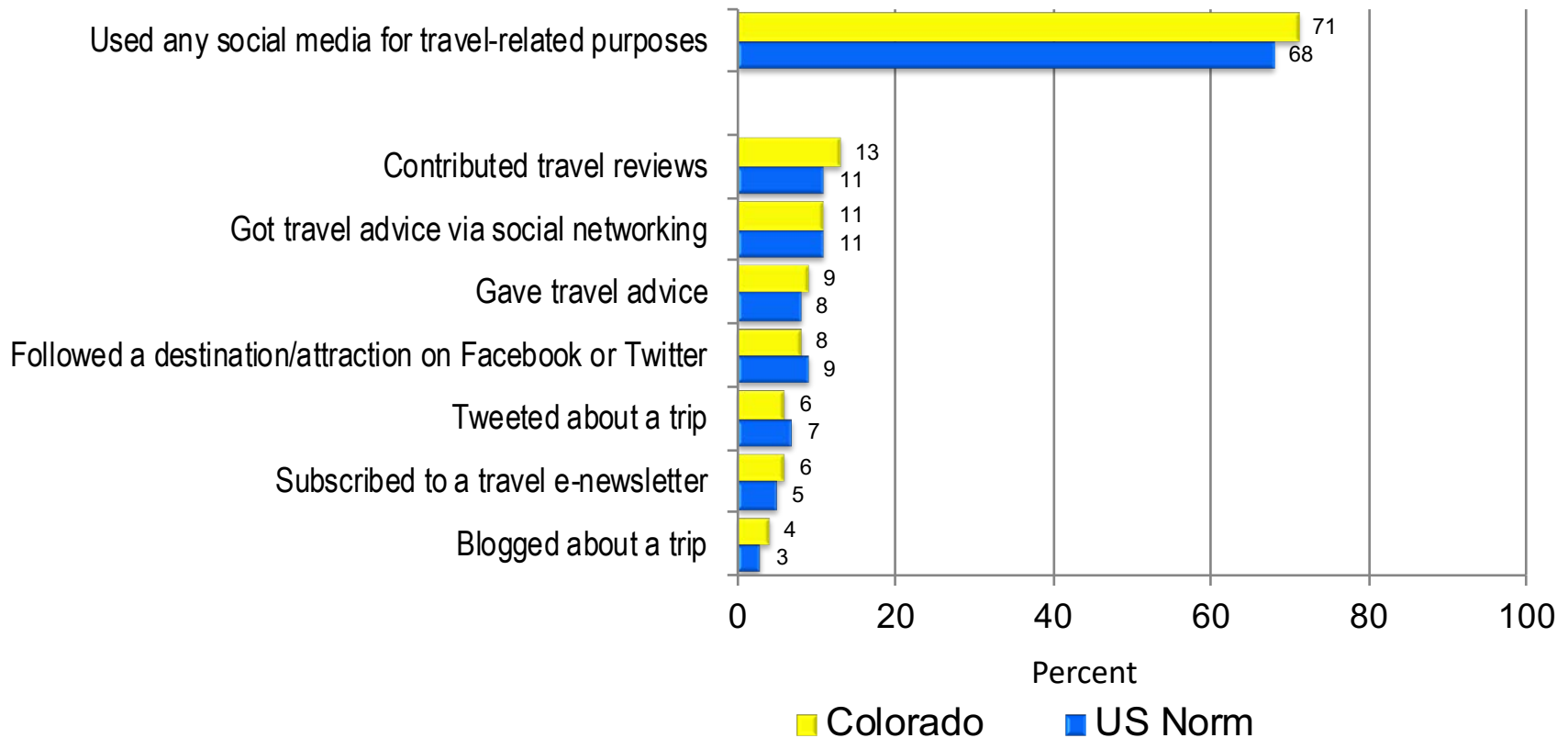
Social Media Used in the Past 3 Months

Base: Overnight Leisure Trips



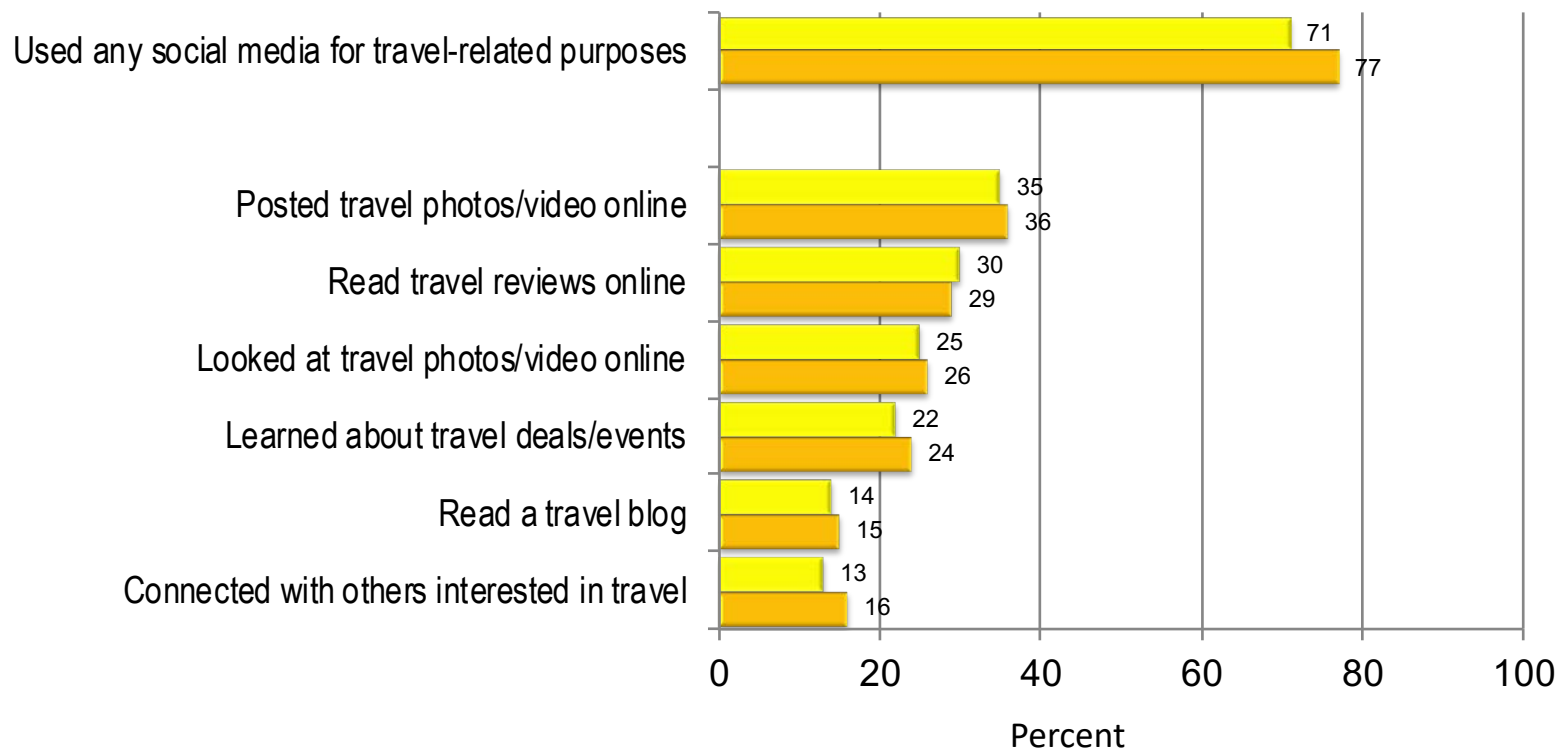
Social Media Used in the Past 3 Months (Cont'd)

Base: Overnight Leisure Trips



Social Media Used in the Past 3 Months — 2017 vs. 2016

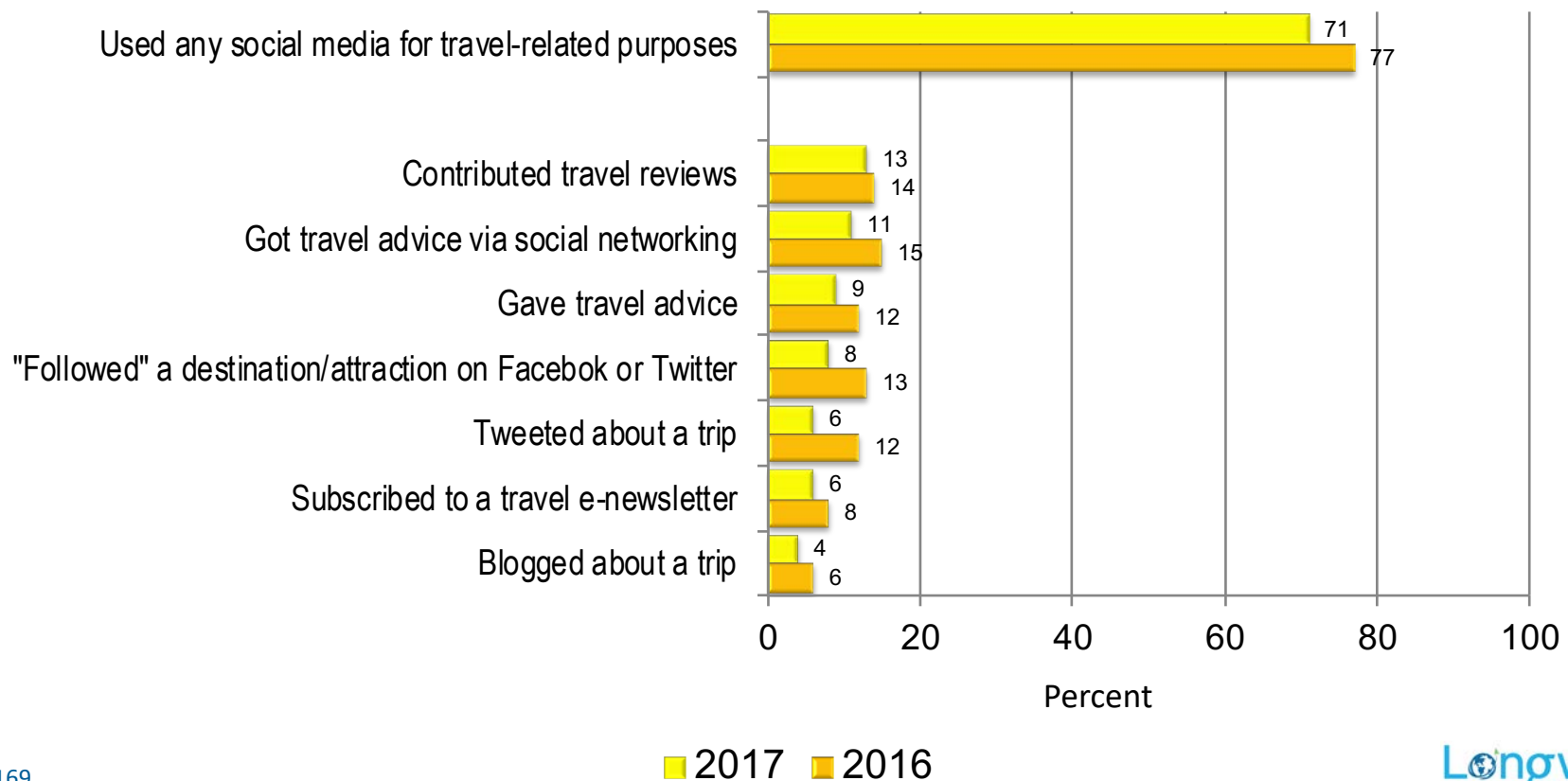
Base: Overnight Leisure Trips



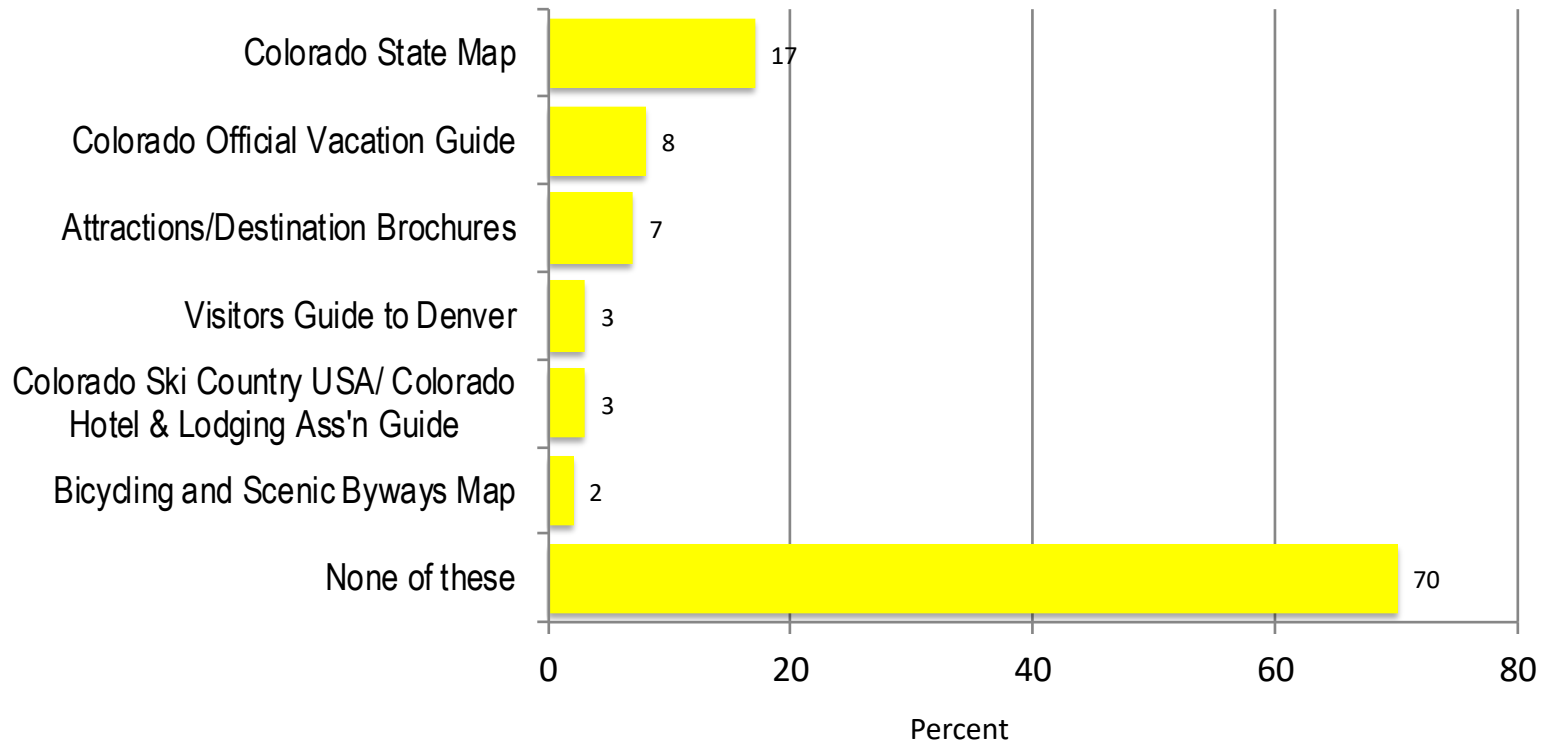
■ 2017 ■ 2016

Social Media Used in the Past 3 Months — 2017 vs. 2016 (Cont'd)

Base: Overnight Leisure Trips

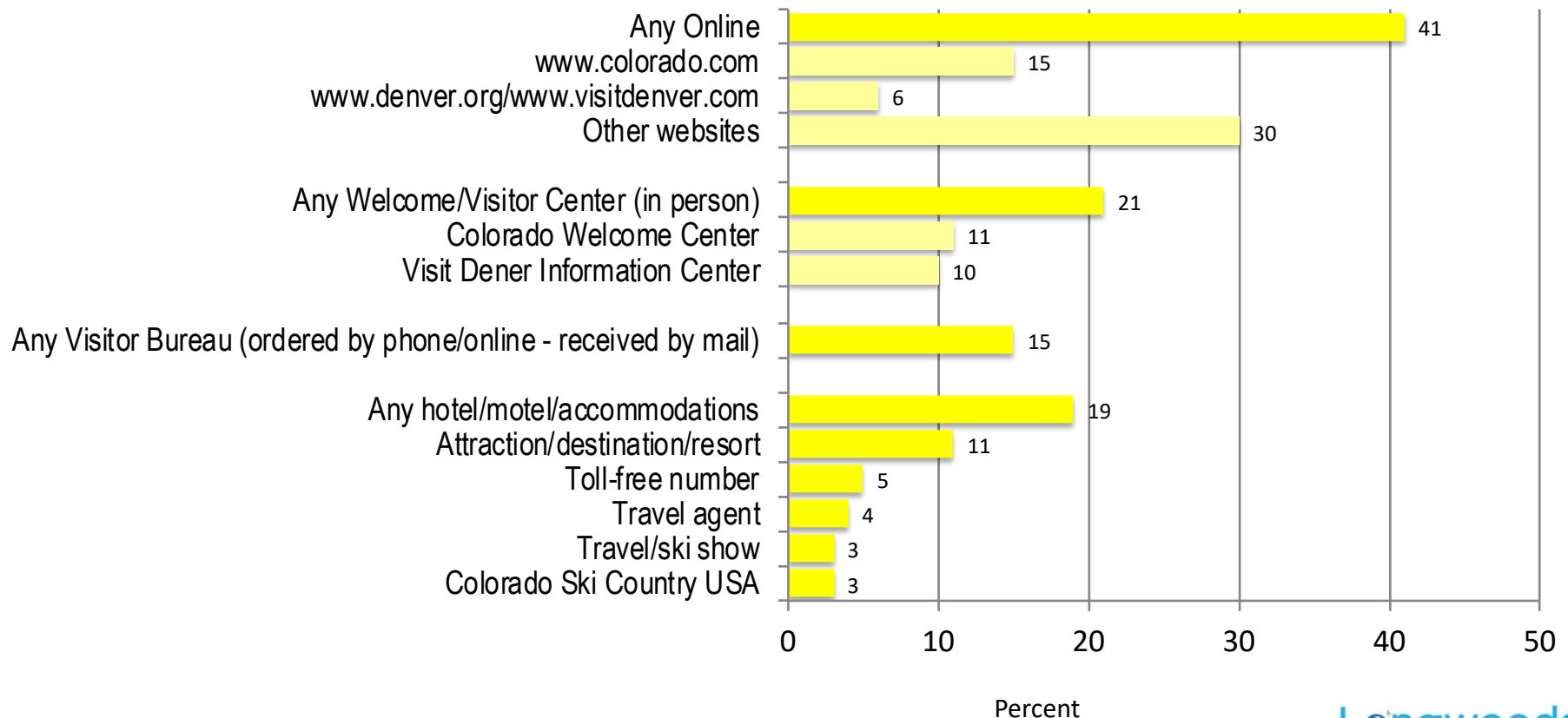


Publications Used For Trip Planning



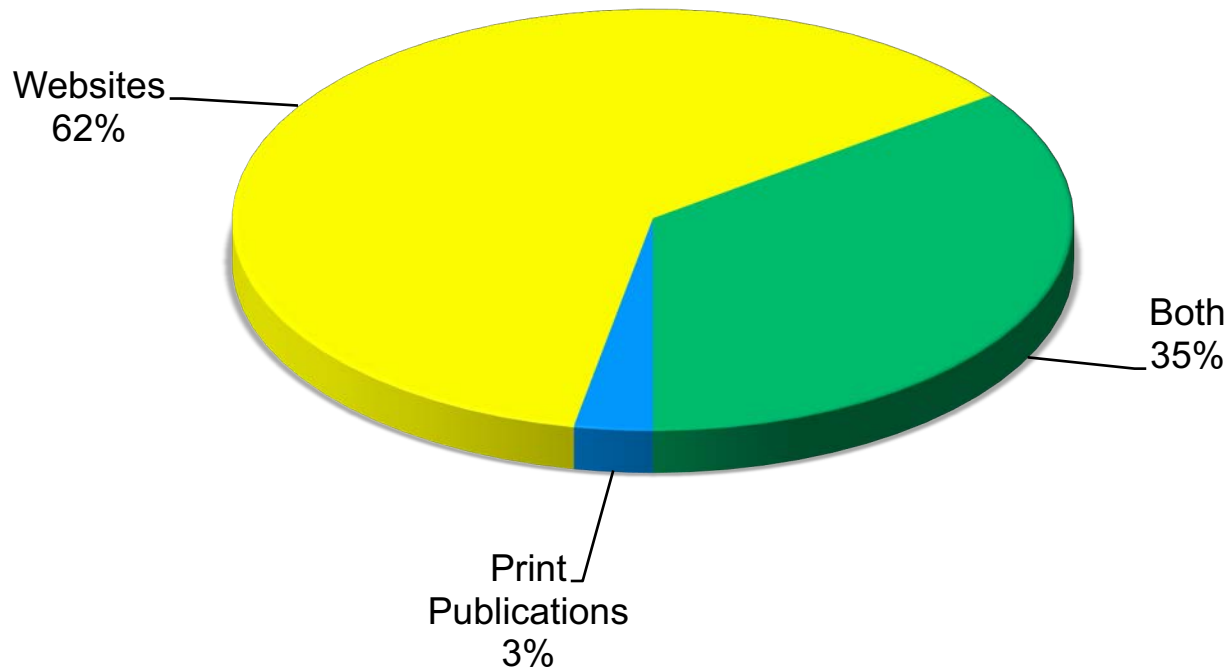
Places Where Publications Were Obtained

Base: Vacationers who used publications to plan trips



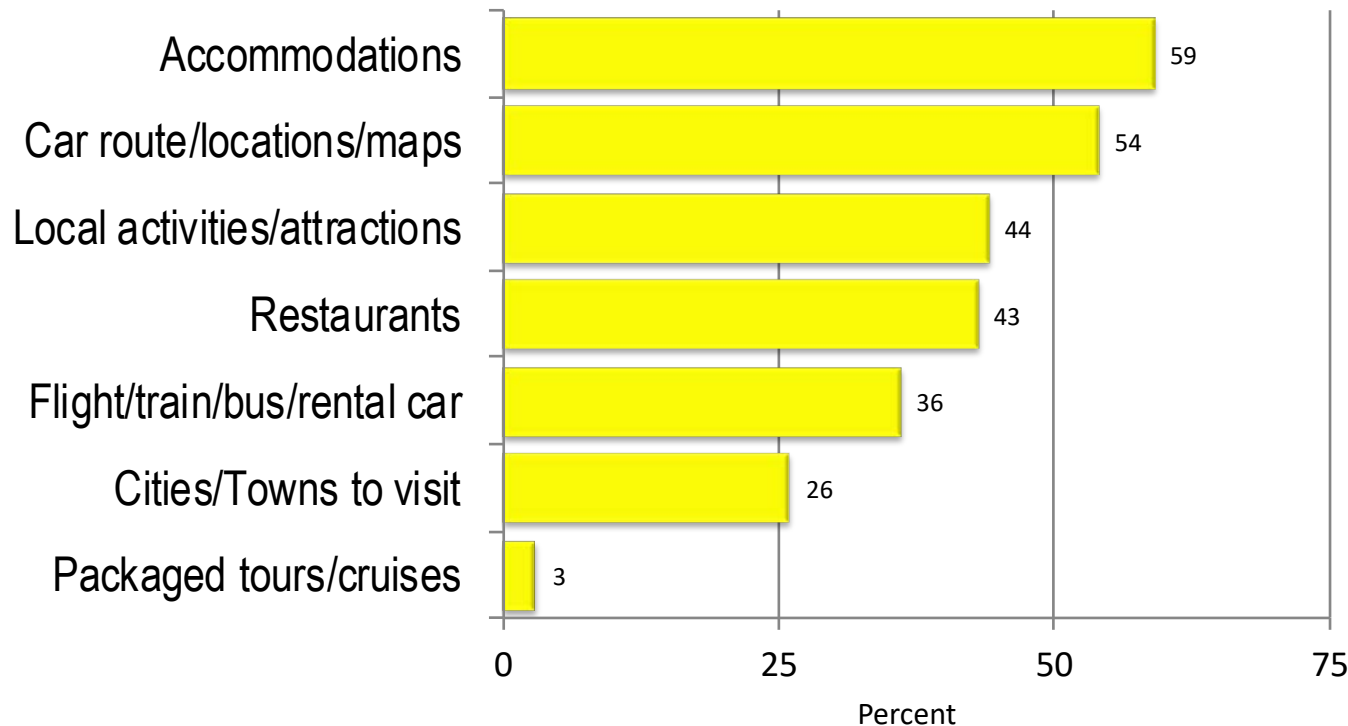
Which of Publications and Websites/Social Media Were More Helpful?

Base: Used Both Websites & Publications to Plan Trip



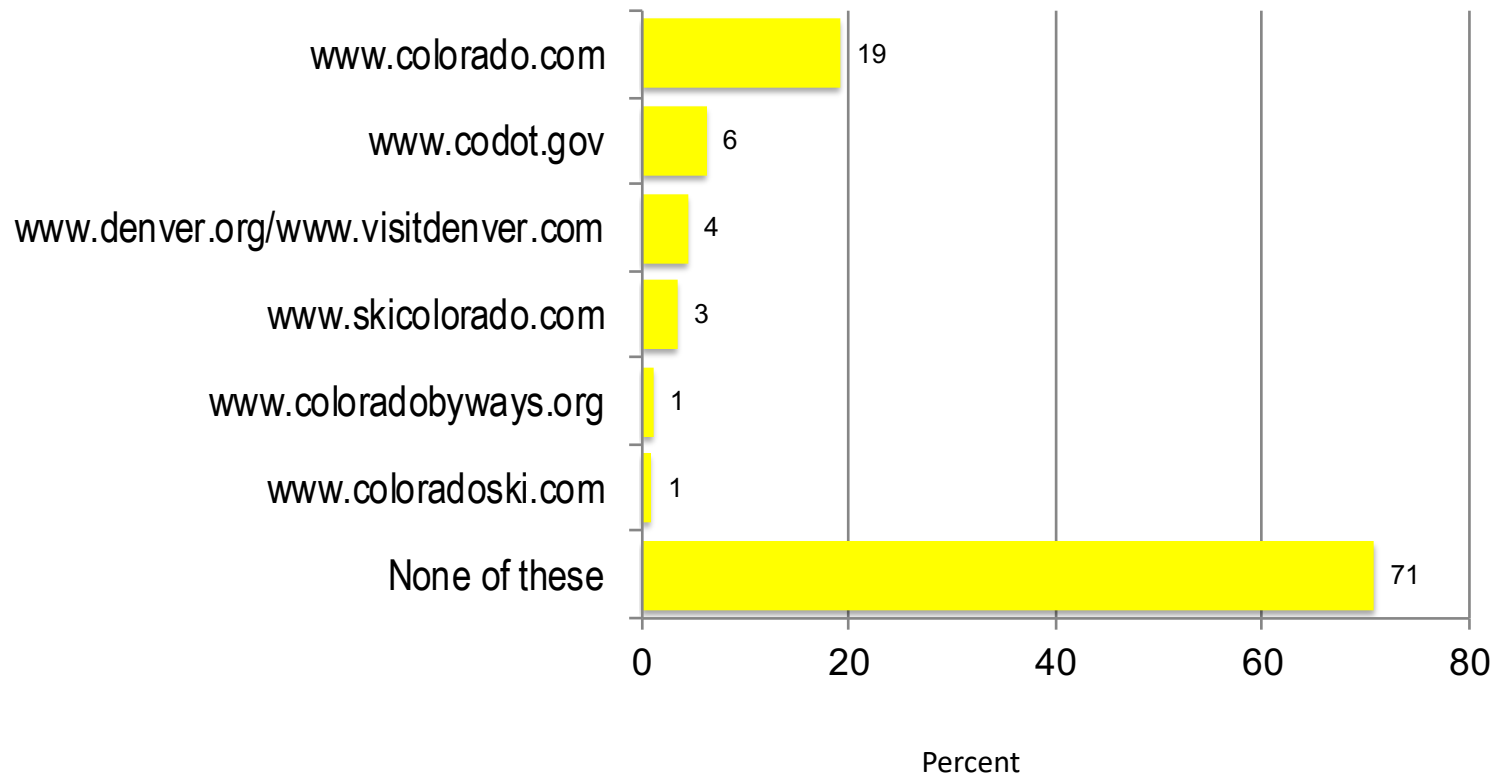
Elements of Trip Planned Online — Leisure

Base: Used Internet for trip planning



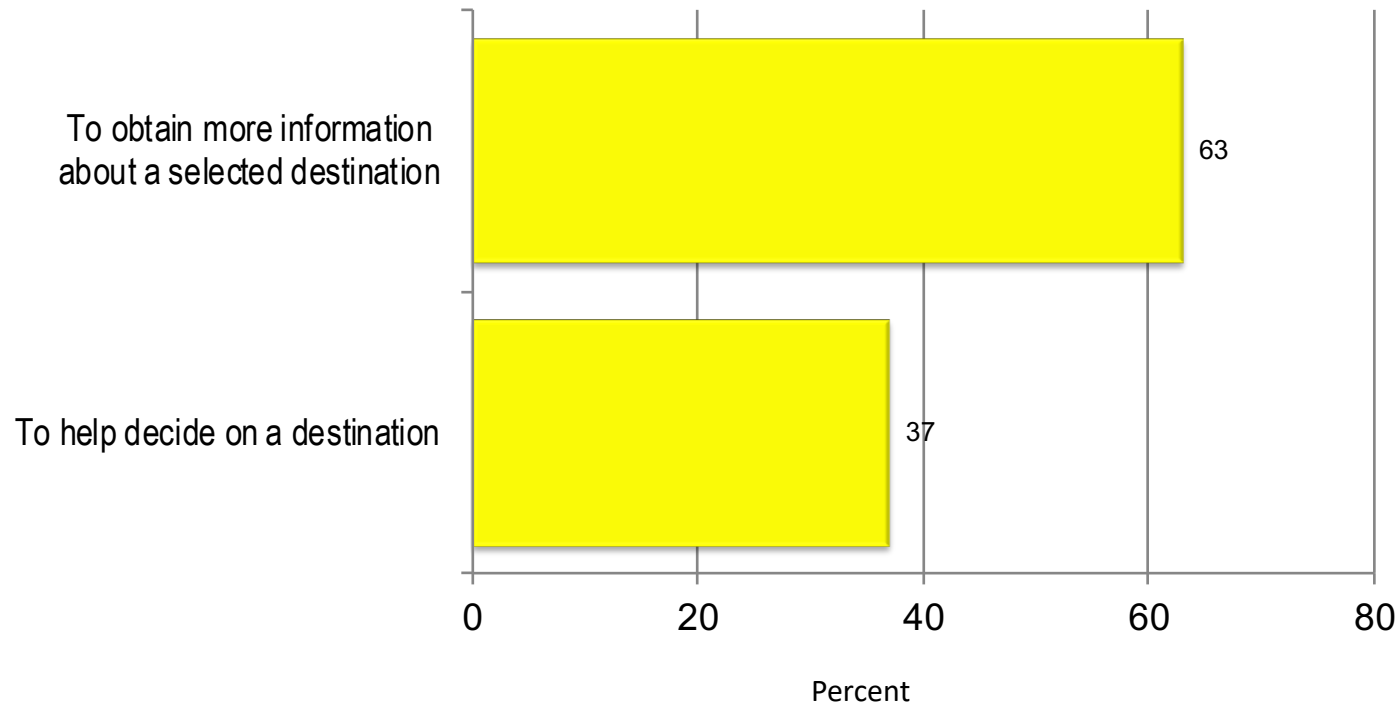
Internet Sites Used for Planning Trip

Base: Used Internet for trip planning



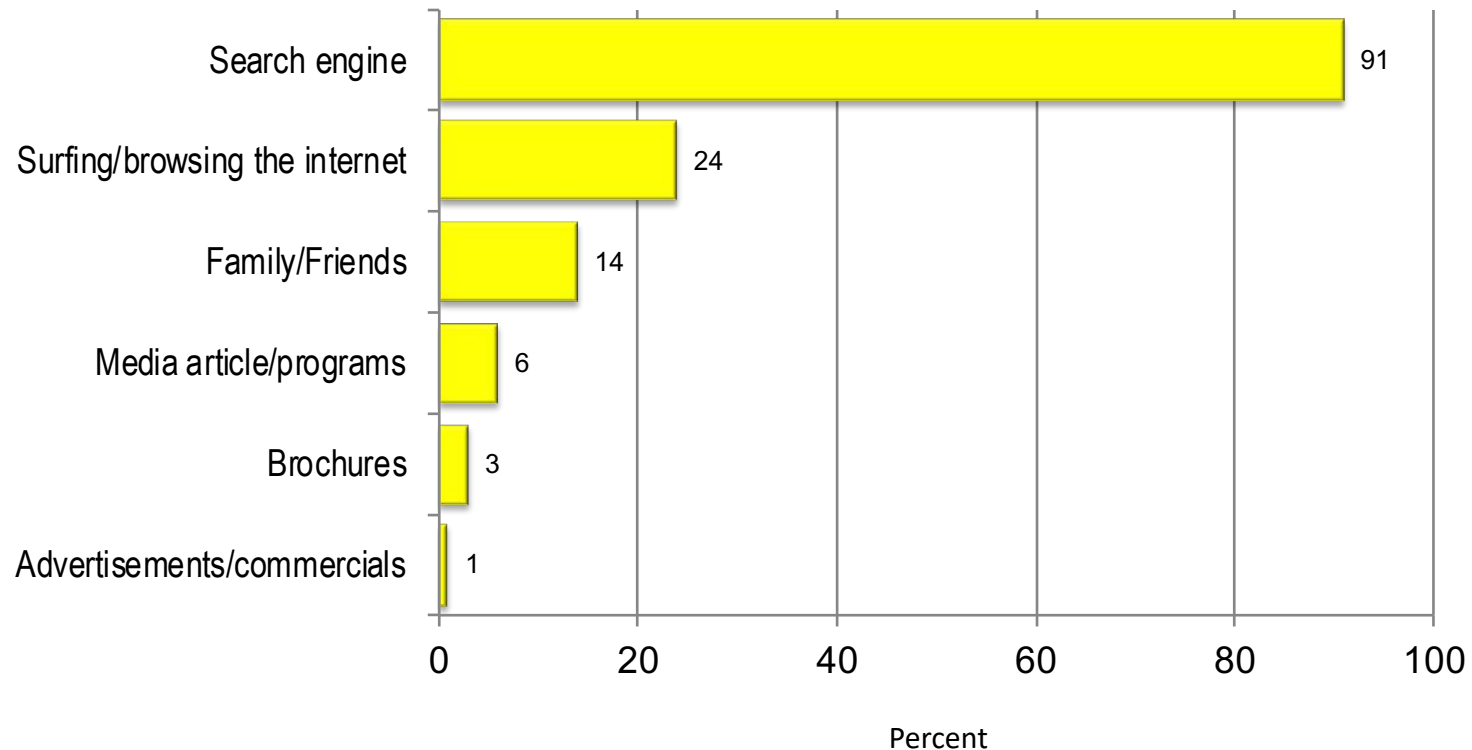
Reason for Visiting Websites --- Leisure

Base: Used specific websites for trip planning



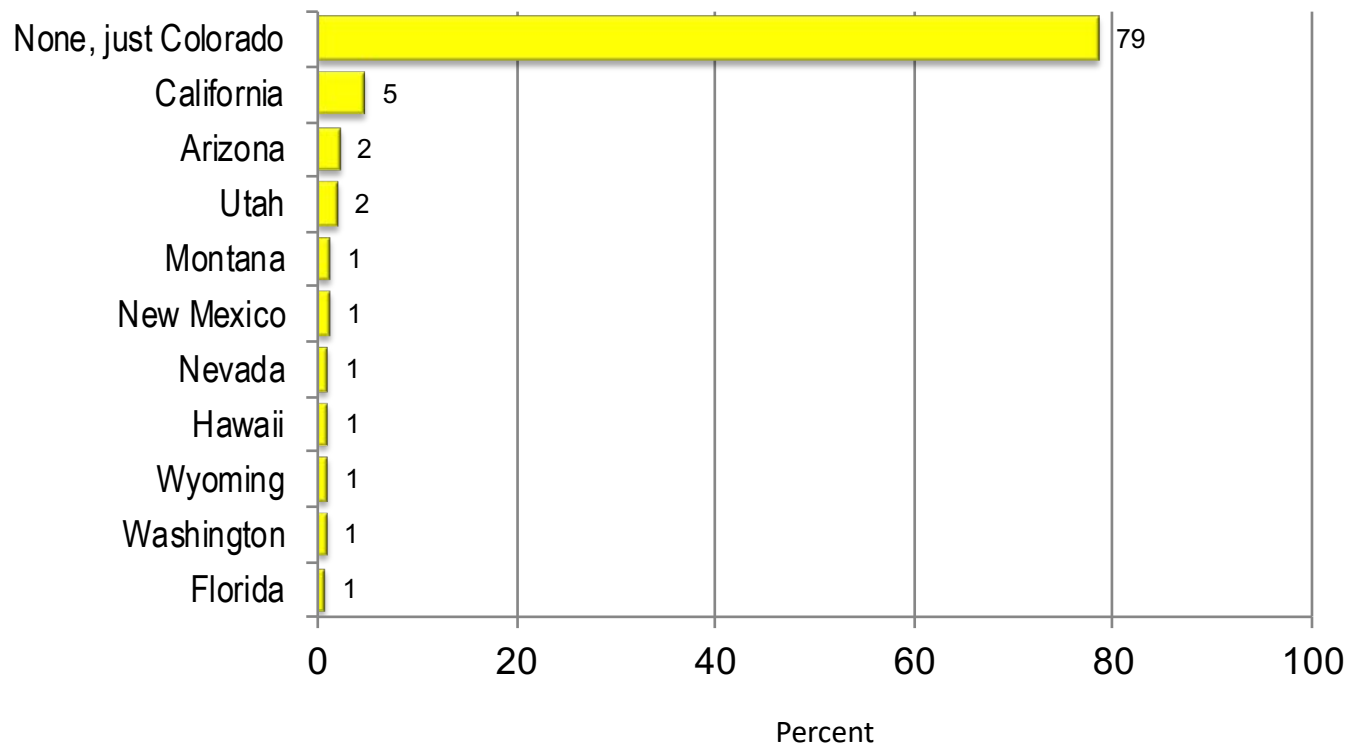
How Websites Were Discovered — Leisure

Base: Used specific websites for trip planning



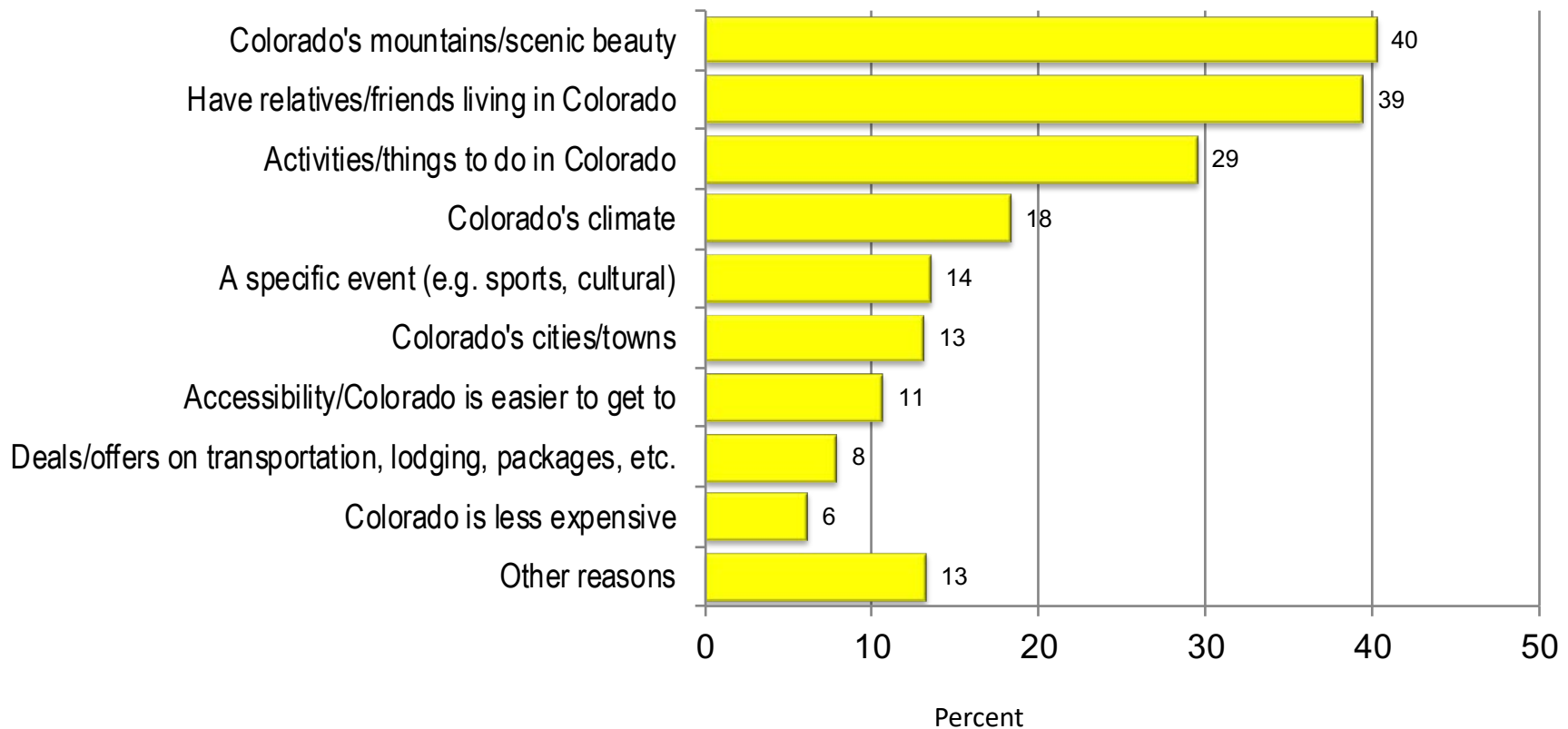
Other Destinations Considered For Trip Apart From Colorado — Leisure

Base: Overnight Leisure Trips



Stated Aspects of Greatest Interest When Choosing Colorado Over Competition

Base: Overnight Leisure Trips



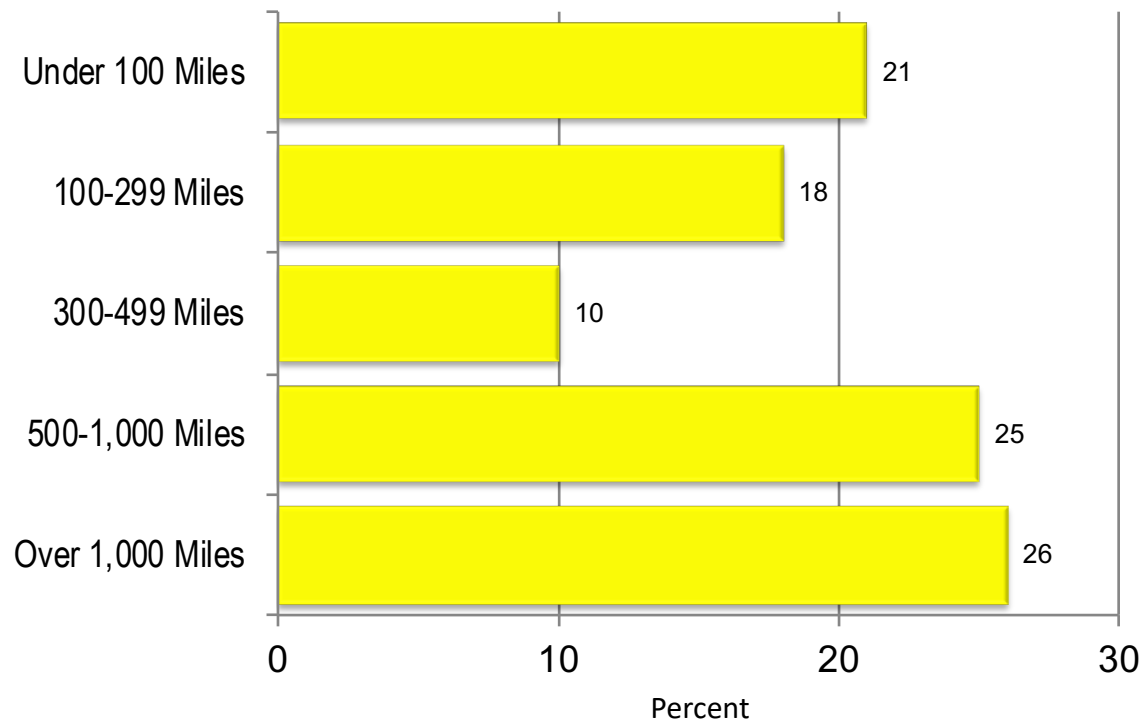


Trip Characteristics



Distance Traveled

Base: Overnight Leisure Trips

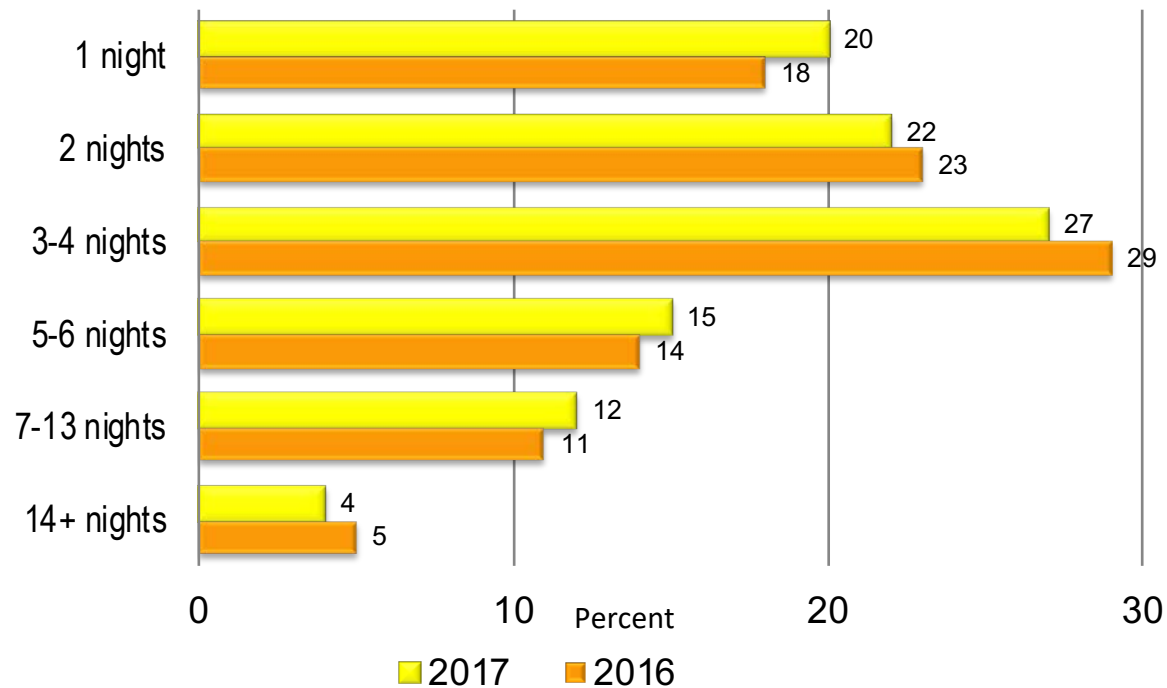


Length of Colorado Trip

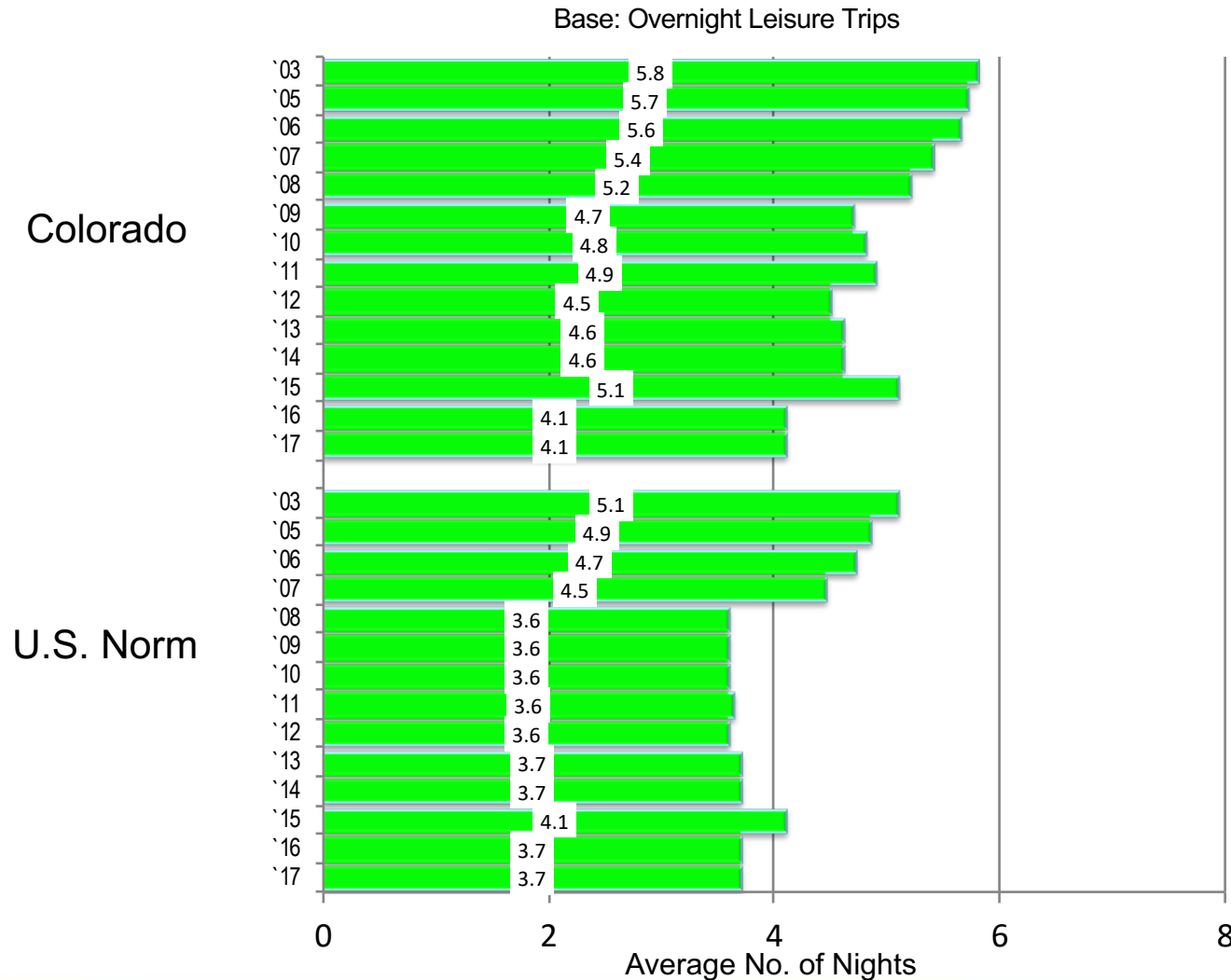
Base: Overnight Leisure Trips

**Average 2017
= 4.1 Nights**

**Average 2016
= 4.1 Nights**

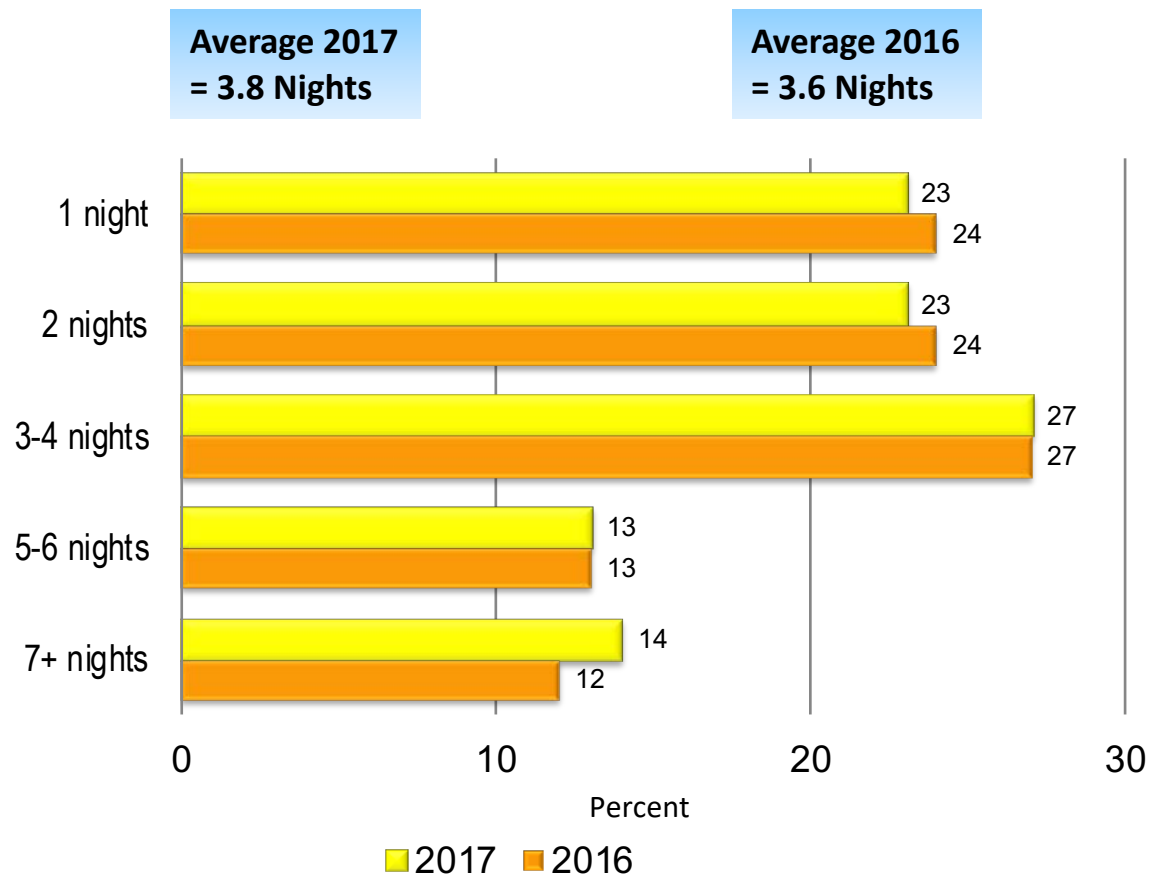


Length of Trip



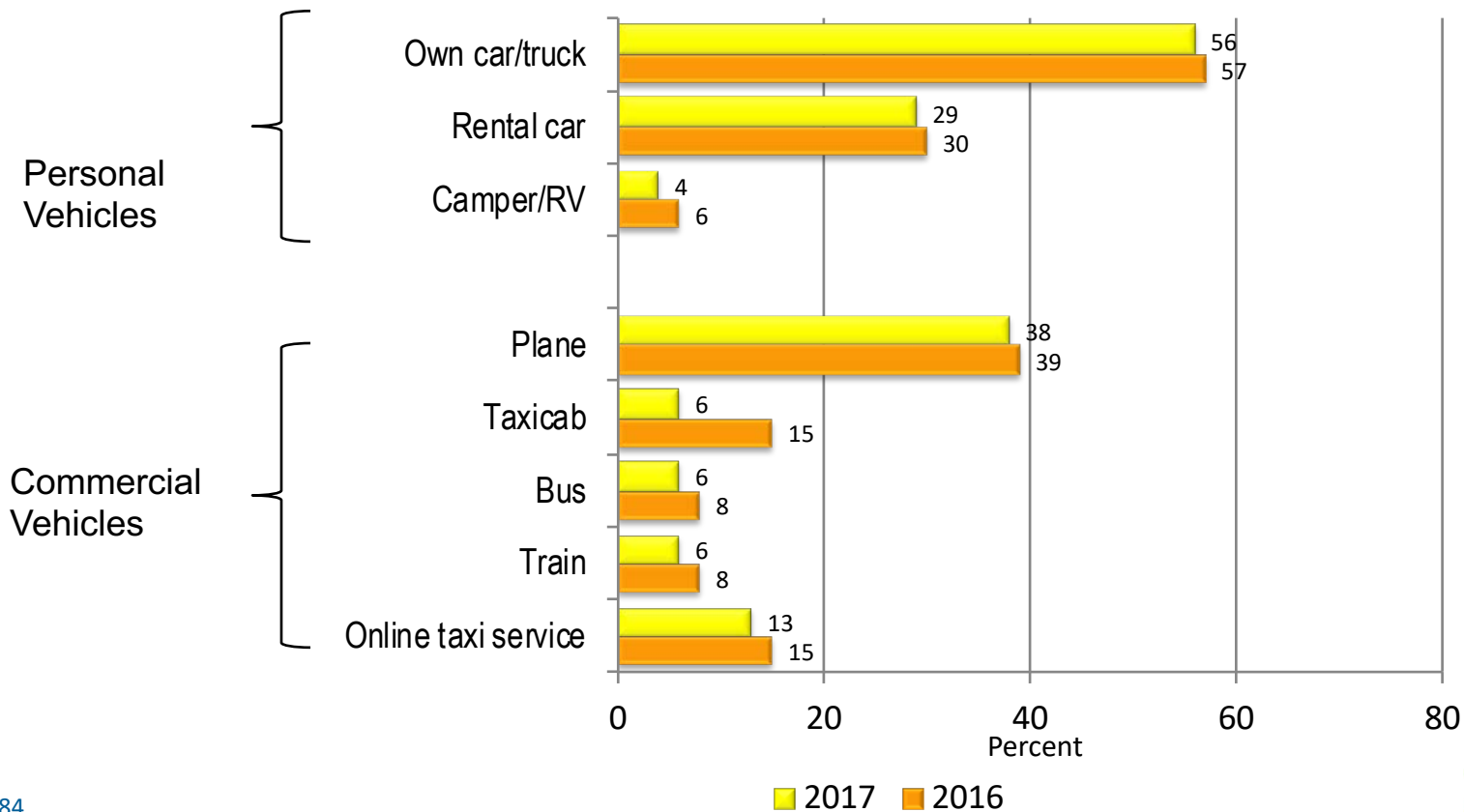
Length of Stay in Colorado

Base: Overnight Leisure Trips



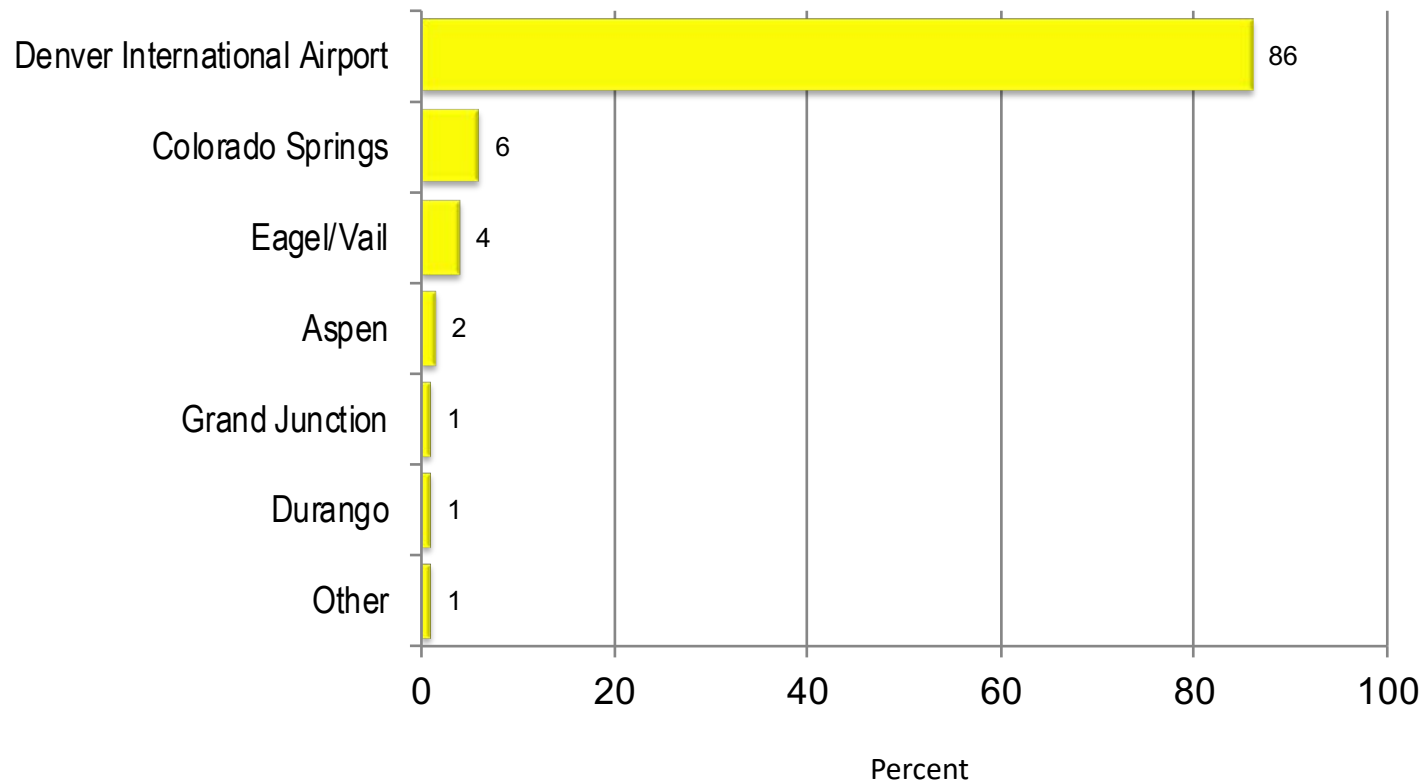
Transportation Used on Colorado Trip

Base: Overnight Leisure Trips Originating Out of State

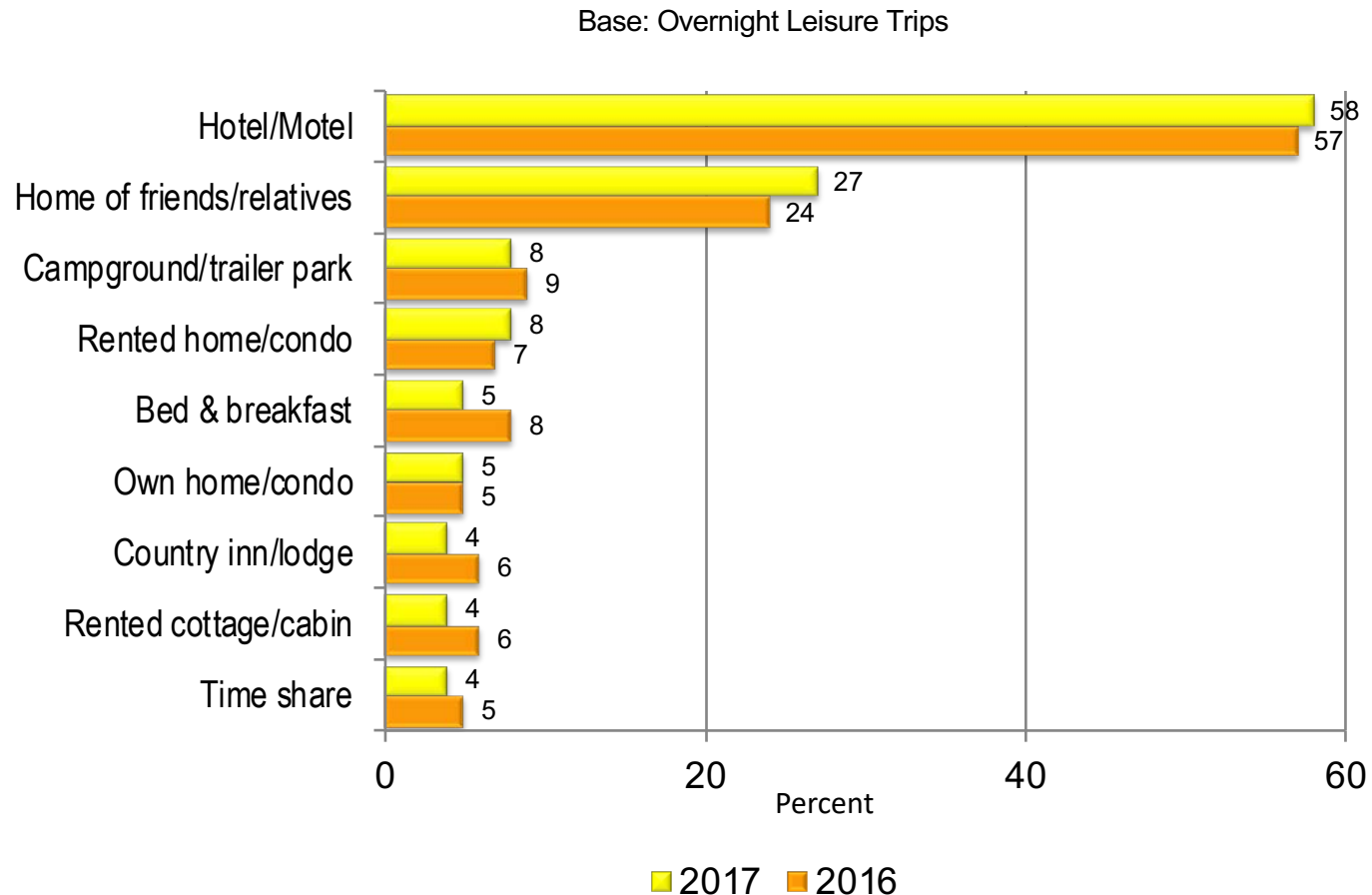


Airport of Arrival in Colorado

Base: Leisure Travelers Who Flew In

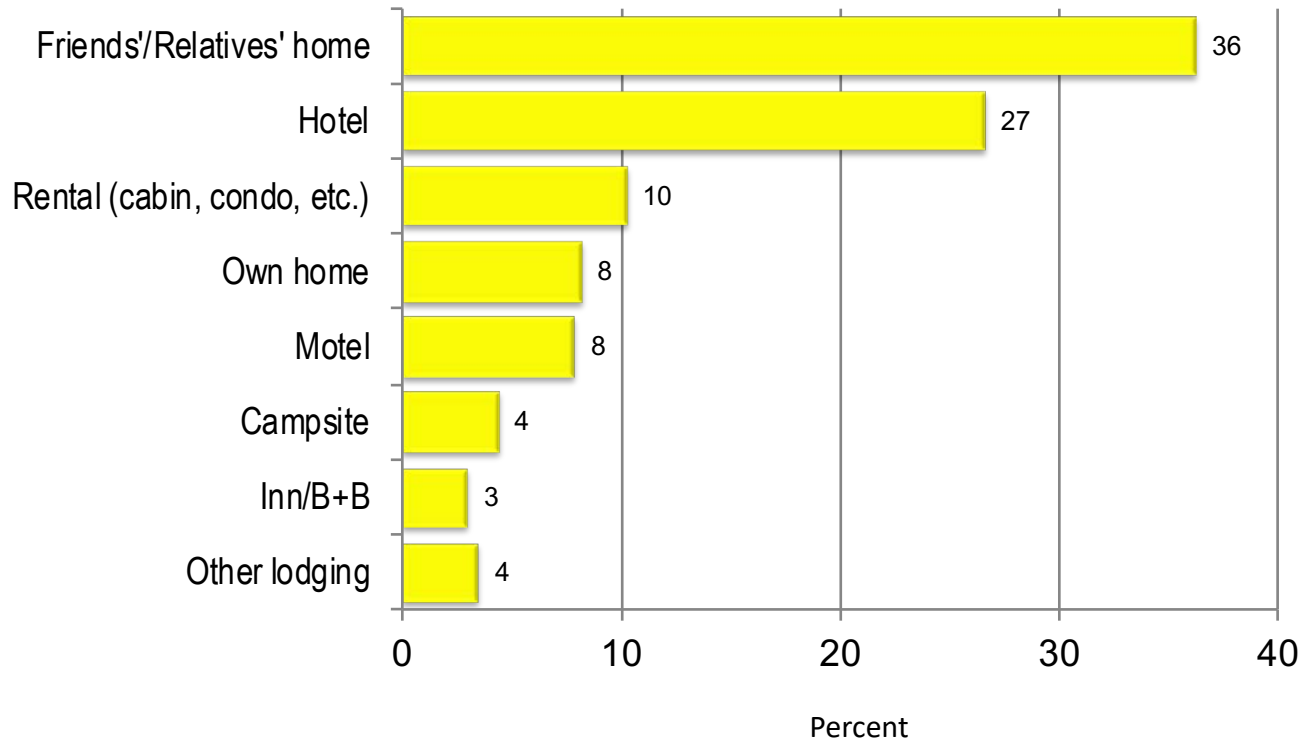


Accommodations Used on Trip

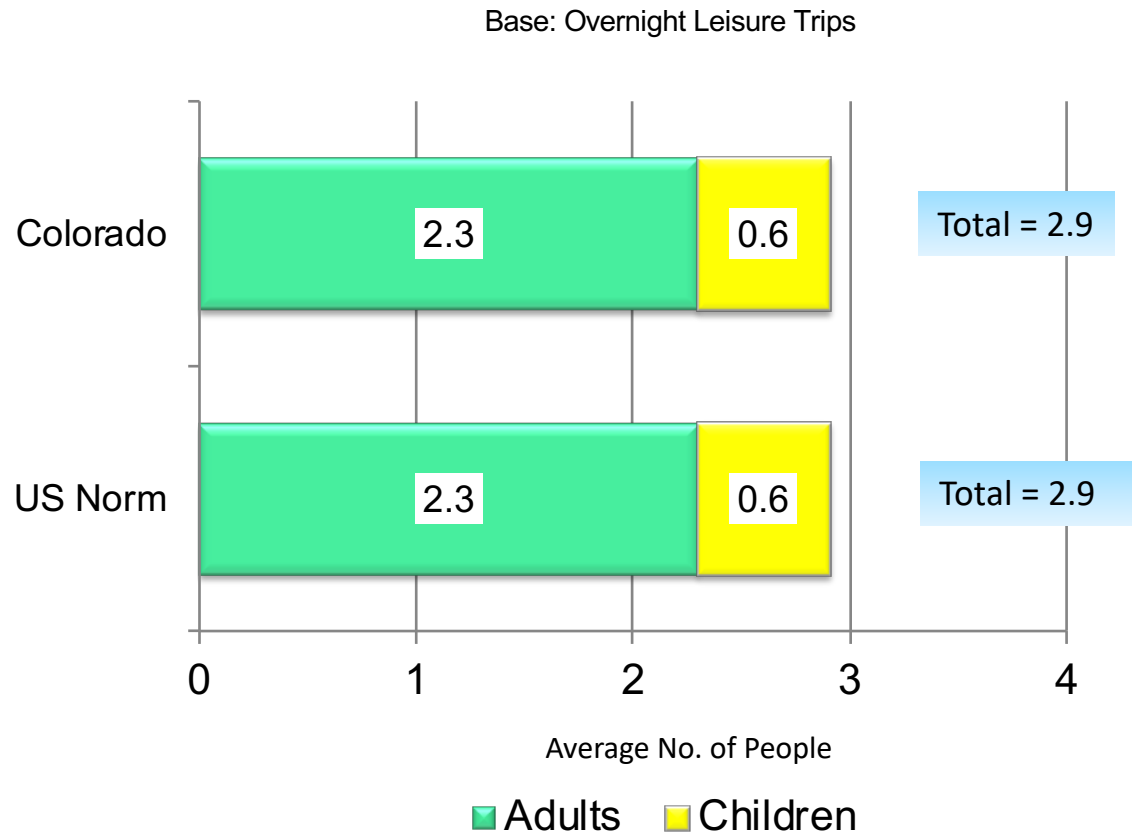


Percent of Colorado Leisure Trip-Nights Spent in Each Type of Accommodation

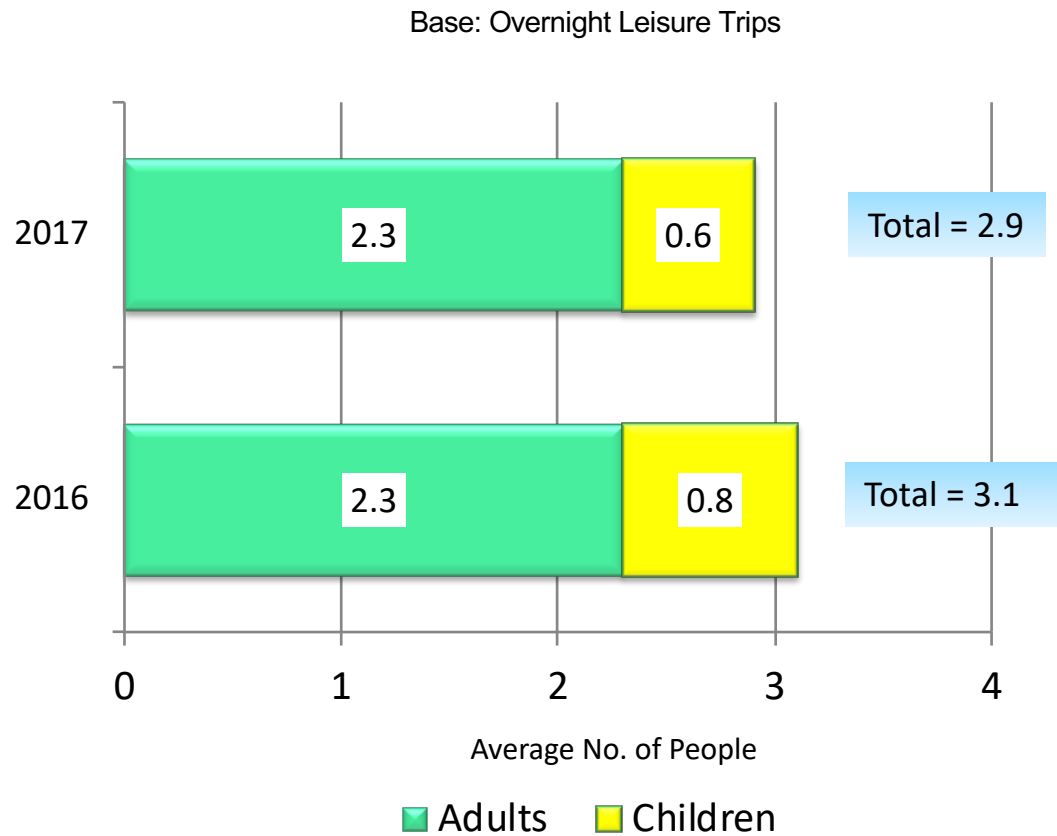
Base: Those Who Stayed at least 1 night in Colorado



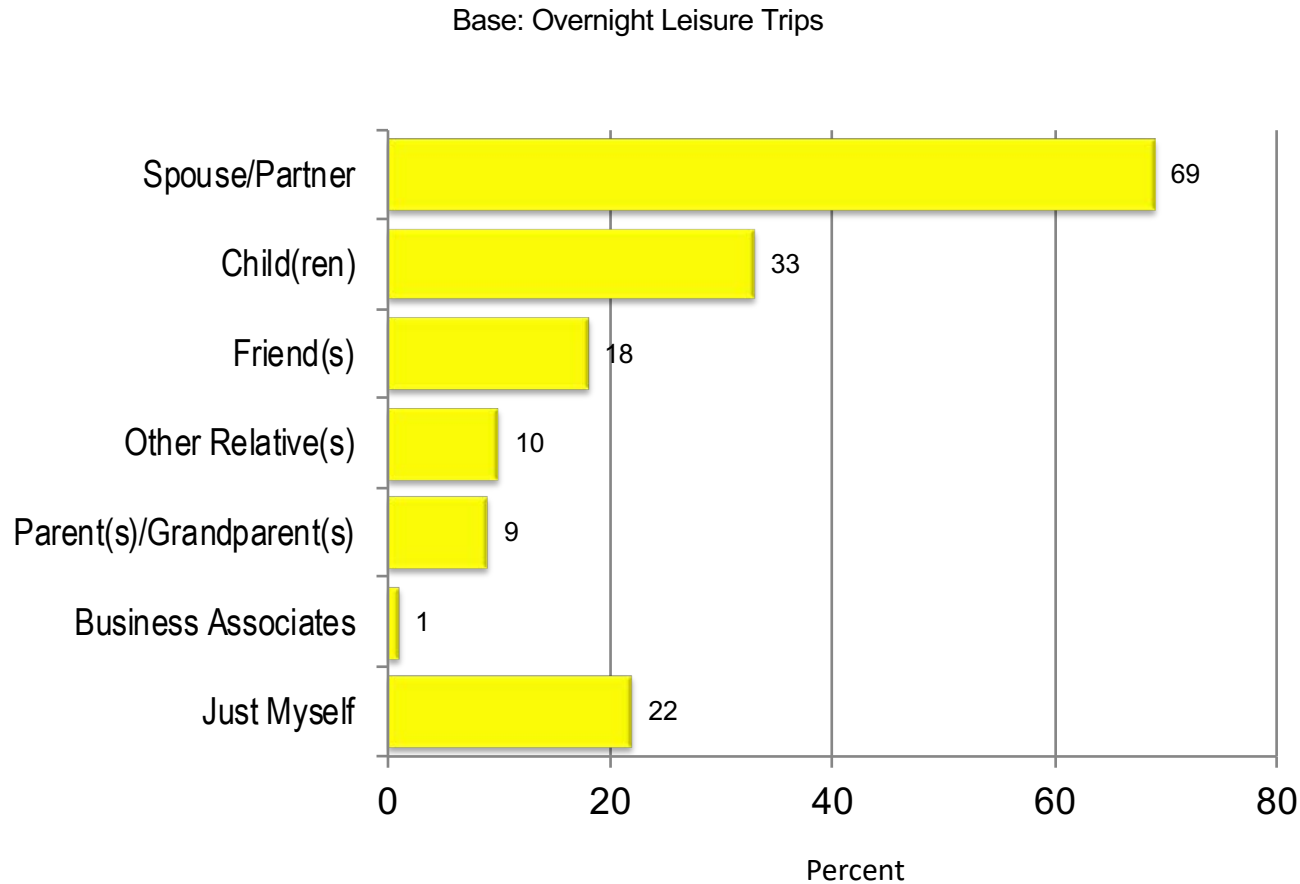
Size of Travel Party



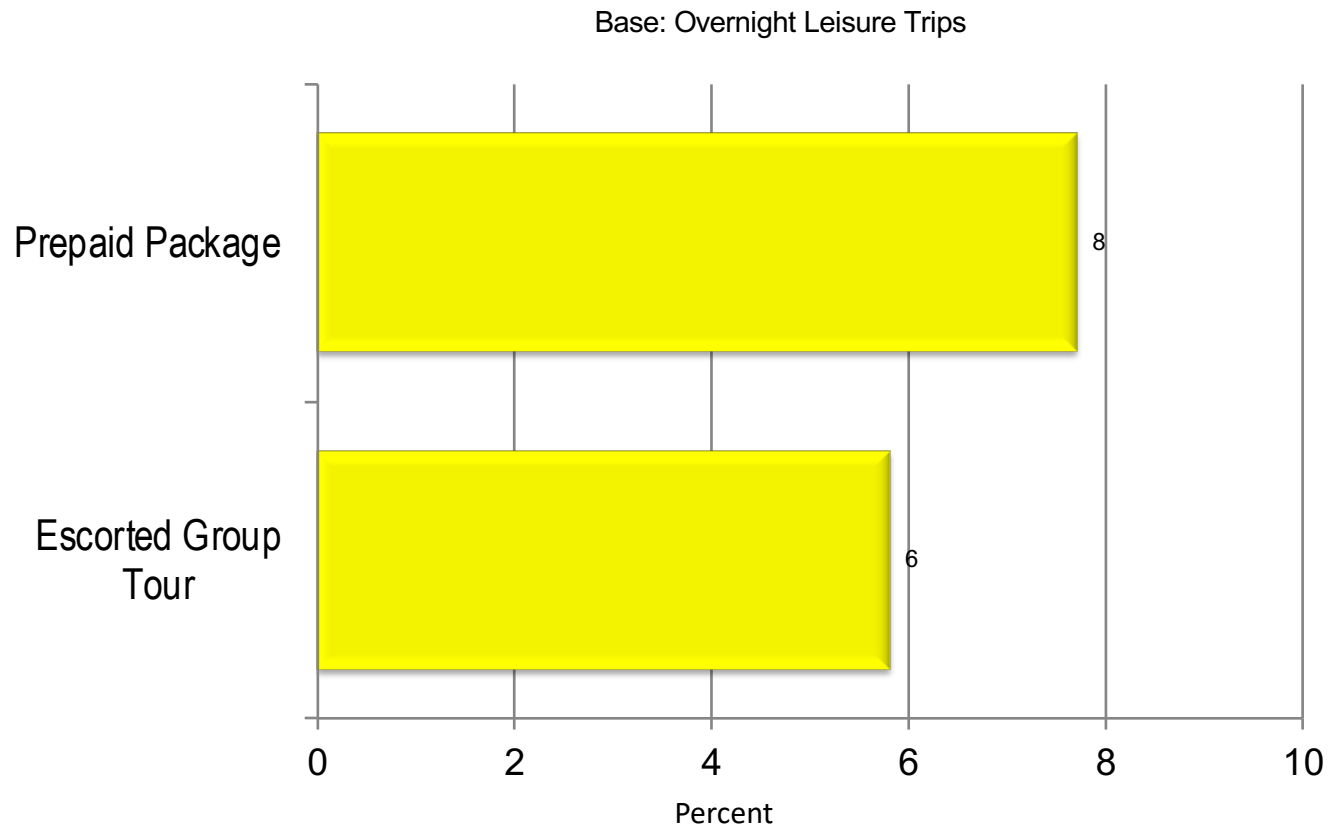
Size of Travel Party



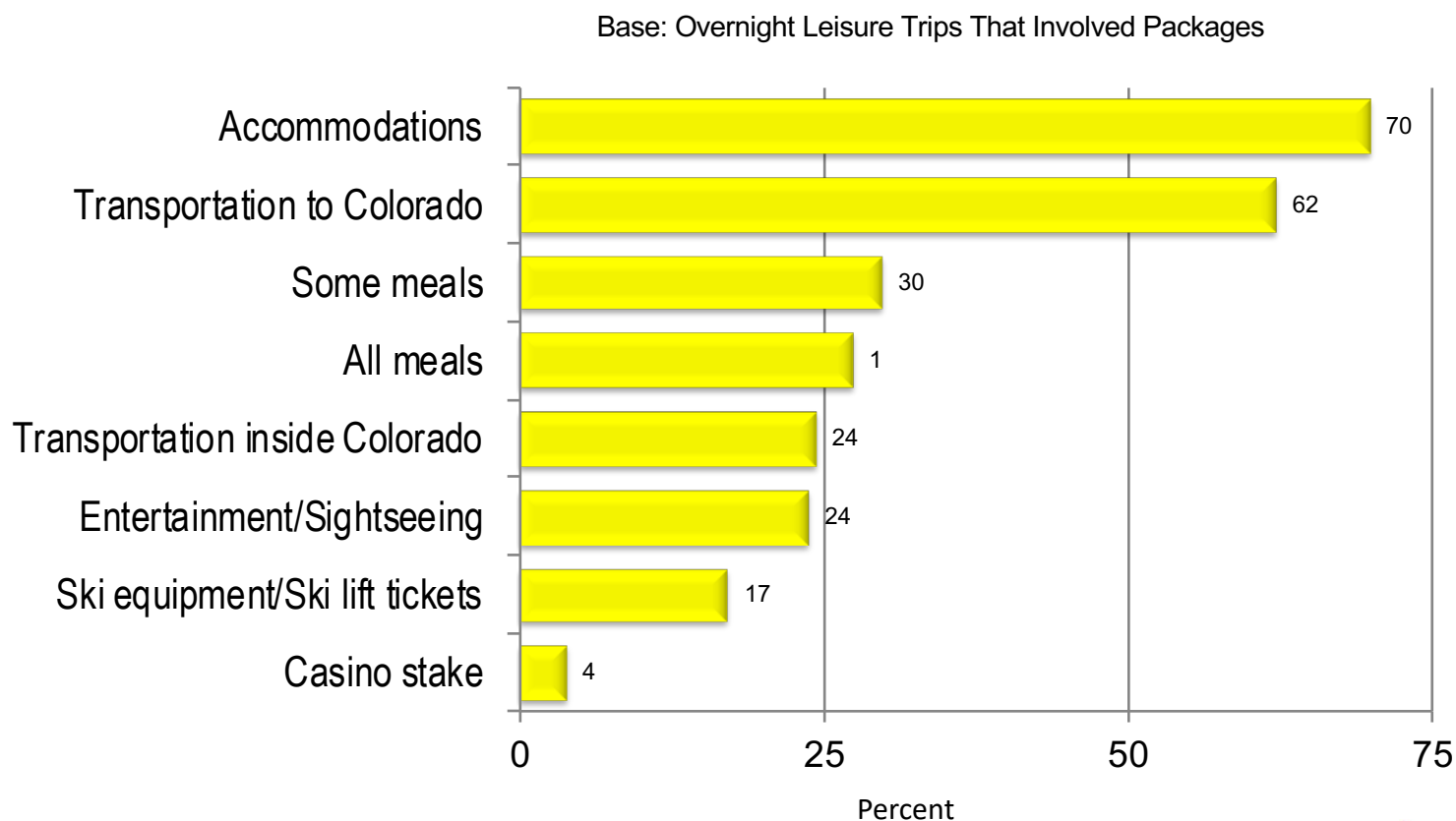
Composition of Travel Party



Use of Escorted Tours/Prepaid Packages

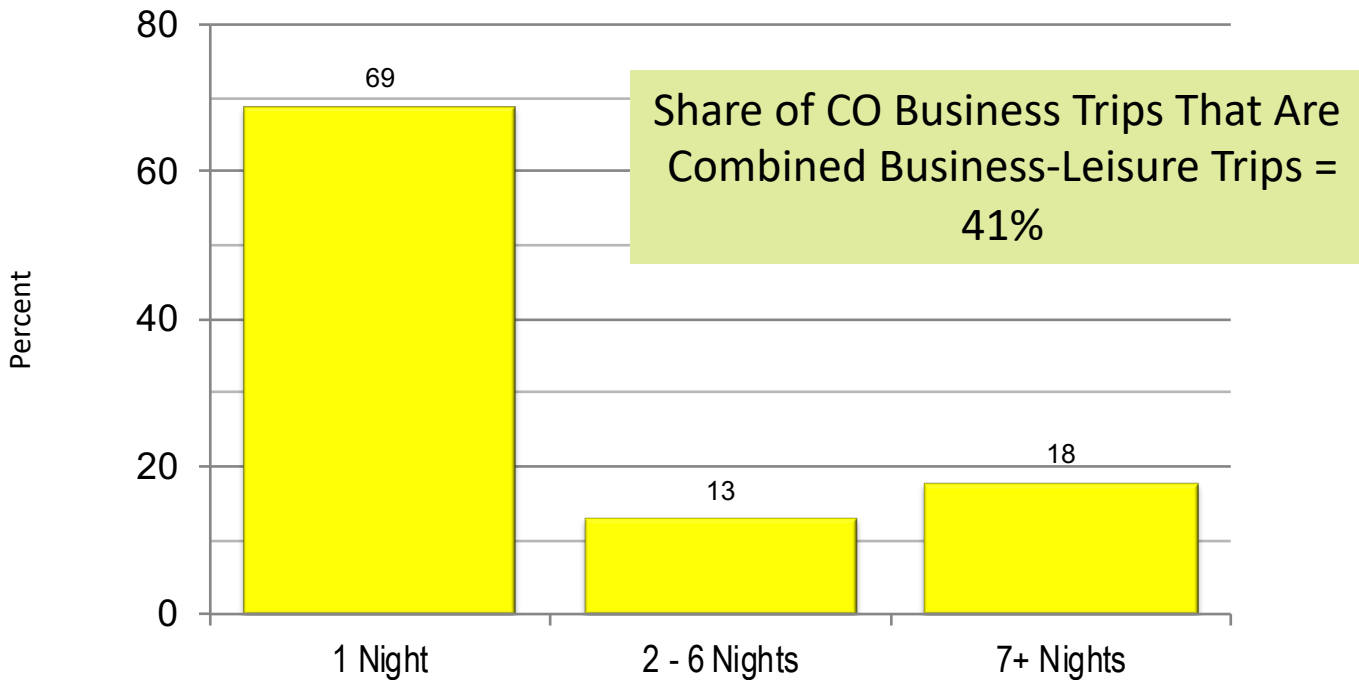


Elements in Prepaid Packages



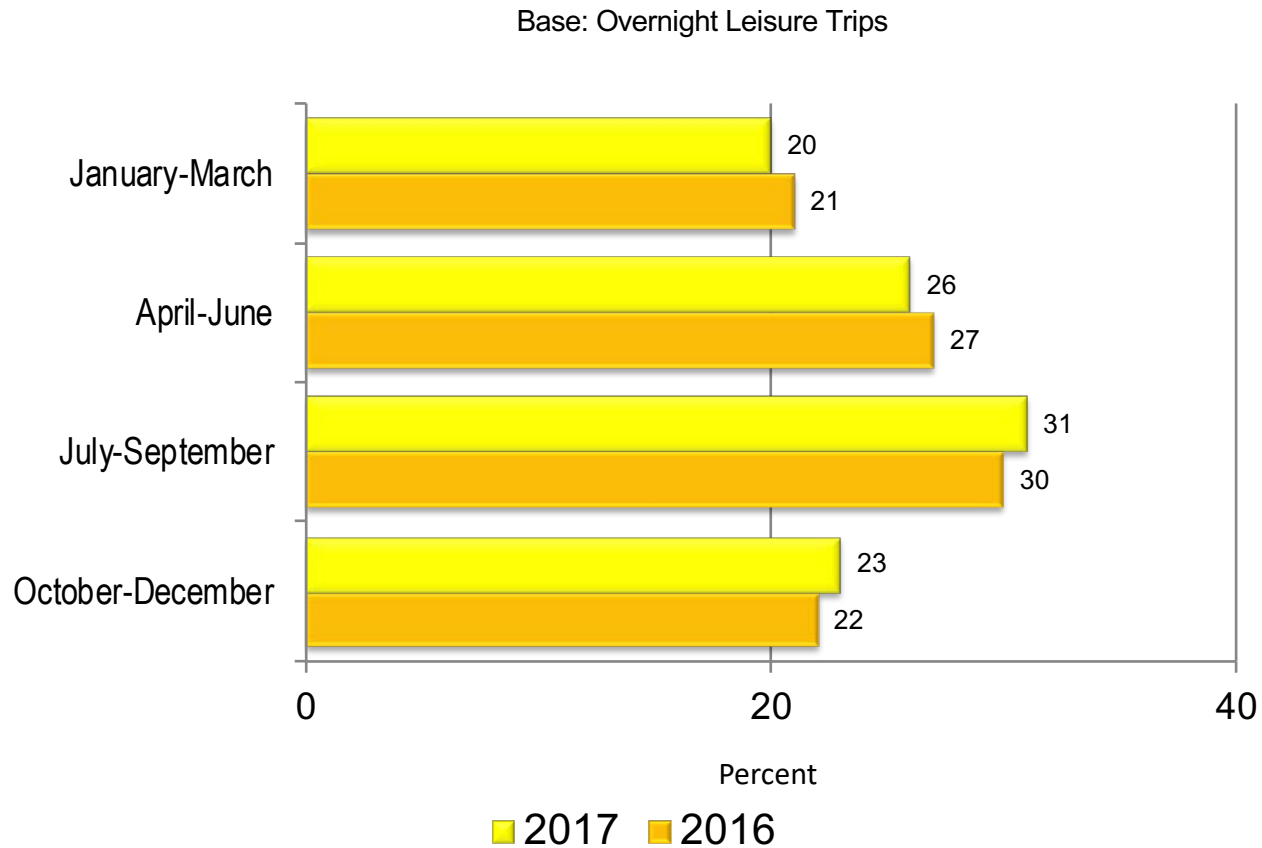
Business/Leisure Trips — Number of Extra Nights Spent in Colorado

Base: Overnight Business/Leisure Trips

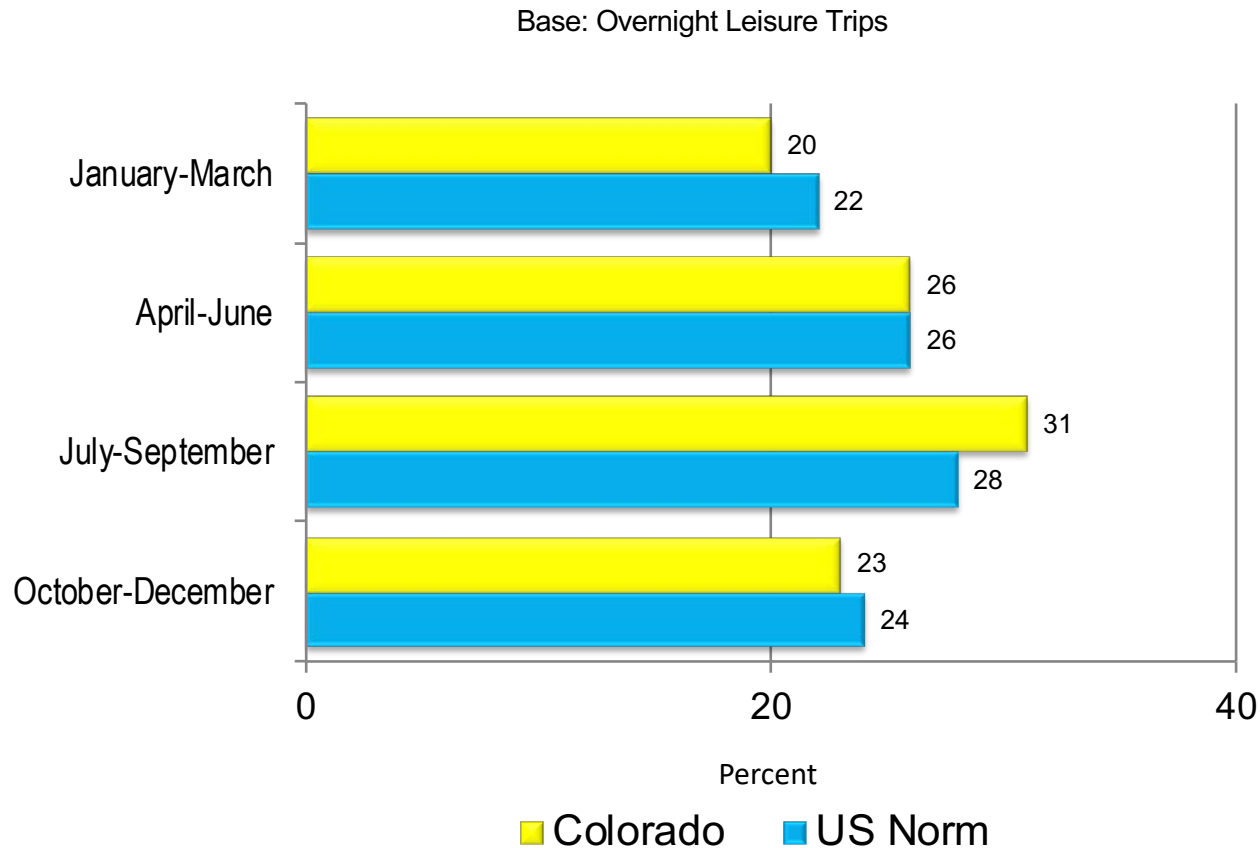


| | |
|---|-----|
| Mean Extra Nights for Leisure | 3.5 |
| Percent of Extra Nights Spent in Colorado | 92% |
| Percent of Extra Nights Spent Elsewhere | 8% |

Distribution of Trips by Quarter

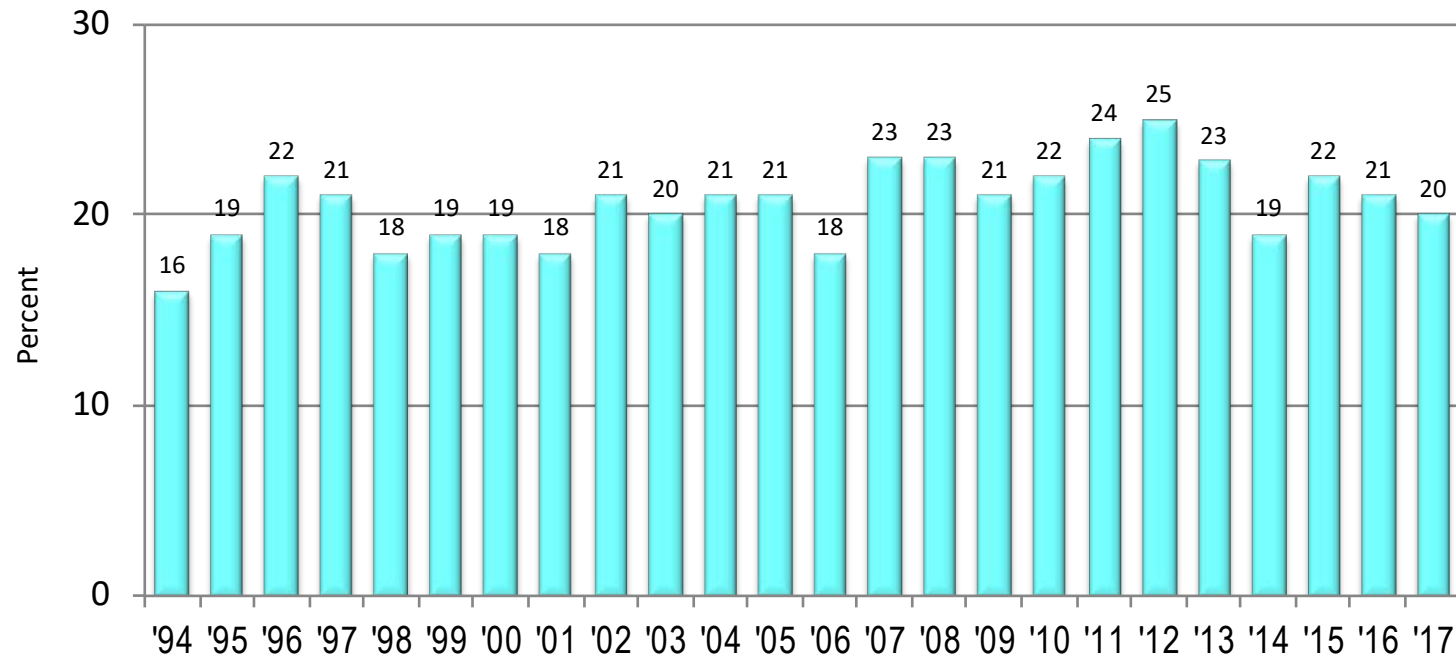


Distribution of Trips by Quarter



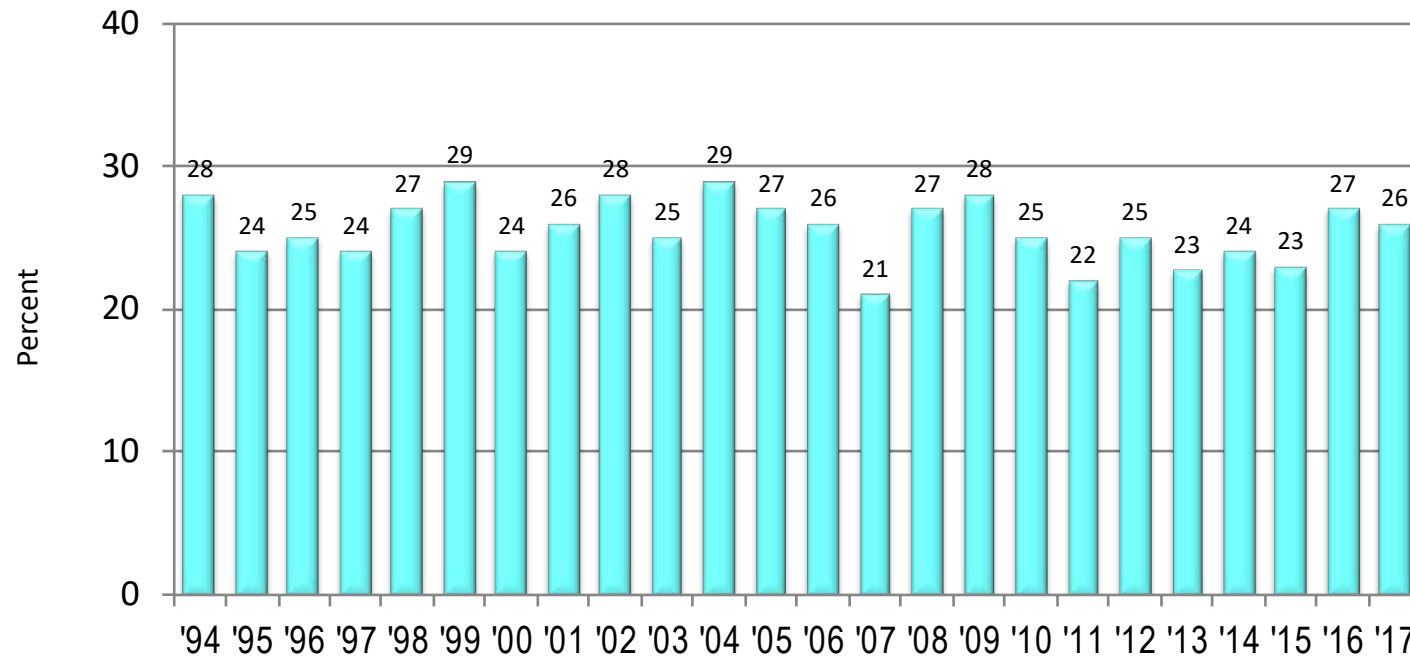
Distribution of Trips by Quarter — January to March

Base: Overnight Leisure Trips



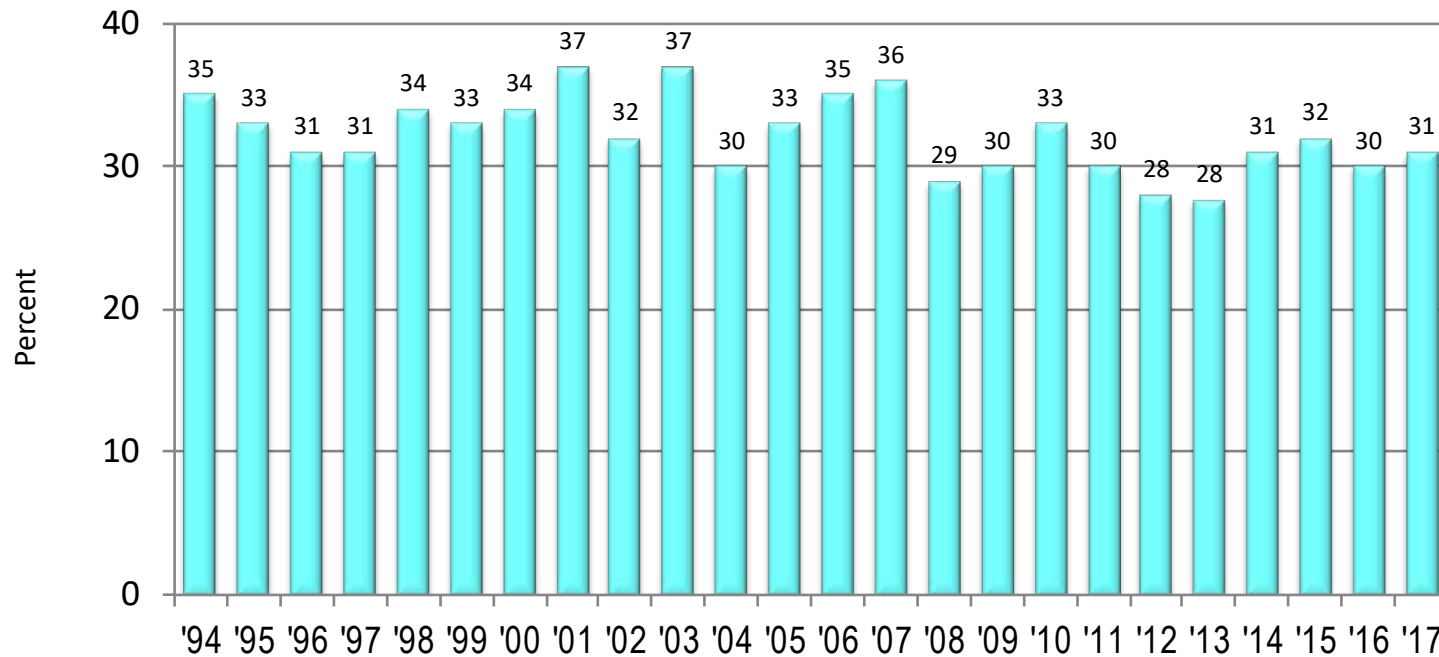
Distribution of Trips by Quarter — April to June

Base: Overnight Leisure Trips



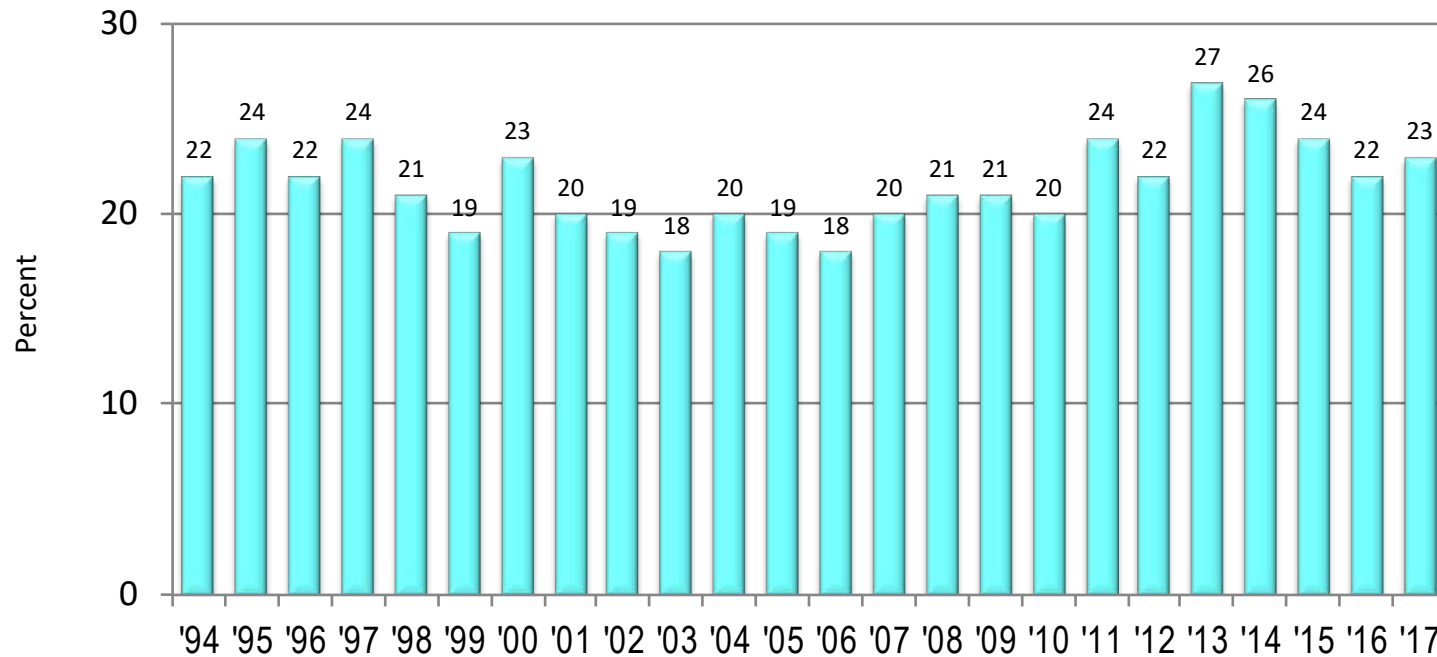
Distribution of Trips by Quarter — July to September

Base: Overnight Leisure Trips



Distribution of Trips by Quarter — October to December

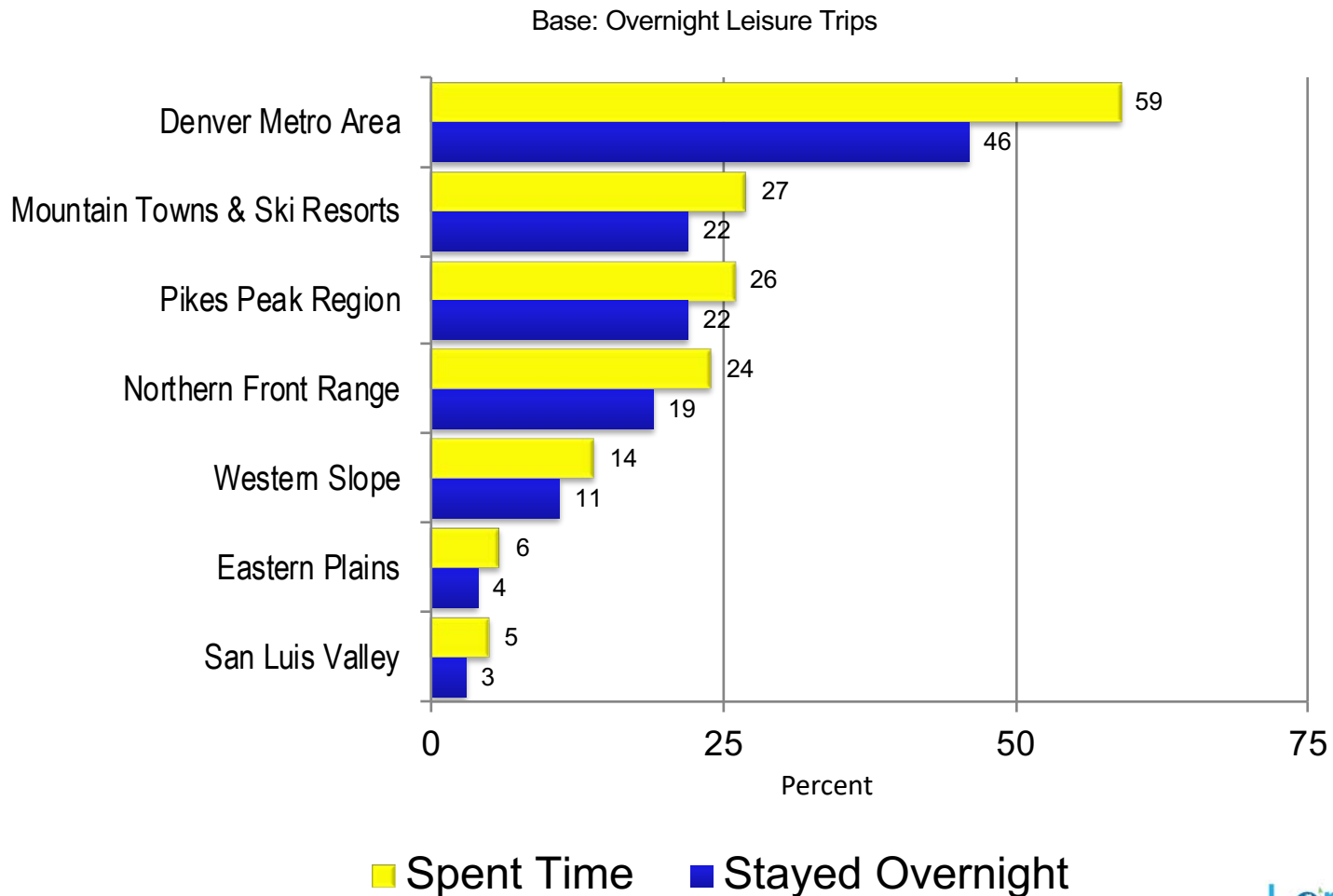
Base: Overnight Leisure Trips



The Trip Experience

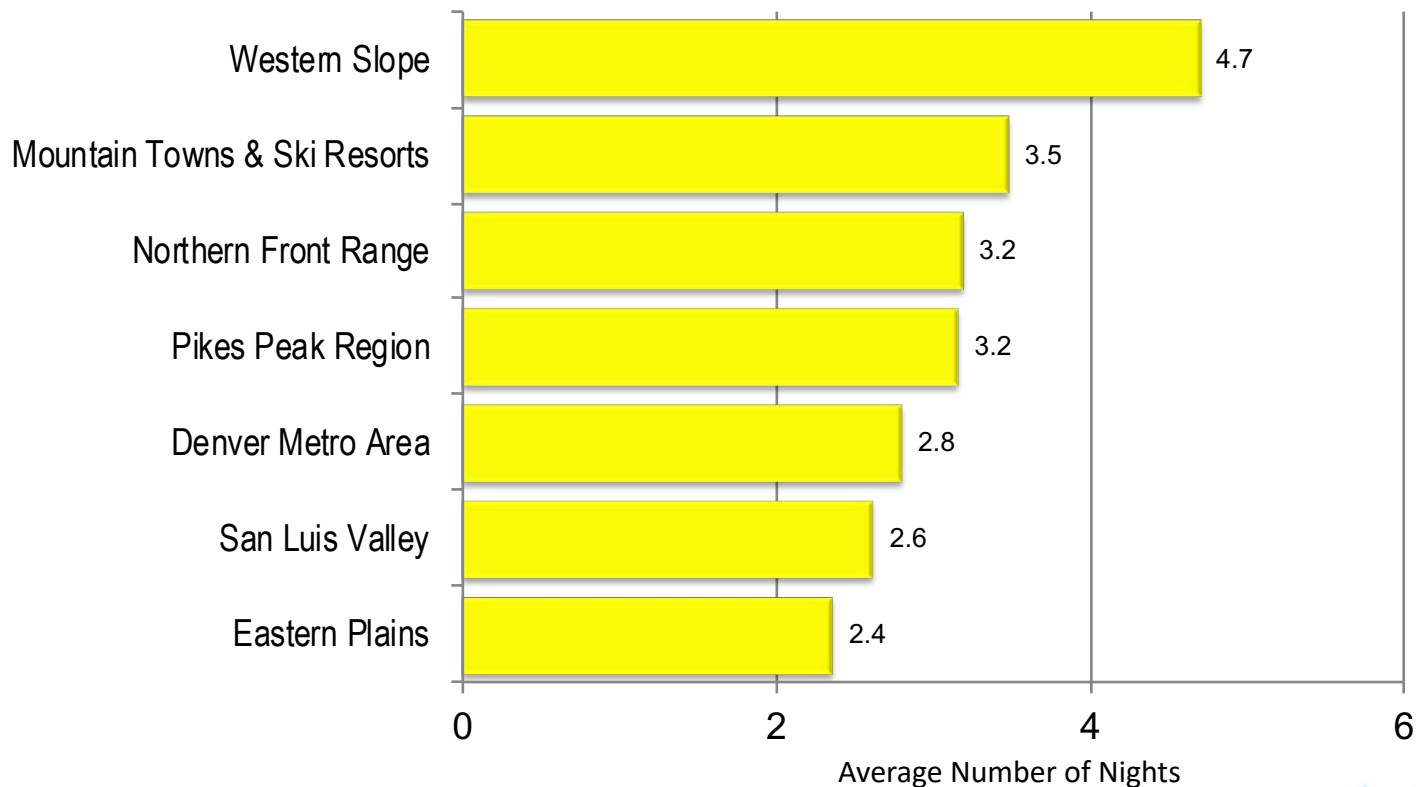


Regions Visited



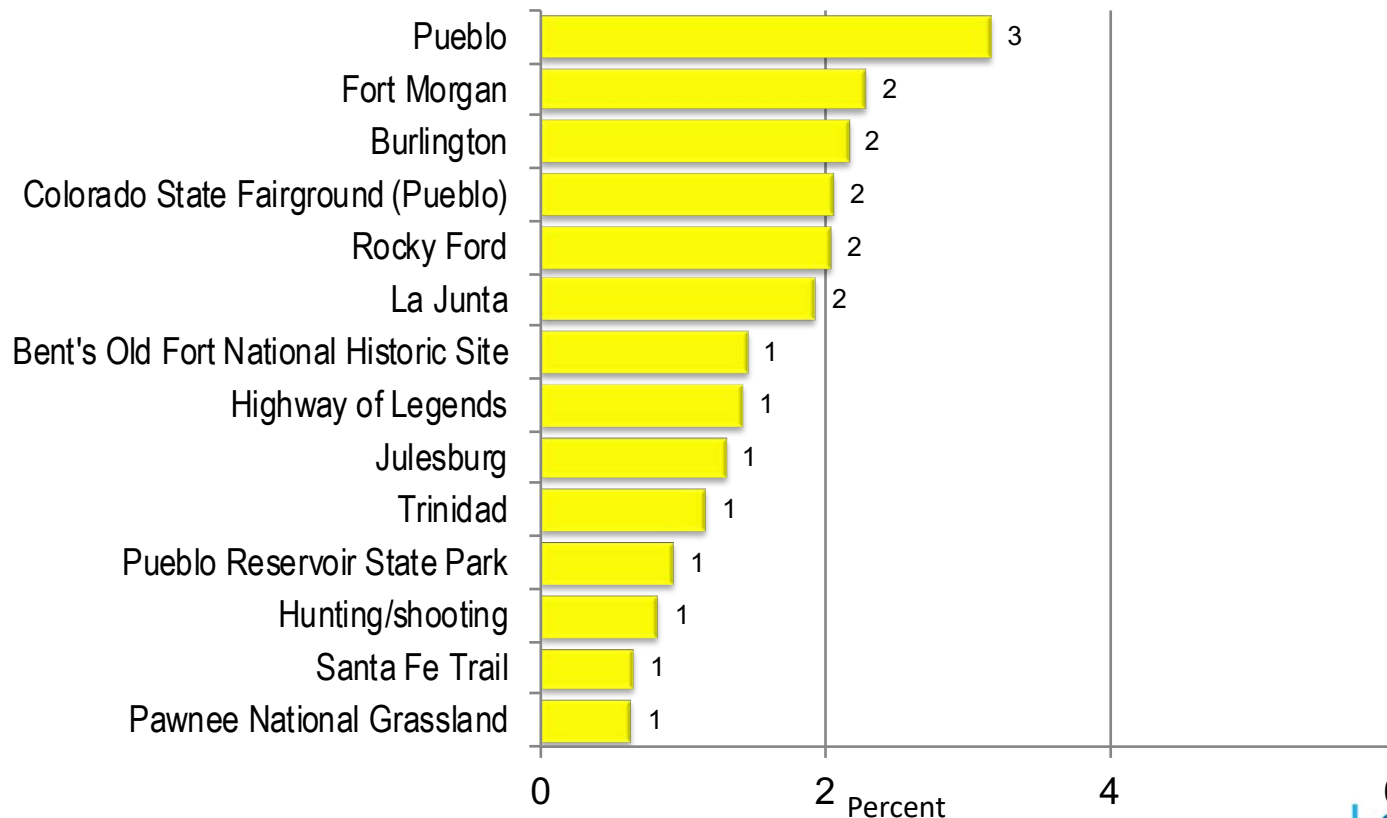
Number of Nights Spent by Region

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



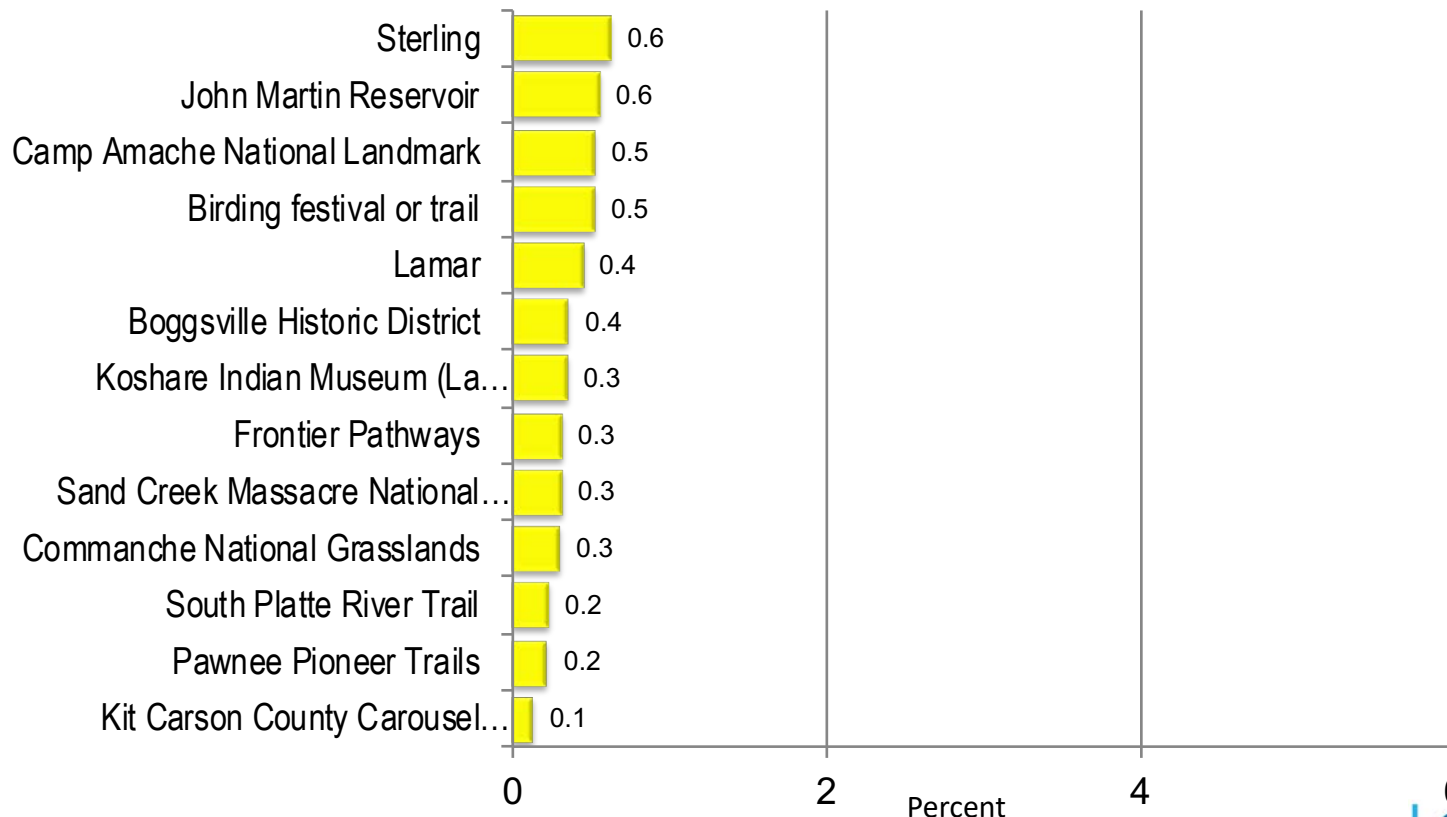
Places/Attractions Visited – Eastern Plains Region

Base: Overnight Leisure Trips



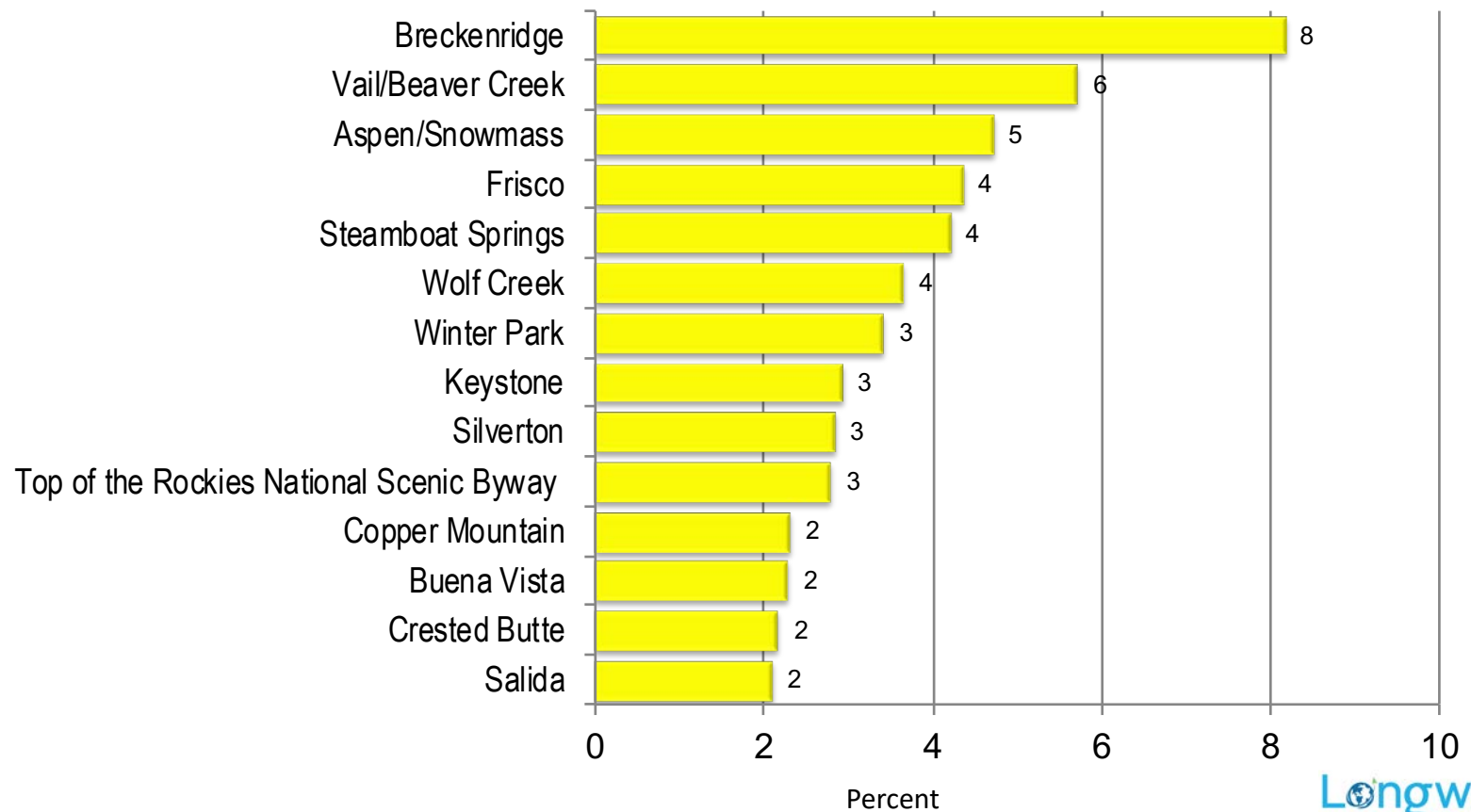
Places/Attractions Visited – Eastern Plains Region (Cont'd)

Base: Overnight Leisure Trips



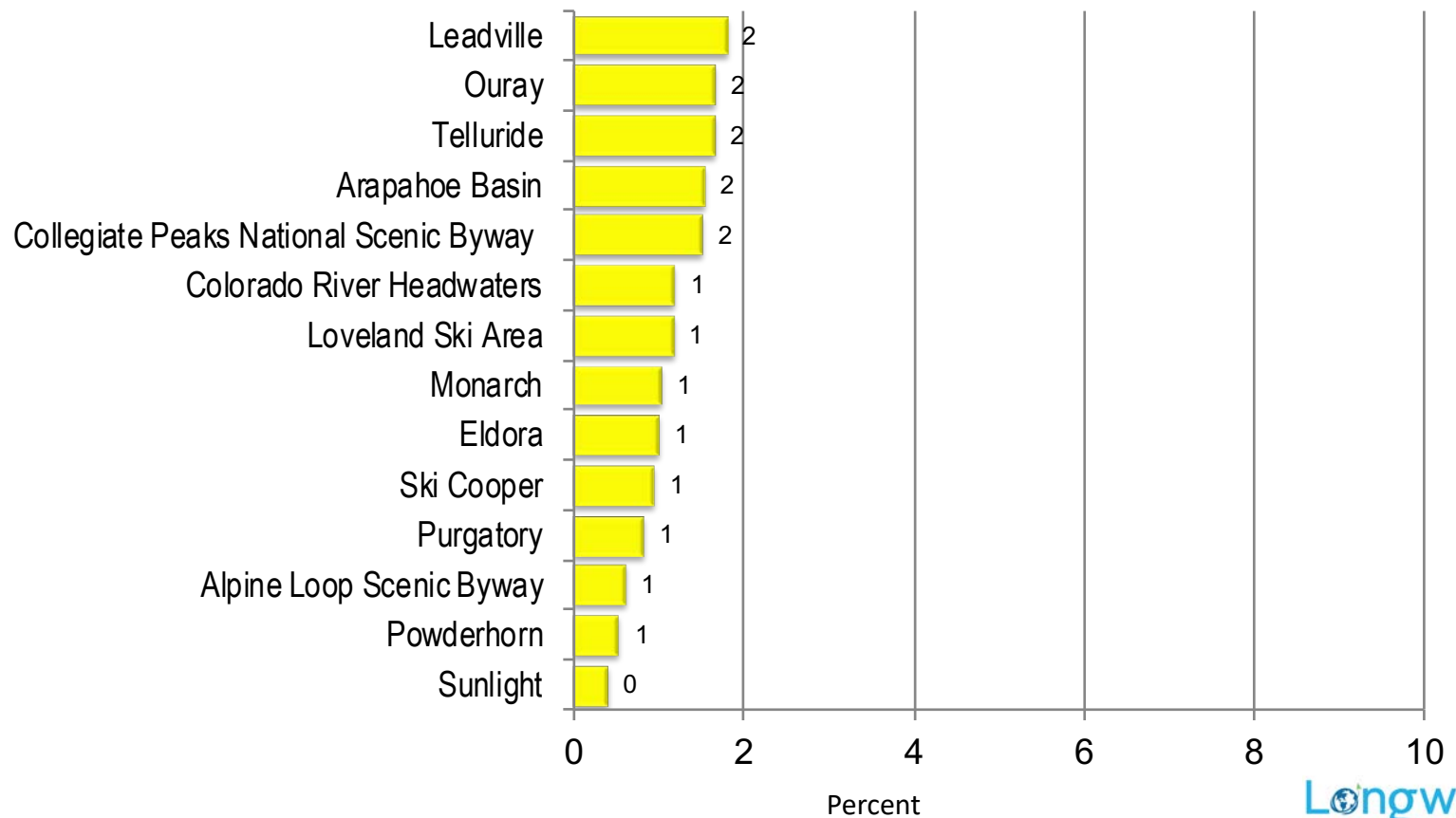
Places/Attractions Visited – Mountain Towns & Ski Resorts

Base: Overnight Leisure Trips



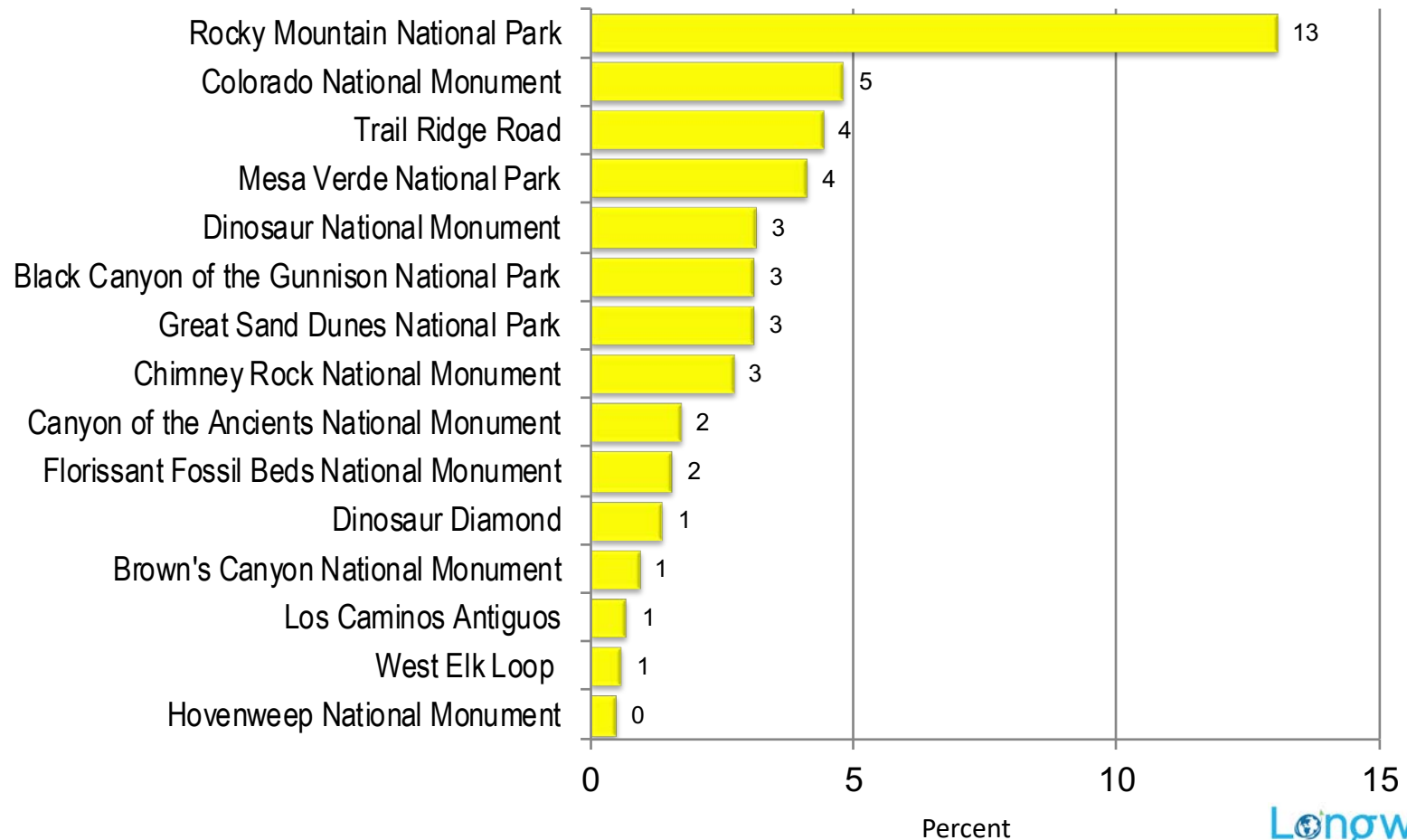
Places/Attractions Visited – Mountain Towns & Ski Resorts (Cont'd)

Base: Overnight Leisure Trips



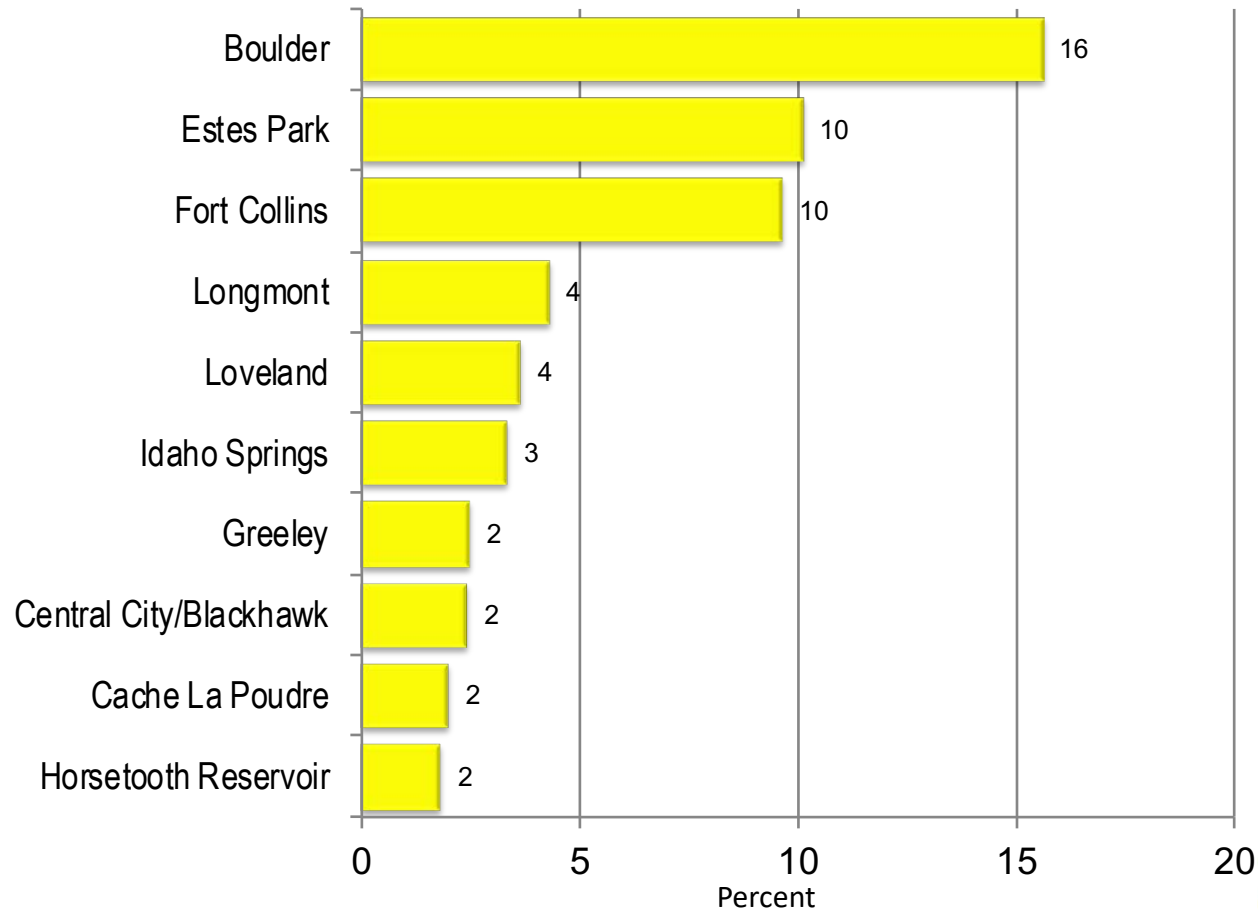
Places/Attractions Visited – National Parks & Monuments

Base: Overnight Leisure Trips



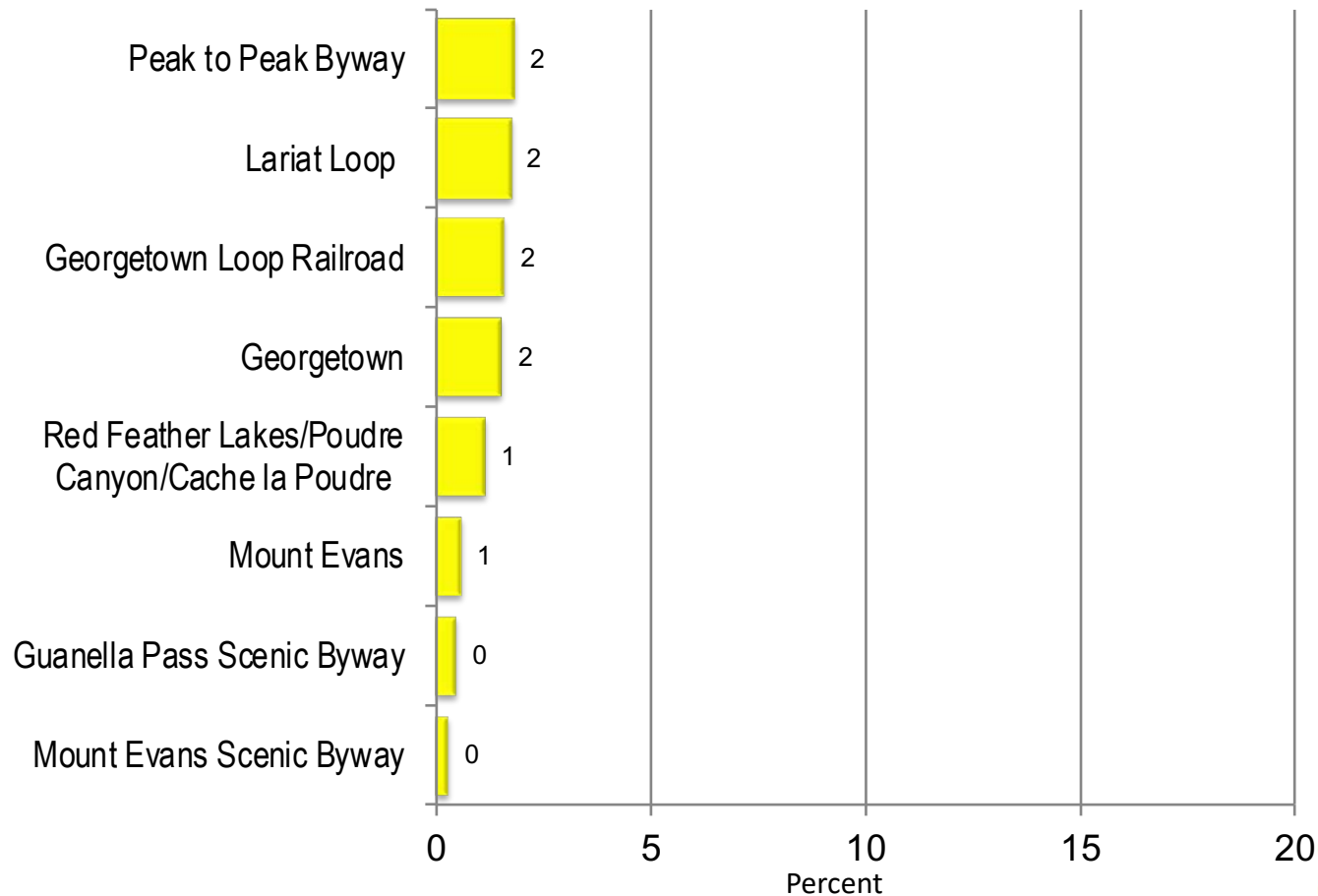
Places/Attractions Visited – Northern Front Range

Base: Overnight Leisure Trips



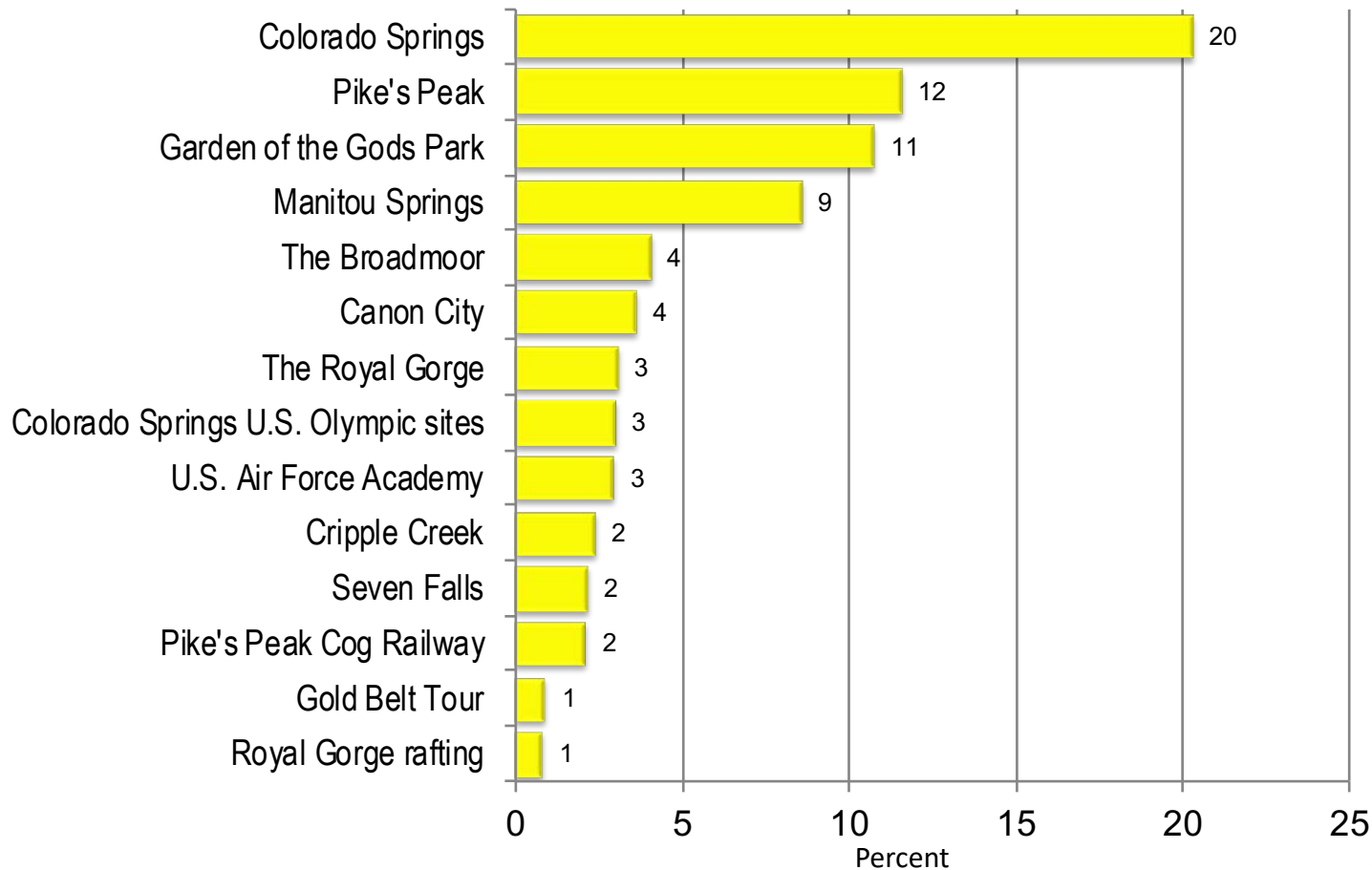
Places/Attractions Visited – Northern Front Range (Cont'd)

Base: Overnight Leisure Trips



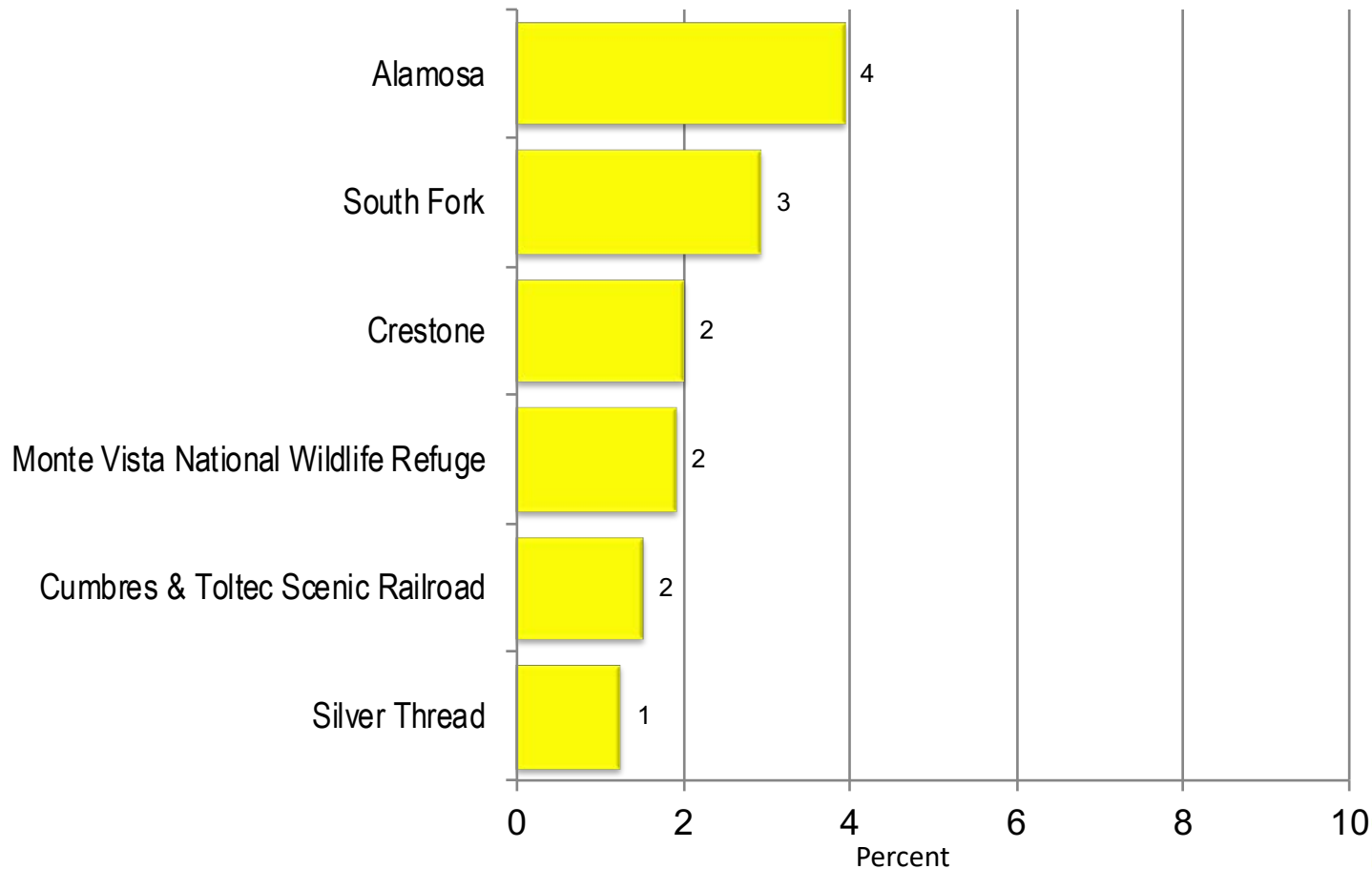
Places/Attractions Visited – Pikes Peak Region

Base: Overnight Leisure Trips



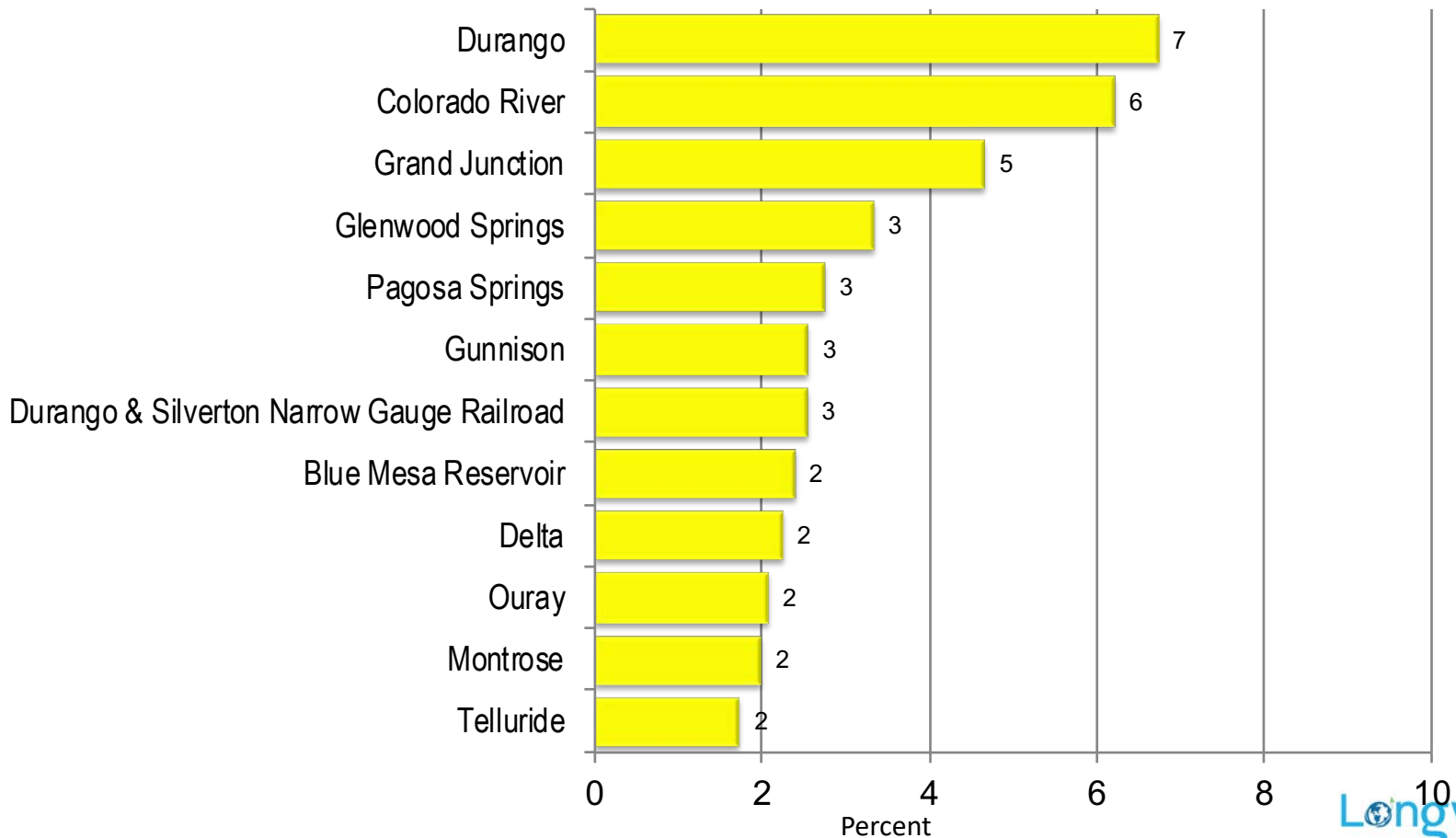
Places/Attractions Visited – San Luis Valley

Base: Overnight Leisure Trips



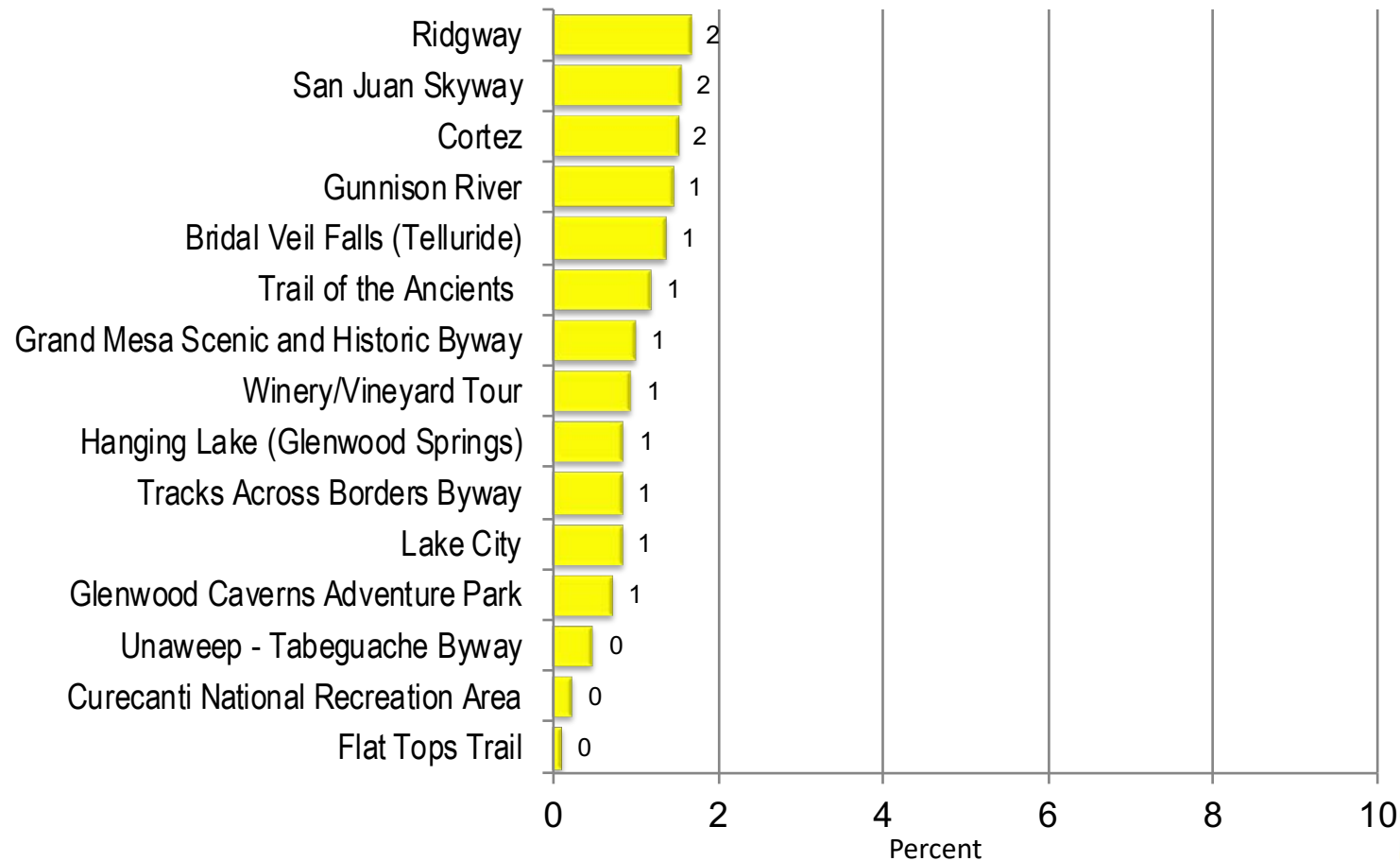
Places/Attractions Visited – Western Slope

Base: Overnight Leisure Trips



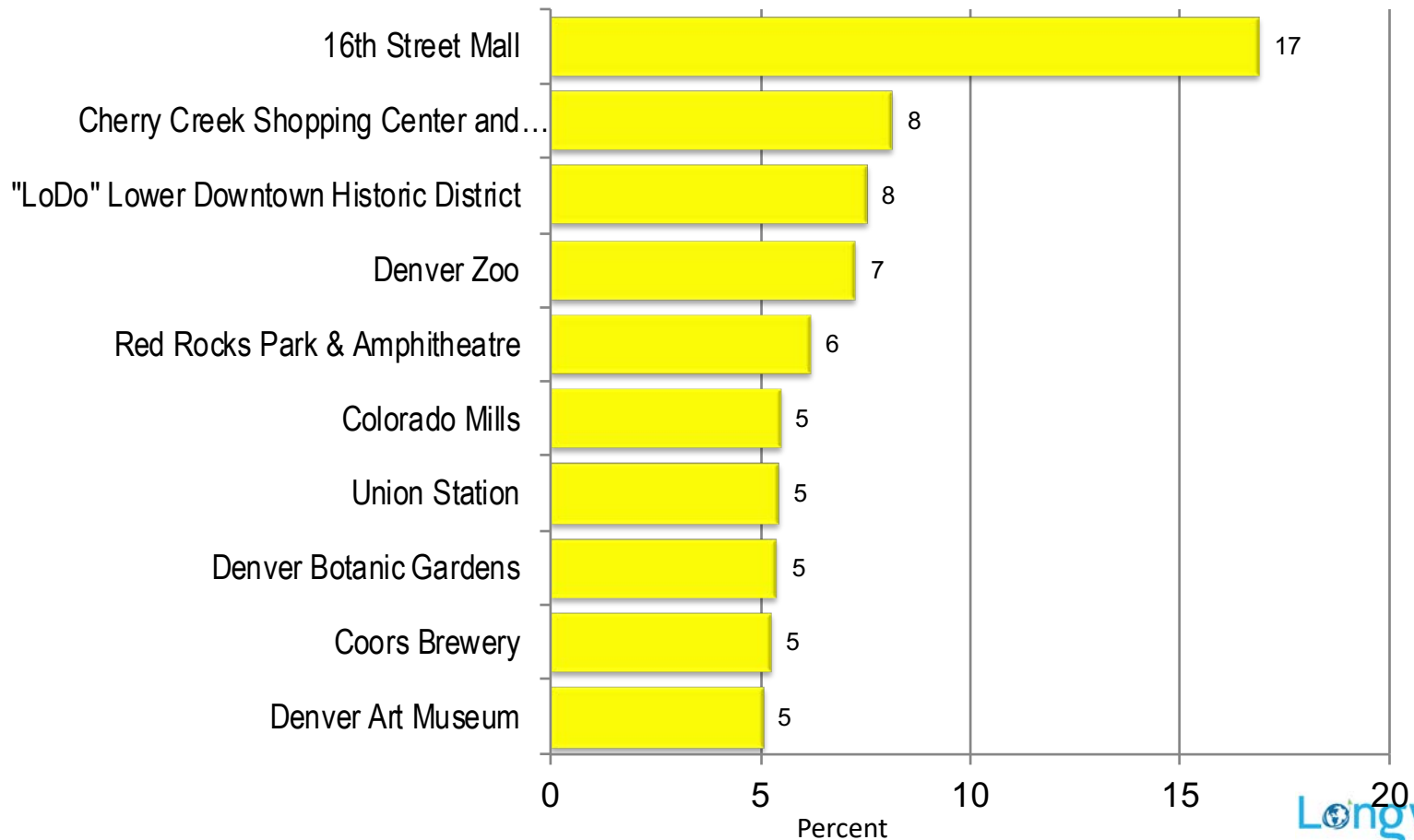
Places/Attractions Visited – Western Slope (Cont'd)

Base: Overnight Leisure Trips



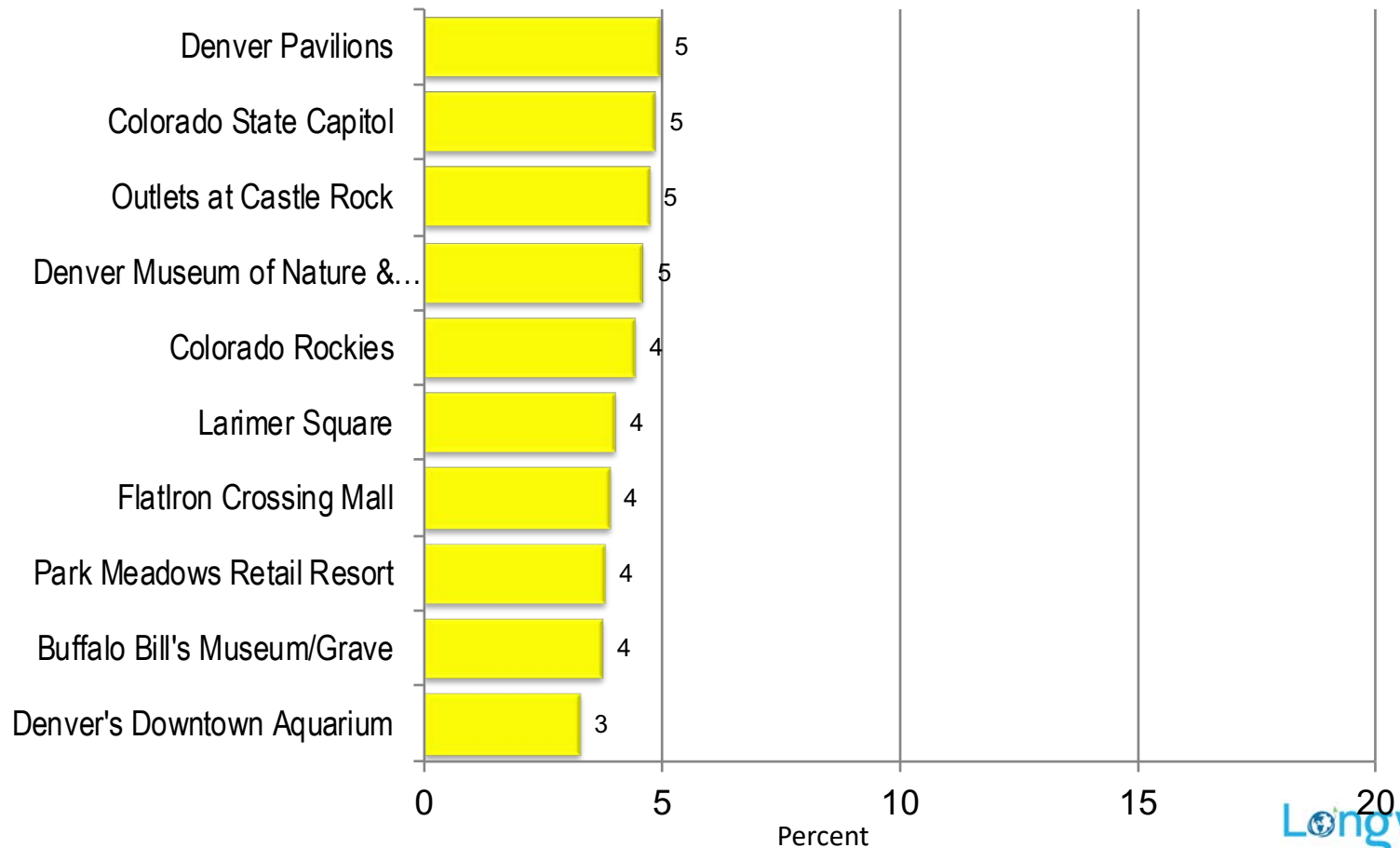
Top Places/Attractions Visited – Denver Metro Area

Base: Overnight Leisure Trips



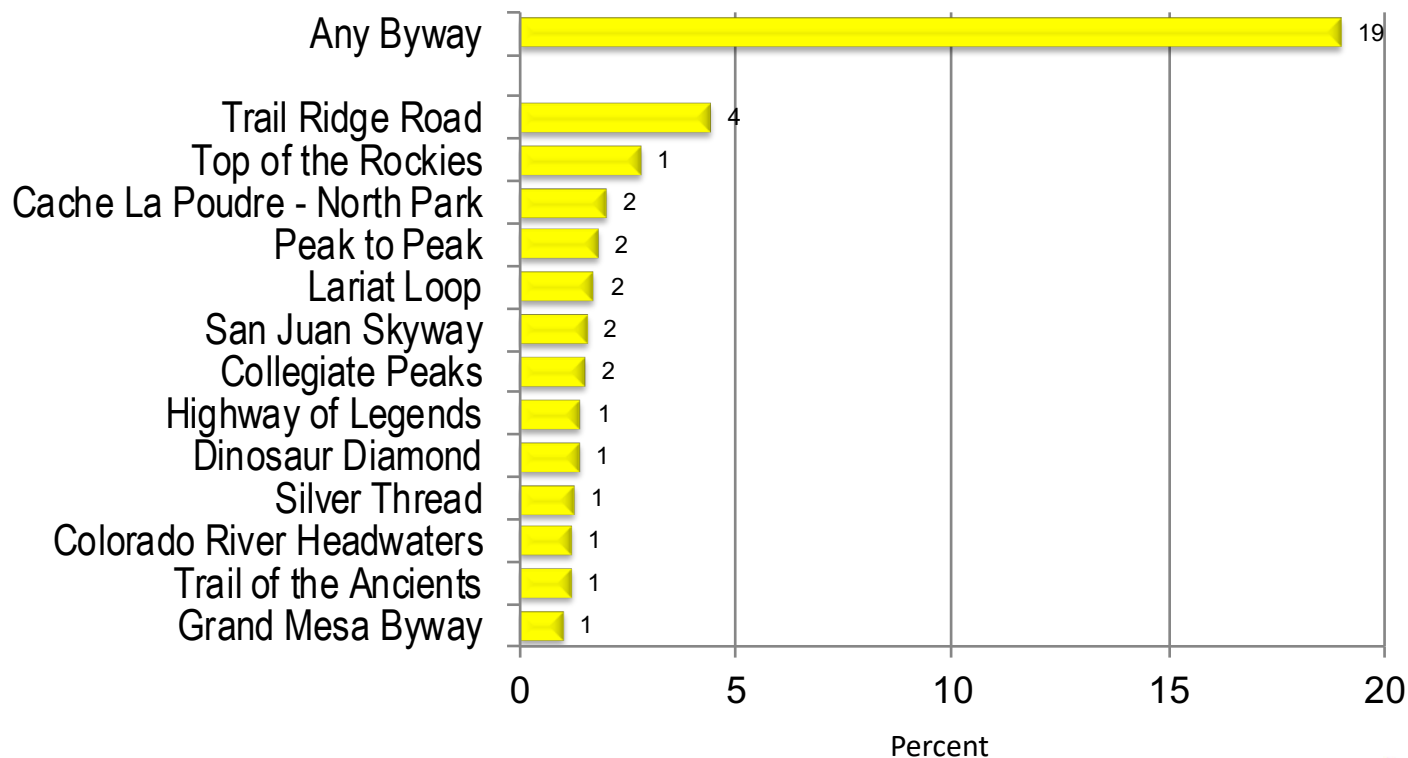
Top Places/Attractions Visited – Denver Metro Area (Cont'd)

Base: Overnight Leisure Trips



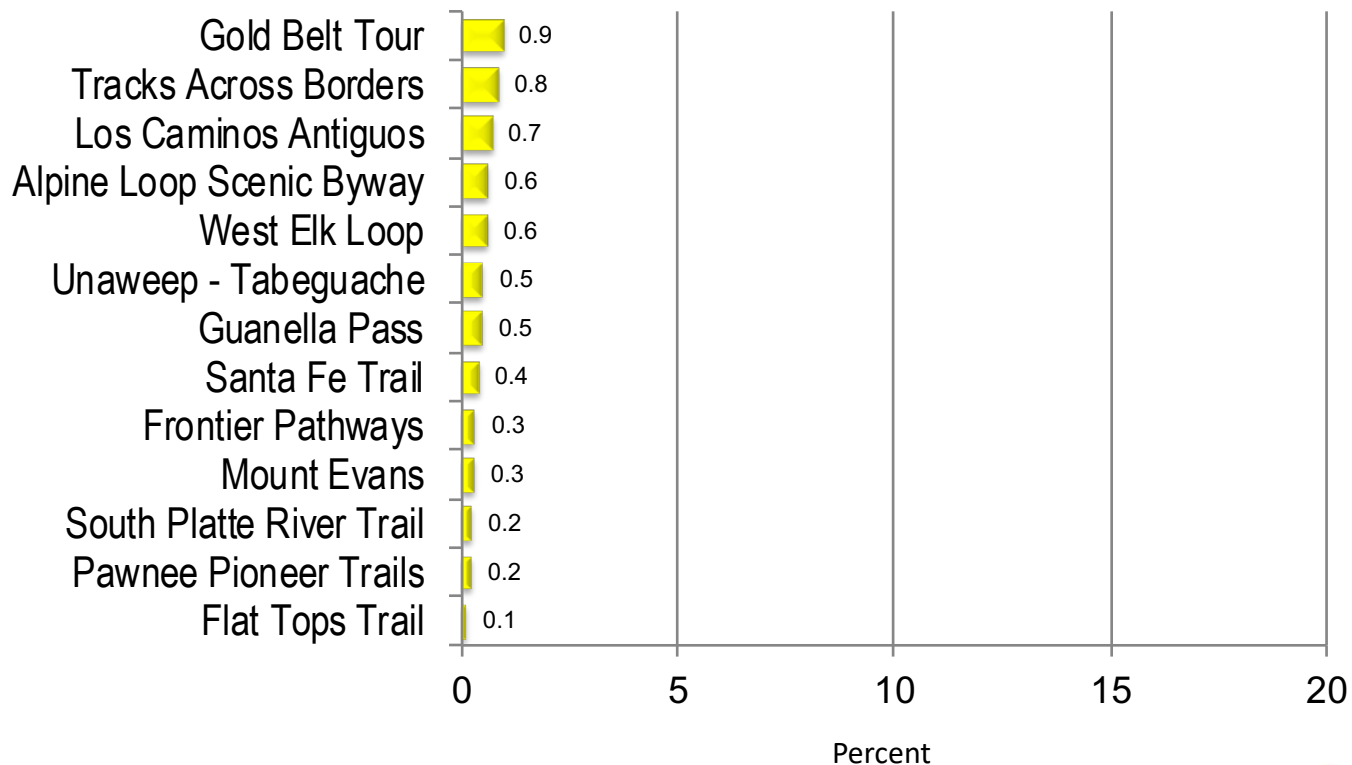
Traveled on Scenic/Historic Byway

Base: Overnight Leisure Trips

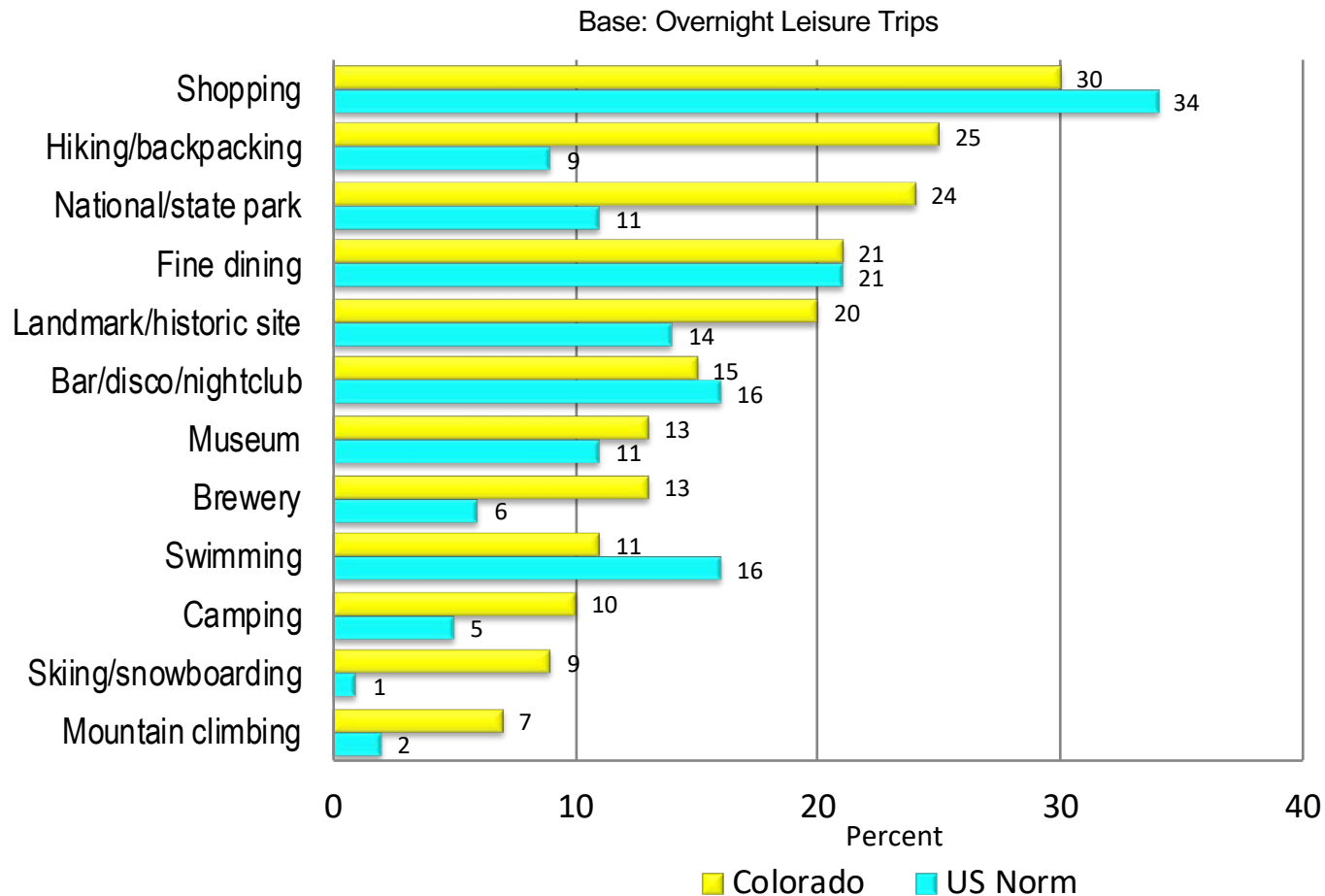


Took Scenic/Historic Byway (Cont'd)

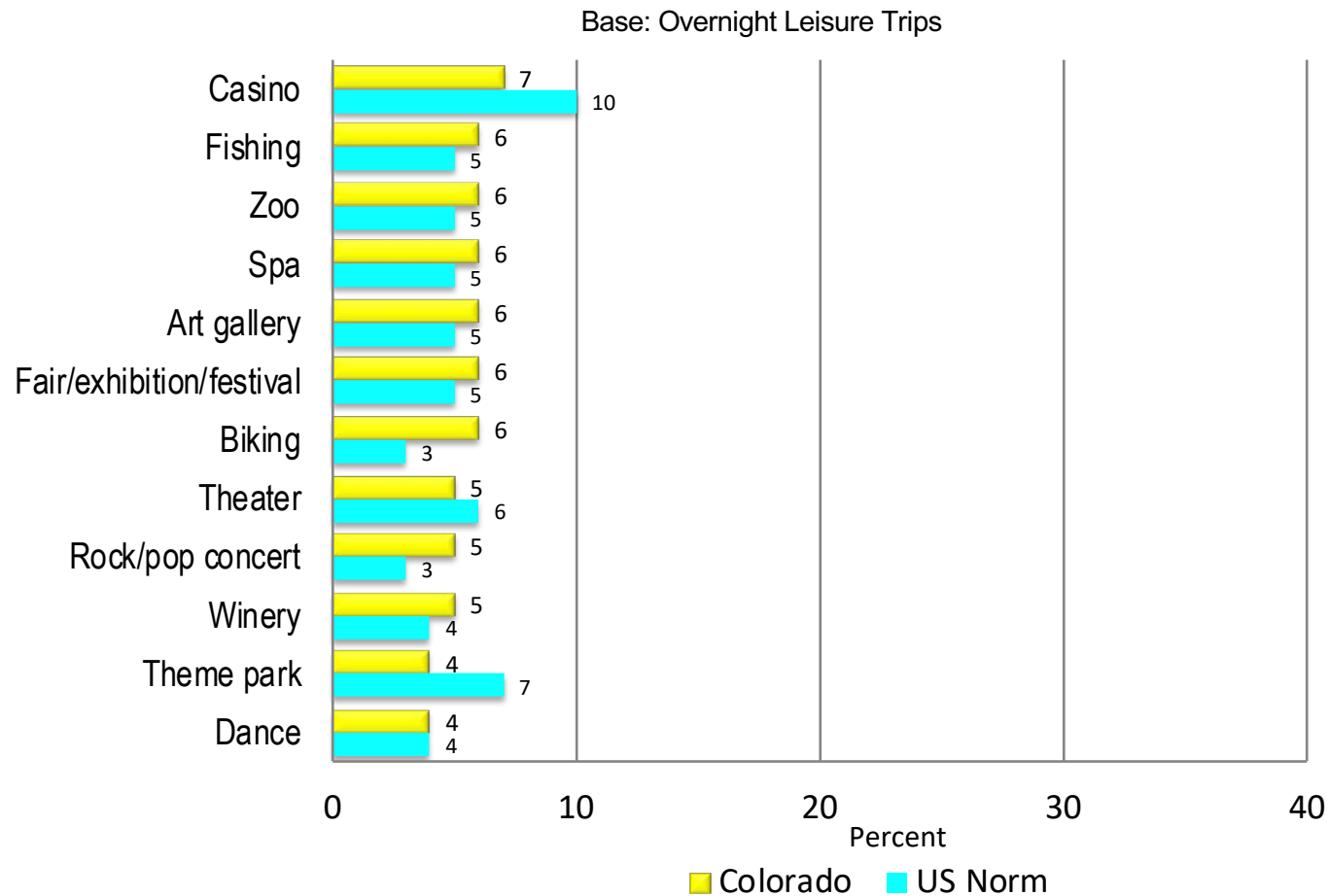
Base: Overnight Leisure Trips



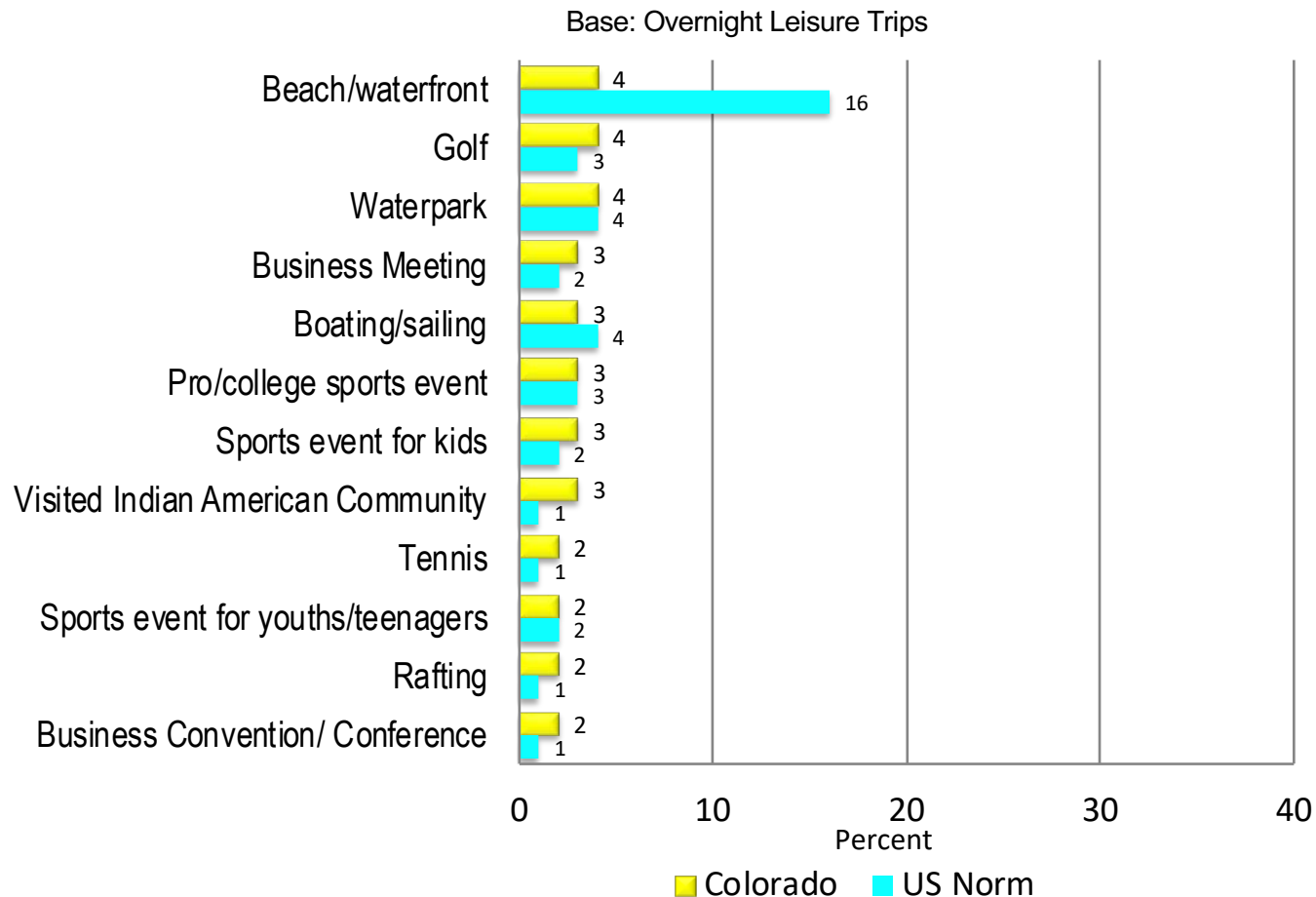
Activities on Trip



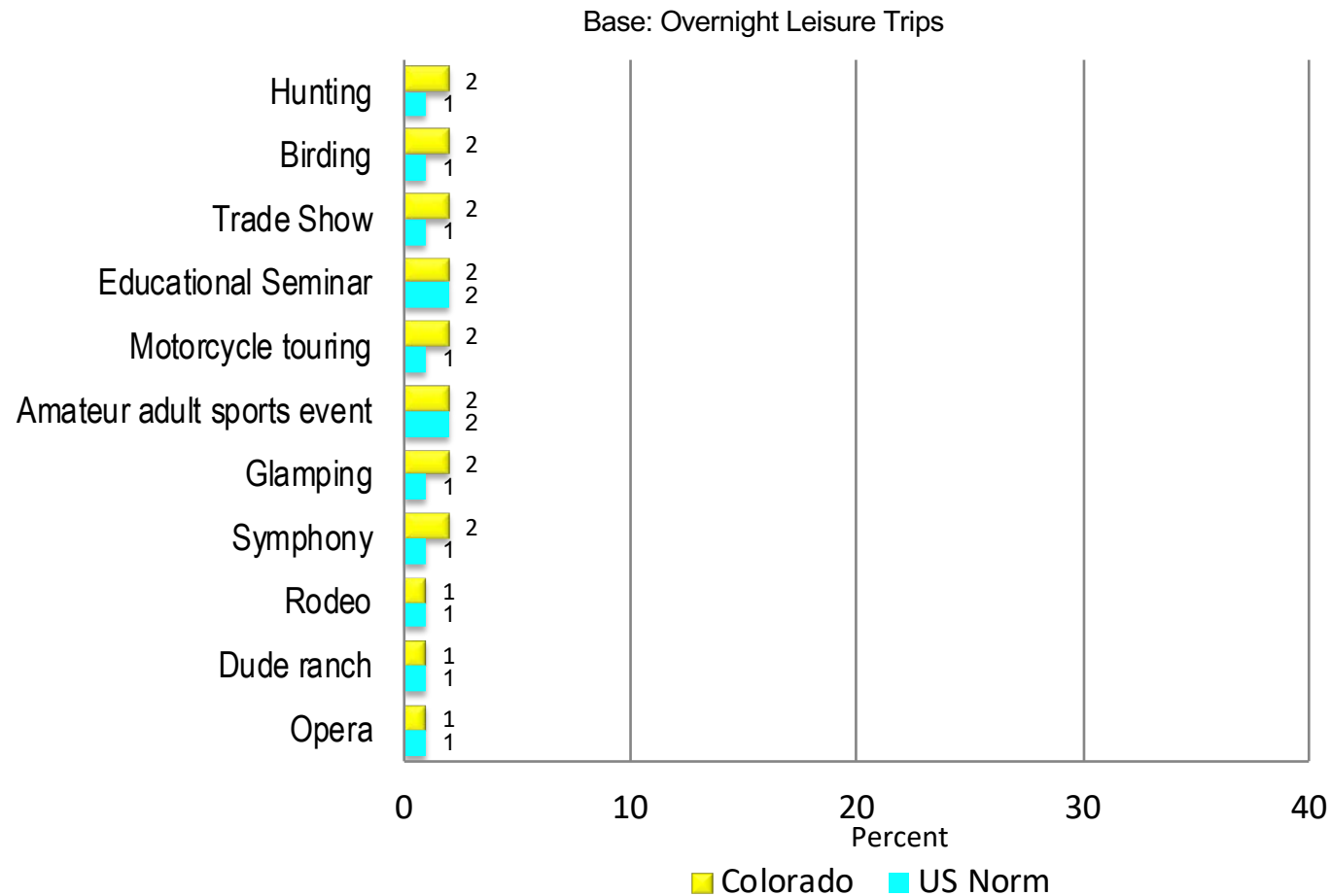
Activities on Trip (Cont'd)



Activities on Trip (Cont'd)

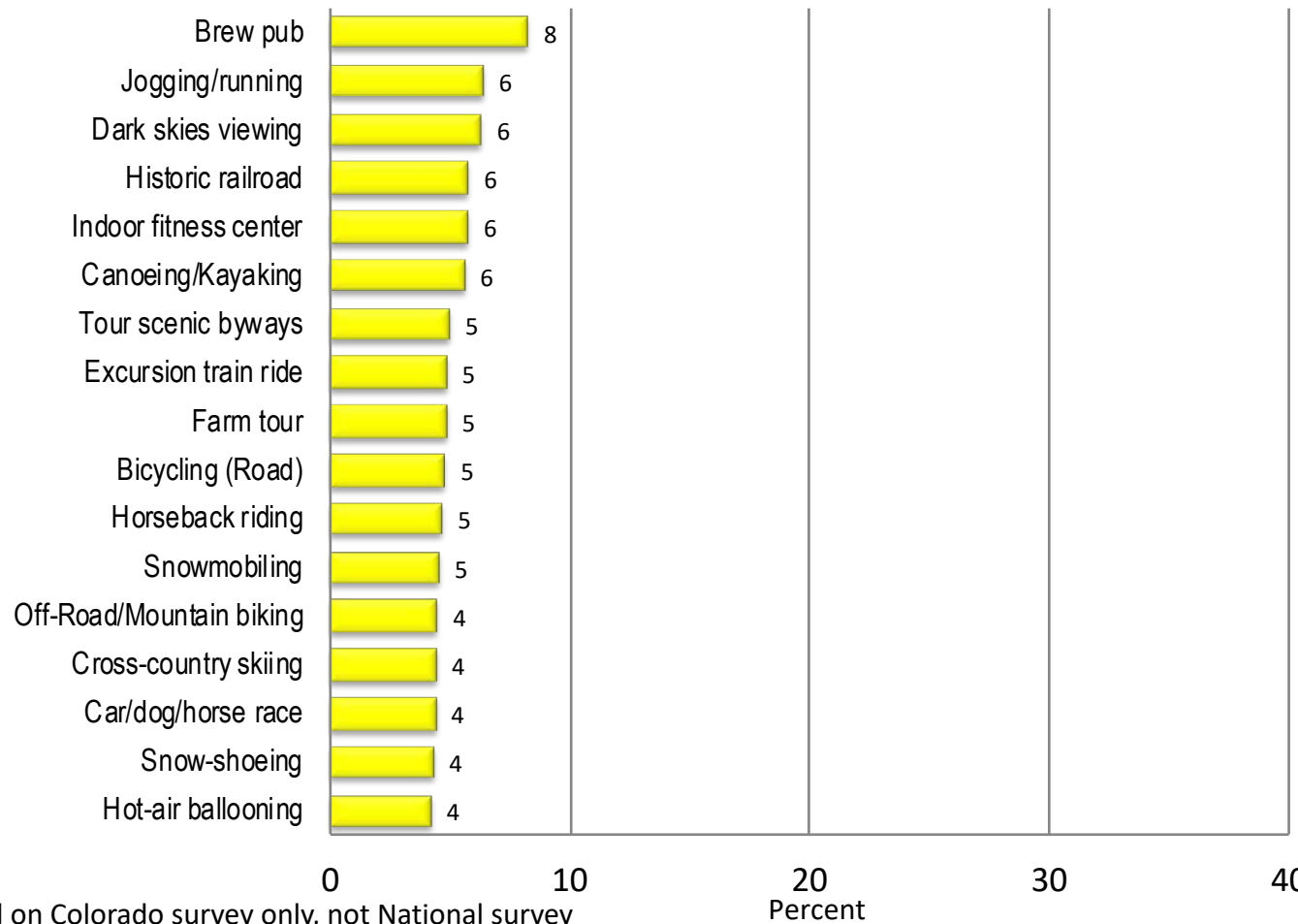


Activities on Trip (Cont'd)

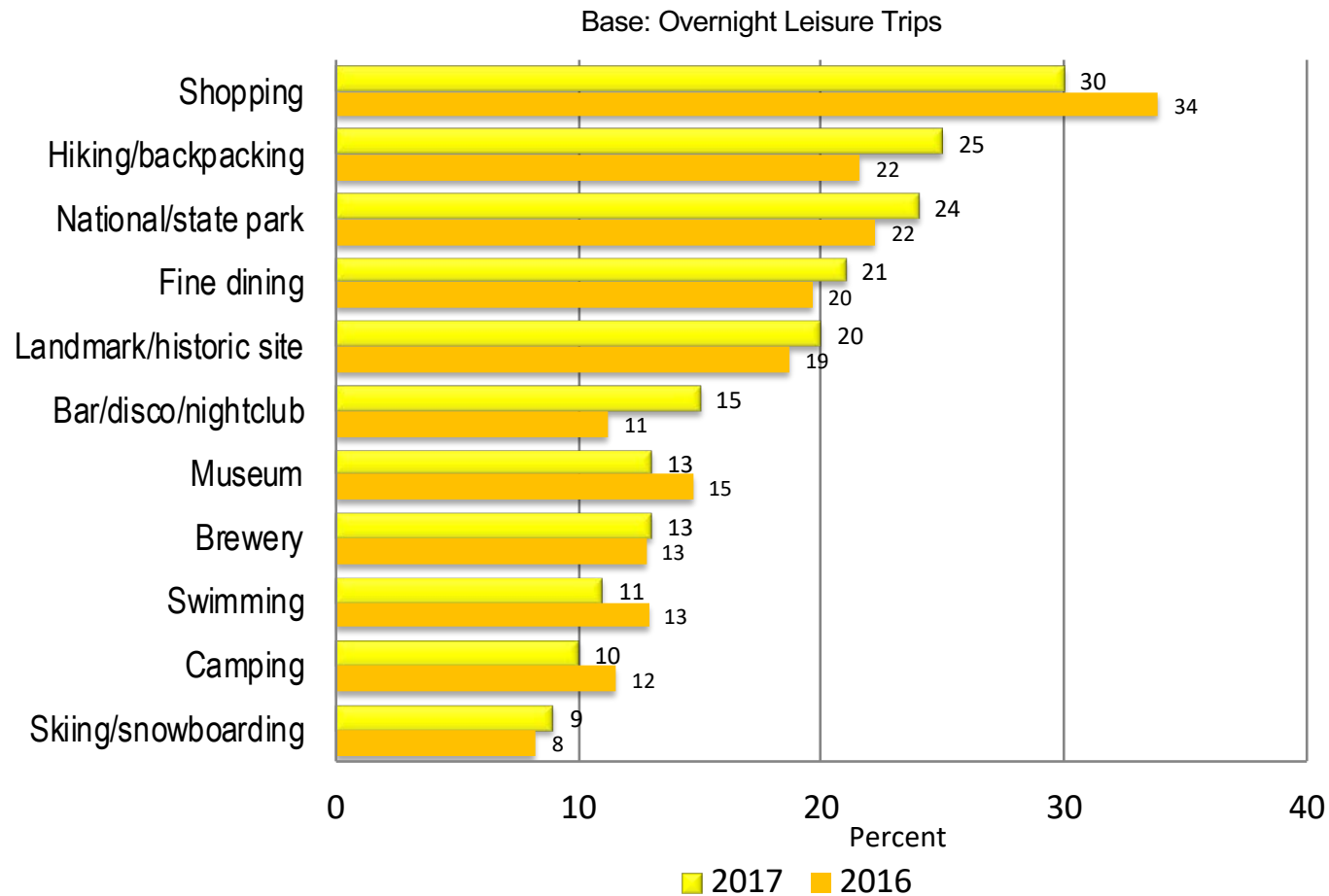


Other Colorado-Specific Activities on Trip*

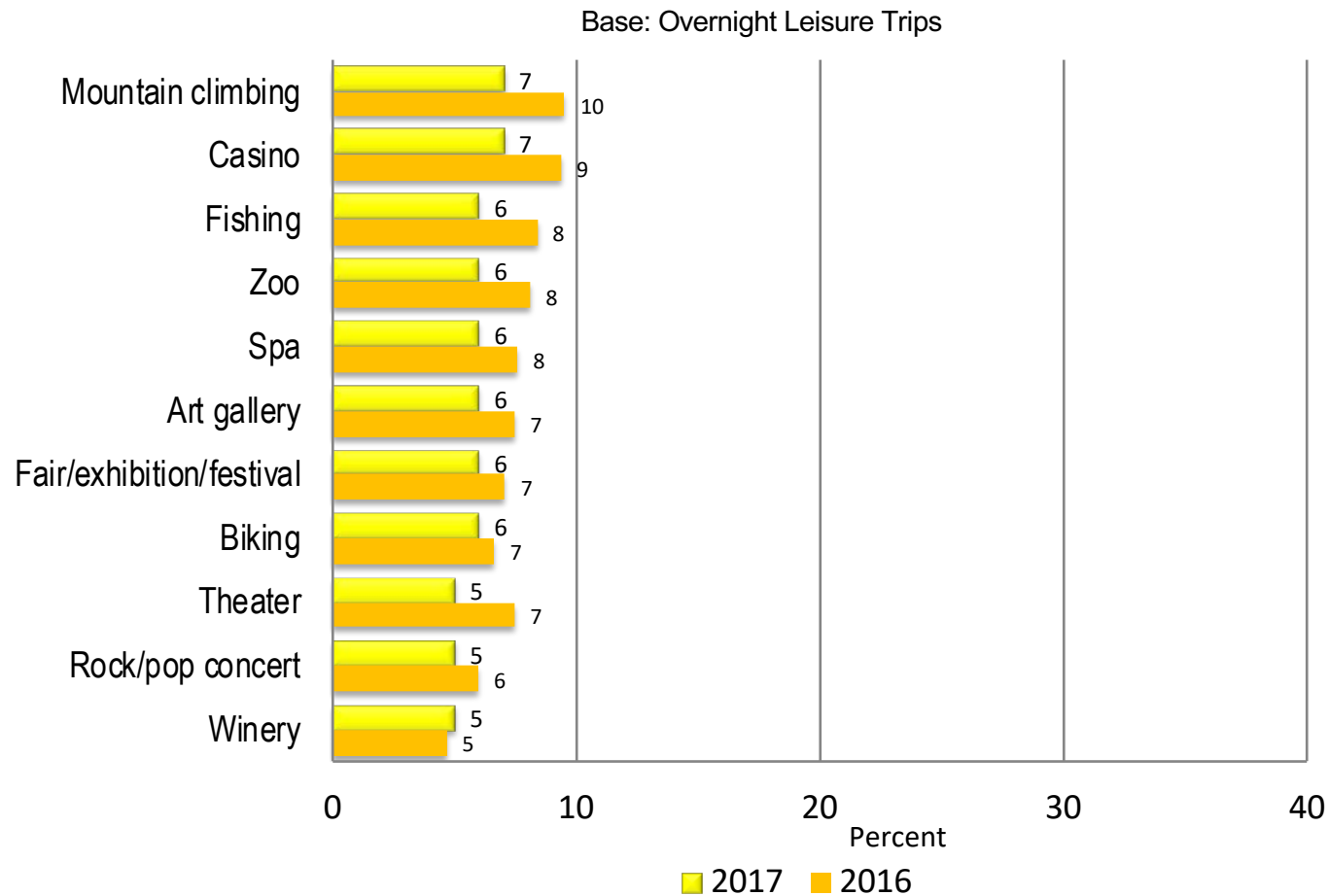
Base: Overnight Leisure Trips



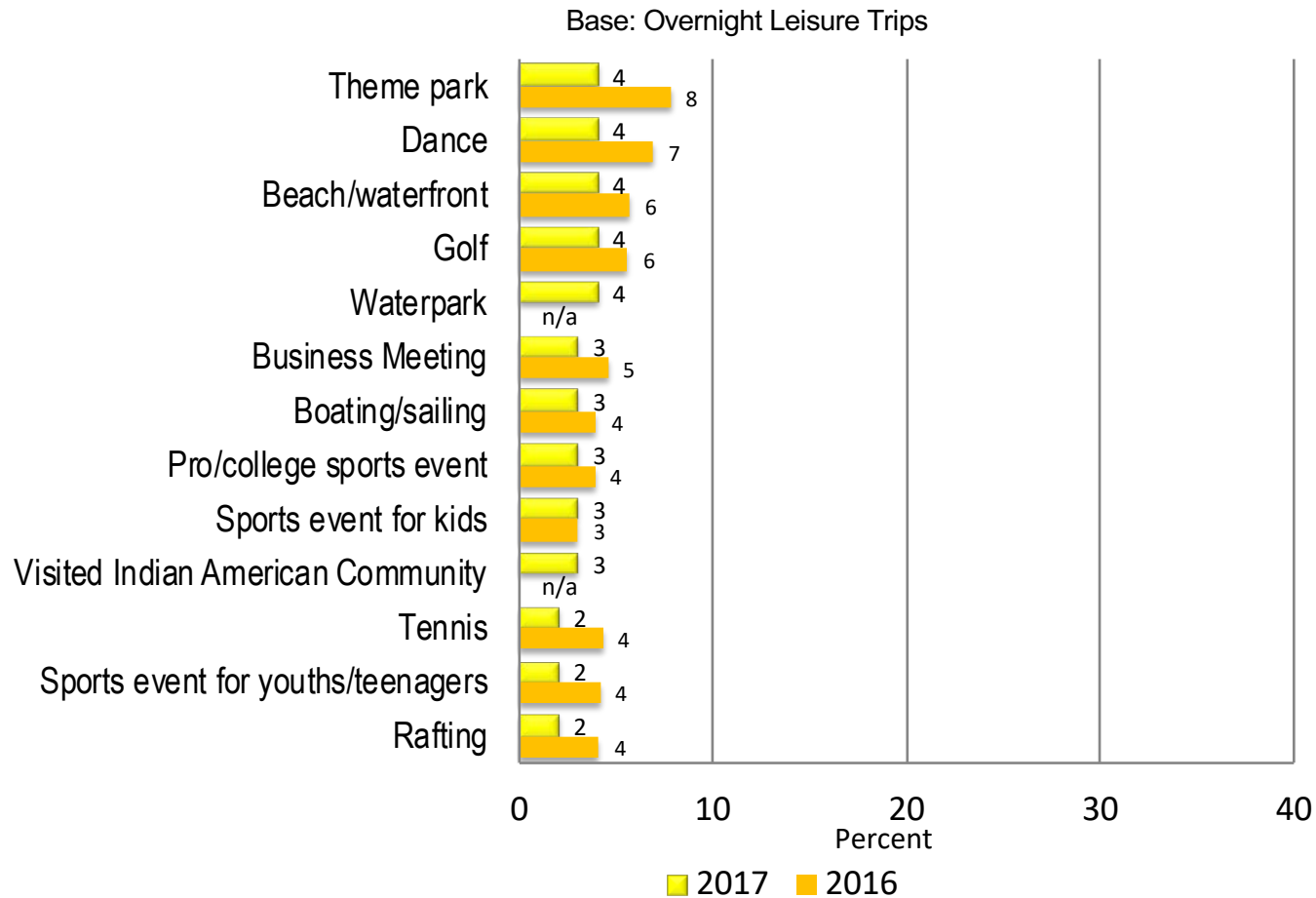
Activities on Trip



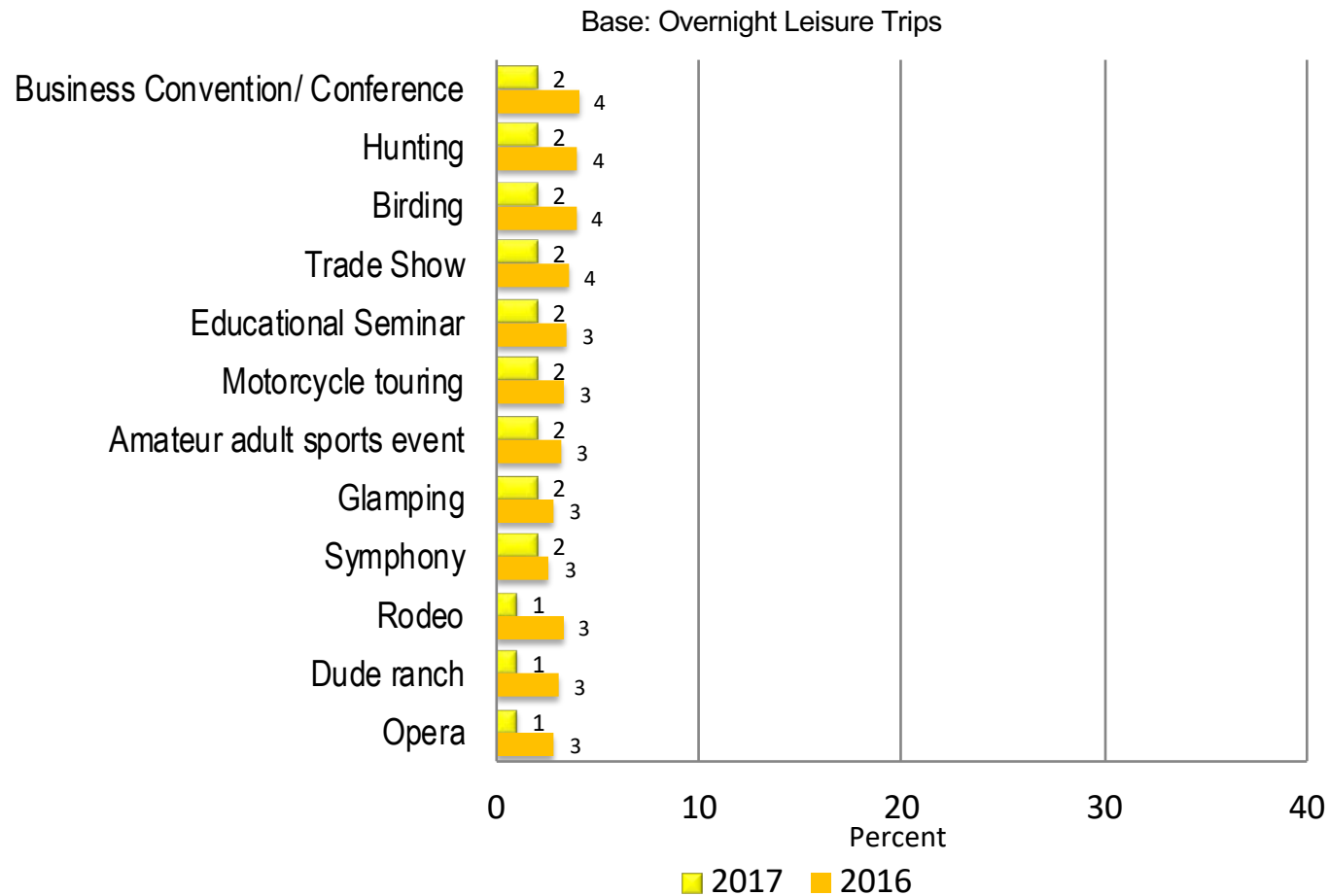
Activities on Trip (Cont'd)



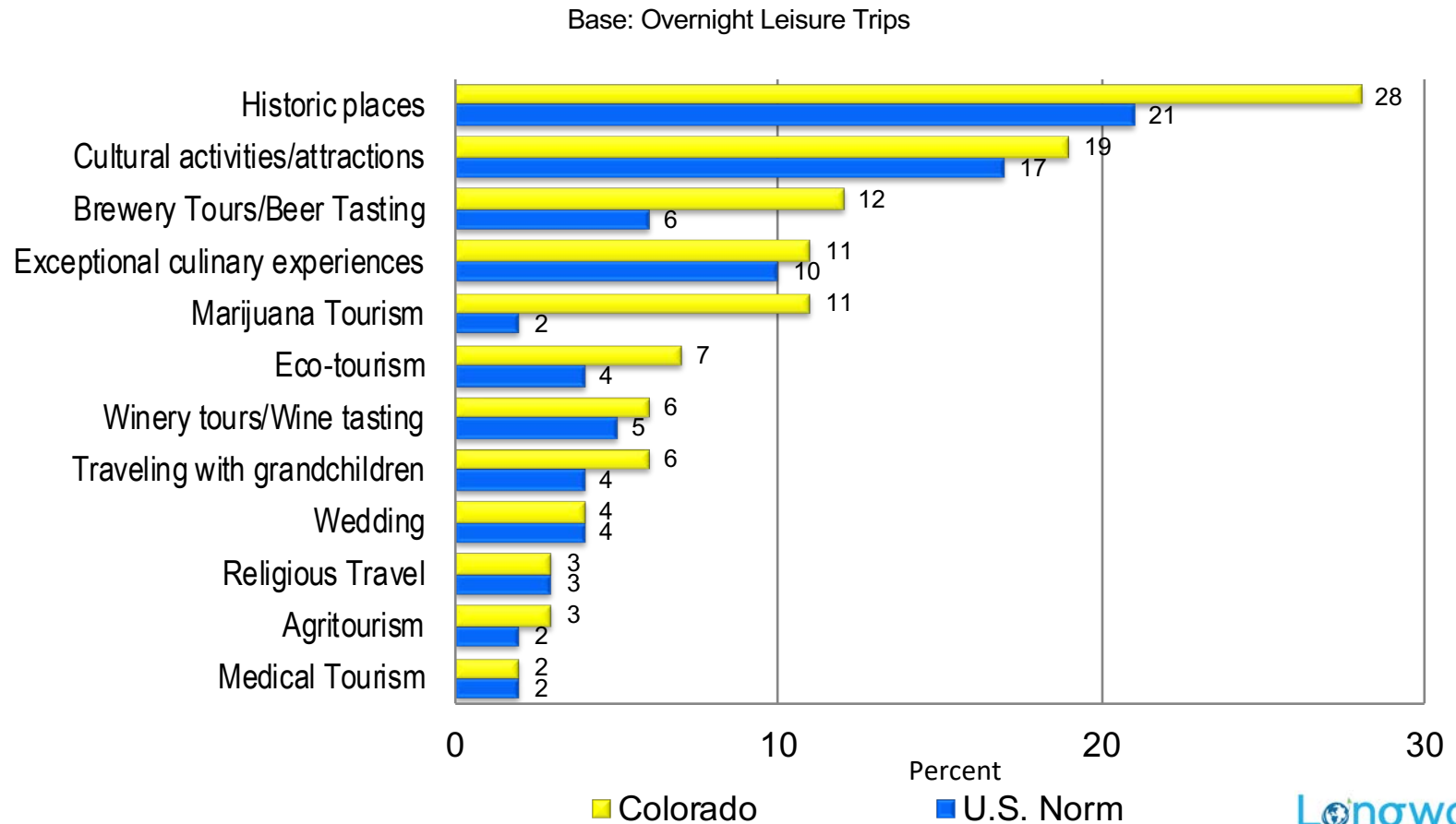
Activities on Trip (Cont'd)



Activities on Trip (Cont'd)

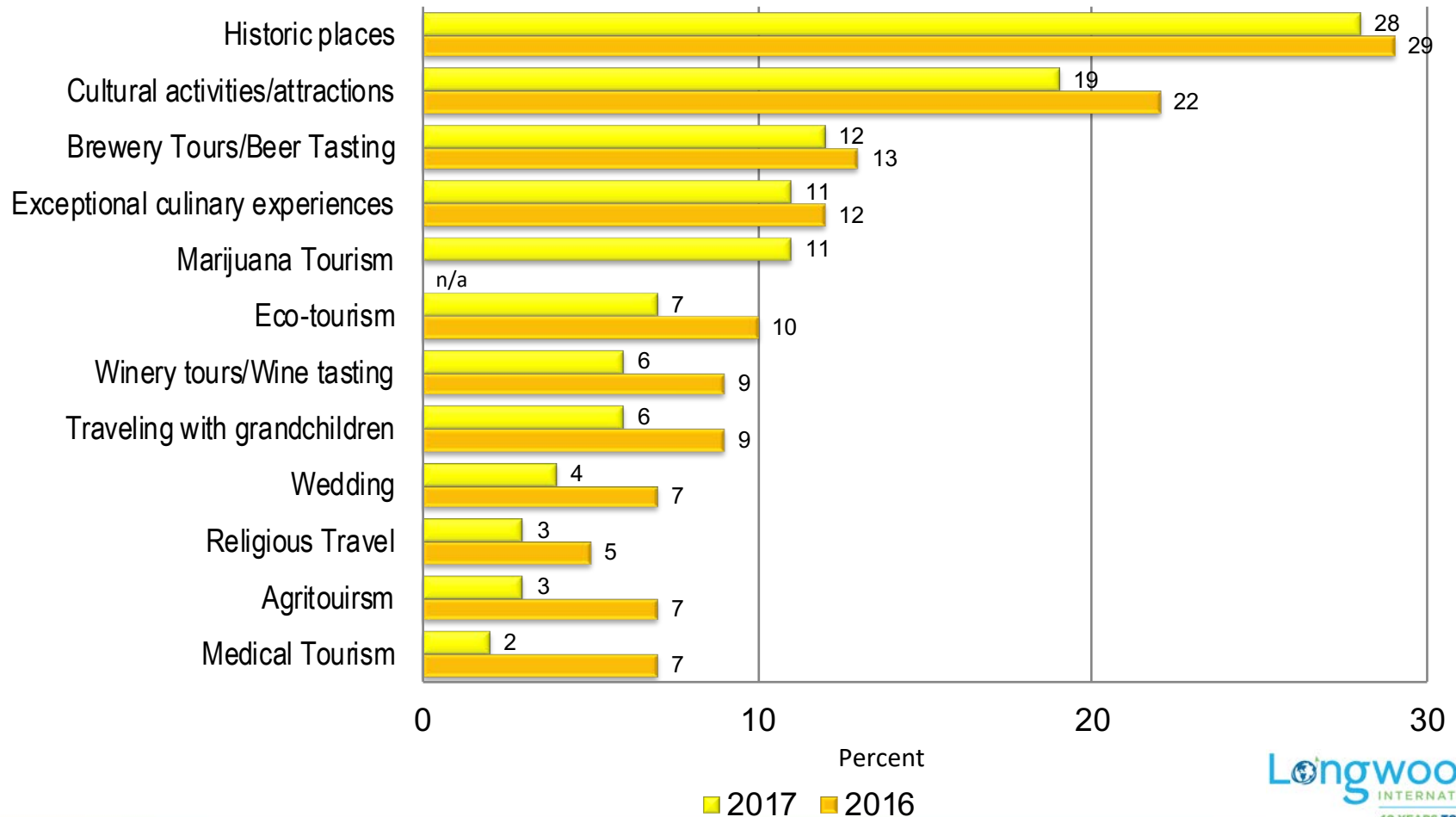


Specific Interests on Trip



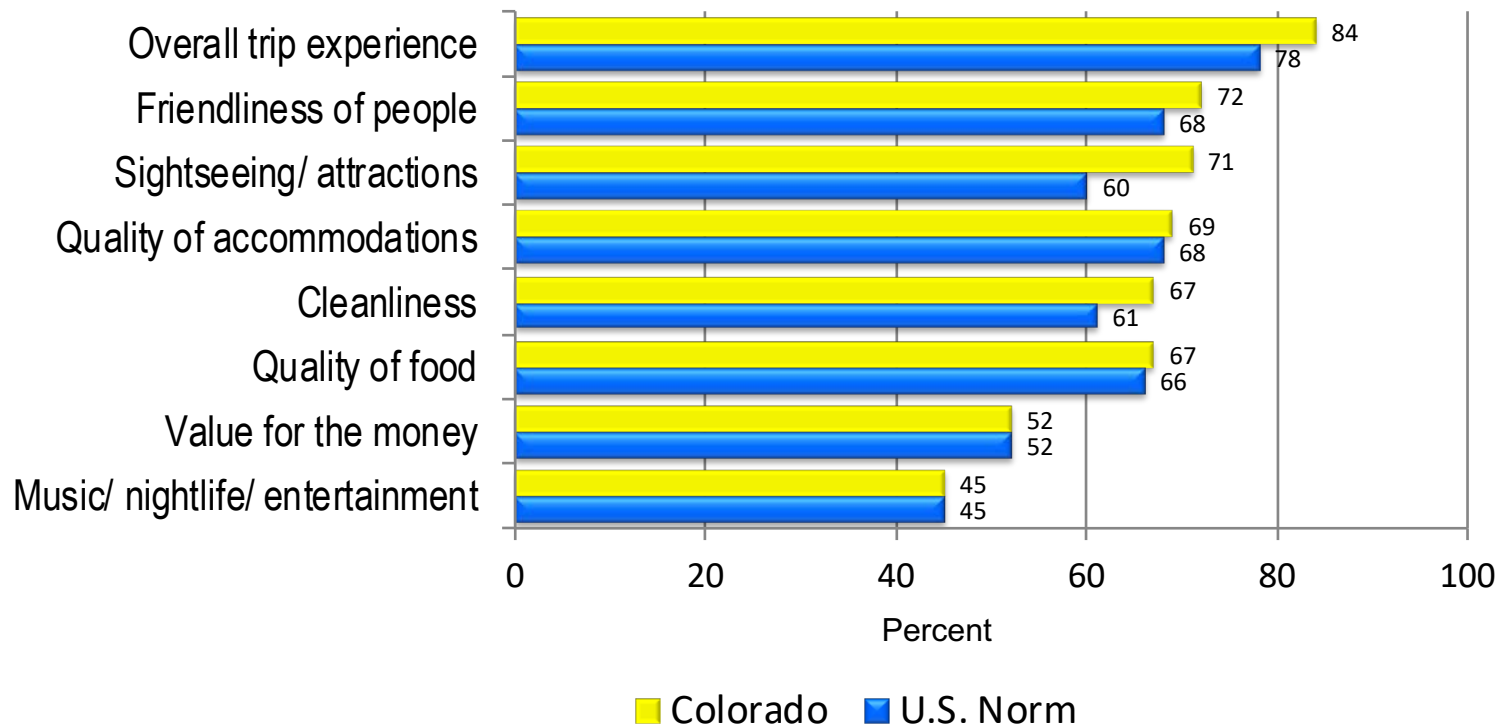
Specific Interests on Colorado Trip

Base: Overnight Leisure Trips

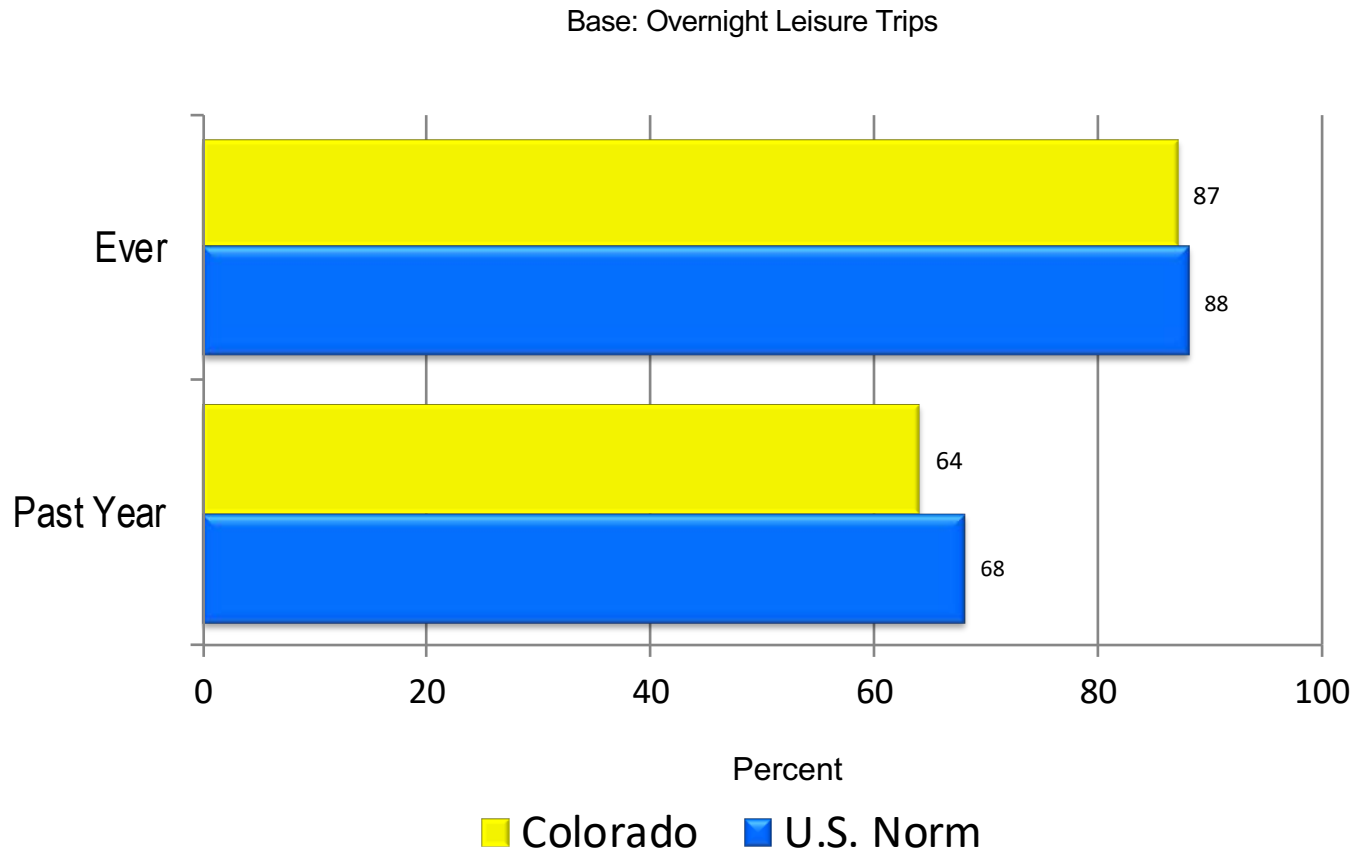


Satisfaction with Trip — % Very Satisfied

Base: Overnight Leisure Trips

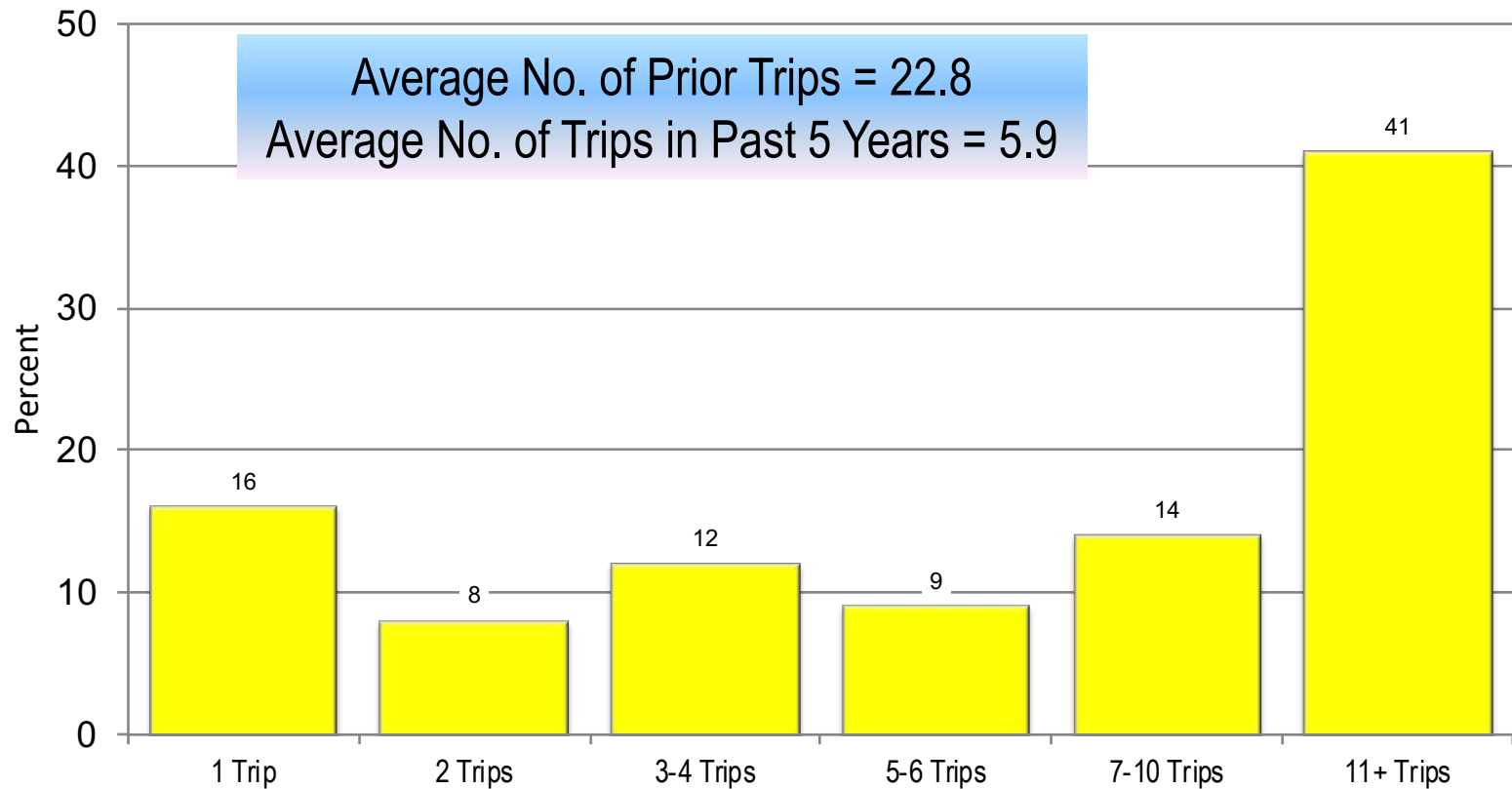


Past Visitation to Colorado

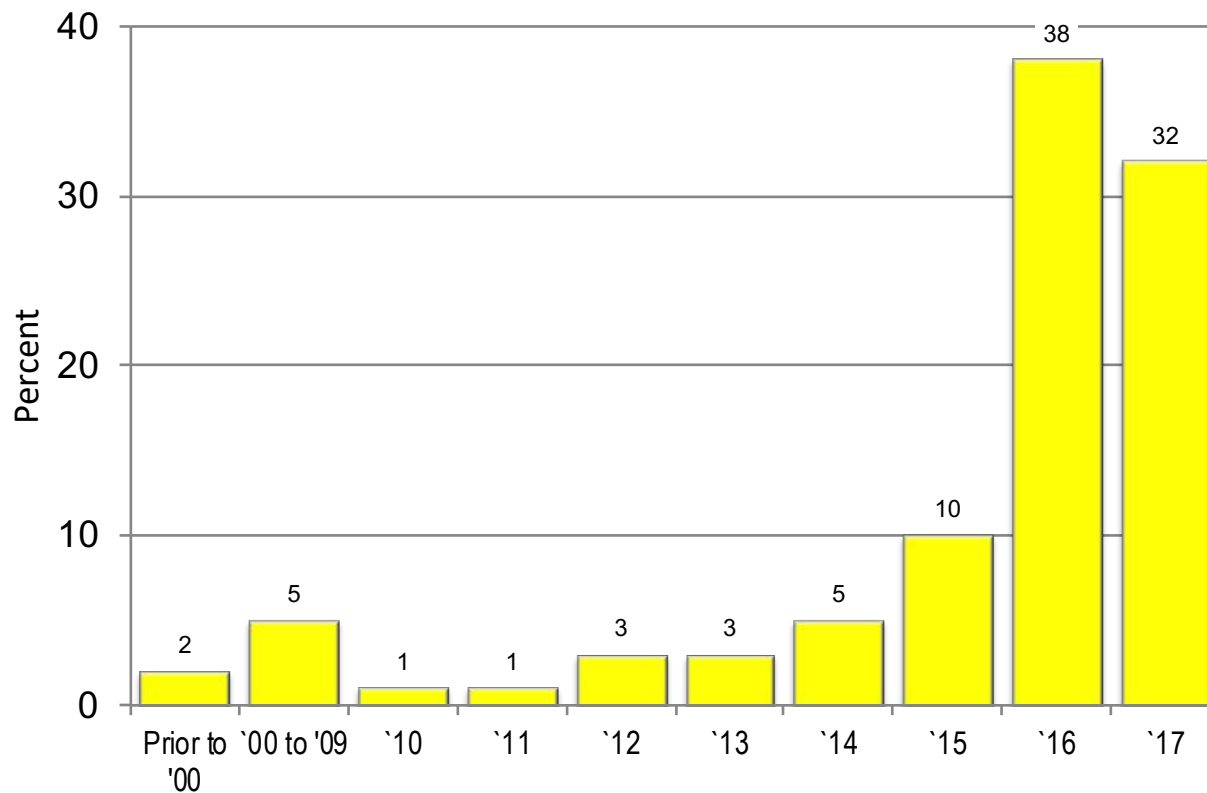


Number of Prior Overnight Leisure Trips to Colorado

Base: Prior Leisure Visitors



Year of Most Recent Colorado Overnight Leisure Trip Among Prior Visitors

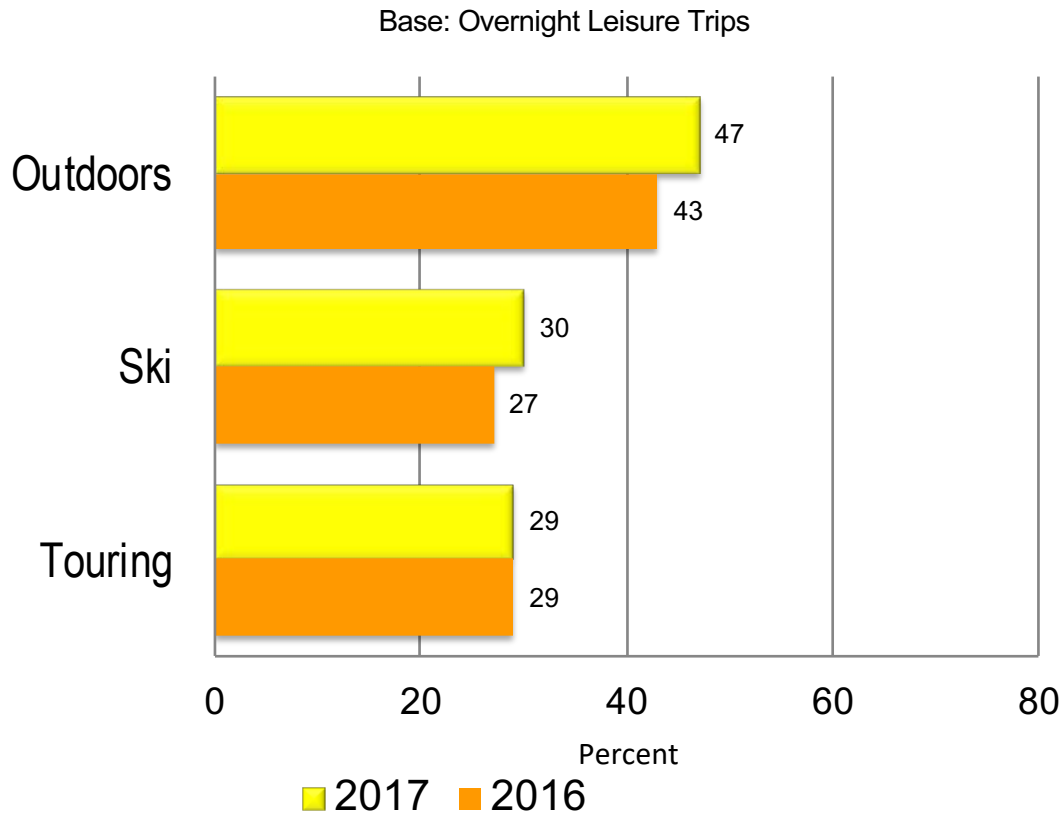




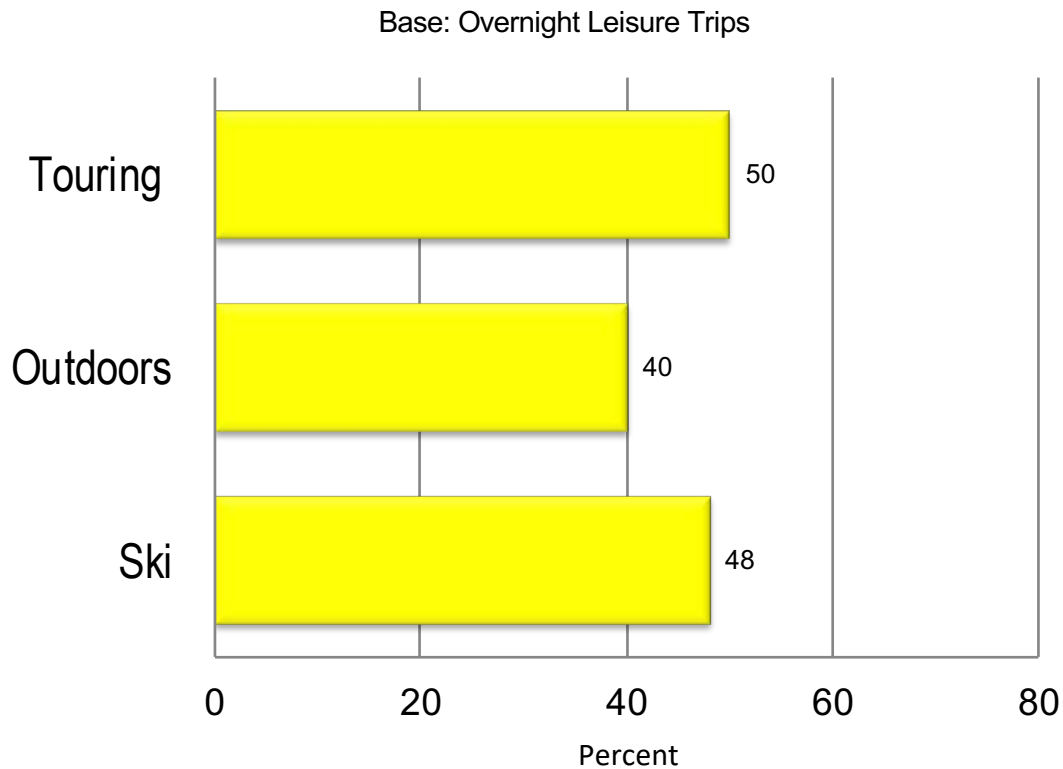
Profiles of Colorado's Key Travel Segments



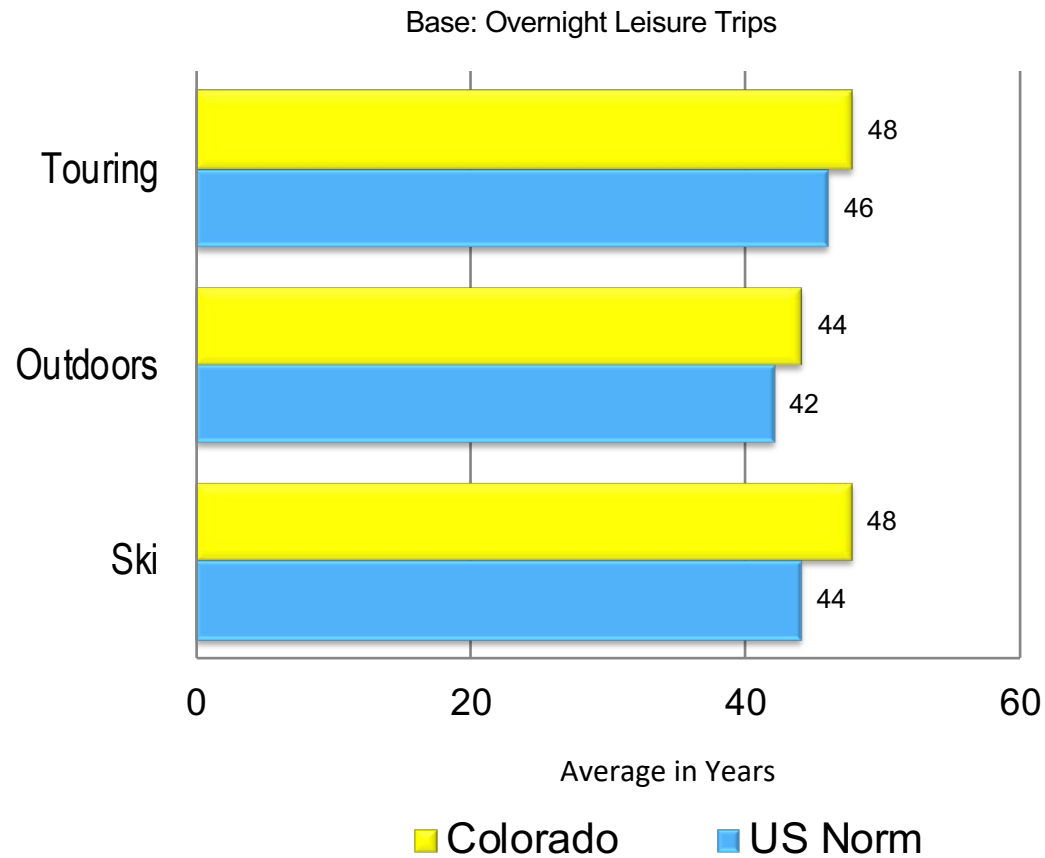
Instate Trips — By Segment



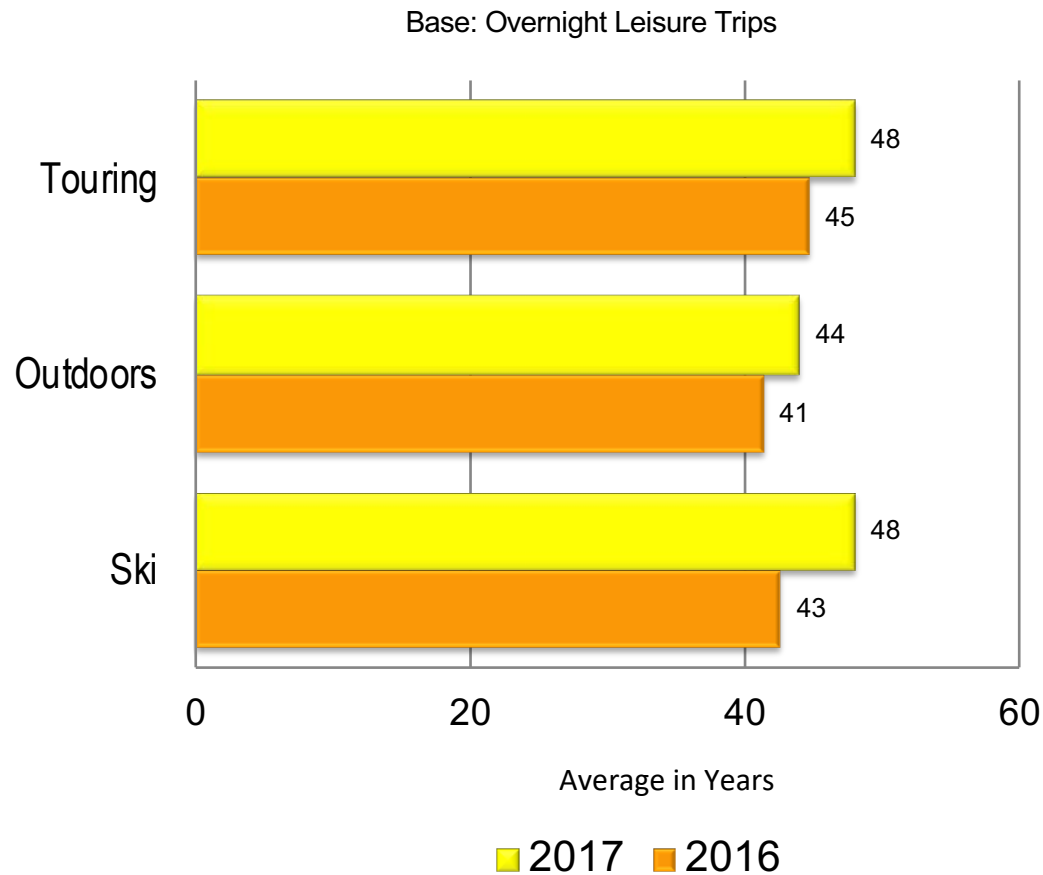
Travel Distance — % Who Traveled 500+ Miles to Visit Colorado



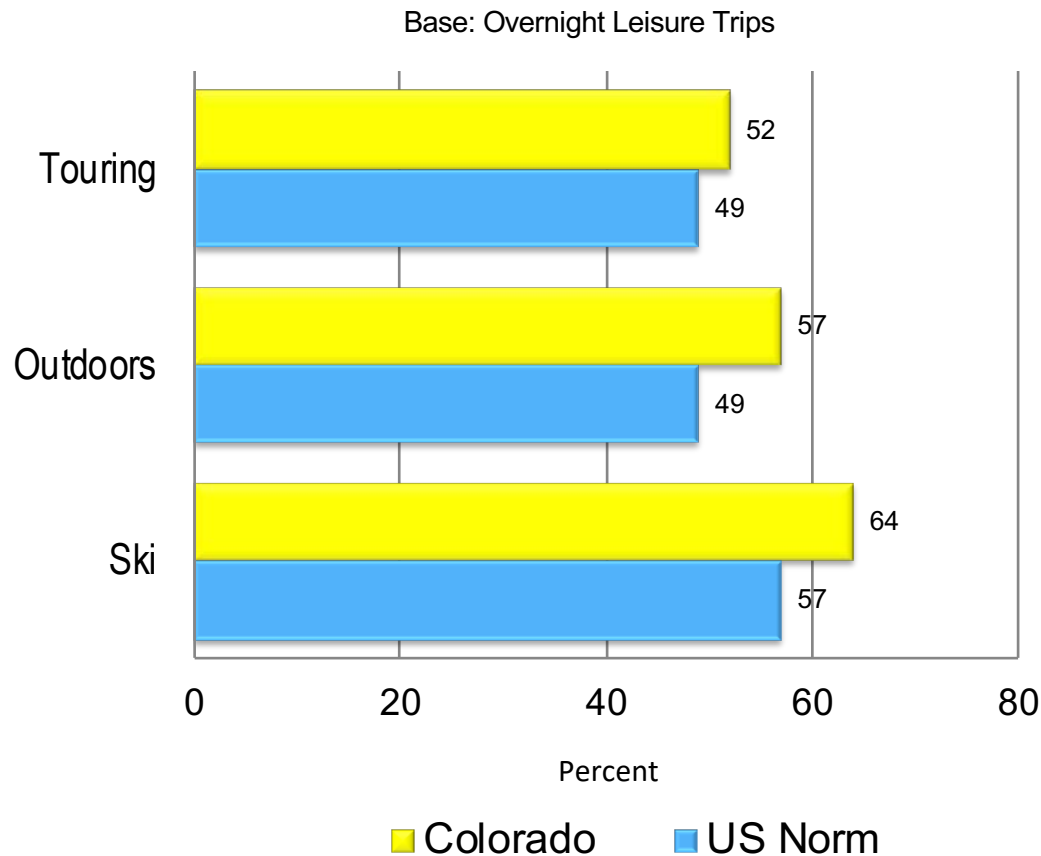
Average Age



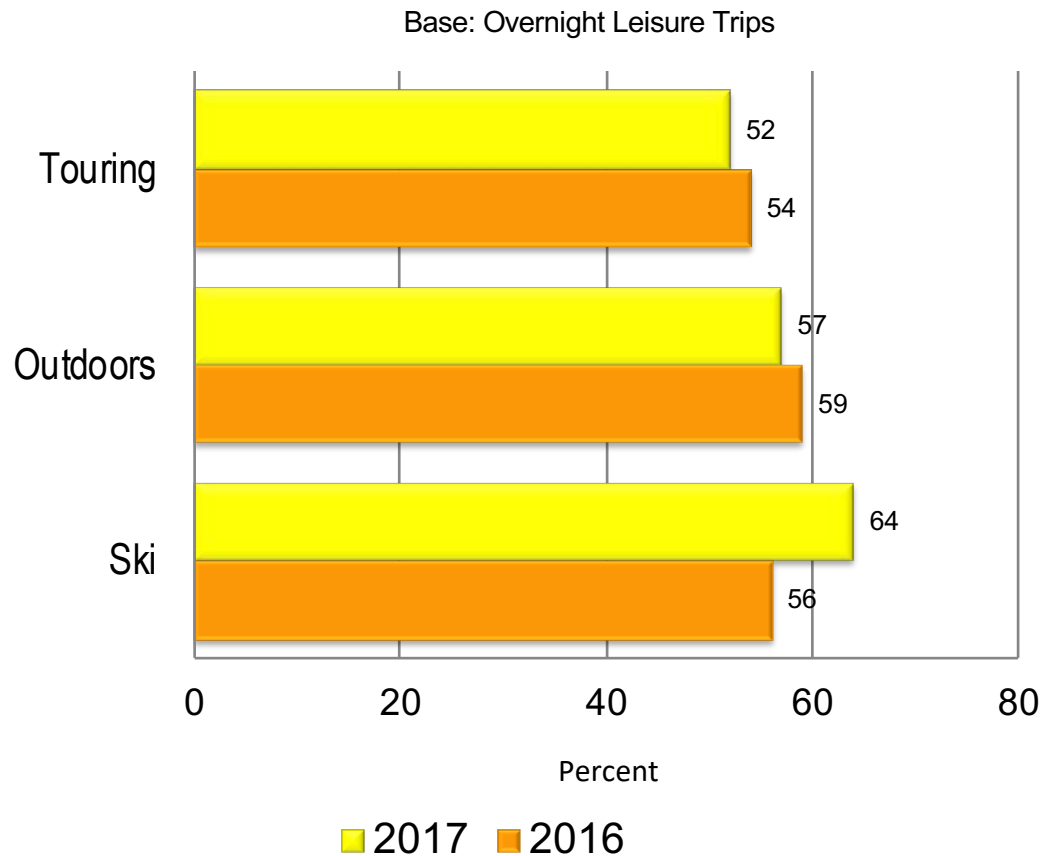
Average Age



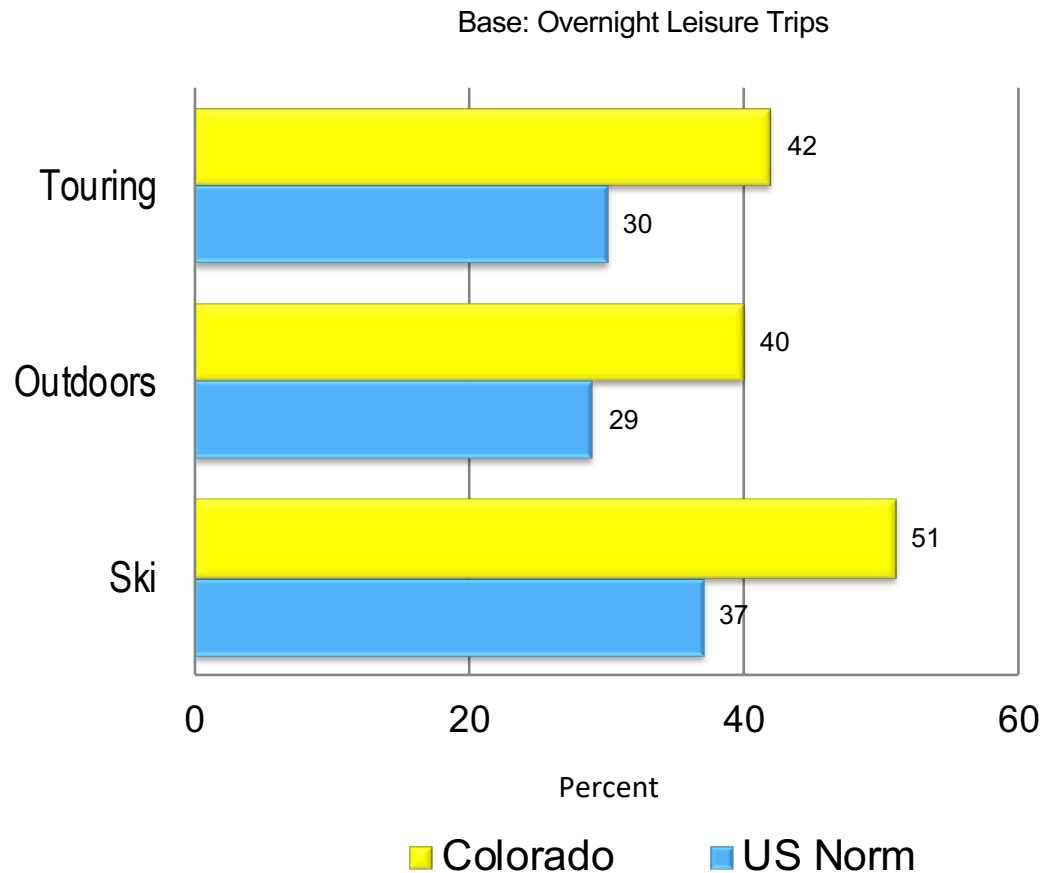
Percent Who Are Male



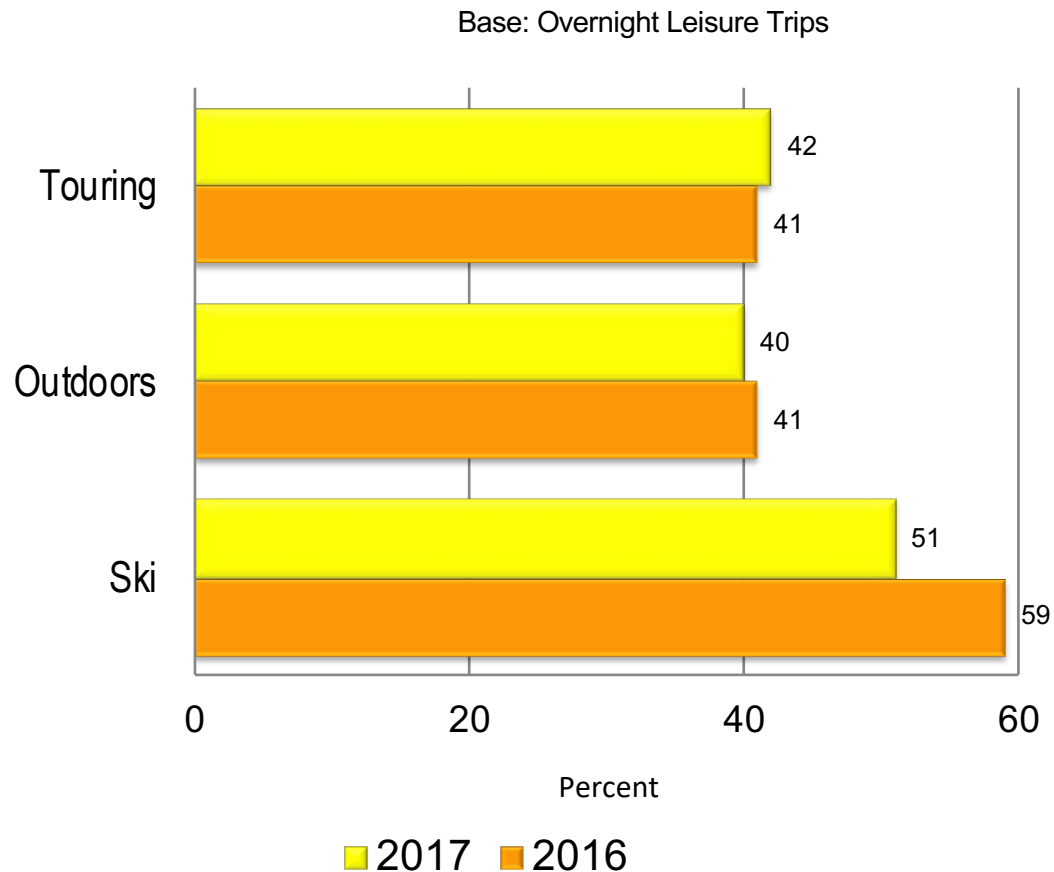
Percent Who Are Male



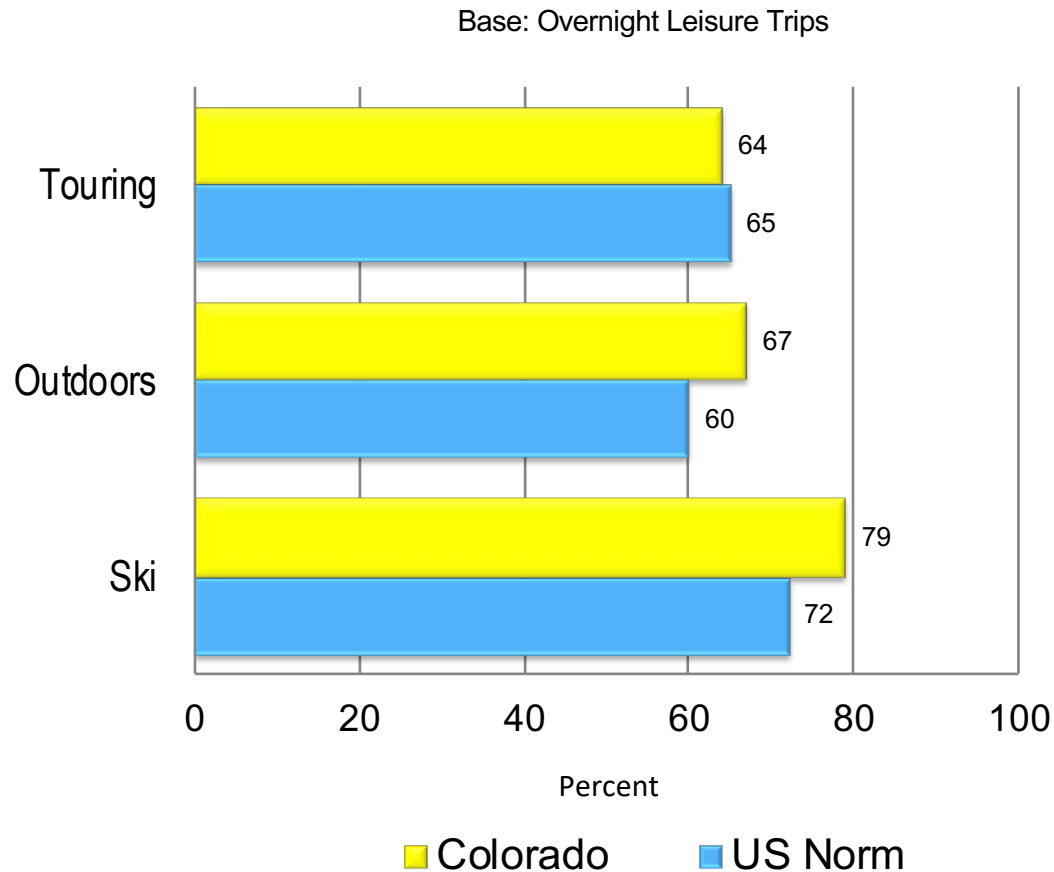
Percent With Income \$75K+



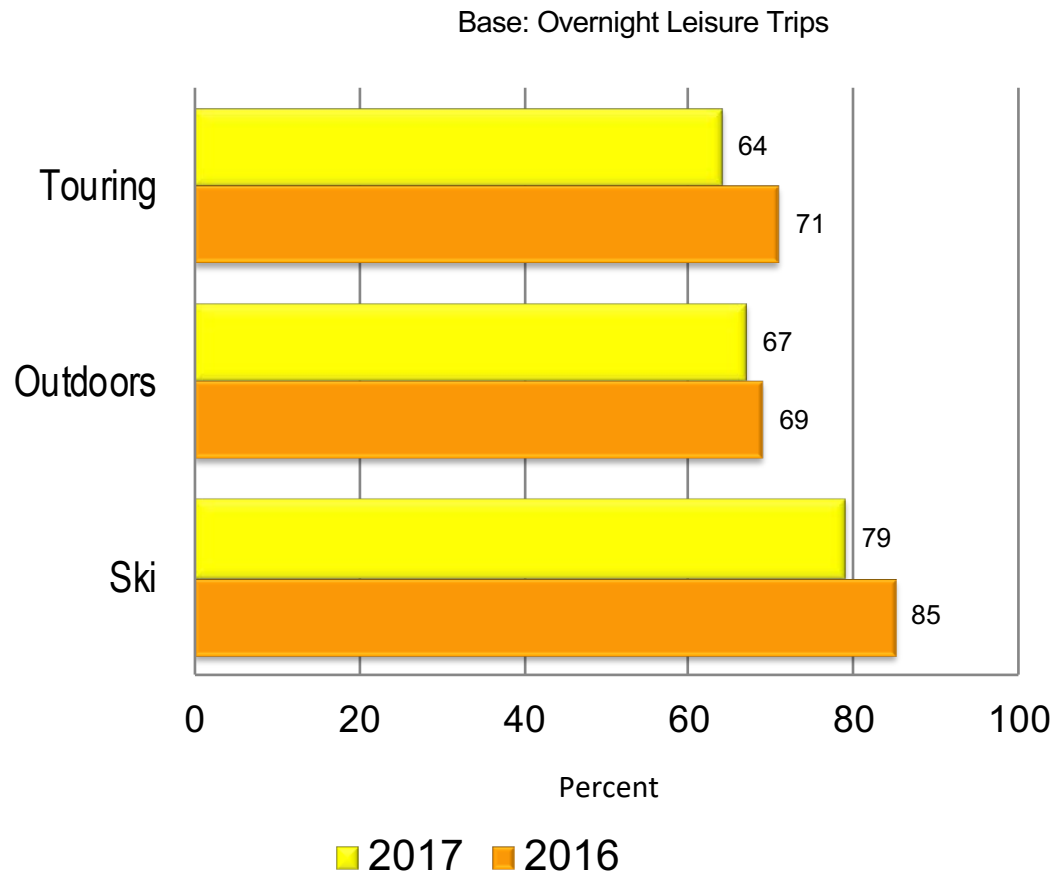
Percent With Income \$75K+



Percent Who Are College Graduates

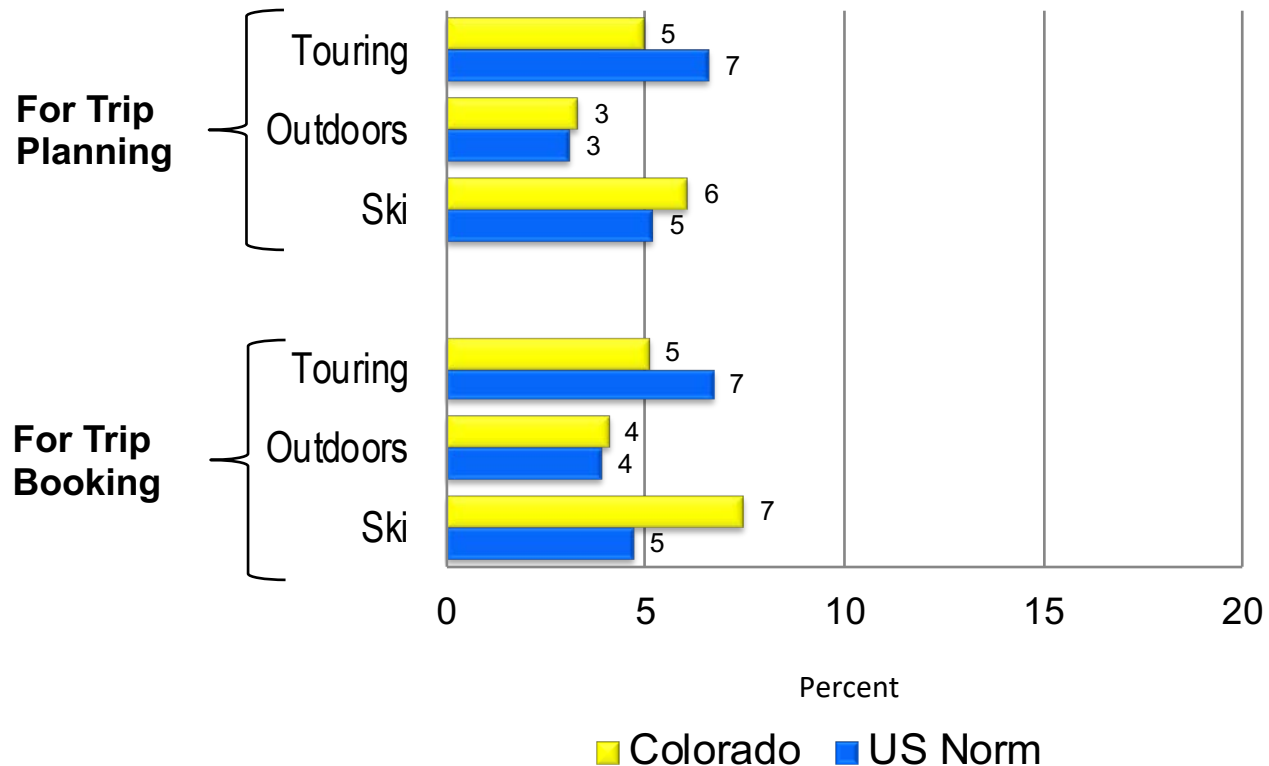


Percent Who Are College Graduates

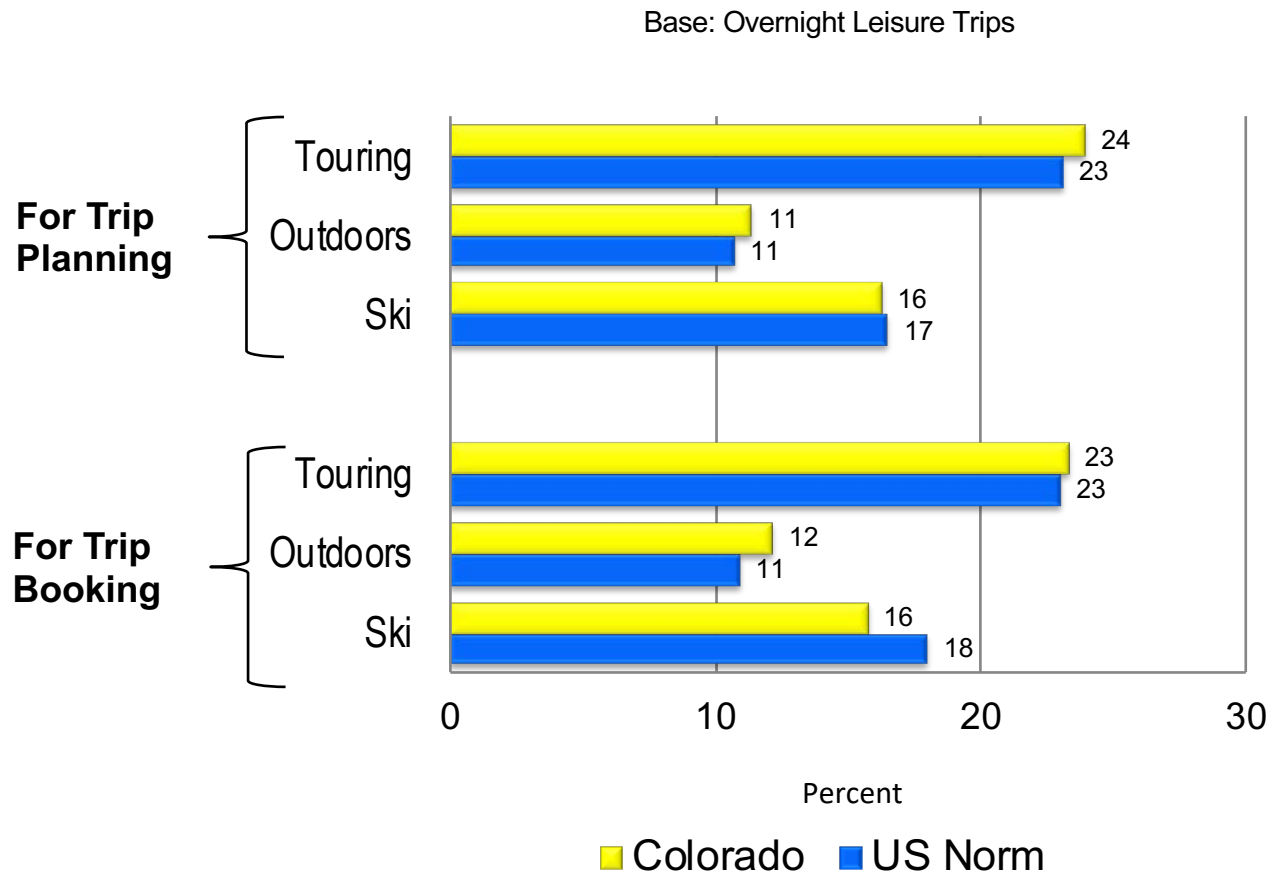


Use of Travel Agents

Base: Overnight Leisure Trips

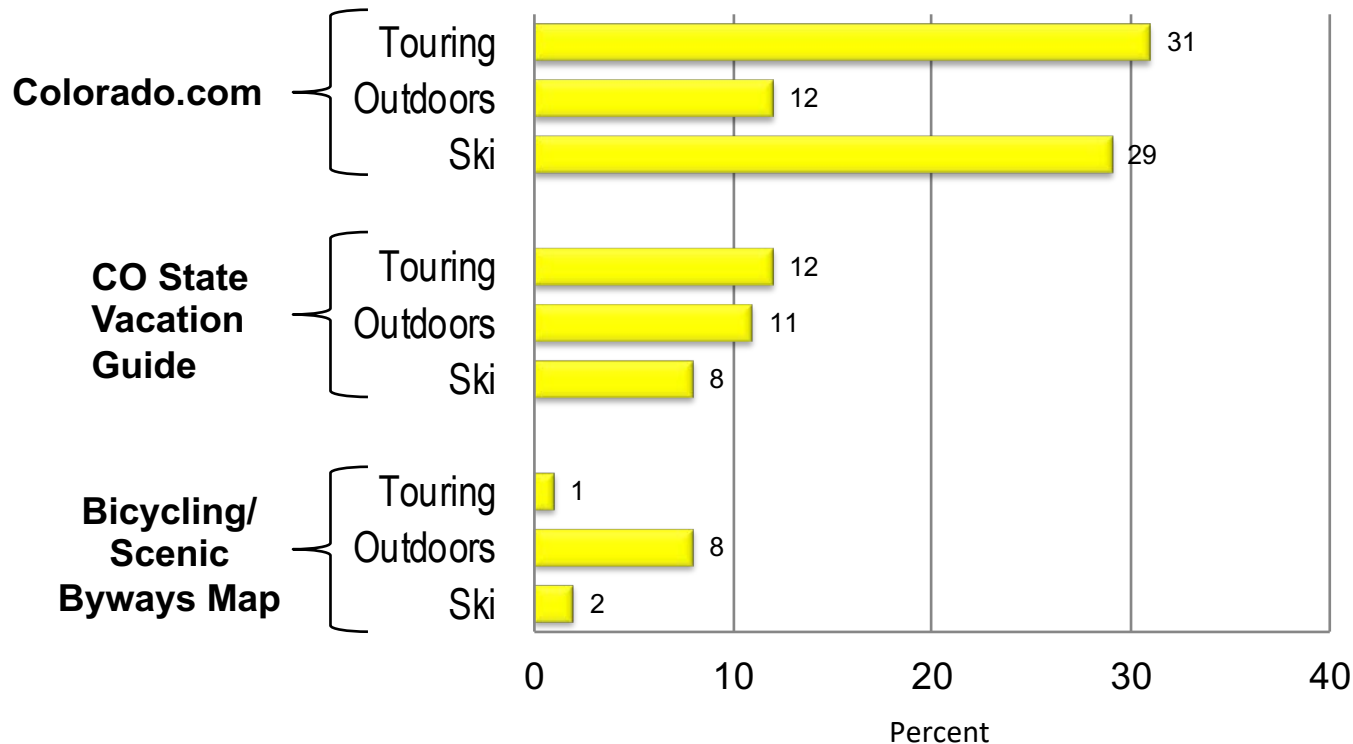


Use of Online Travel Agency for Trip Planning & Booking

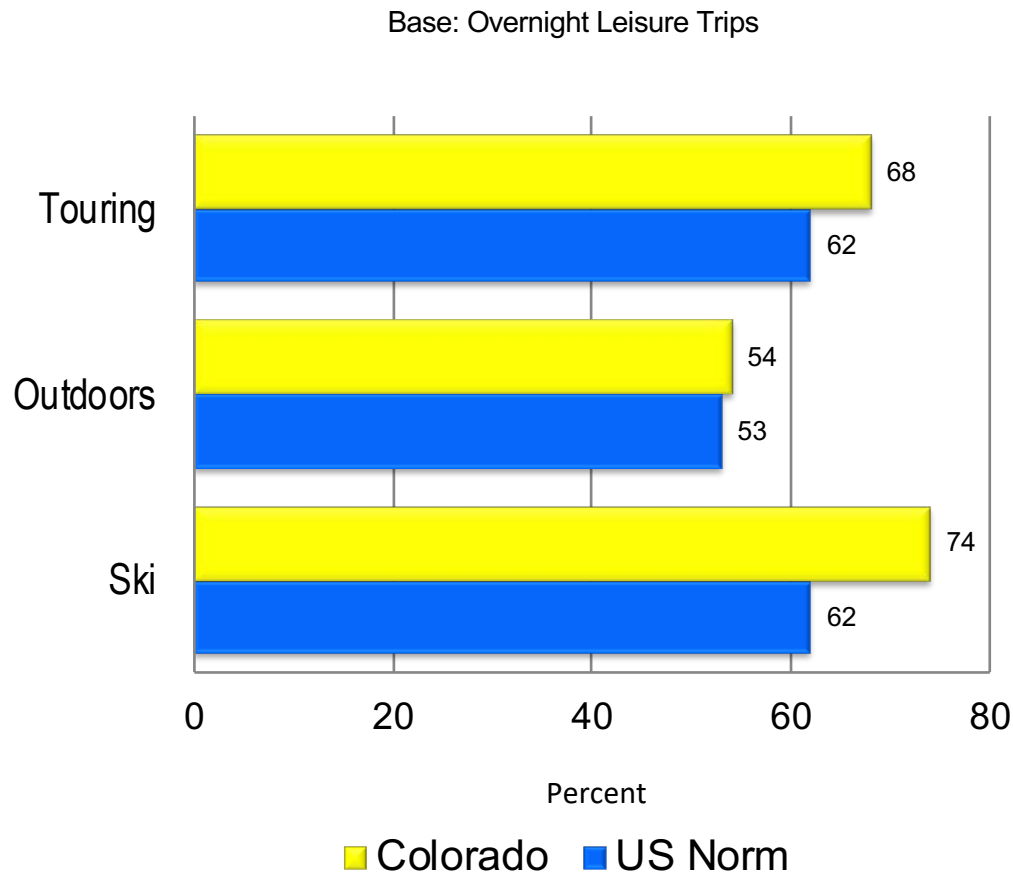


Use of Colorado-Specific Material for Trip Planning/During Trip

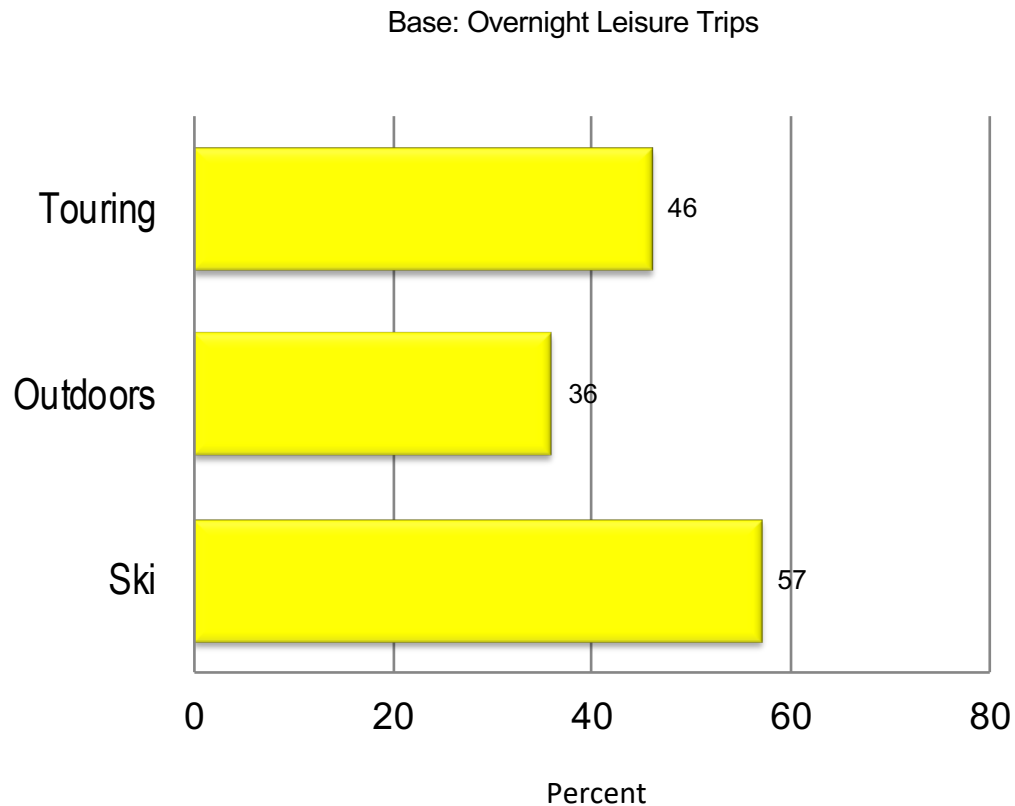
Base: Overnight Leisure Trips



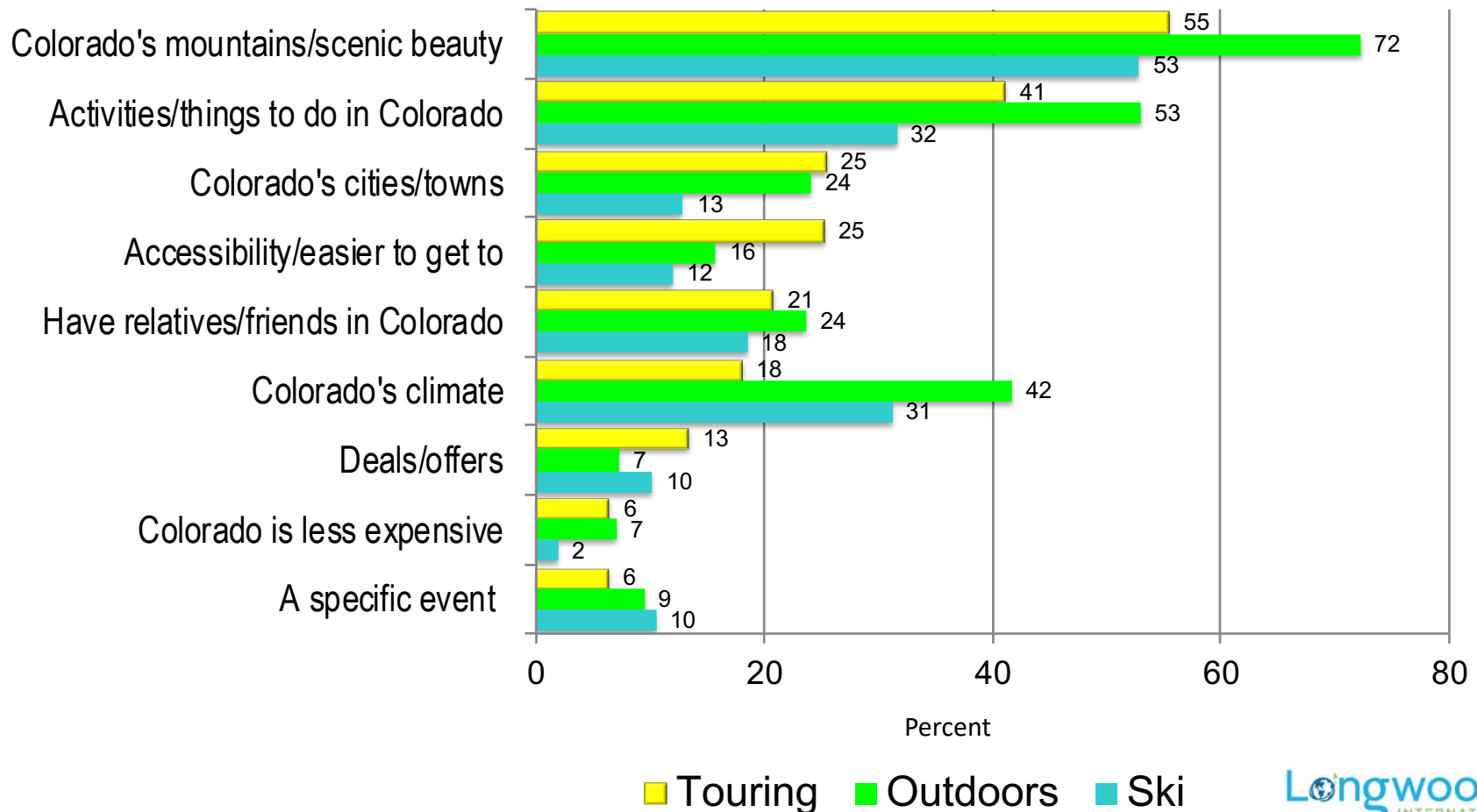
Trip Planning Cycle — % Planning 2+ Months in Advance



Trip Booking Cycle — % Booking 2+ Months in Advance

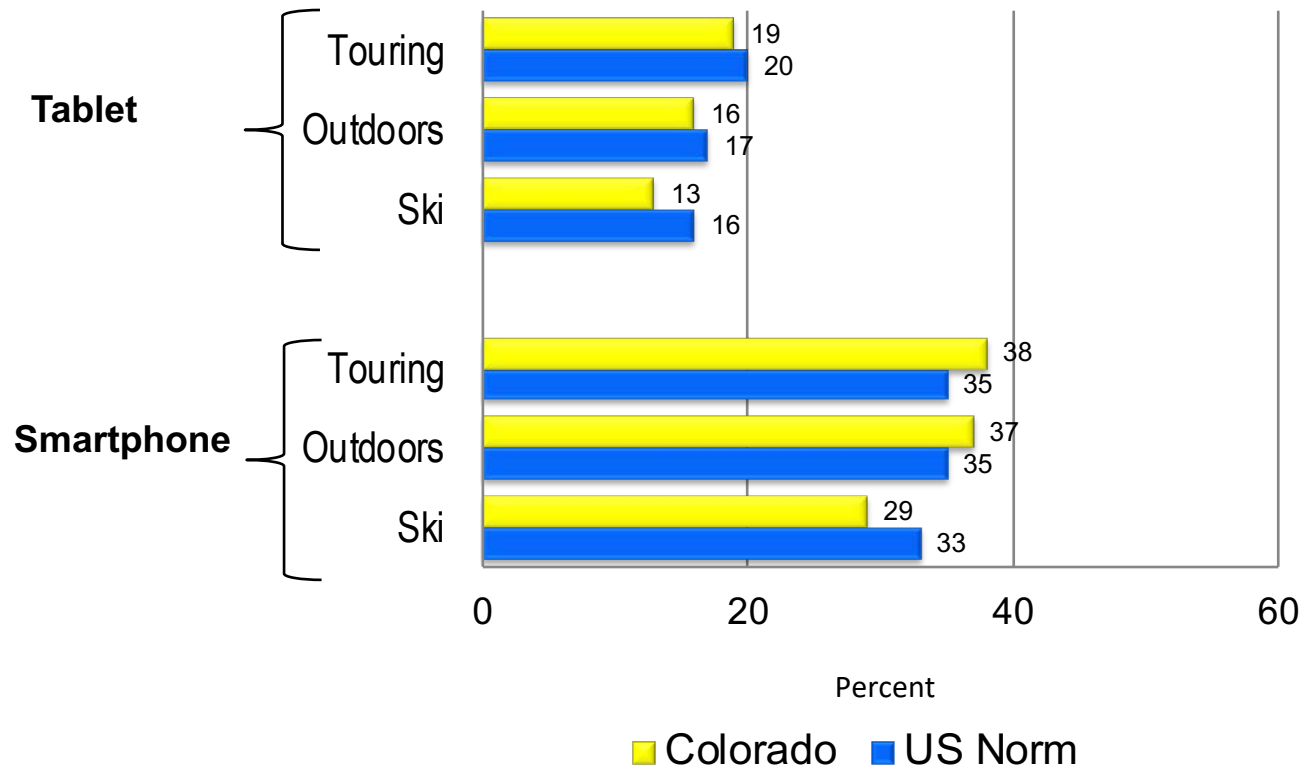


Stated Aspects of Greatest Interest When Choosing Colorado Over Competition

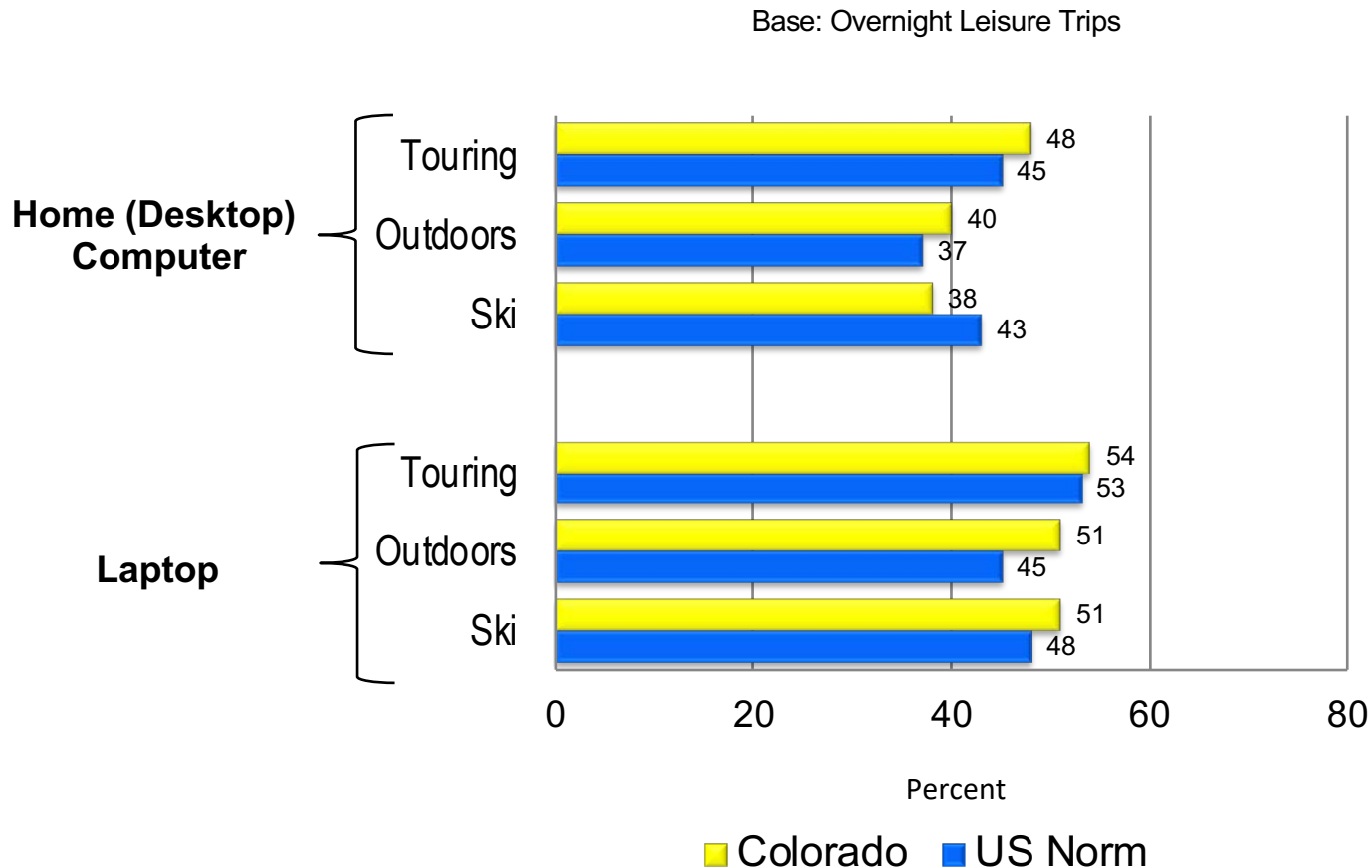


Use of Devices for Trip Planning

Base: Overnight Leisure Trips

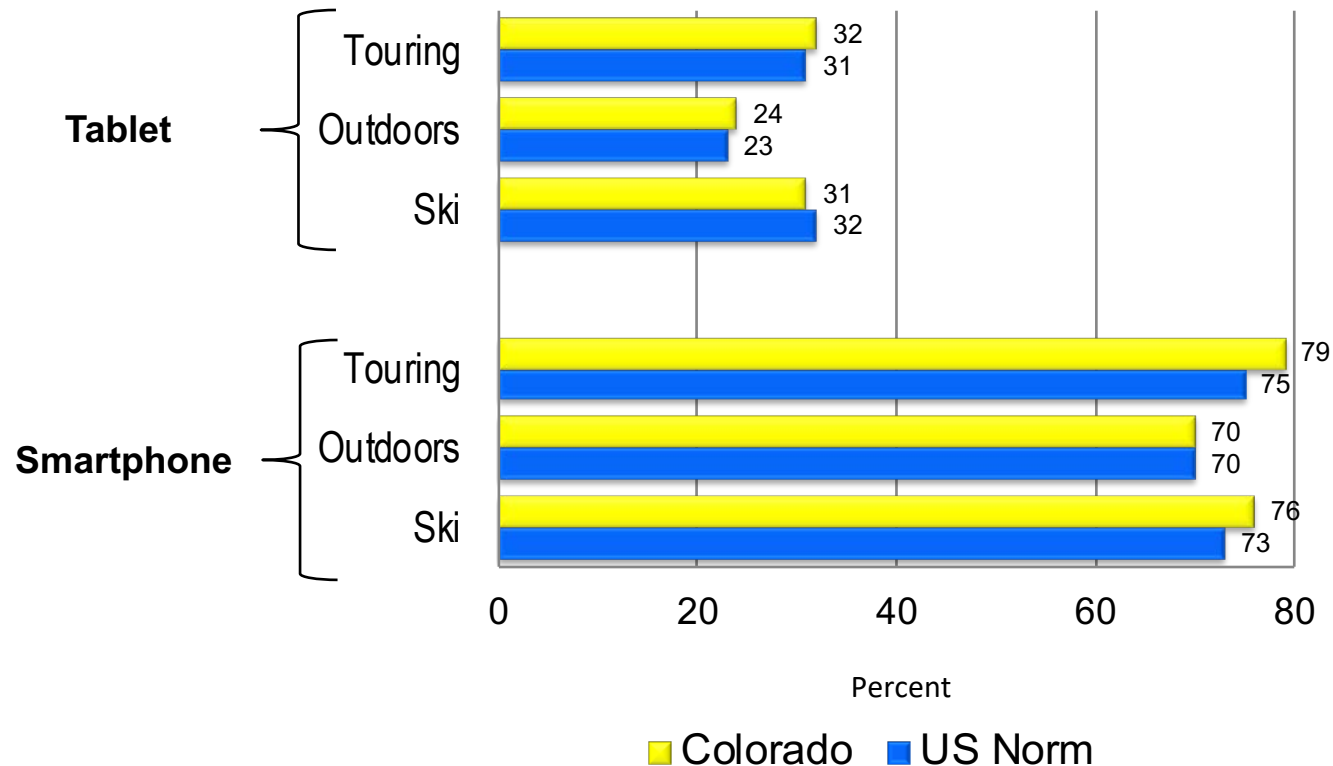


Use of Devices for Trip Planning



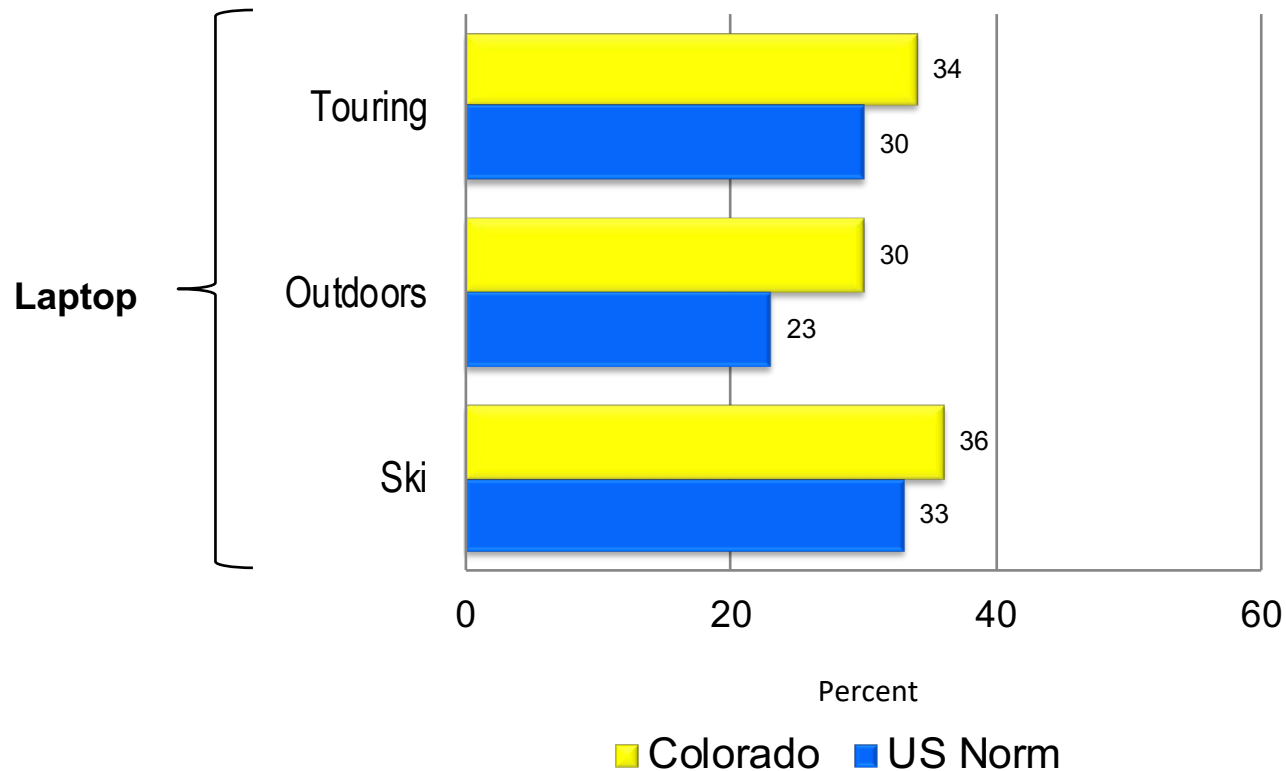
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips



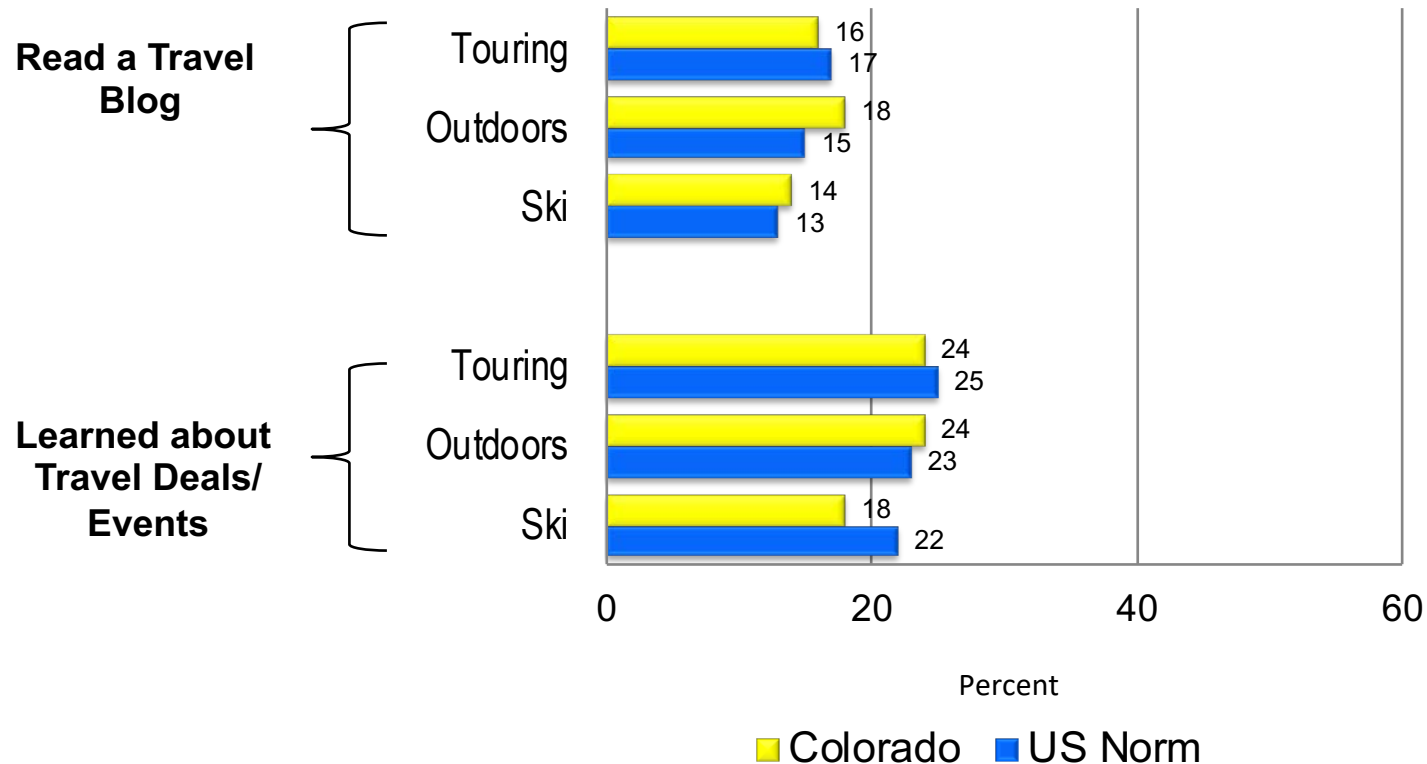
Use of Mobile Devices During Trip

Base: Overnight Leisure Trips

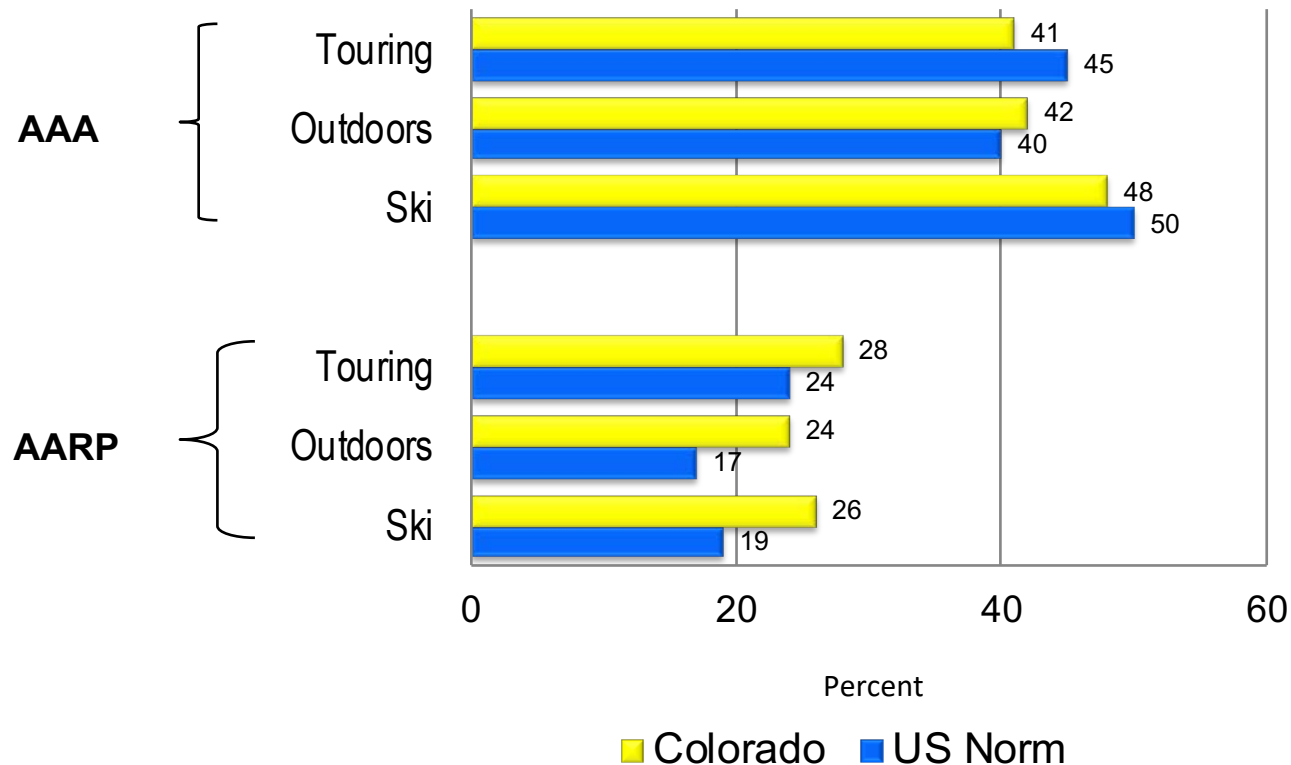


Use of Social Media in the Past 3 Months

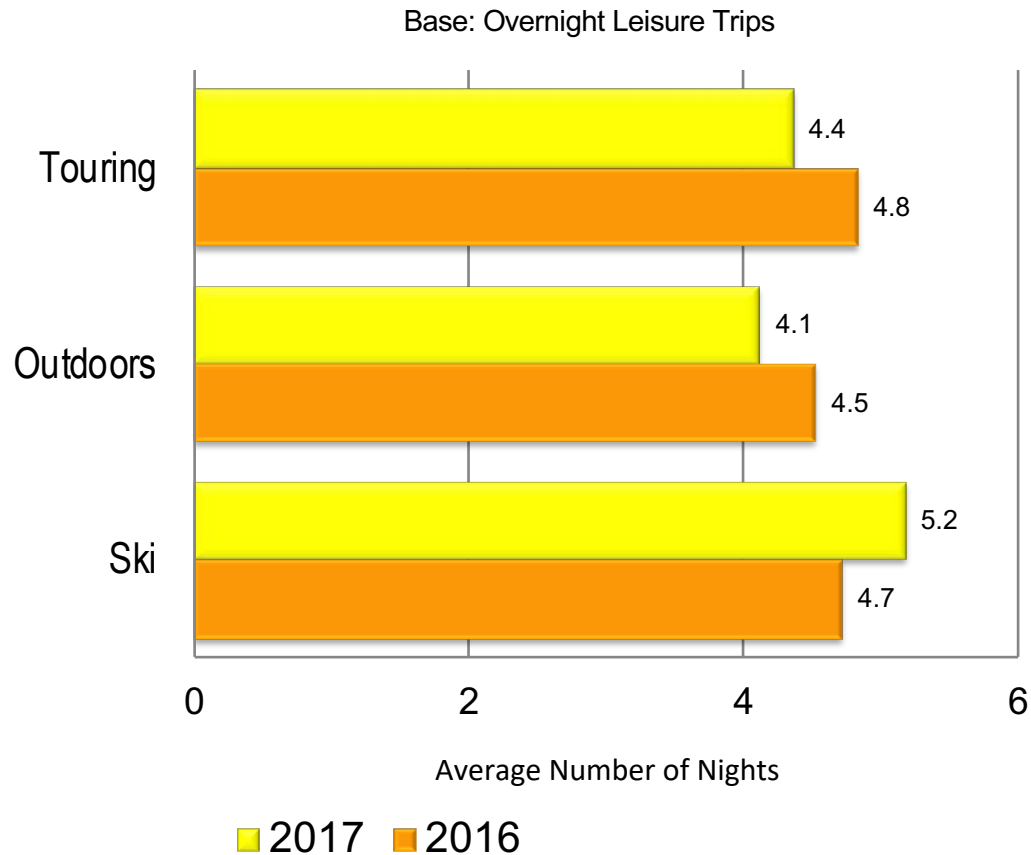
Base: Overnight Leisure Trips



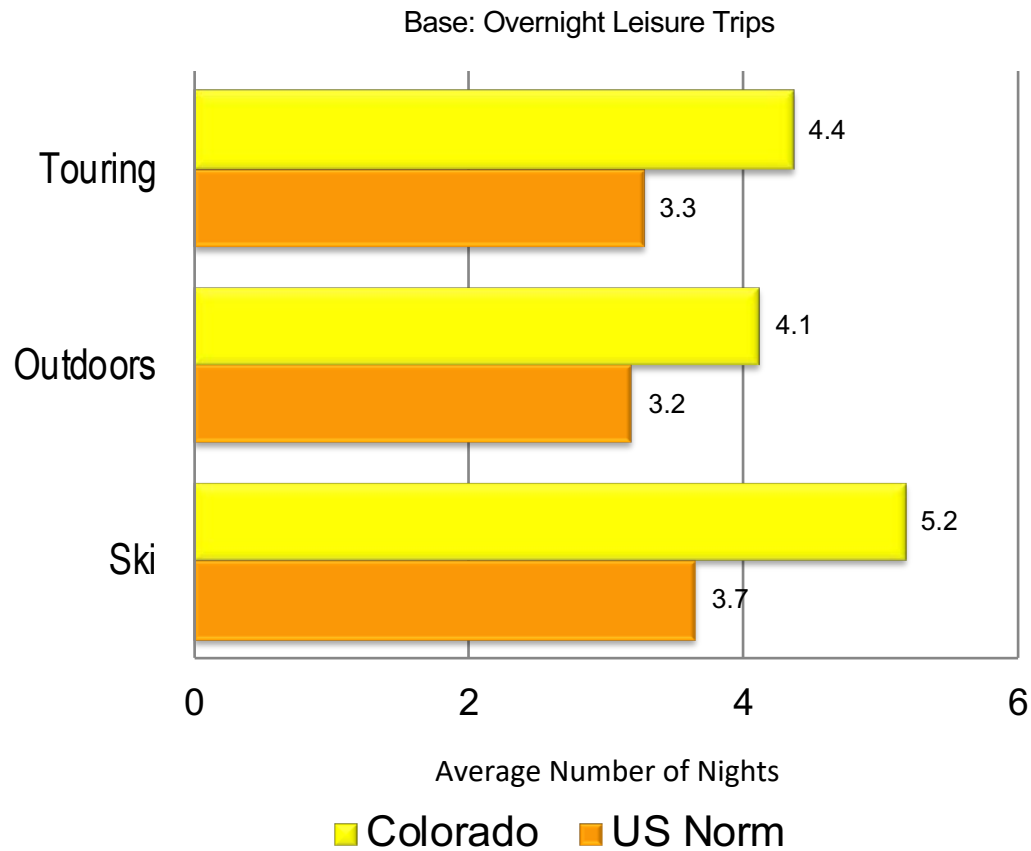
Percent Who Are Members of AAA/AARP



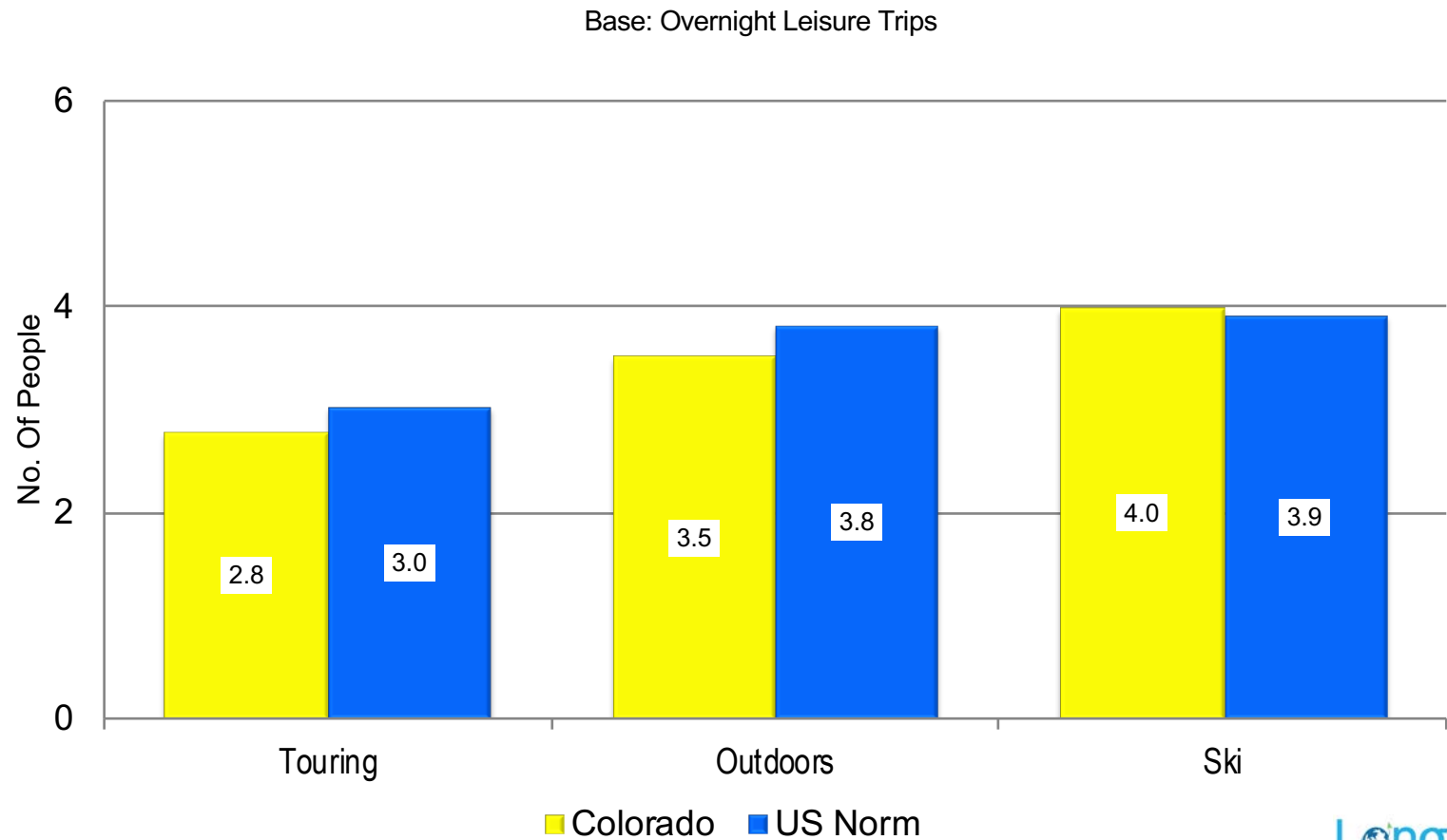
Length of Colorado Trip



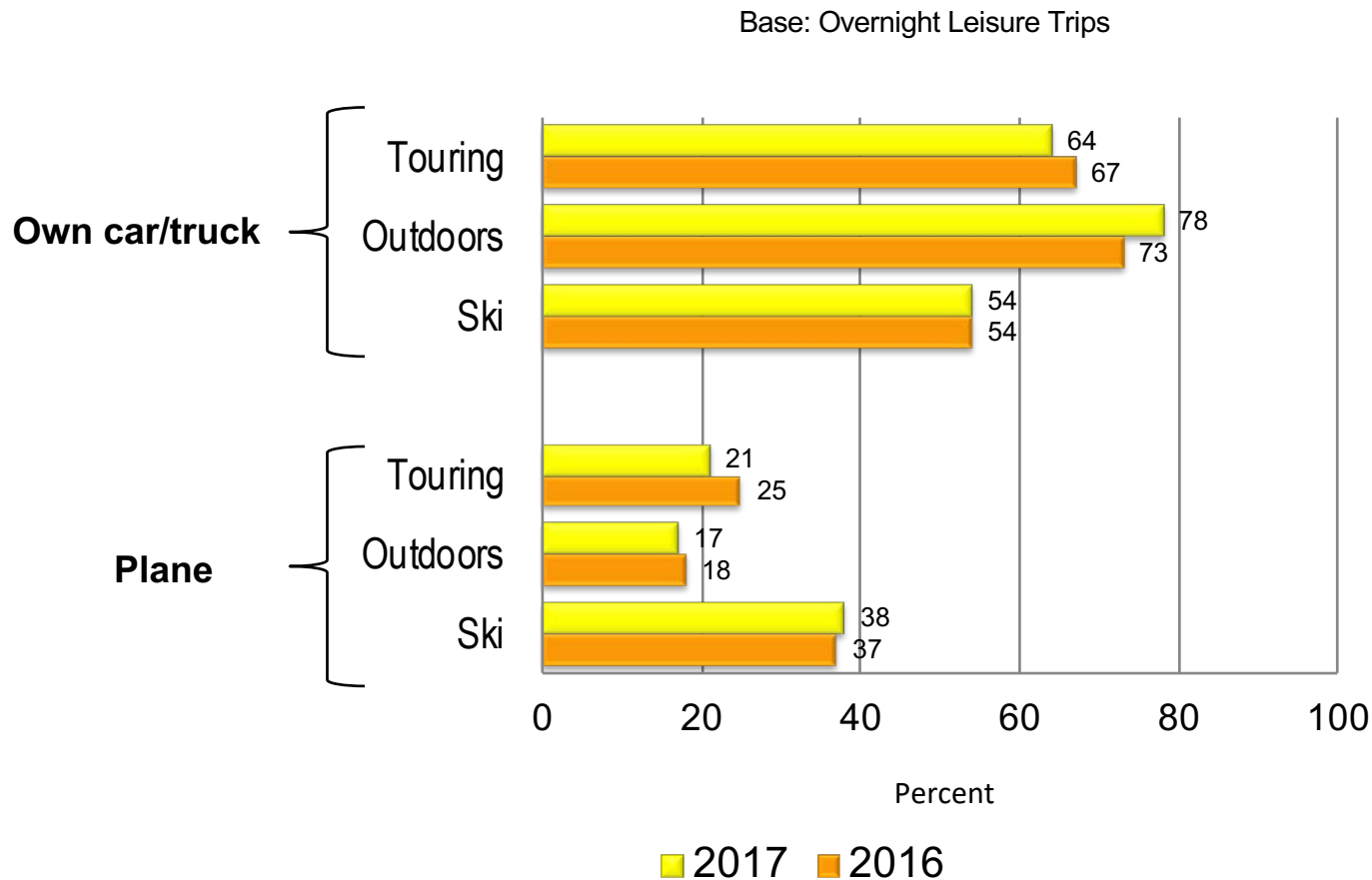
Length of Trip



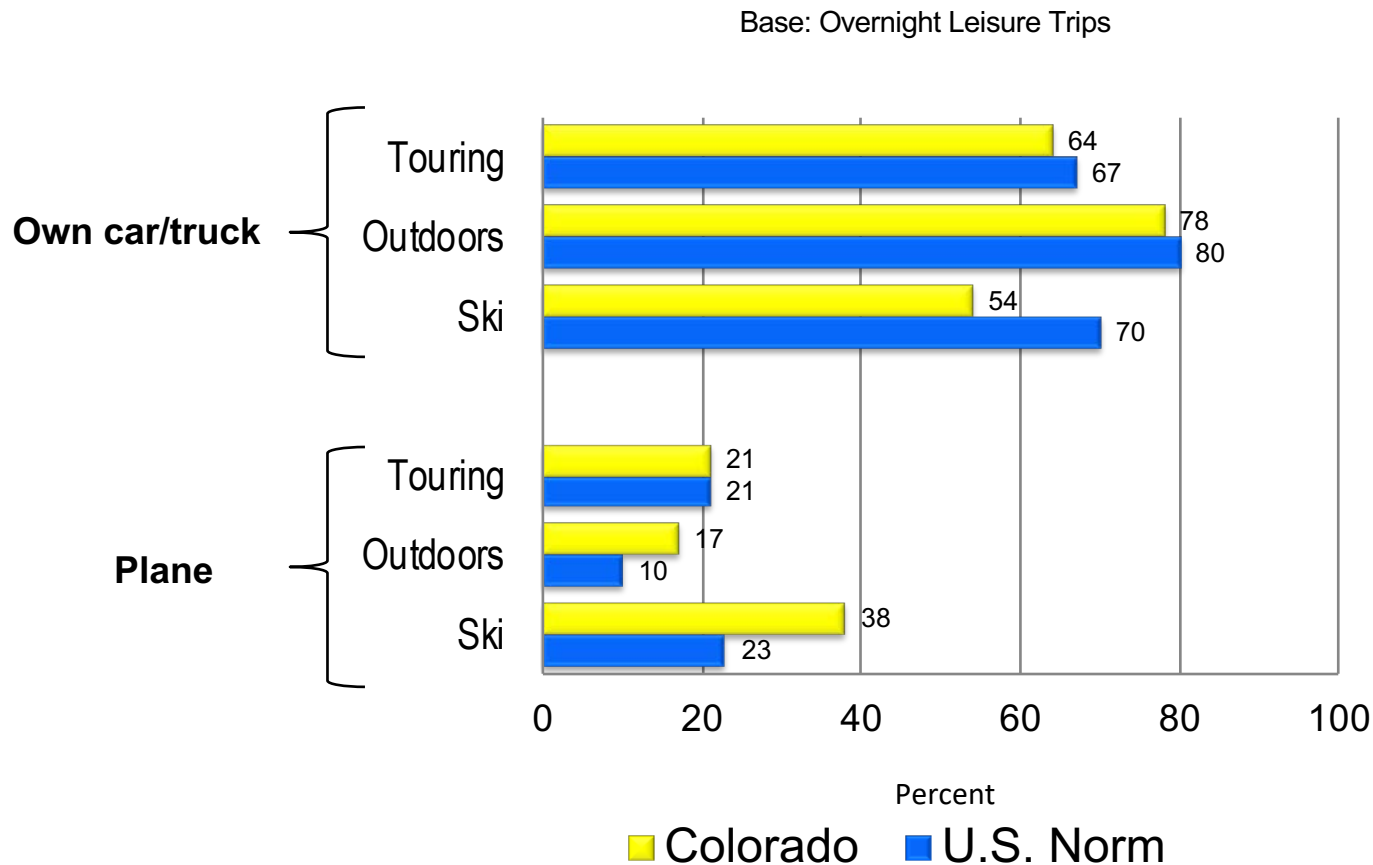
Size of Travel Party



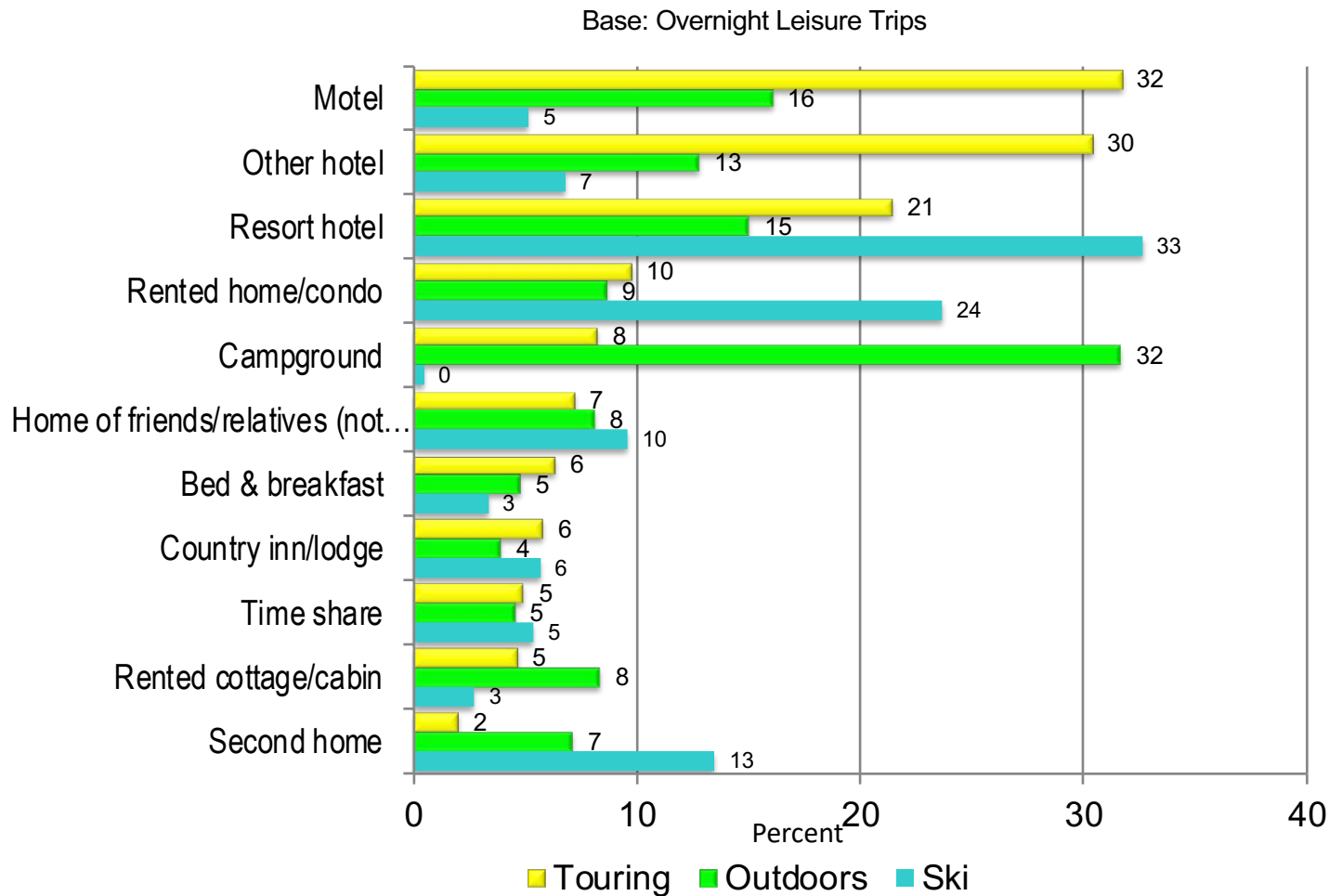
Transportation Used on Colorado Trip



Transportation Used on Trip

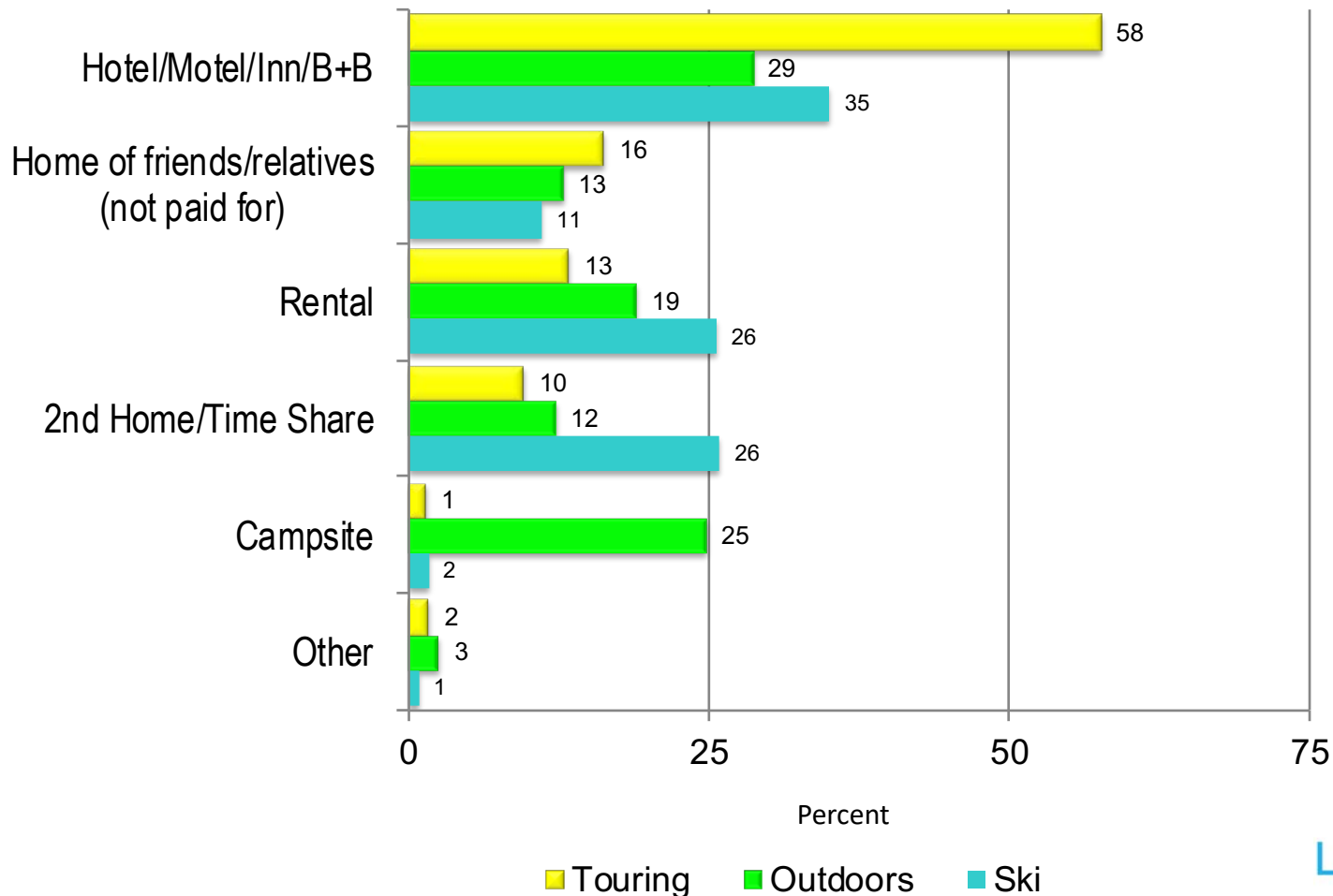


Accommodations Used on Trip



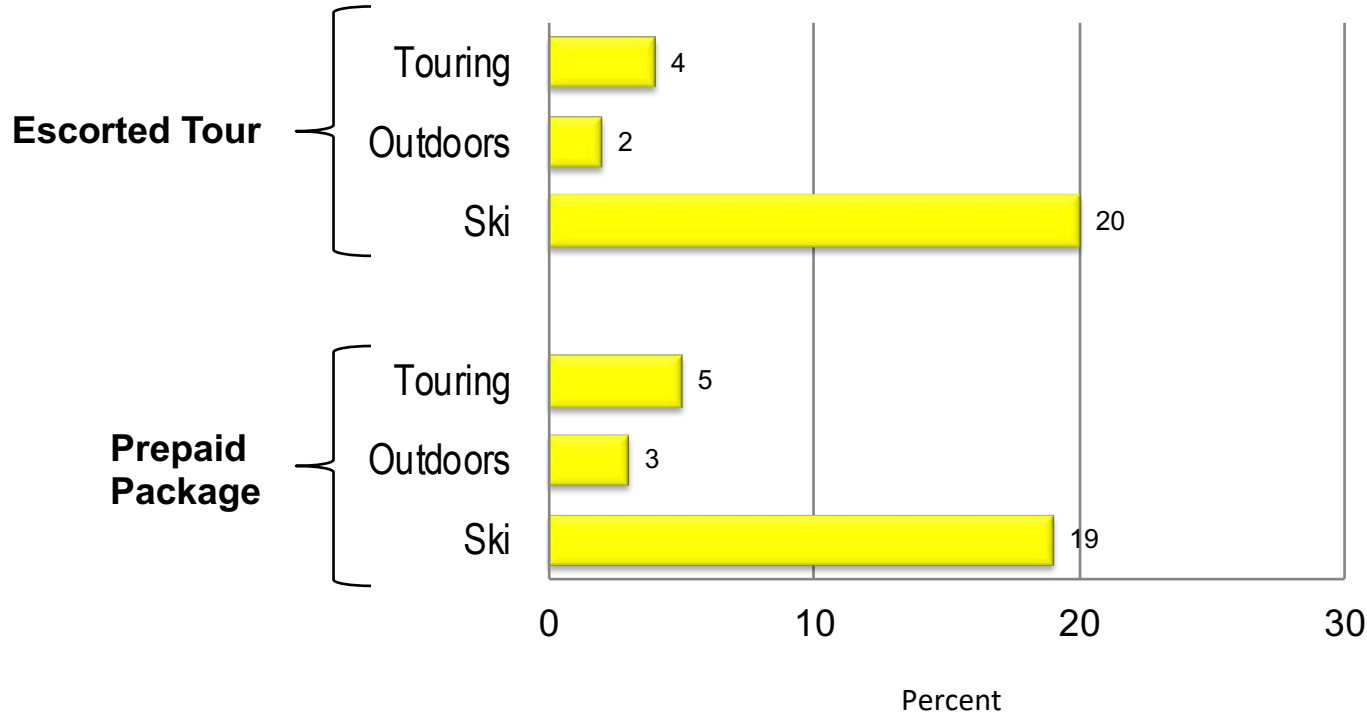
Percent of Colorado Trip-Nights Spent in Each Type of Accommodations

Base: Overnight Leisure Trips

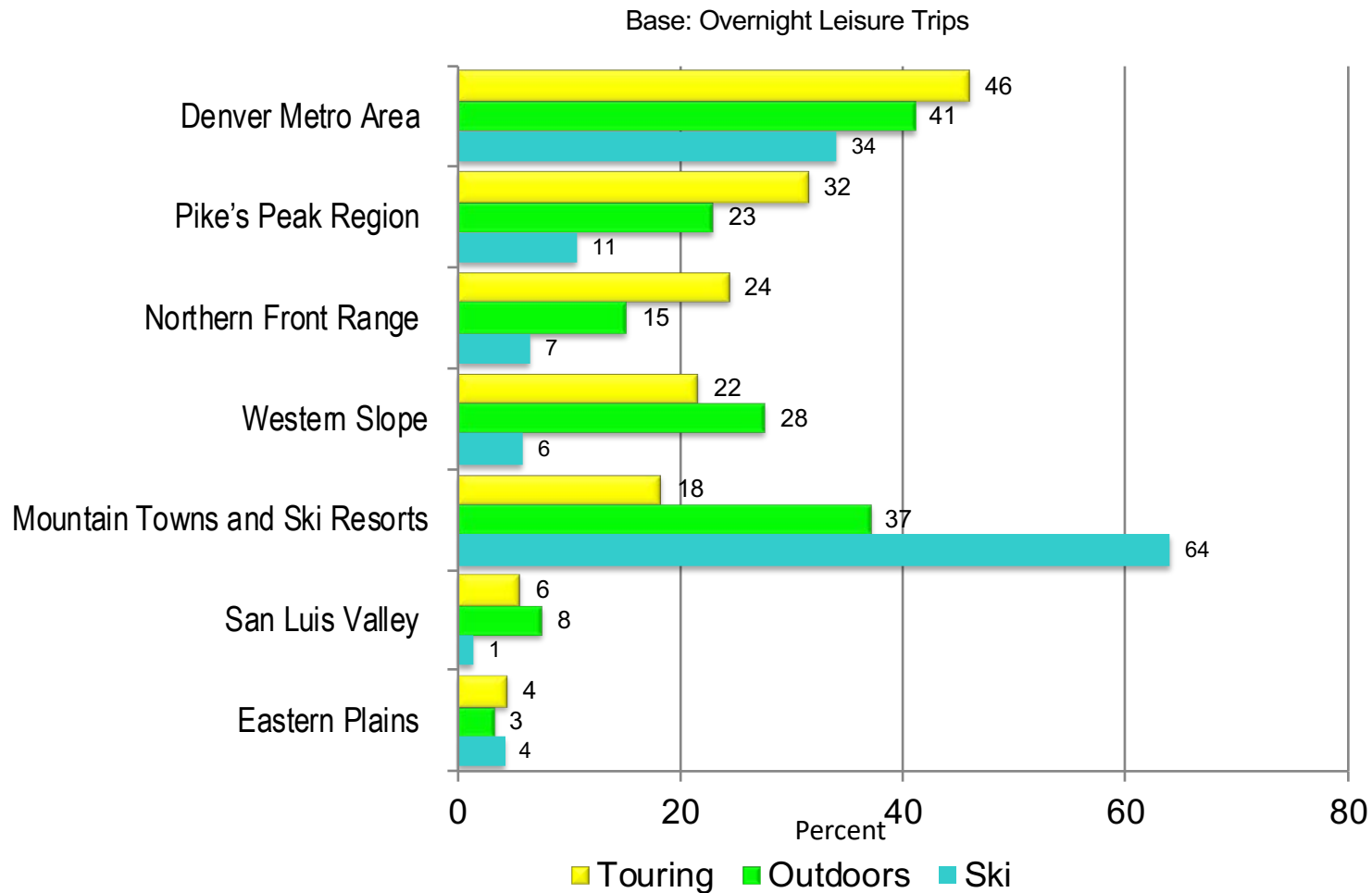


Escorted Group Tours/Prepaid Packages on Colorado Trip

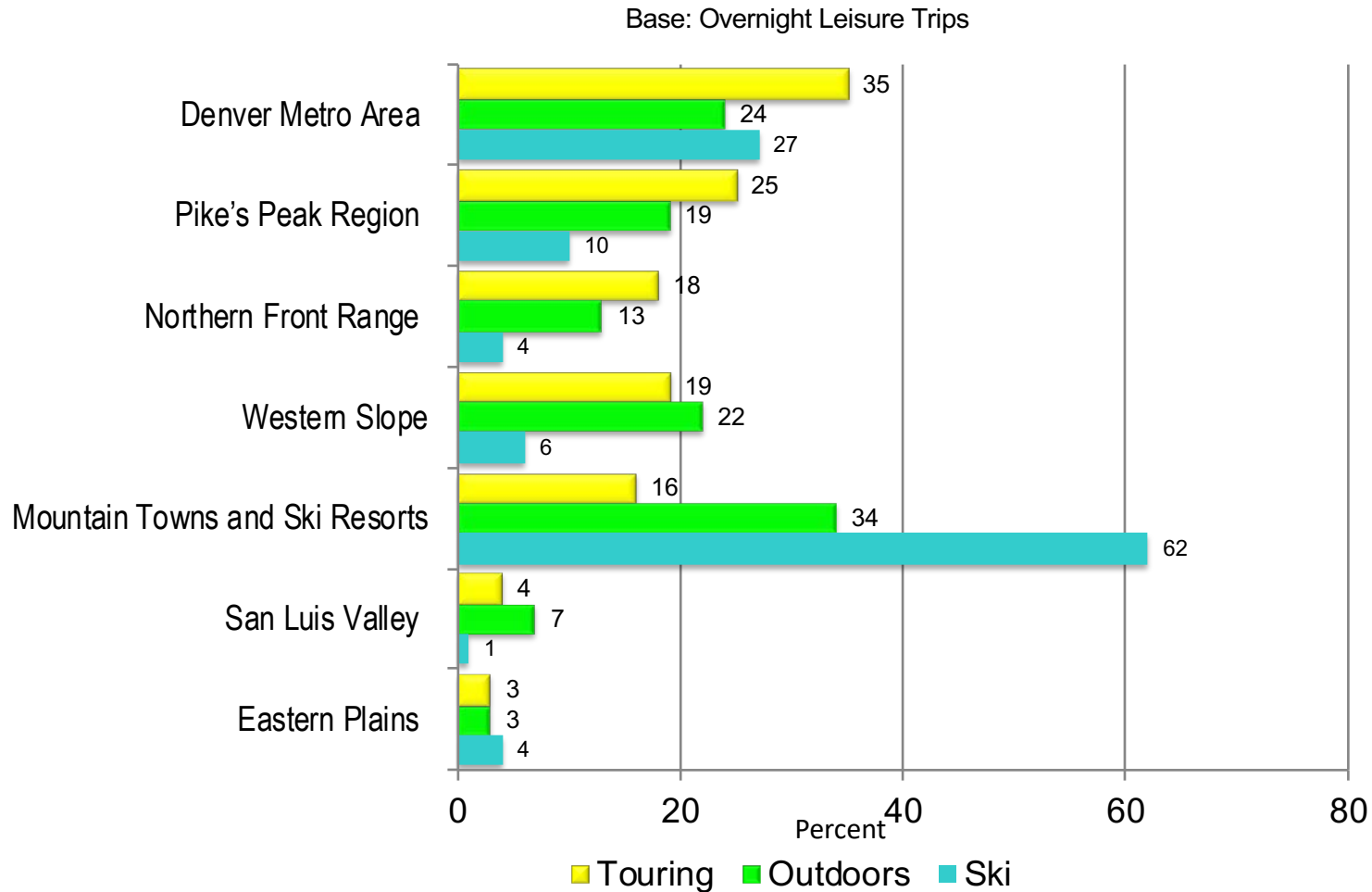
Base: Overnight Leisure Trips



Regions Spent Time In

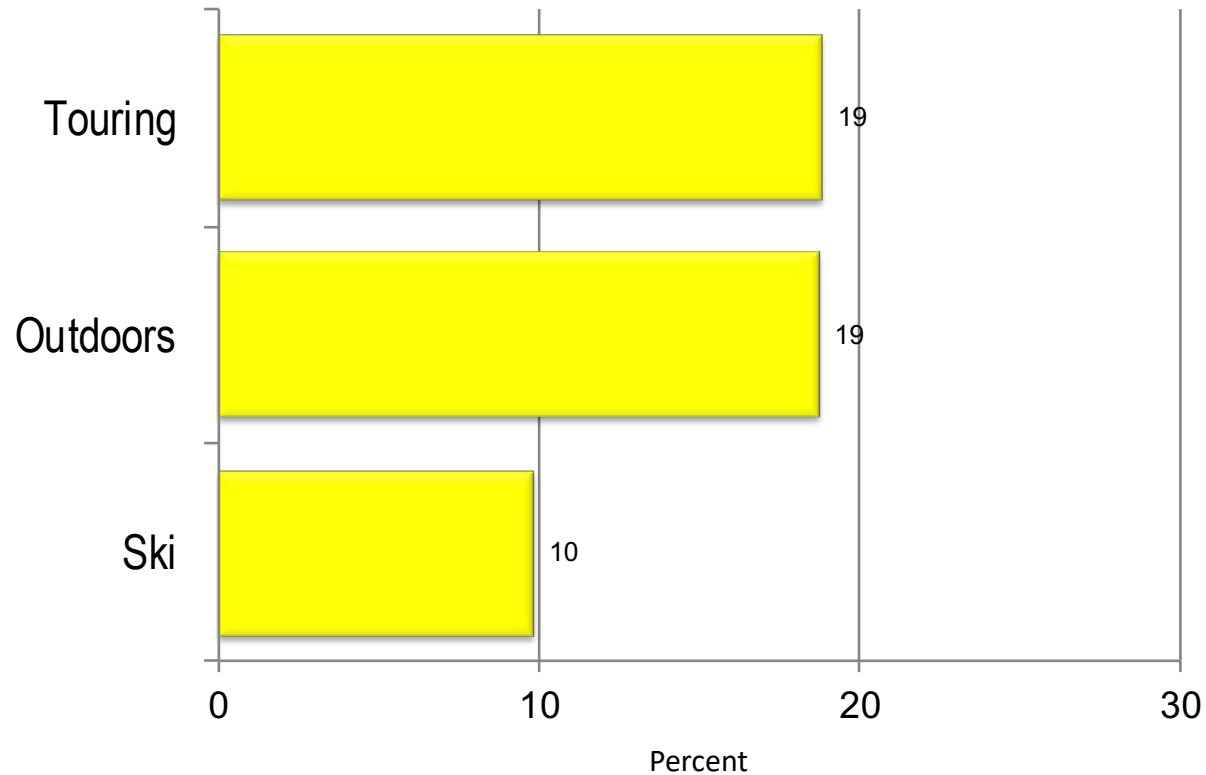


Regions Stayed Overnight

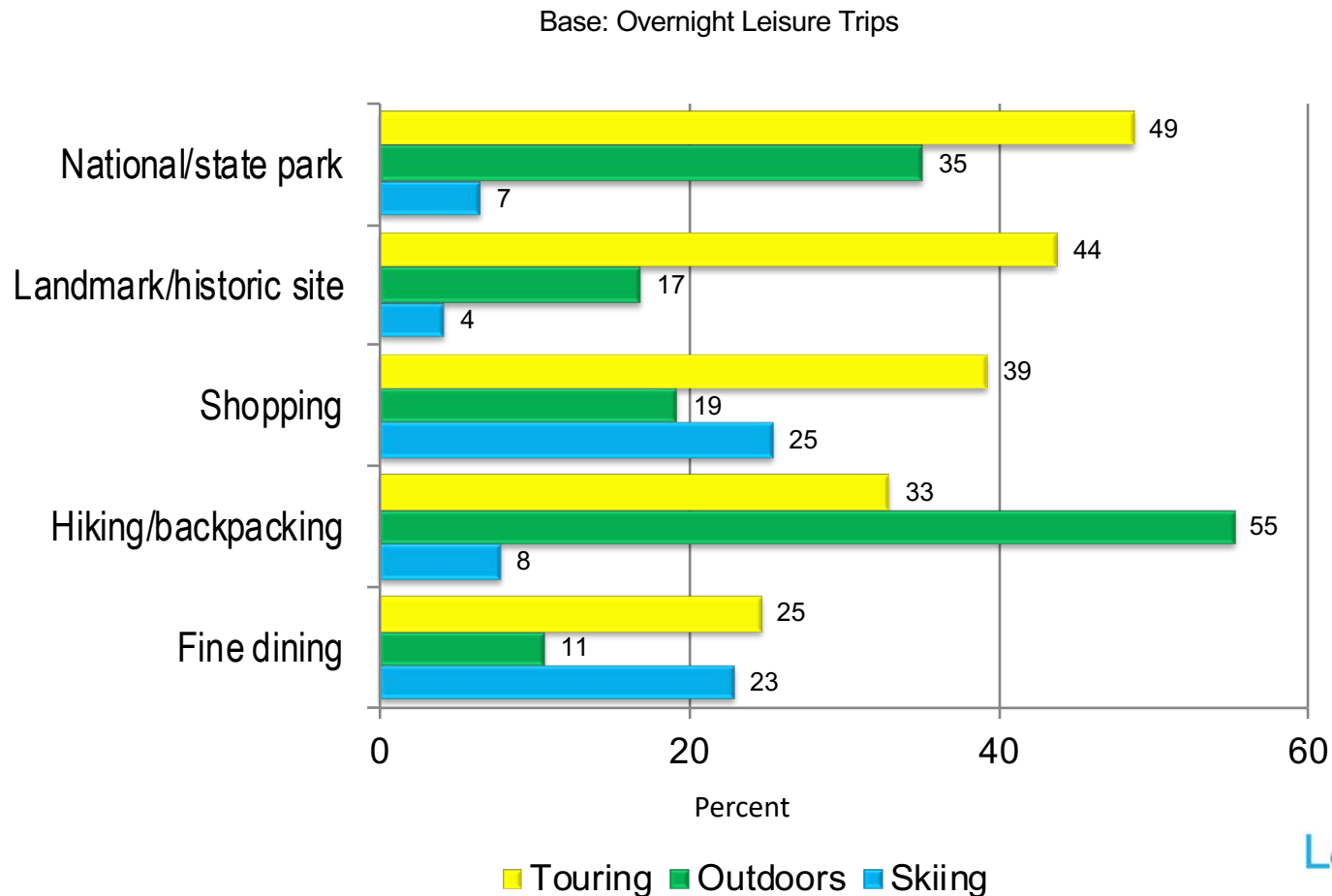


Traveled on Scenic/Historic Byway

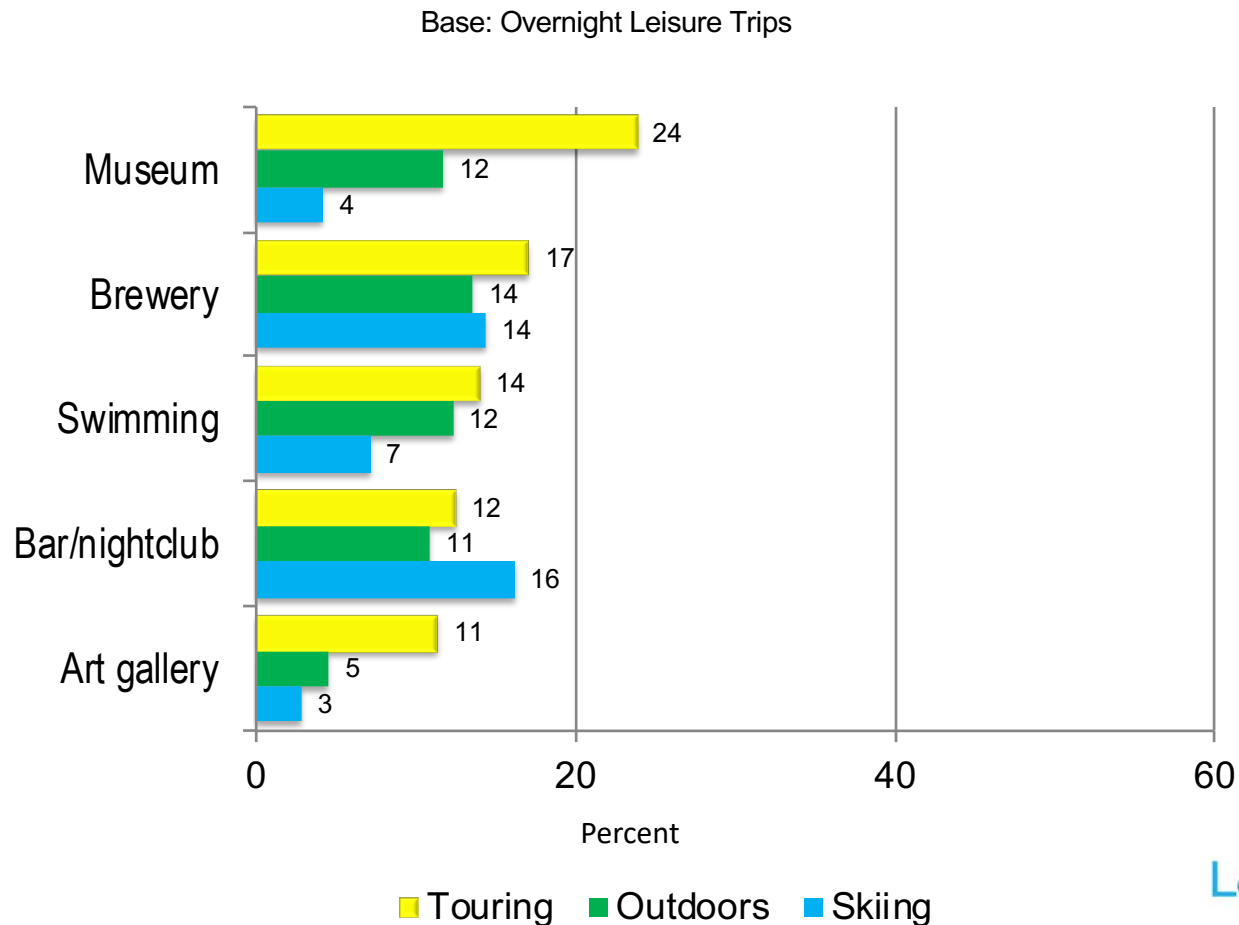
Base: Overnight Leisure Trips



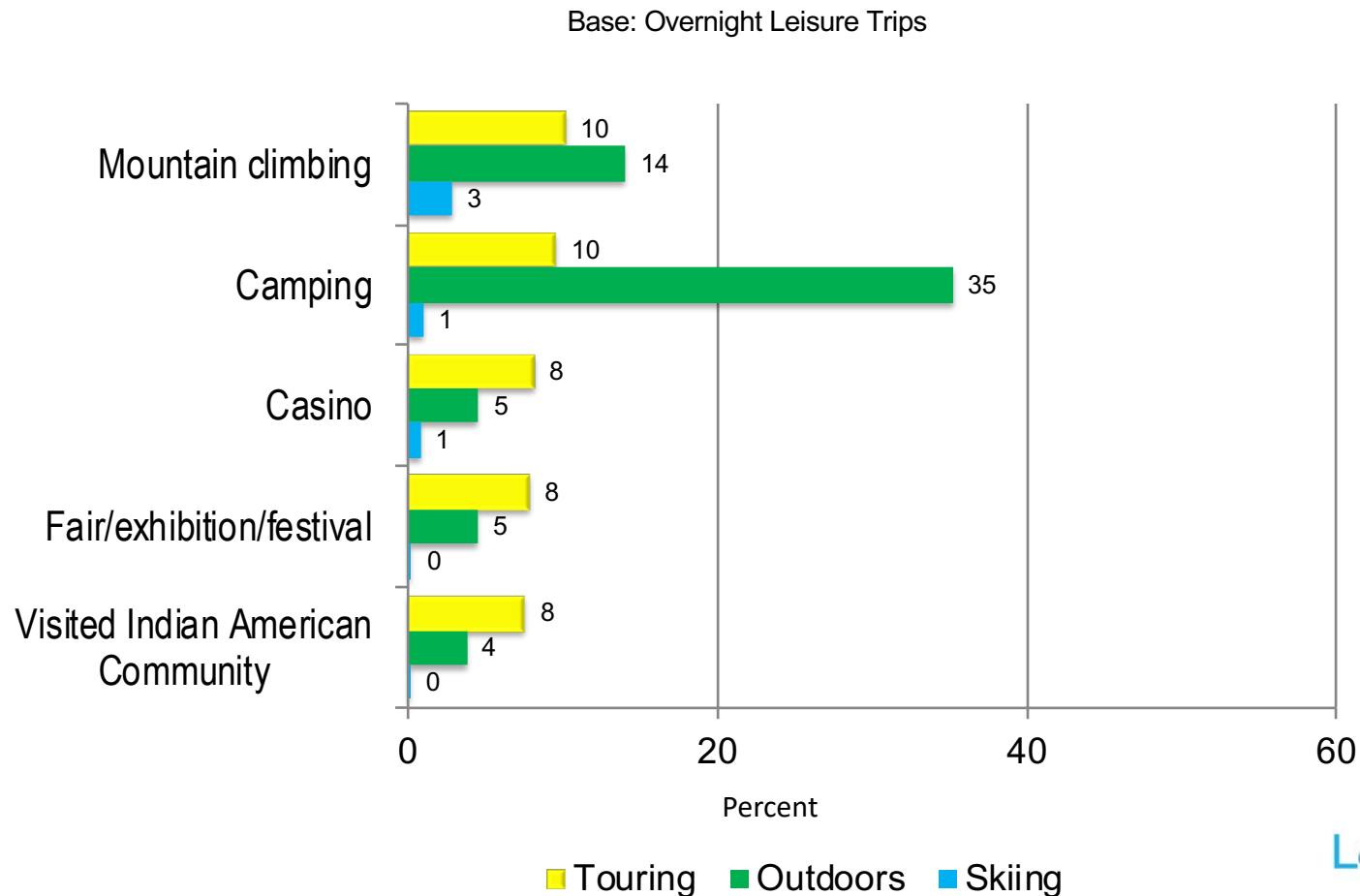
Activities on Colorado Trip in 2017



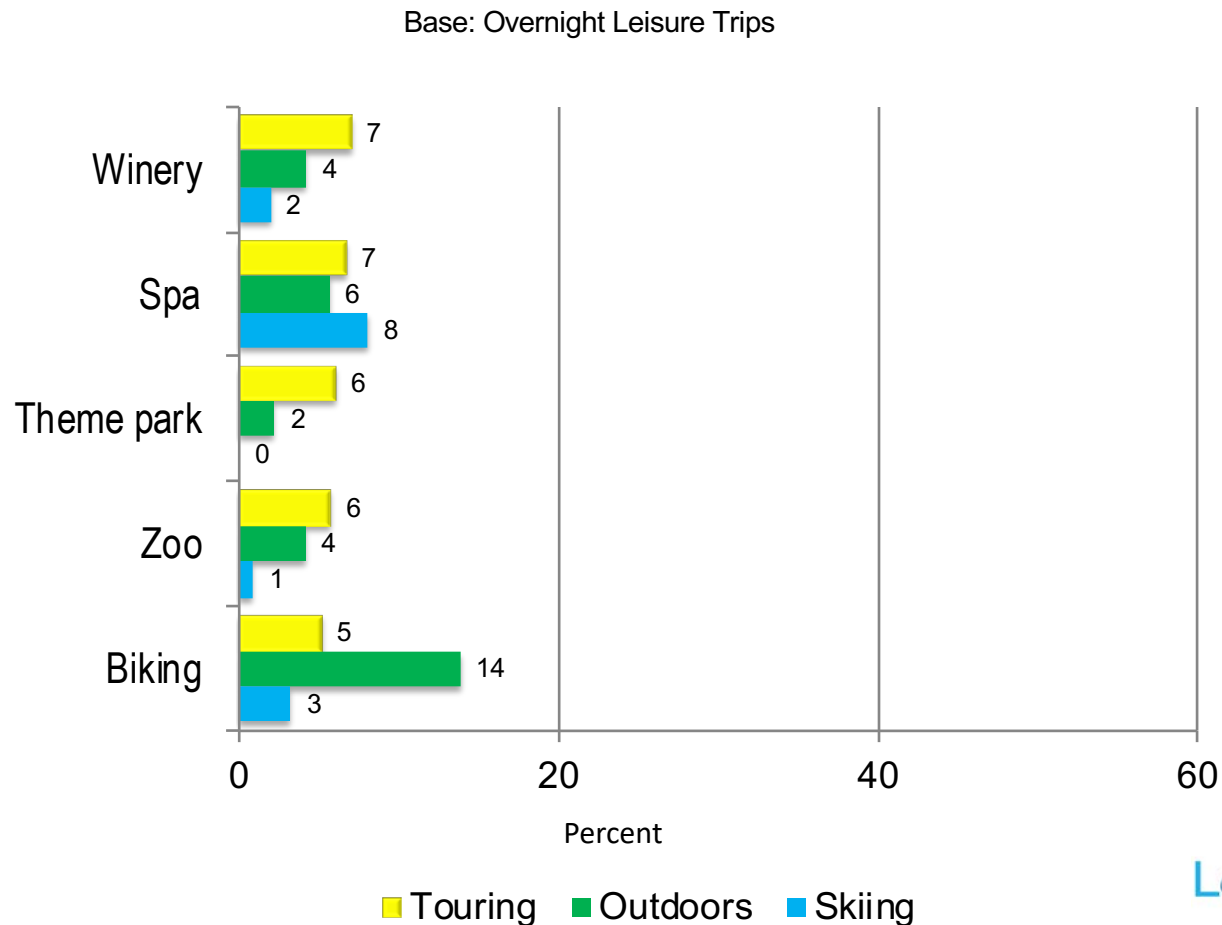
Activities on Colorado Trip in 2017 (Cont'd)



Activities on Colorado Trip in 2017 (Cont'd)

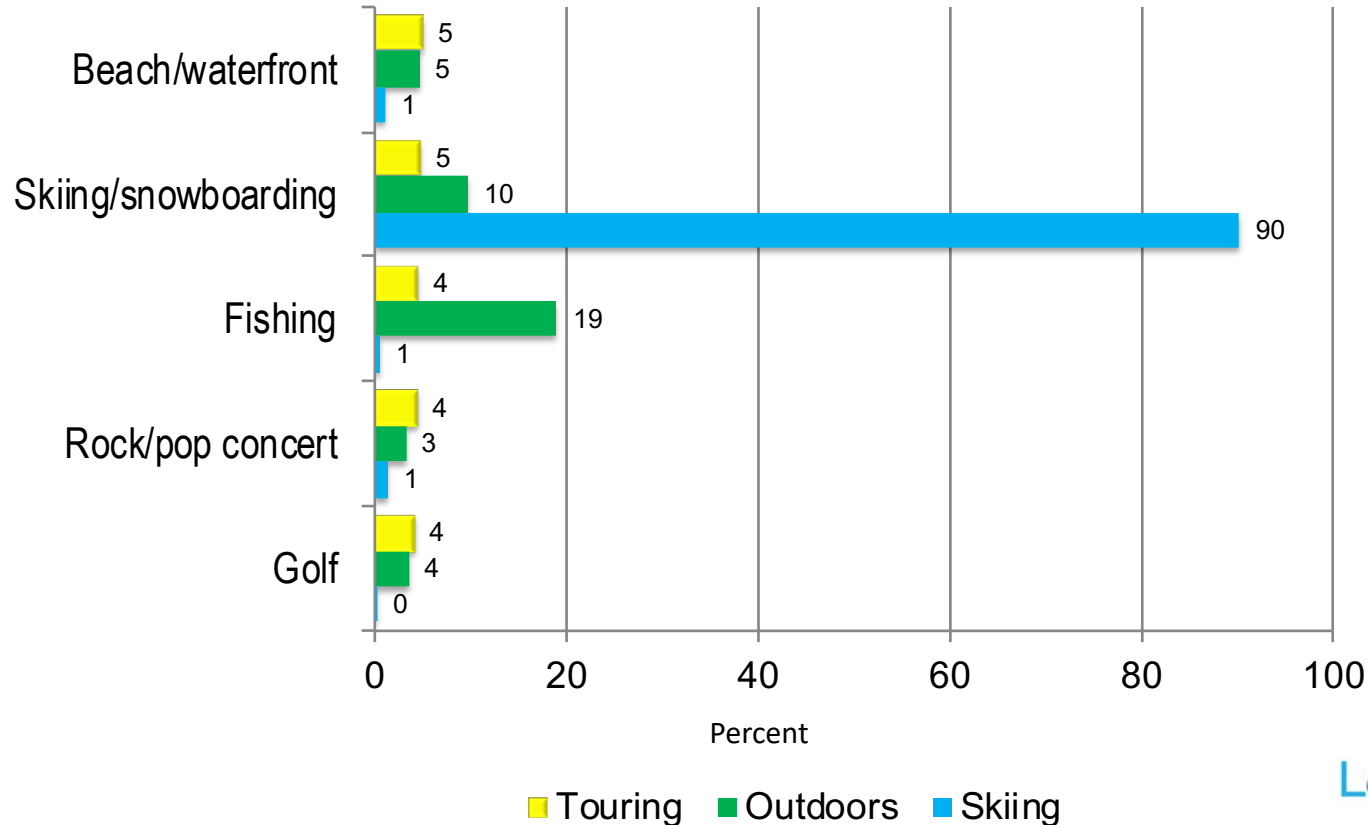


Activities on Colorado Trip in 2017 (Cont'd)

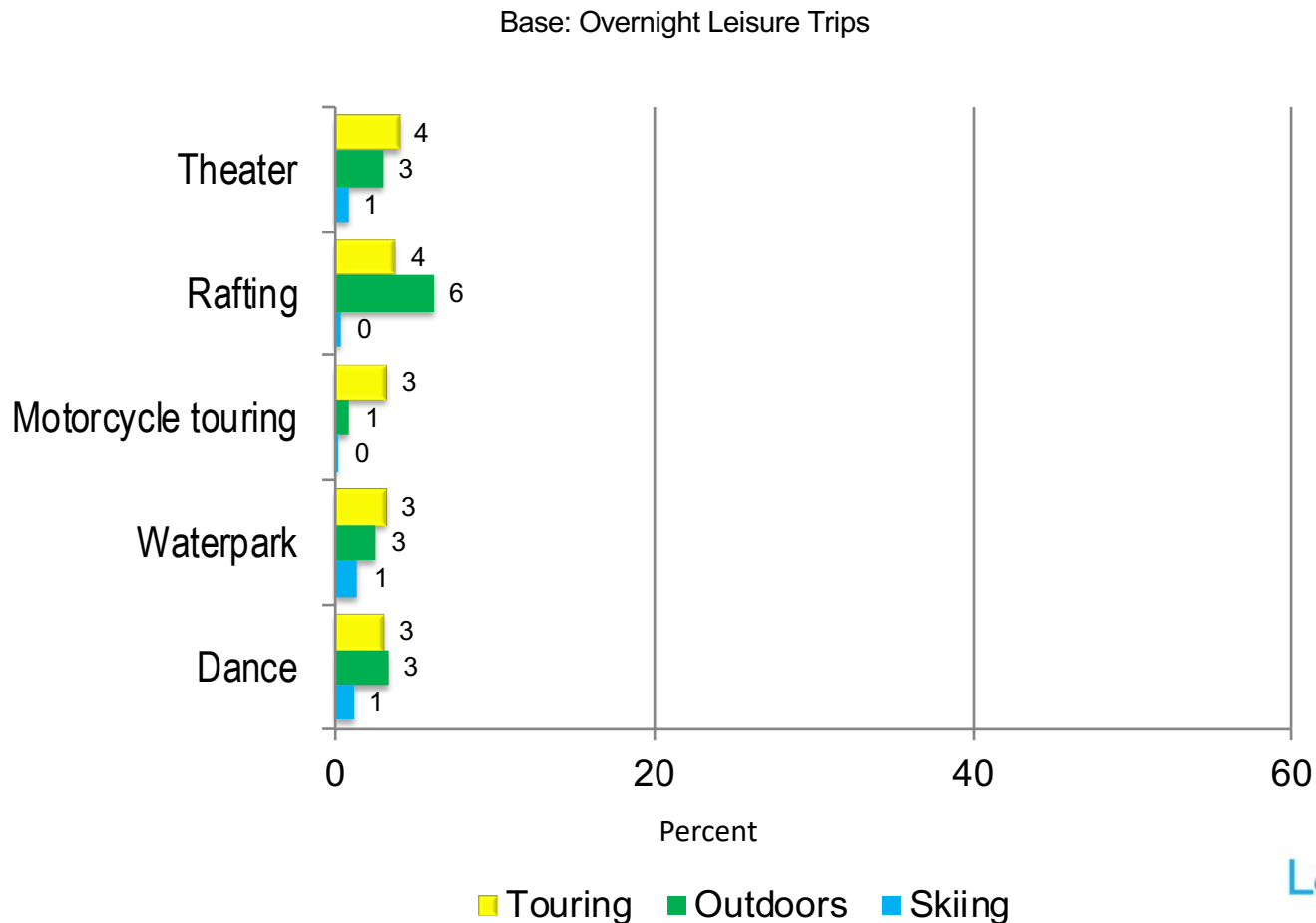


Activities on Colorado Trip in 2017 (Cont'd)

Base: Overnight Leisure Trips

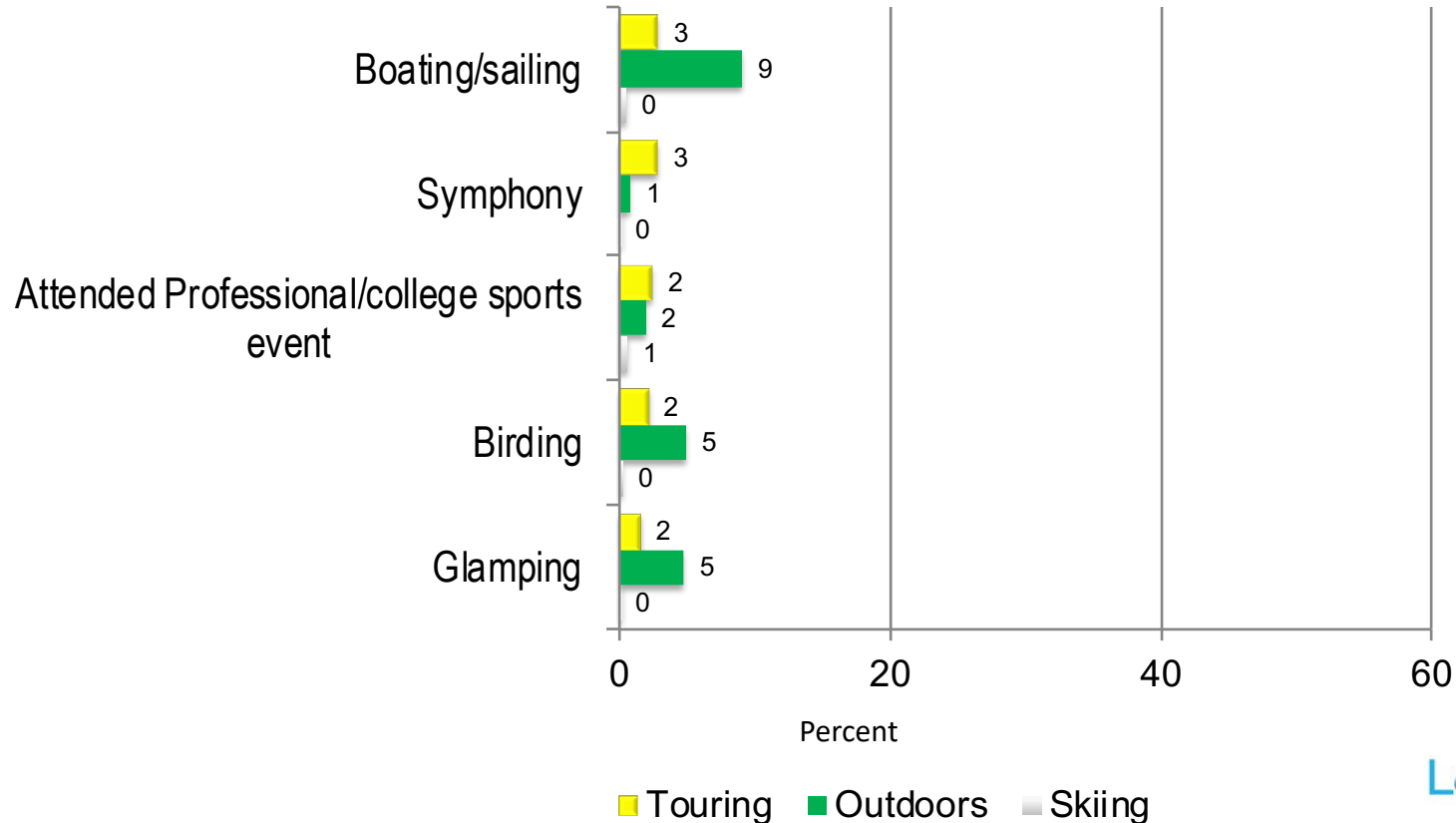


Activities on Colorado Trip in 2017 (Cont'd)



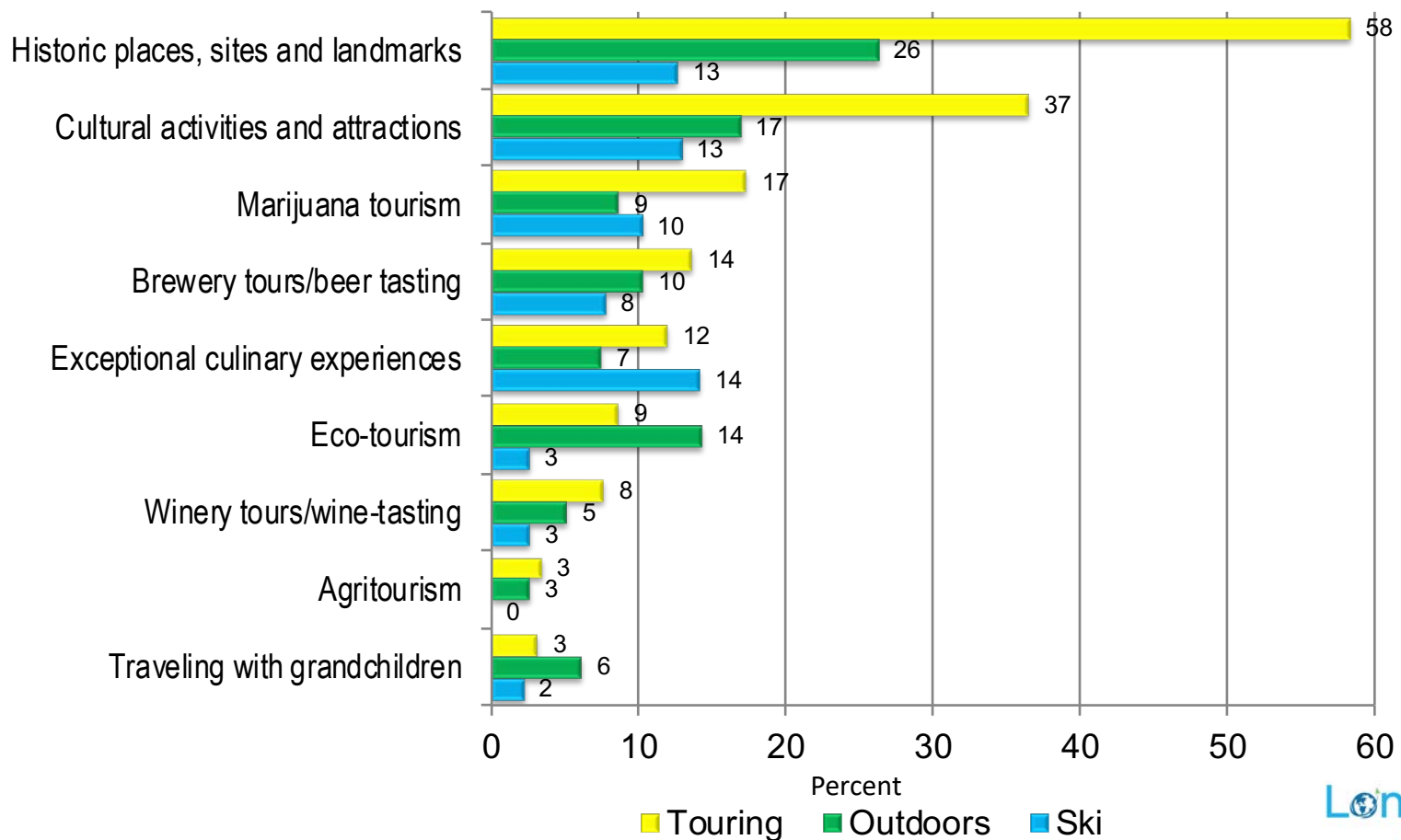
Activities on Colorado Trip in 2017 (Cont'd)

Base: Overnight Leisure Trips

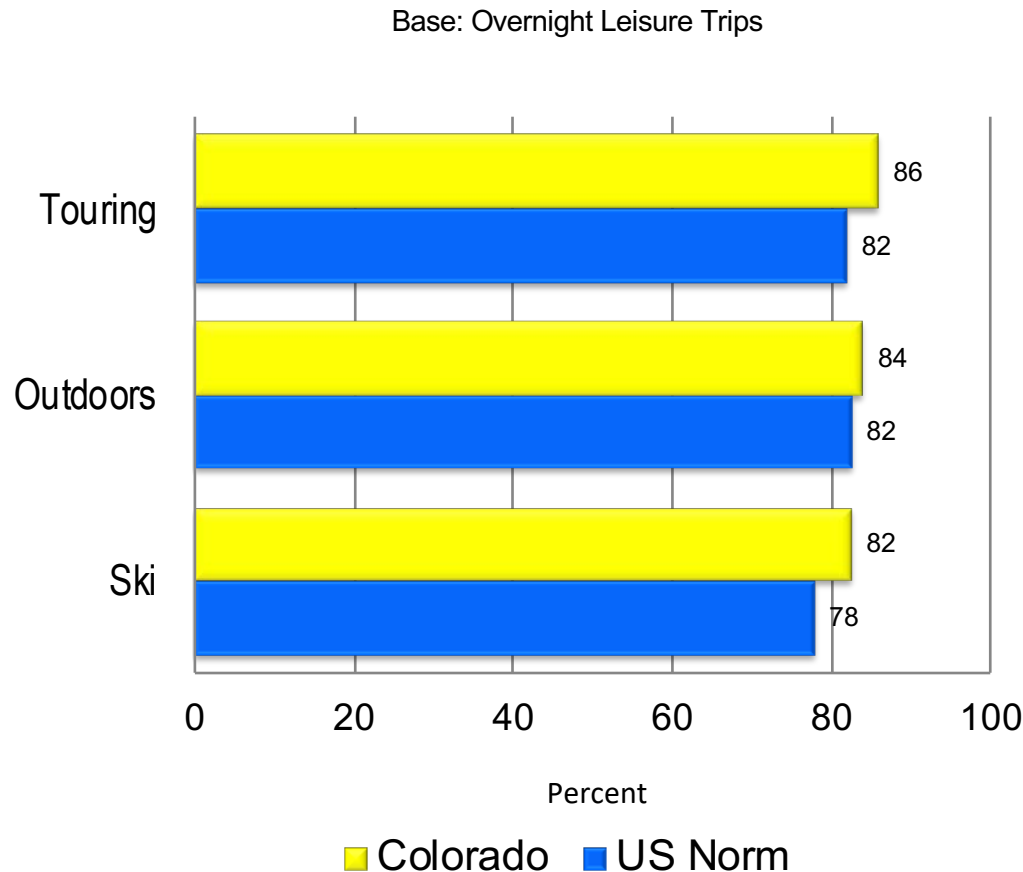


Specific Interests on Trip in 2017

Base: Overnight Leisure Trips

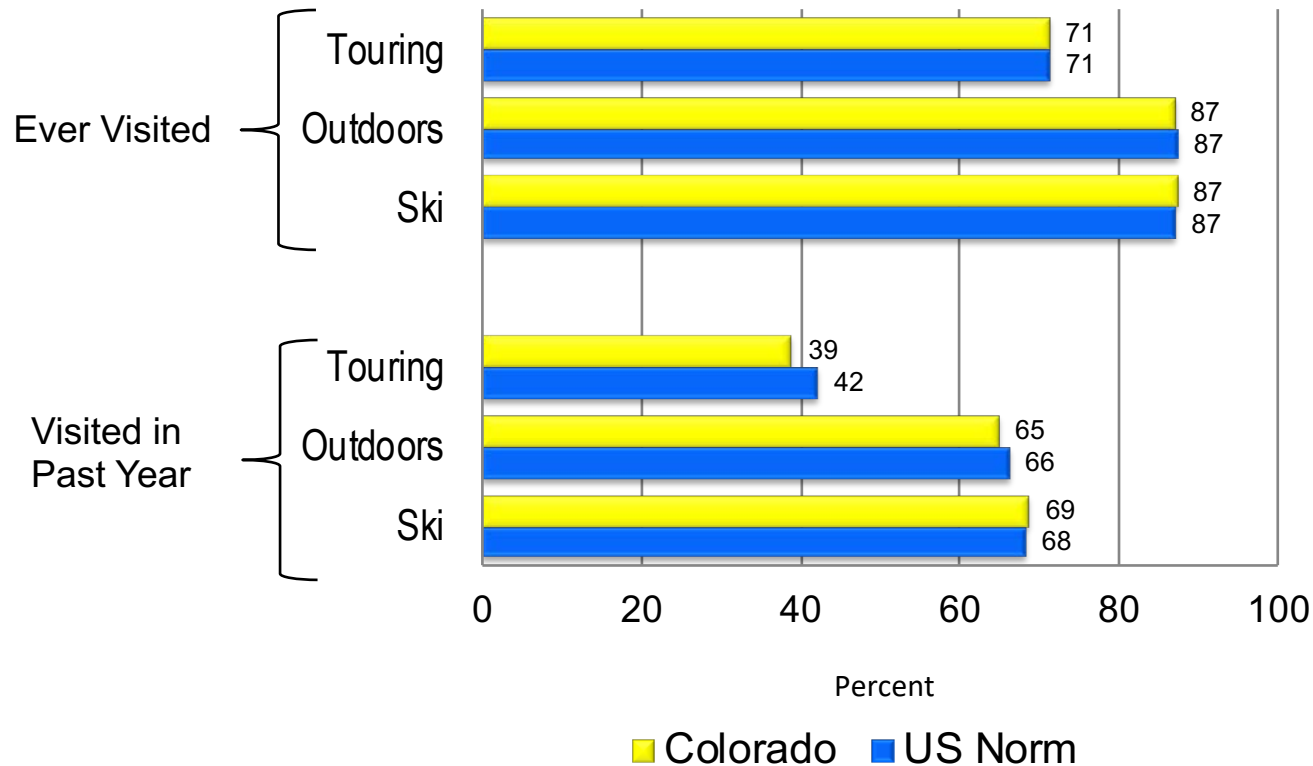


Satisfaction With Overall Trip Experience — % Very Satisfied



Past Visitation

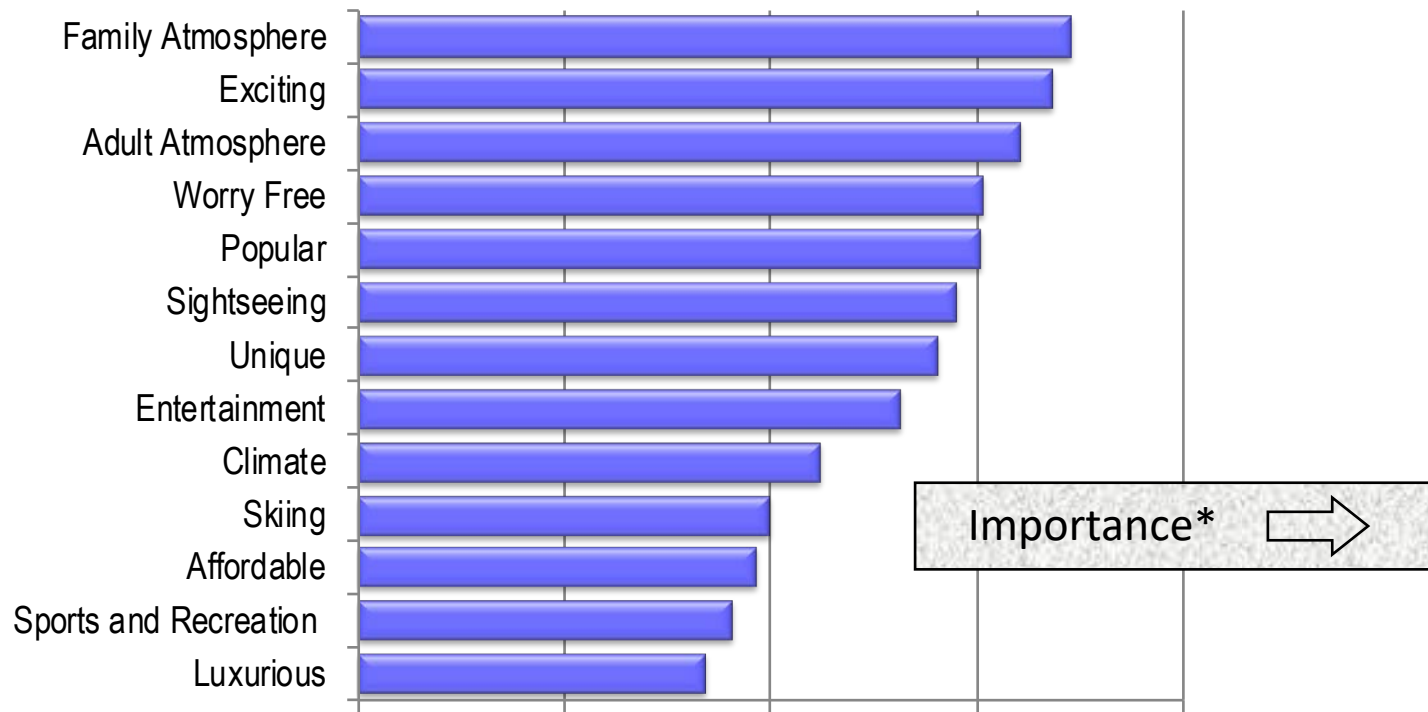
Base: Overnight Leisure Trips



Colorado's Product Delivery



Travel Motivators — What's Important in Motivating a Repeat Visit



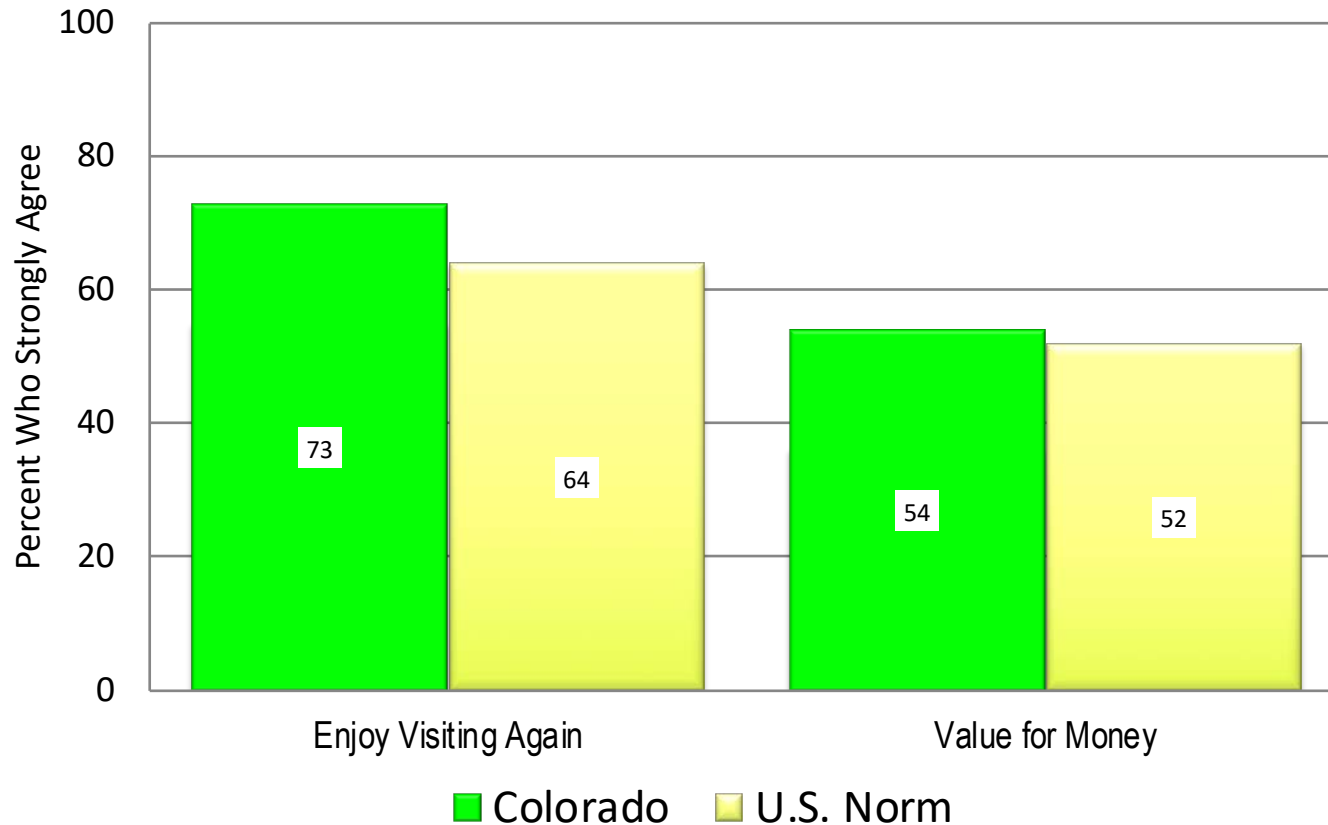
*A measure of the degree of association between ratings of Colorado on each factor and for being a place "I would really enjoy visiting again"

Most Important Individual Dimensions

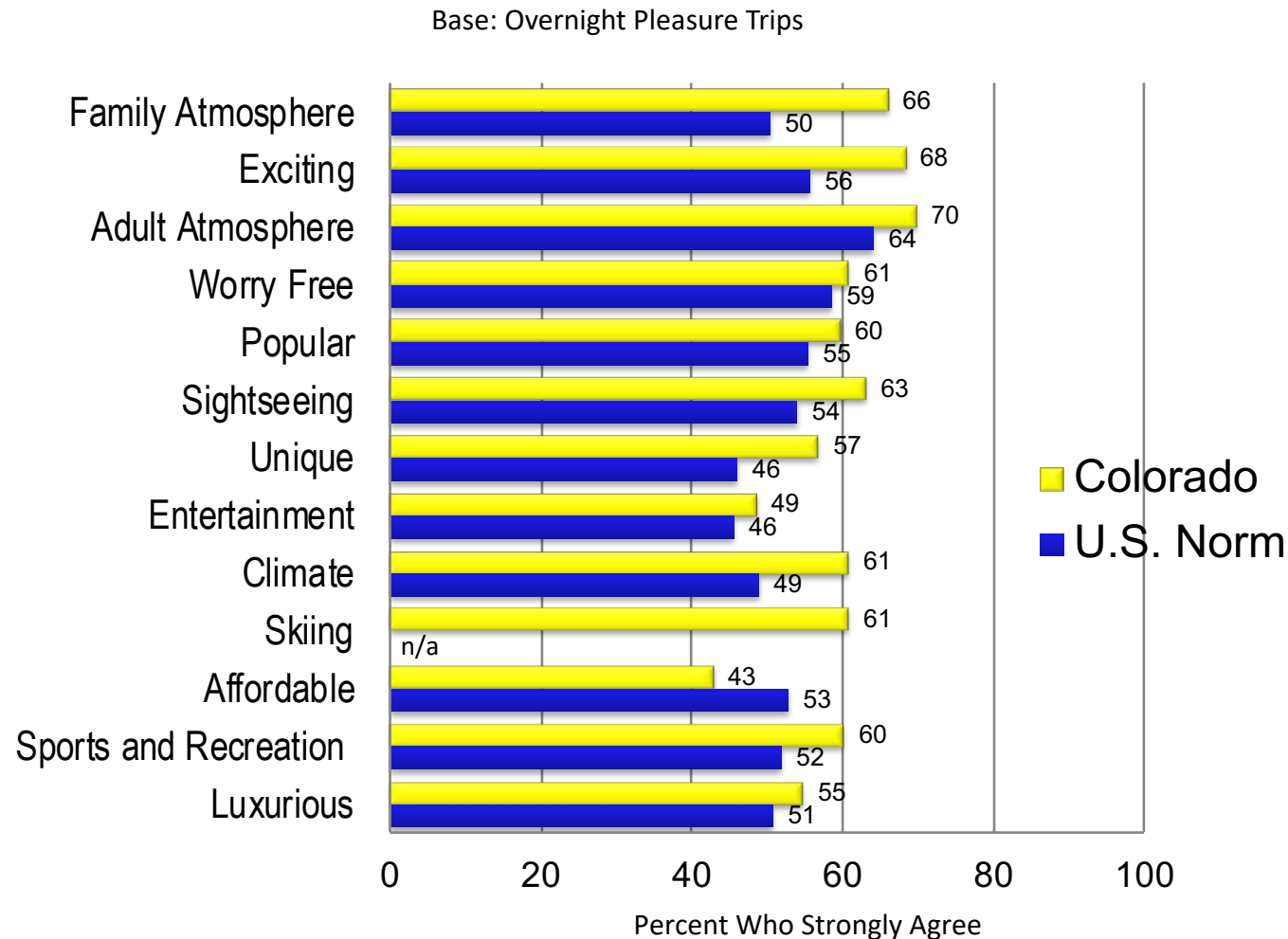
| |
|----------------------------|
| Good place to relax |
| Safe to travel anywhere |
| Unique vacation experience |
| Interesting place |
| Good for families |
| Good vacation packages |
| A real adventure |
| Interesting local people |
| Children would enjoy |
| An exciting place |

Colorado's Overall Product Delivery

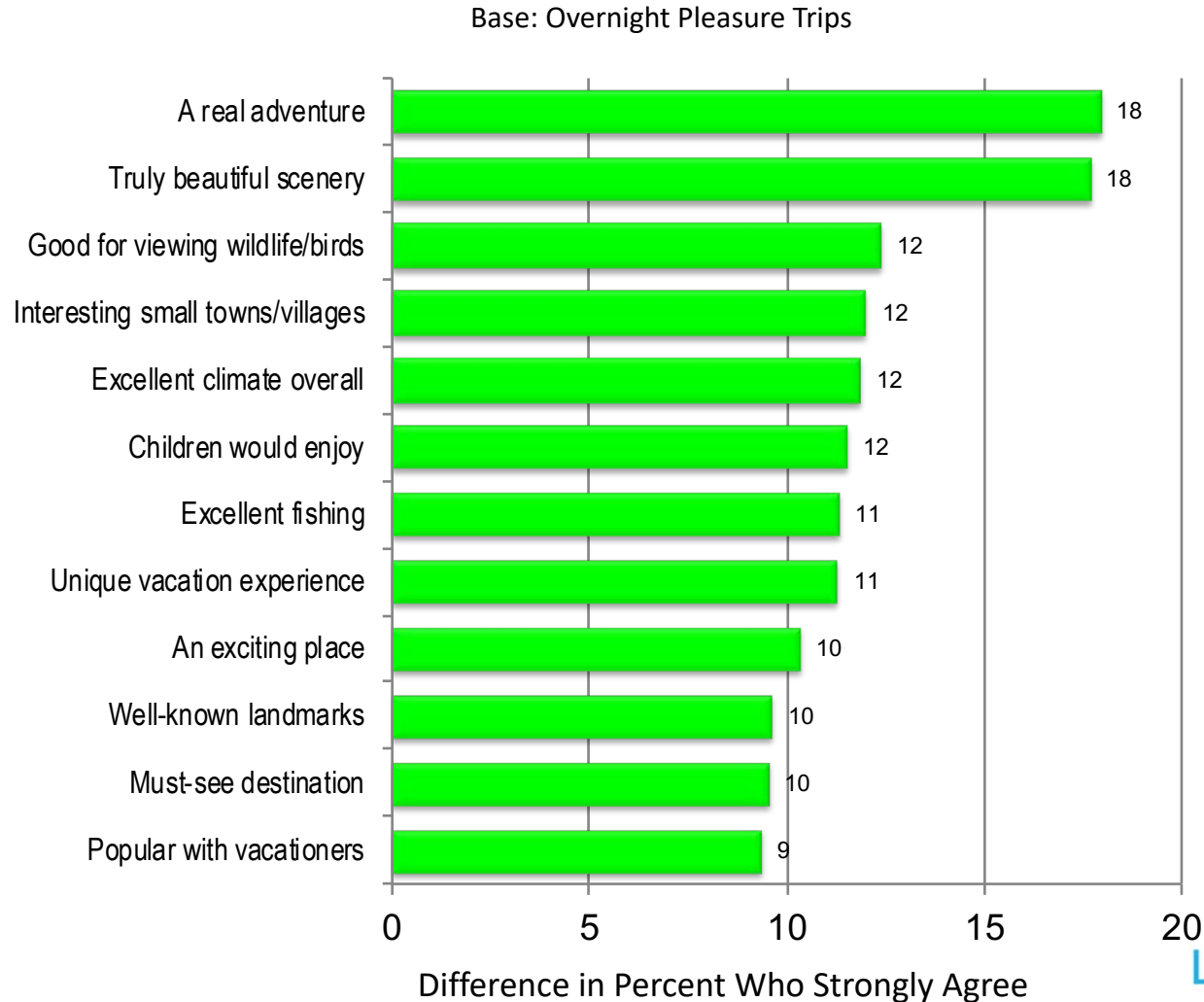
Base: Overnight Pleasure Trips



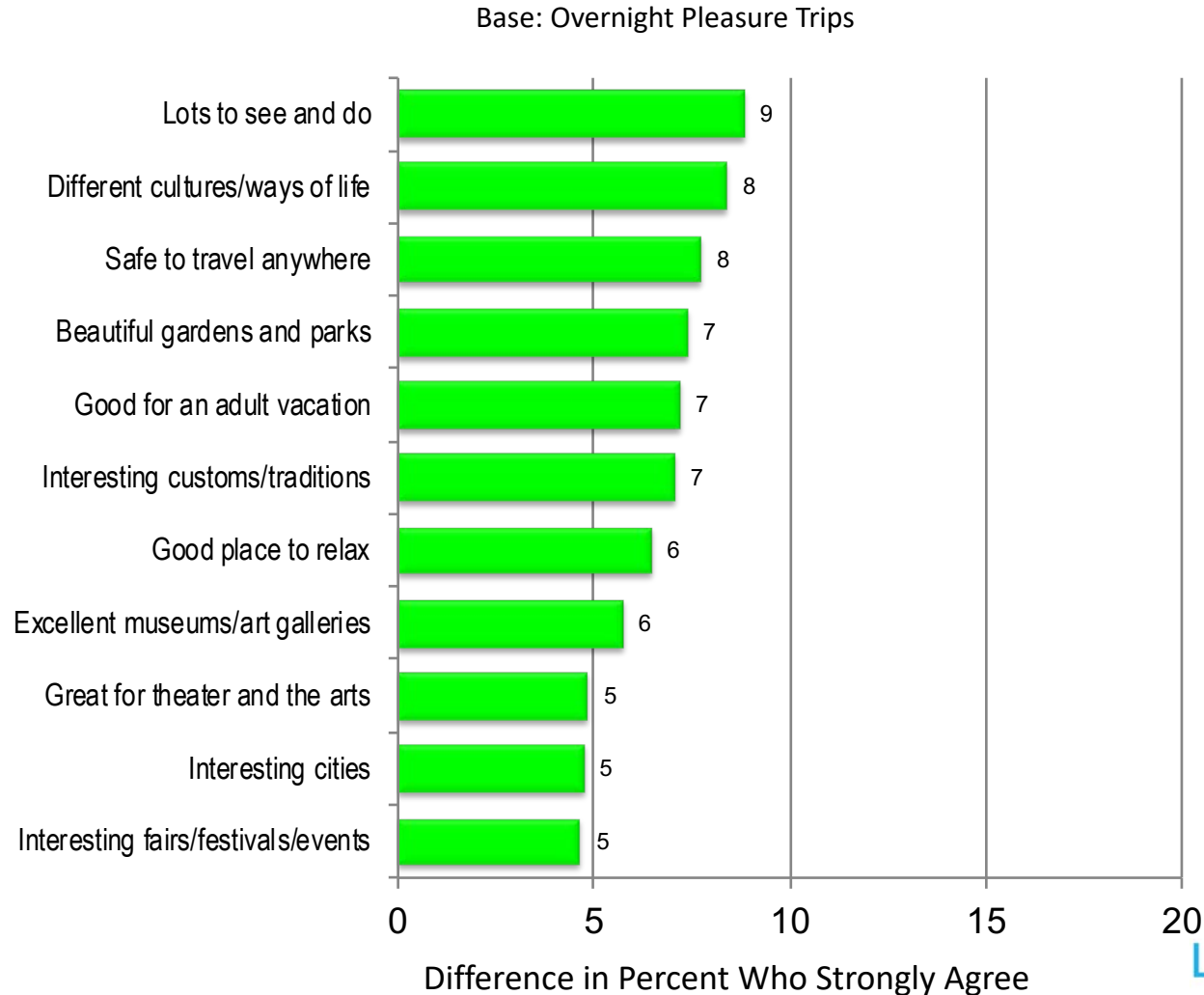
Colorado's Product Delivery



Colorado's Perceived Product Strengths vs. U.S. Norm

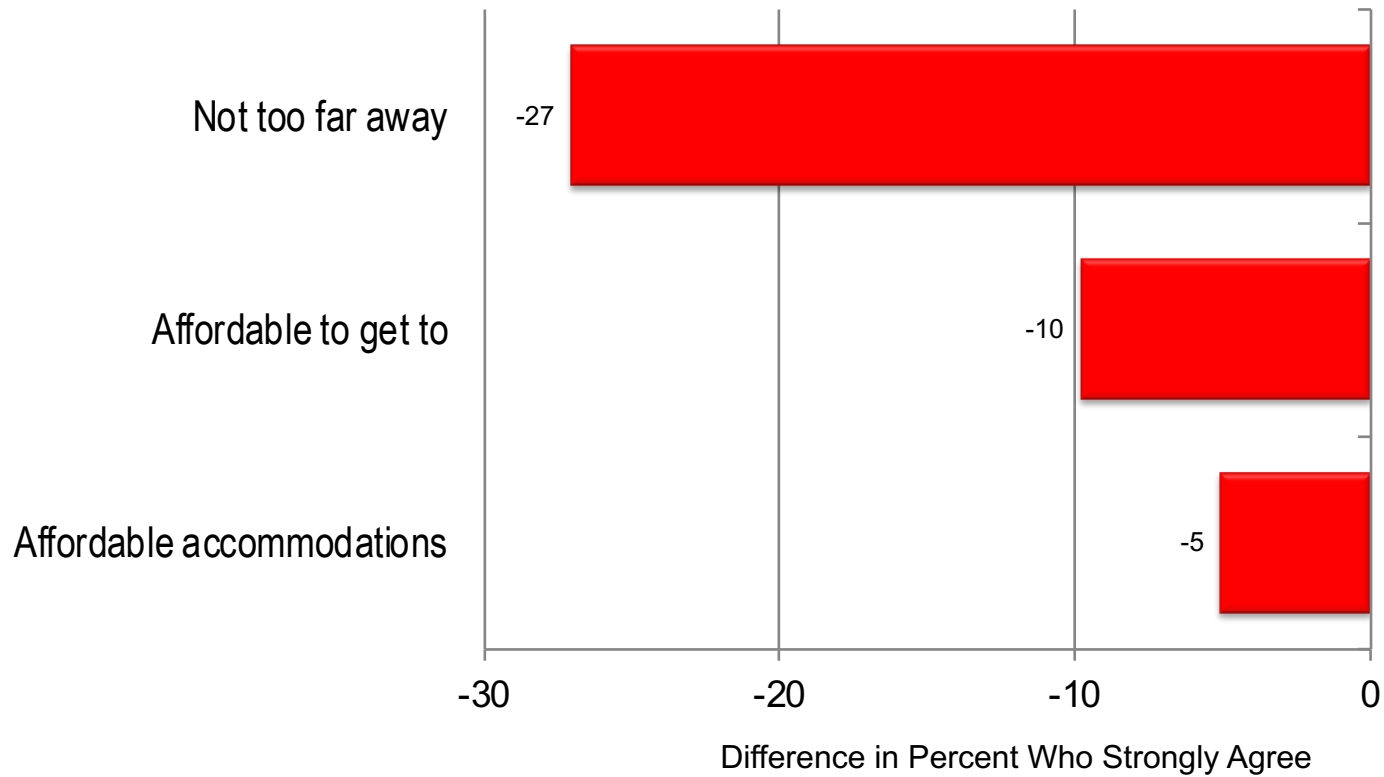


Colorado's Perceived Product Strengths vs. U.S. Norm (Cont'd)



Colorado's Perceived Product Weaknesses vs. U.S. Norm

Base: Overnight Pleasure Trips



Attitudes on Legalization of Marijuana



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

Base: Overnight Leisure Travelers

U.S. Norm

Consider buying goods/services made there

Consider living/working there

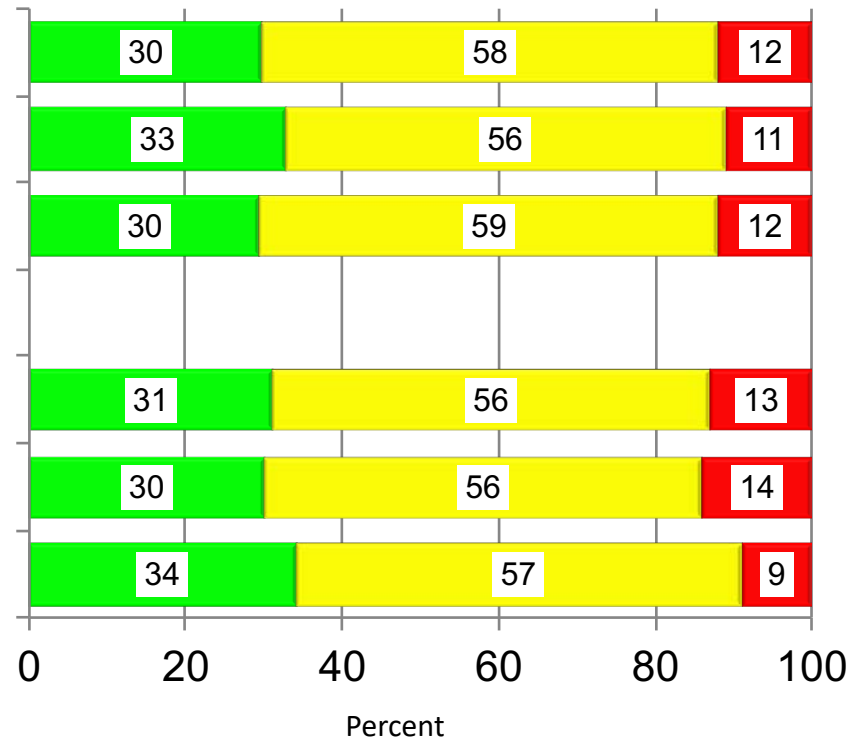
Consider visiting on a vacation

CO Leisure Visitors

Consider buying goods/services made there

Consider living/working there

Consider visiting on a vacation



■ More Positive ■ Same ■ More Negative

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

Base: Overnight Leisure Travelers

CO Visitors – CO Residents

Consider buying goods/services made there

Consider living/working there

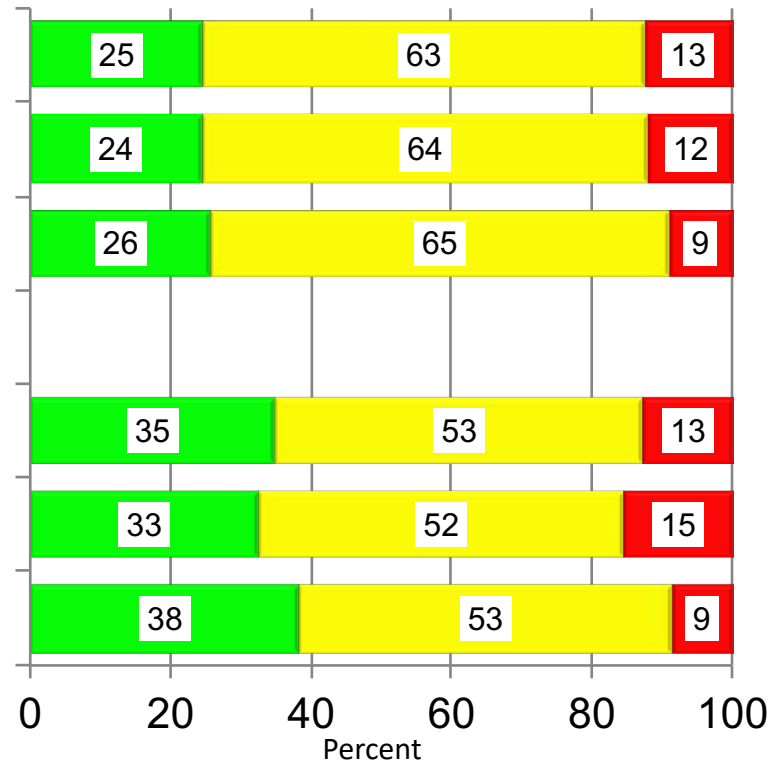
Consider visiting on a vacation

CO Visitors – Non-Residents

Consider buying goods/services made there

Consider living/working there

Consider visiting on a vacation



■ More Positive ■ Same ■ More Negative

Appendix: Key Terms Defined



Key Terms Defined

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

Trip-Type Segments

Total Trips = Leisure + Business + Business-Leisure

Marketable Trips:

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

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