

Denver Travel Year 2015

Report

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Background & Purpose



- ◉ VISIT DENVER, The Convention & Visitors Bureau, has commissioned Longwoods International to conduct an ongoing program of research to assess the city's current position and future opportunities within the American travel market.
- ◉ Beginning with Longwoods' 1990 **TRAVEL USA®** Benchmark Study, the most comprehensive single study ever conducted of the American leisure traveler, Denver's tourism business has been monitored quarterly with large-scale probes of a representative and projectable sample of leisure travelers across the U.S.
- ◉ A sample of business travelers was added to the study for the first time in 1994.
- ◉ Since 2007, information on day trip visitor volume, expenditures and demographics has been provided. Nonetheless, the primary focus of the study remains on overnight travel.

Background & Purpose (Cont'd)



- ◉ The purpose of the research is to track:
 - ◉ *size of market, in terms of visitors and expenditures*
 - ◉ *the profile of the Denver visitor:*
 - ◉ *demographics, geography and lifestyle*
 - ◉ *trip characteristics:*
 - ◉ *trip planning, transportation, accommodations, dining, sports, recreation, sightseeing, entertainment, etc.*
 - ◉ *Denver's product delivery, i.e., Denver's image among visitors*

Survey Method



- ◉ Denver visitors were identified using Longwoods' Travel USA®, our syndicated study which surveys a projectable national sample of U.S. residents quarterly.
 - ◉ *Online self-completion survey*
 - ◉ *Respondents 18+ years of age selected randomly from a major national internet consumer panel*
 - ◉ *Quarterly data is aggregated for annual reporting*
- ◉ An initial survey gathers data on visitors to all destinations. A detailed follow-up questionnaire is e-mailed on a quarterly basis to respondents identified as Denver visitors – over the year the follow-up sample totaled 1,881, consisting of 1,178 overnight and 703 day visitors.
- ◉ Response rates were high, with 79% completing the survey.

Highlights & Conclusions

Market Size and Structure



- ◉ Travel and tourism to Denver continued to grow at a record-setting pace in 2015, with significant improvement in both visitor volume and spending by visitors:
 - ◉ *Denver welcomed 16.4 million overnight visitors in 2015, 6% more than in 2014 and setting yet another visitor volume record*
- ◉ This increase was reflected across all major travel sectors:
 - ◉ *“Marketable” leisure trips, i.e., vacations and getaways by people who could travel to any destination but who specifically chose to visit Denver, rose by 1% to a new high of 6.1 million visitors*
 - ◉ *This continues an unbroken trend of increases that started in 2003*
 - ◉ *Continuing a growth spurt that began in 2014, the number of people coming to visit friends and relatives (VFR trips) in 2015 jumped 10% to 7.7 million trips*
 - ◉ *Overnight business travel to Denver rose 9% to 2.6 million trips, finally regaining the ground lost in the recessionary years of 2009/2010, when business travel nationwide experienced a major slump:*
 - ◉ *While Denver rebuilds volume in this sector, business travel across the country continued a no-growth pattern*
 - ◉ *Within the business segment, the number of people coming to Denver for conventions/conferences totaled 900,000 and general business trips amounted to 1,540,000, up 12% and 8% versus 2014, respectively.*

Market Size and Structure



- ◉ In 2015, the overall growth in marketable leisure travel reflected some variation across Denver's main marketable trip purpose segments:
 - ◉ *While the volume of special event trips was flat, touring, outdoor, business-leisure and city trips all grew by between 3 and 9% on a year-over-year basis*
 - ◉ *Ski trips were the only segment to show a decline versus 2014, dropping 7%.*
- ◉ The volume of visitors coming to Denver in 2015 and 2014 in each of the city's core marketable travel segments were as follows:

	<u>2014</u>	<u>2015</u>
◉ <i>Special event trips</i>	1,480,000	1,460,000
◉ <i>City trips</i>	1,160,000	1,180,000
◉ <i>Touring trips</i>	1,160,000	1,270,000
◉ <i>Combined business-leisure trips</i>	730,000	770,000
◉ <i>Outdoor trips</i>	710,000	760,000
◉ <i>Ski trips</i>	410,000	380,000

Market Size and Structure



- ◉ At the national level, we saw some growth in leisure travel, but none at all in business trips:
 - ◉ *Visits to friends and relatives increased by 3% versus 2014*
 - ◉ *Marketable trips rose 1% year over year*
- ◉ Looking at the marketable leisure trip segments of interest to Denver, we observed the following national trends in 2015:
 - ◉ *Touring, resort, combined business-leisure and special event trips all grew in volume between 3% and 10% versus 2014*
 - ◉ *Ski/snowboarding trips were relatively flat year-to-year*
 - ◉ *The segments showing declines were city, outdoor and especially casino trips.*
 - ◉ *The difference in growth for Denver versus the nation as a whole meant that Denver's overall market share for overnight leisure travel grew again, rising to 1.6% in 2015, up from 1.5% in 2014.*

Expenditures



- ◉ Denver visitors' spending in 2015 also grew at a record setting pace.
- ◉ Overnight visitors spent \$5.0 billion in the city, 9% more than in 2014.
- ◉ Both tourists and business travelers contributed to the increase:
 - ◉ *Leisure visitors spent \$3.9 billion, up 8% from \$3.6 billion in 2014*
 - ◉ *Business travelers' expenditures rose 13% to approximately \$1.1 billion in 2015, up from \$1.0 billion the previous year*
- ◉ All five of the major business sectors connected to travel and tourism benefited by the overall growth in visitor spending:
 - ◉ *Reflecting a higher room supply, higher occupancy and increased room rates, the lodging sector experienced a 12% rise in visitor spending*
 - ◉ *Visitor spending in the food/beverage and sightseeing/recreation/attractions sectors grew almost as much, each increasing by 10%*
 - ◉ *Expenditures on retail and transportation also rose, gaining 8% and 7%, respectively, on a year to year basis*

Expenditures



- ◉ Travel and tourism continued to be a major force in Denver's economy in 2015:
 - ◉ *Visitors spent \$1.5 billion in Denver's hotels and other lodging establishments, and their expenditures on restaurant food and beverage amounted to \$1.0 billion*
 - ◉ *Expenditures by visitors on gas, car rentals and other local transportation purchases reached close to \$1.5 billion in 2015, and purchases at retail stores totaled approximately \$627 million.*
 - ◉ *Vacationers and business visitors spent \$437 million at the city's paid attractions and on other recreational and sightseeing activities.*
- ◉ The fact that Denver continues to show above average growth in the travel and tourism sector also means that visitors' value is increasing and not losing ground to inflation.

Expenditures



- ◉ The average daily expenditures of the various segments provide a relative measure of each one's "value" :
 - ◉ *Marketable leisure visitors spent an average of \$136 daily*
 - ◉ *Business visitors spent even more on a daily basis at \$149 per capita*
 - ◉ *In comparison, the typical visitor coming to vacation with friends and relatives in 2015 spent only \$71 a day*
- ◉ Because these different segments have shorter and longer stays, another way of looking at value is overall spending per trip to Denver:
 - ◉ *The biggest spenders by far are business and marketable leisure visitors, who spent \$435 and \$328 per person in Denver respectively in 2015:*
 - ◉ *Business visitors attending conferences and conventions were the leaders, averaging \$560 in spending per capita in the city*
 - ◉ *In comparison, people visiting friends and relatives each spent just \$246 while in Denver.*

Expenditures



- A more detailed examination of where the traveler segments were spending their money in 2015 reveals patterns similar to what we have observed in prior years:
 - *Among business travelers to Denver, roughly half of their budget was spent on lodging. And virtually all of the remaining expenditures were divided between food/beverage and local transportation, with only small amounts spent on retail or sightseeing, attractions and/or recreation..*
 - *For marketable leisure visitors, the top two expenditures were for lodging and transportation, accounting for over half of their overall spending. Spending on food and beverage was almost as high as among business travelers. These travelers are the overnight visitors spending the most in retail stores and on recreational pursuits*
 - *People visiting friends and relatives were most likely to spend their relatively lower per diem on transportation, followed by dining out, lodging and retail, and somewhat less on sightseeing, attractions or recreation.*

Expenditures



- People staying in commercial accommodations (hotels, motels, inns and B&B's) while visiting Denver in 2015 spent considerably more than those staying in other types of accommodations:
 - *\$147 per person daily vs. only \$66 for those using non-commercial accommodations*
 - *Consistent with prior years, a very high proportion (75%) of all visitors' expenditures in 2015 were attributable to visitors staying in commercial accommodations*
- As would be expected, those staying in commercial accommodations spent a great deal more on their lodging than other visitors; however, they also spent considerably more on dining, retail, recreational activities/attractions, and especially transportation
- In 2015, 12 million people visited Denver on day trips, up 18% from 2014. A very high proportion of these day trips (68%) originated from within Colorado itself. The expenditures of people visiting Denver on daytrips remained constant from year-to-year, totaling \$671 million.

Top Sources of Business



- ◉ The West (consisting of the Mountain, West North Central and West South Central census divisions) continues to be the source of a high proportion of travelers coming to Denver:
 - ◉ *Just over half (53%) of overnight tourists and business visitors came from this broad region, virtually the same as in 2014*
- ◉ And the Pacific census region contributed 1 in 6 (16%) visitors, comparable to the year before.
- ◉ Denver continues to draw substantial numbers of visitors from central/eastern markets:
 - ◉ *The Mid-West and the South each accounted for 11% of visitors in 2015, and the Northeast contributed 9%..*
- ◉ The top state markets for Denver vacationers in 2015, apart from Colorado itself, were:
 - ◉ *California*
 - ◉ *Texas*
 - ◉ *Illinois*
 - ◉ *Florida*
 - ◉ *New York*
 - ◉ *neighbors Arizona, Nebraska, and Kansas*

Top Sources of Business



- ◉ Most of Denver's tourism comes from out-of-state, accounting for over 8 in 10 vacationers:
 - ◉ *18% of Denver tourists came from within the state in 2015, down from 23% in 2014*
- ◉ The top out-of-state DMA's that generated significant leisure travel to Denver in 2015 were:
 - ◉ *Los Angeles*
 - ◉ *New York City*
 - ◉ *Chicago*
 - ◉ *Phoenix*
 - ◉ *Houston*
 - ◉ *Albuquerque*
 - ◉ *Dallas/Ft. Worth*
 - ◉ *Salt Lake City*
 - ◉ *San Francisco-Oakland-San Jose*
 - ◉ *Washington, DC*

Visitor Profile



- ◉ In 2015, Denver's overnight leisure visitors resembled the U.S. norm for vacation travelers on all of the demographics measured:
 - ◉ *similar gender, age (average of 46 years)*
 - ◉ *similar marital status, with the majority married, and household size/composition*
 - ◉ *most have full-time or part-time employment*
 - ◉ *similar education and income levels*
- ◉ Compared to the previous year, leisure visitors in 2015 were:
 - ◉ *More likely to have children living at home*
 - ◉ *Less upscale in terms of income*

Visitor Profile



- ◉ Denver's overnight business visitors' demographic profile matched that of the typical U.S. business traveler in 2015 on most of the criteria measured in our survey:
 - ◉ *Gender, with a substantial male skew*
 - ◉ *Age, with an average age of 46*
 - ◉ *Marital status*
 - ◉ *Education*
 - ◉ *Employment status*
- ◉ The main differences versus the norm were:
 - ◉ *A greater skew male*
 - ◉ *Less likelihood of having children in the household*
 - ◉ *Slightly greater household income*
 - ◉ *Less likely to be white*

Visitor Profile



- Compared to 2014, business travelers in 2015 were:
 - *Younger*
 - *Less educated*
 - *Less likely to be white*
 - *More apt to be Hispanic*
 - *Slightly more affluent*
- People visiting Denver on day trips in 2015 closely resembled the national day trip norm in terms of gender, age, marital status, household size and composition, and race.
- Denver daytrippers differed from the U.S. norm with respect to the following:
 - *Slightly better educated and higher income*
 - *More apt to have full-time employment*

Overnight Trip Profile



- ◉ A vacation or business trip to Denver in 2015 continued to be relatively long haul:
 - ◉ *64% of leisure travelers and 71% of business visitors traveled 500 miles or more to reach Denver*
 - ◉ *Travel distances were somewhat greater for both vacationers and business travelers than in 2014*
- ◉ In 2015, there was an approximately 55:45 split among leisure travelers in terms of driving or flying to Denver:
 - ◉ *Similar to prior years*
 - ◉ *About 3 in 10 vacationers used a rental car once they arrived/during their trip*
- ◉ The proportions of the split were opposite for business travelers – they were more likely to fly in than to drive:
 - ◉ *And they were somewhat more apt than tourists to rent a car (34% vs. 28%)*

Overnight Trip Profile



- As we have noted in the past, longer trips generally involve greater planning. Reflecting the longer Denver trip:
 - *In 2015, 64% of Denver vacationers started planning their trip two or more months ahead of time, a higher proportion than we have seen for several years*
 - *and 44% of vacationers booked some aspect of their trip in the two months+ timeframe, somewhat more than in 2014*
- Among business travelers coming to Denver in 2015, we found that the planning and booking cycle for business trips also lengthened slightly:
 - *In 2015, 46% started planning their travel 2 or more months out, and 38% began the booking process that far in advance*
 - *Both proportions were higher than in 2014*

Overnight Trip Profile



- ◉ In 2015, people staying in commercial accommodations tended to plan and book their travel much farther ahead than those staying in other types of accommodation (mainly homes of friends and relatives)
 - ◉ *About two-thirds of those using commercial lodging started planning their travel more than a month ahead, while only half of their counterparts staying in non-commercial accommodations did so*
 - ◉ *About 1 in 3 of the non-commercial segment arrived in Denver without any advance booking, compared to only 1 in 10 of those staying at a hotel or other commercial lodging.*
- ◉ The Internet has become almost ubiquitous as a source of information for planning travel. In the 2015 Travel USA™ surveys, we began asking about usage of specific types of websites:
 - ◉ *About 2 in 10 Denver visitors indicated they consulted online travel agencies to plan and ultimately book their trip, somewhat more than said they looked at travel company websites, destination websites or social media*
 - ◉ *In each case usage was greater than the national norm*

Overnight Trip Profile



- ◉ Apart from the Internet, the top formal sources used for planning by Denver vacationers and people on marketable trips (mainly staying in commercial accommodations) in 2015 included:
 - ◉ *airlines*
 - ◉ *hotels and resorts*
 - ◉ *auto club/AAA*
 - ◉ *print media (books, magazines primarily)*
 - ◉ *travel agents*
 - ◉ *lodging sharing websites*
 - ◉ *toll-free numbers*
- ◉ The top sources used by vacationers to book travel in 2015 were:
 - ◉ *Airlines/commercial carriers*
 - ◉ *Online travel agencies*
 - ◉ *Hotels/resorts*
 - ◉ *Travel company websites*

Overnight Trip Profile



- ◉ Business travelers used many of the same information sources as tourists to plan and book their Denver trips, albeit at lower levels – mainly airlines, online travel agencies, hotels/resorts, travel company websites, and destination websites.
- ◉ Business travelers continued to be more likely than tourists to use the services of a travel agent for researching and booking travel to Denver:
 - ◉ *1 in 10 reported doing so in 2015 vs. only 1 in 20 leisure travelers*
 - ◉ *Use dropped sharply compared to 2014, when 2 in 10 reported using a travel agent for booking purposes*

Overnight Trip Profile



- ◉ The Colorado state map and the Visitor's Guide to Denver were the most popular "official" publications used by visitors for trip planning purposes:
 - ◉ *In 2015, 1 in 8 (13%) vacationers and somewhat fewer business visitors (8%) said they used the Guide*
- ◉ Leisure visitors also less frequently indicated that they used a Colorado Official Vacation Guide, or attraction/destination specific brochures.
- ◉ The most popular of these publications among business visitors were the state map (9%), Visitor's Guide to Denver (8%) and the Colorado Vacation Guide (8%).
- ◉ People staying in commercial accommodations were more likely than those staying in non-commercial lodging to have made use of any of these publications.
- ◉ The main places or means by which people acquired these "official" publications in 2015 were via the Internet, the visitor's hotel/motel, or a Visit Denver or Colorado Info/Welcome Center.

Overnight Trip Profile



- VISIT DENVER's own website, www.denver.org, and www.colorado.com were the two "official" websites that tourists in 2015 most often visited to plan their trip:
 - *Approximately 3 in 10 (30%) vacationers who planned travel online said they visited www.denver.org, somewhat more than indicated this for www.colorado.com (18%)*
 - *A slight increase for Denver's website, and a steady level for colorado.com*
 - *Business travelers who used the internet for trip planning were equally likely to access www.Denver.org or www.Colorado.com*
- Among tourists who visited one of the official websites, people were more likely to say they were primarily looking for additional information about Denver than to say they needed help on their destination decision:
 - *at the same time 4 in 10 people visiting these websites said they were seeking information to help them make up their minds on a destination for their trip*

Overnight Trip Profile



- ◉ The vast majority of people who visited any of the official websites said they found the sites via a search engine or general surfing. A few also cited word-of-mouth recommendations from friends/relatives, mentions in media articles/programs, brochures, or advertising.
- ◉ When vacationers used the Internet in 2015 to plan their Denver trip, they were most often looking for information about accommodations, followed by information on restaurants, transportation to/from/around Denver, directions on how to get to or around Denver and information on attractions and things to see and do
 - ◉ *Relatively fewer were seeking information on cities/towns to visit apart from Denver, information on local events, or information about packaged tours*
 - ◉ *This “ranking” of types of information being sought was quite similar to 2014*
- ◉ Business travelers using the Internet for trip planning were mainly looking for information on lodging and transportation options. To a lesser extent, they were interested in information on dining or travel directions. Very few business travelers said they were seeking information on local events, local activities/attractions, or other places to visit.

Overnight Trip Profile



- Most people (69%) in 2015 who used both the Internet 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 (4%) felt that publications were the more helpful sources of information, or that neither provided the assistance they needed (1%).
- Although use of social media such as Twitter or Facebook for Denver trip planning increased significantly over the past year, it still remained at a relatively low level, with only 12% of tourists and fewer business travelers (5%) mentioning having used them for planning their specific Denver trip.
- At the same time, use of “social media” continued to increase in the broader travel-related context (i.e., not related to a specific trip or planning thereof):
 - About 8 in 10 of Denver’s overnight leisure visitors and 3 in 4 business travelers reported using social media for a travel related purpose in the past 3 months*
 - Marginally higher in 2015 for vacationers, but about the same as the year before for business travelers*
 - Leisure levels are somewhat higher than the national norm, and similar to the norm for the business segment*

Overnight Trip Profile



- ◉ In 2015, the aspects of social media most often used “in the past 3 months” in this general context for both Denver travelers and those visiting the average destination included the following, mentioned by between 2 in 10 and 5 in 10 people:
 - ◉ *Using a smartphone or tablet while traveling to assist with lodging, restaurants, finding attractions, etc.*
 - ◉ *Posting travel photos and videos on social media websites*
 - ◉ *Reading travel reviews*
 - ◉ *Looking at other people’s travel photos*
 - ◉ *Learning about travel deals/promotions, events, etc.*
- ◉ Somewhat fewer used social media for:
 - ◉ *Reading a travel blog*
 - ◉ *Connecting with other travelers*
 - ◉ *Contributing a travel review*
 - ◉ *Getting travel advice through a social networking site*

Overnight Trip Profile



- ◉ Relatively few people said they get more involved or sought out specific travel-related information via social media, such as:
 - ◉ *Joining a destination feed*
 - ◉ *Tweeting about a trip*
 - ◉ *Giving travel advice through a social networking site*
 - ◉ *Subscribing to a travel e-newsletter*
 - ◉ *Writing a travel blog*
- ◉ Among Denver's leisure travelers, recent usage of the top social activities was higher in 2015 than the year before.
- ◉ Denver business travelers tended to use social media in the general travel context to about the same extent as leisure travelers in most of the aforementioned ways.

Overnight Trip Profile



- ◉ In 2015, approximately half of Denver leisure travelers indicated they used a laptop or desktop computer while planning travel to Denver. About 3 in 10 said they used a smart phone, and half that number a tablet while planning their Denver trip. In comparison, business travelers were as likely to use a laptop or tablet for trip planning but less apt to use a desktop computer or smartphone in this context
 - ◉ *Denver vacationers are above average in their use of all devices except tablets for this purpose*
- ◉ A high proportion of Denver business travelers (56%) and some tourists (36%) used a laptop to access travel information during their trip. Tablets were a somewhat less popular choice for this purpose in each group.
- ◉ And 7 in 10 of both tourists and business visitors reported using a smartphone for travel related research while traveling.
- ◉ As for trip planning, usage of most of these devices while traveling is more prevalent among Denver vacationers than among typical vacationers nationwide
- ◉ Use of smartphones in both of these contexts rose among leisure visitors from year to year.

Overnight Trip Profile



- ◉ In 2015, the average vacation trip to Denver remained at 4.8 nights long, the same as in 2014:
 - ◉ *Nationally the average trip length rose to 4.0 nights, up from 3.7 nights in 2014 and a level that had been quite constant for several years*
- ◉ Vacationers spent an average of 3.3 nights in the city, about the same as in 2014:
 - ◉ *This length of stay in the city translates into a share of 69% of the entire trip*
- ◉ Among business travelers, the overall length of the trip to Denver dropped to 3.3 nights in 2015 from 3.9 nights the year before:
 - ◉ *This trip length is similar to the national norm for business travel (3.4 nights)*
- ◉ The length of business visitors' stay in Denver also dropped, though not as sharply, to 2.9 nights.
- ◉ Most of that time for business travelers, i.e., 87% of the entire trip, was spent in the city:
 - ◉ *A slightly higher proportion than in 2014*

Overnight Trip Profile



- ◉ In 2015, the visitors who stayed the longest in Denver were people visiting friends or relatives (3.8 nights), people combining business with leisure trips (3.7 nights), those business travelers attending a convention or conference (3.0 nights) or visiting for other business purposes (2.9 nights), and touring vacationers (2.8 nights).
- ◉ Those who spent below average time in Denver were people on special event (2.3 nights) or city (2.0 nights) trips.

Overnight Trip Profile



- ◉ The proportion of Denver business travelers combining business and leisure purposes on their trip remained quite high:
 - ◉ *In 2015, 50% added a leisure component to their trip, down from 57% in 2014, but still more than double what it was at the low points of 2003 and 2004 (22%)*
 - ◉ *The majority of business travelers adding time to their trip for leisure purposes in 2015 increased their trip by one or two days*
 - ◉ *Almost all of the extra time was spent in Denver rather than in other places in Colorado*
- ◉ In 2015, leisure travelers' room nights were skewed somewhat towards the homes of friends/relatives and second homes rather than commercial accommodations.
- ◉ Continuing a long-standing trend, virtually all Denver business traveler room nights were spent in commercial accommodations.
- ◉ Most commercial accommodation room nights (85%) in 2015 were attributable to tourists vs. just 15% to business travelers:
 - ◉ *Which is consistent with the distribution of visitors.*

Overnight Trip Profile



- ◉ The average Denver leisure travel party in 2015 numbered 2.7 adults and children, which is smaller than the national norm (3.0):
 - ◉ *The party size of business visitors averaged 2.0 individuals, which was comparable to the national norm*
- ◉ People on leisure trips to Denver most often traveled with a spouse, and occasionally a child, another family member or a friend:
 - ◉ *About 2 in 10 Denver vacationers visited on their own*
- ◉ Approximately 6 in 10 Denver business travelers in 2015 traveled to the city on their own. Those visiting with someone else most often were traveling with a business associate or brought a spouse.

Overnight Trip Profile



- ◉ In 2015, about 1 in 4 leisure travelers were first-time Denver visitors on a leisure trip, a slightly lower proportion than in 2014.
 - ◉ *people visiting Denver on marketable leisure trips were much more likely to be “first-timers” (31%) than people visiting friends and relatives (18%) or business travelers (17%)*
- ◉ Among the majority of people who had visited Denver at some point in the past on a leisure trips, the average number of prior visits averaged 12 for vacationers and substantially fewer (8) for business visitors.
- ◉ Most prior leisure and business trips occurred within the previous two to three years.

Overnight Trip Profile



- ◉ In 2015, shopping continued to be one of the most popular activities for American travelers, and so it was for a majority of Denver visitors. About 6 in 10 of all visitors included malls and shopping areas in the Denver area on their itinerary, with the most popular being:
 - ◉ *the 16th Street Mall, LoDo, Cherry Creek, Park Meadows Retail Resort, Denver Pavilions, Larimer Square, Outlets at Castle Rock, FlatIron Crossing Mall, Belmar, the Shops at Northfield/Stapleton, and Writers Square.*
- ◉ A high proportion of visitors also visited local landmarks and historic sites, attractions like museums, the zoo, aquarium and breweries.
- ◉ Between 1 in 7 and 1 in 4 vacationers indicated they attended local cultural (arts, theater, etc.) events (25%), sporting events (16%) or other events (14%), while somewhat fewer said they took in specific child-oriented parks, venues and museums (7%).

Overnight Trip Profile



- ◉ In 2015, the most popular sights, attractions and events included:

<u>Overall</u>	<u>Paid Admission</u>
16th Street Mall	Denver Zoo
"LoDo" Lower Downtown Historic District	Denver Art Museum
Cherry Creek Shopping Center/neighborhood shops, etc.	Red Rocks Park & Amphitheater
Denver Zoo	Denver Botanic Gardens
Denver Art Museum	Denver Museum of Nature & Science/IMAX
Coors Brewery	Buffalo Bill's Museum/Grave
Red Rocks Park & Amphitheater	Denver's Downtown Aquarium
Park Meadows Retail Resort	Colorado Rockies
Denver Pavilions	Colorado Railroad Museum
Denver Botanic Gardens	Butterfly Pavilion

Overnight Trip Profile



- ◉ In addition to shopping, leisure visitors in 2015 often sought out other entertainment and events, including local food specialties, dining at one of Denver's fine restaurants, visiting one of Denver's many breweries/brew pubs, taking in a local nightclub/live music venue, attending a sports event, festival/fair, concert, theater performance, or visiting a local theme/amusement park.
- ◉ The most popular sports events for visitors in 2015 were Colorado Rockies baseball, Denver Broncos football, Denver Nuggets basketball, Colorado Avalanche hockey, and Colorado Mammoth lacrosse games.

Overnight Trip Profile



- ◉ The types of attractions that business visitors most often took in on their trips to Denver in 2015 included:
 - ◉ *shopping*
 - ◉ *dining out, especially at some of the city's fine restaurants*
 - ◉ *brew pubs/breweries*
 - ◉ *Denver's parks and gardens*
 - ◉ *landmarks and historic sites/areas*
 - ◉ *bars, nightclubs/discos, places with live music*
 - ◉ *museums and art galleries*
 - ◉ *a sports event*

Image Hot Buttons



- Based on the image and advertising research conducted in 2016, in order for a destination to get on the wish list, it must be perceived, first and foremost, to be an exciting place and one that adults will 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
- Also relatively important determinants of destination choice are the perceptions that a place has a good **family atmosphere** (i.e., lots for the family to do and plenty of things for kids to enjoy) and is **unique**, with interesting scenery, experiences, cultures and customs

Image Hot Buttons



- ◉ For a city destination like Denver and its competition to be on consumers' radar, several aspects are of moderate importance:
 - ◉ Opportunities for **sightseeing**, especially the variety of things to see and do
 - ◉ A **worry-free** atmosphere, which means perceived safety, plus a sense of relaxation, welcoming atmosphere and general friendliness
 - ◉ The availability of **luxurious** accommodations and fine dining
 - ◉ **Climate**
 - ◉ **Entertainment** options, ranging from shopping to live performances and nightlife

Image Hot Buttons



- ◉ Of least importance at the “wish list” stage of travel planning are a destination’s image for:
 - ◉ **Popularity** – *people like to travel to places that are well-known and that they see being advertised*
 - ◉ **Sports and recreation**
 - ◉ **Affordability**
- ◉ Nonetheless, affordability tends to move closer to the top of the priority list, the closer consumers come to making up their minds on a destination, as the cost and time/travel distance factors play a greater role in travel decisions.

Product Delivery



- ◉ In this visitor study, we report on Denver's image among a sub-set of the total market -- people who have recently visited Denver, i.e., their impressions of Denver's "product delivery".
- ◉ On an overall basis, visitors appear to have had an excellent experience in Denver in 2015:
 - ◉ *8 in 10 agreed strongly that Denver is a place they would "really enjoy visiting again", virtually the same proportion as indicated this in 2014*
- ◉ In 2015 people on marketable and VFR trips seemed to be more satisfied than business travelers with their trip to the city.
- ◉ And out-of-state visitors were as positive about their Denver experience as Colorado residents.

Product Delivery



- ◉ Product perception ratings of Denver continued to rise on all factors in 2015, reaching new highs in terms of satisfaction levels, notably for:
 - ◉ *Denver's popularity as a destination*
 - ◉ *sightseeing (including beautiful scenery)*
 - ◉ *great dining and accommodations*
 - ◉ *relaxed and safe atmosphere:*
- ◉ Shifts were particularly strong among those visiting on marketable leisure trips.
- ◉ There were no areas in 2014 on which visitors' image of Denver deteriorated as a result of visiting, or in which people visiting in 2015 were less satisfied than their counterparts in 2014.

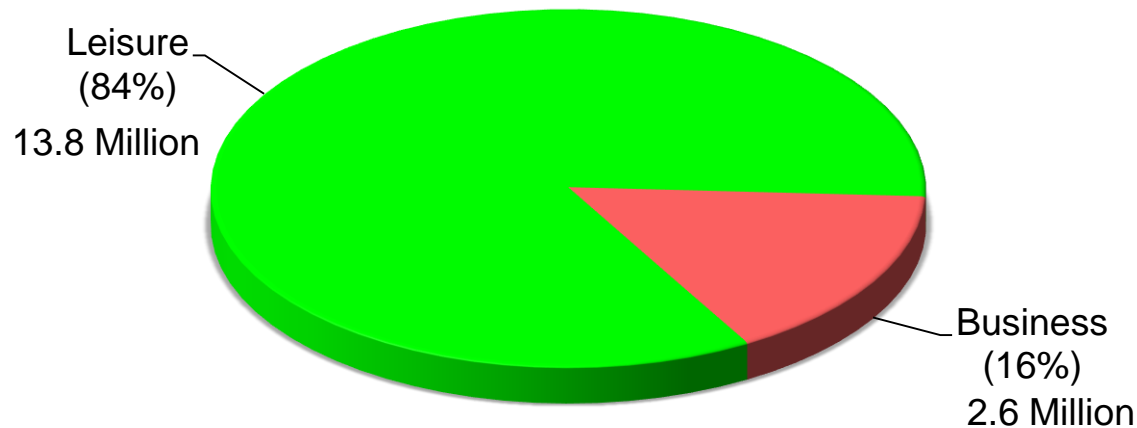
Results in Detail

Size & Structure of Denver's Overnight Travel Market

Overnight Trips to Denver



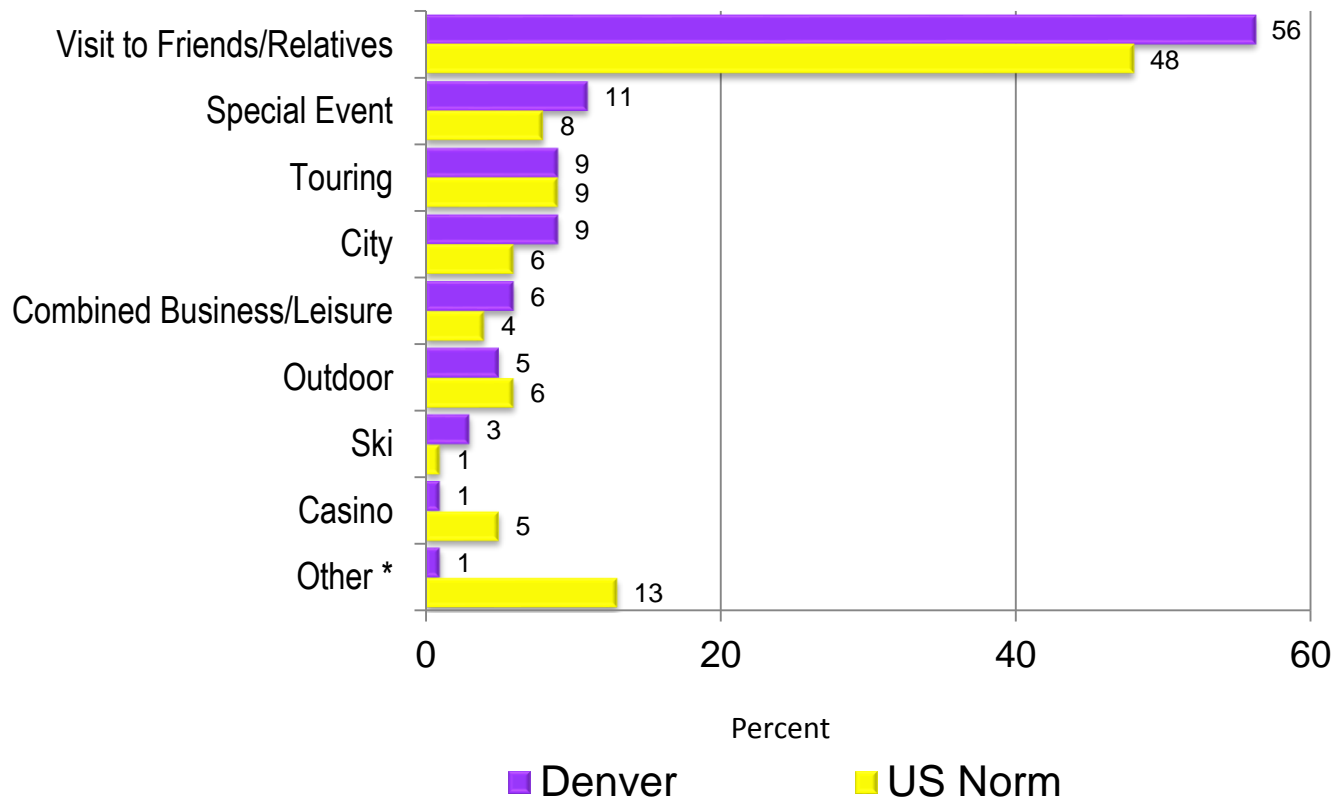
Total 2015 Trips = 16.4 Million



Main Purpose of Leisure Trips



Base: Overnight Leisure Visitors

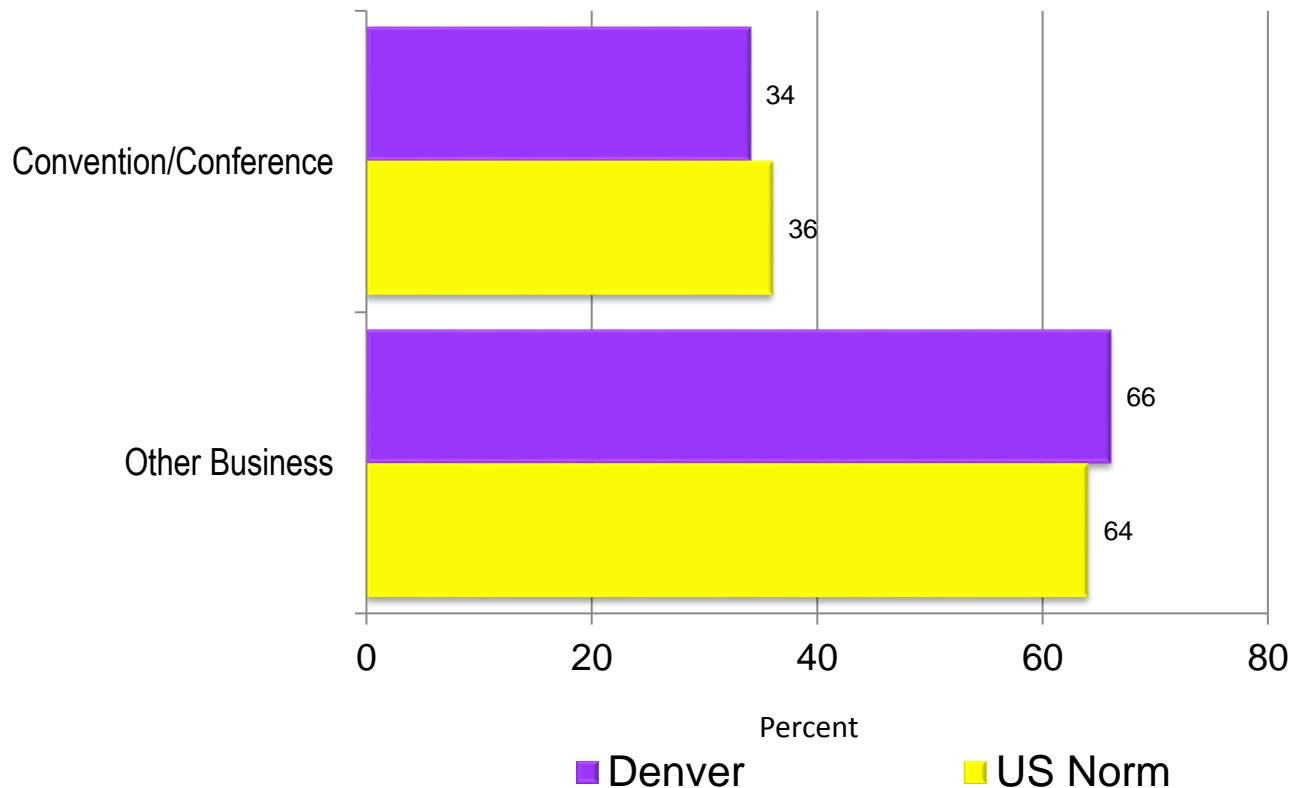


* Theme Park, Resort, Cruise

Main Purpose of Overnight Business Trips



Base: Overnight Business Visitors



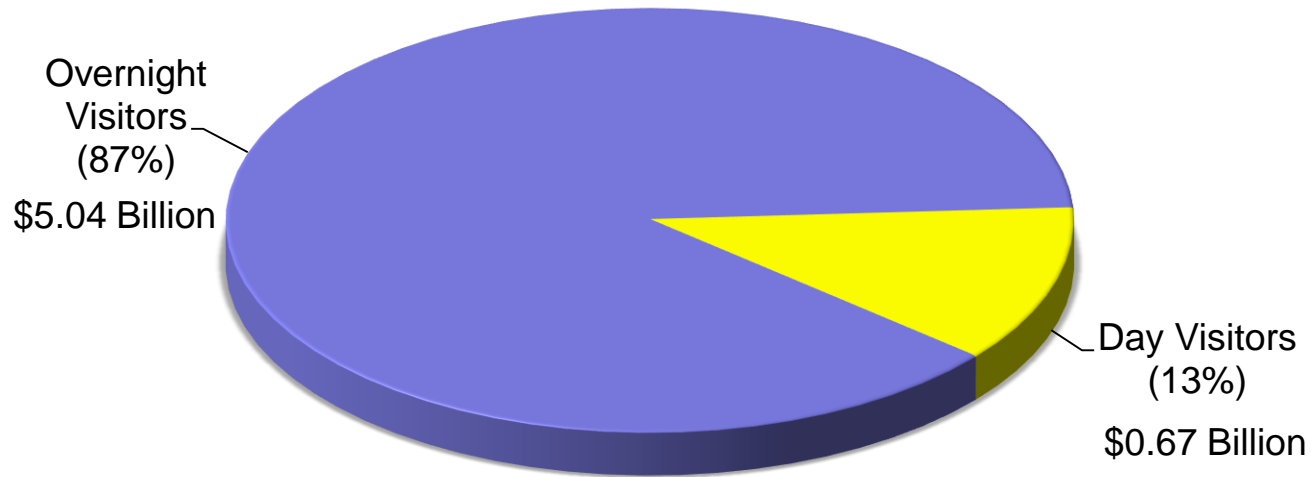
Travel Expenditures

Travel Spending in Denver



Base: Total Visitors

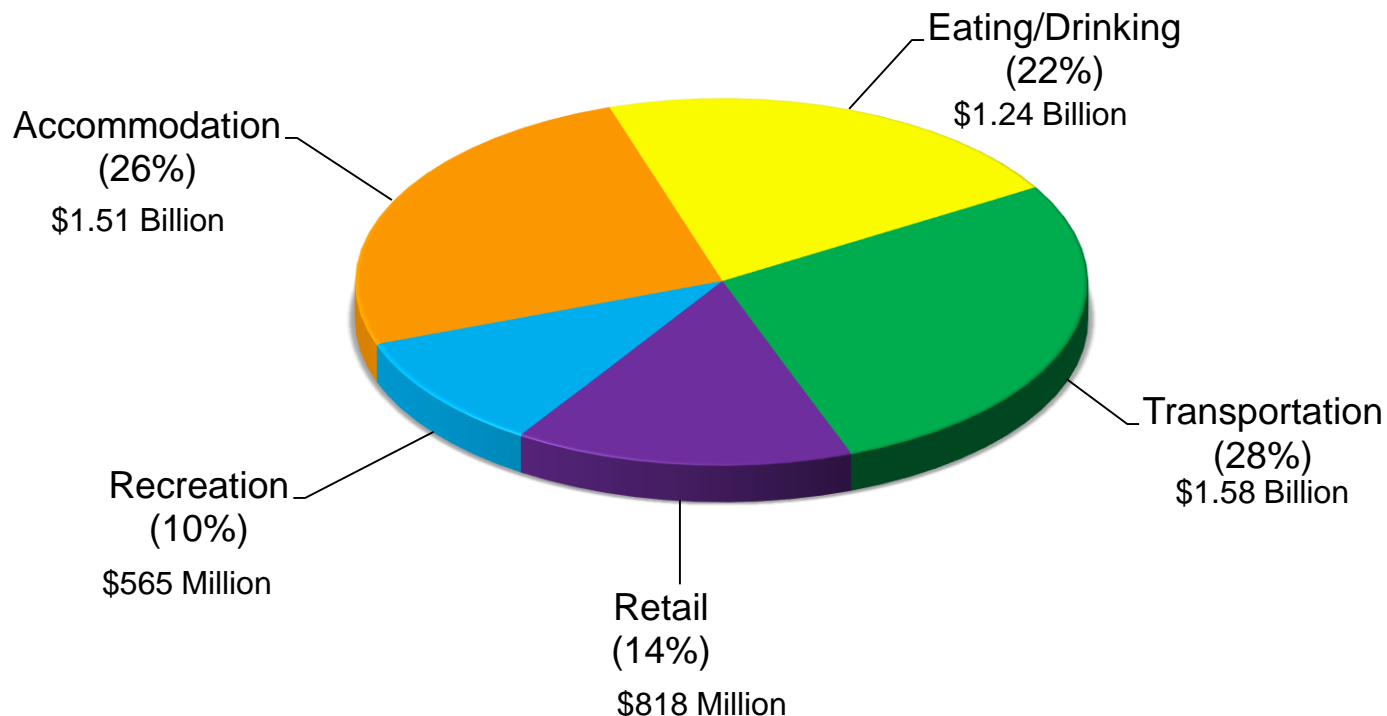
Total = \$5.71 Billion



Travel Spending by Sector — Day & Overnight Visitors



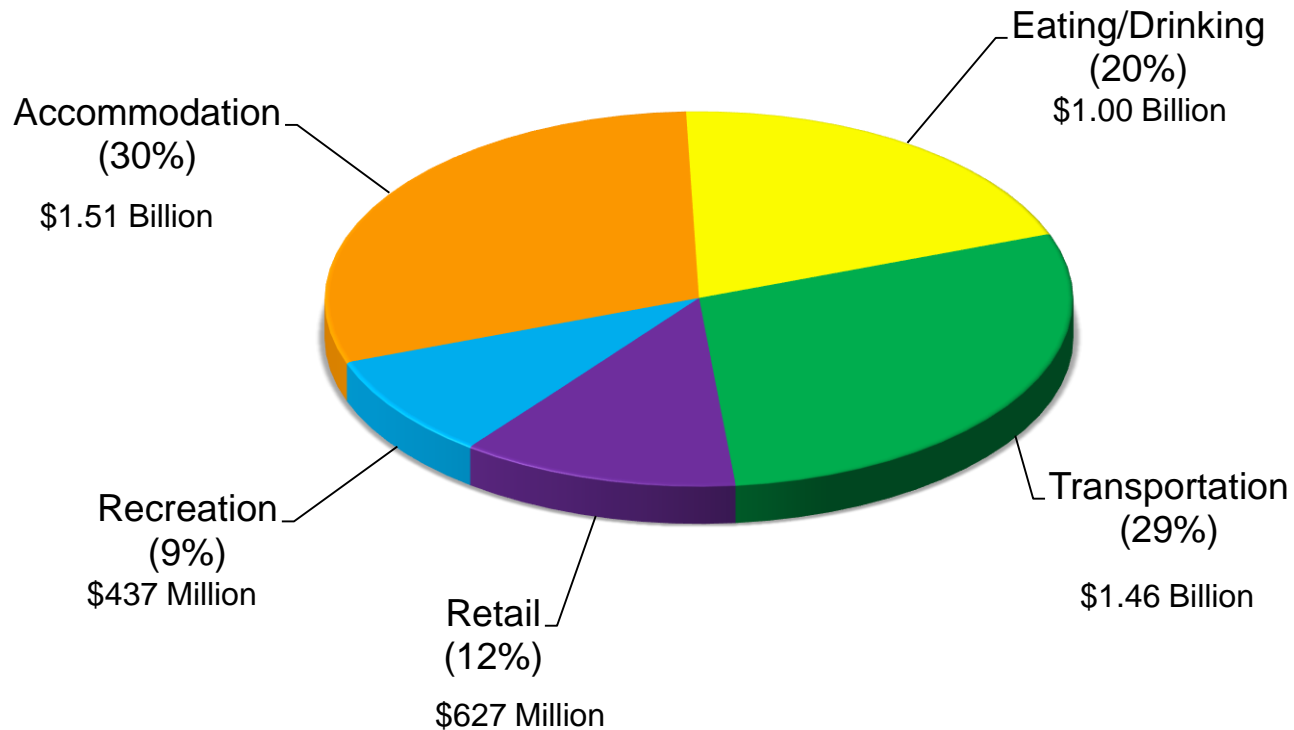
Total Spending = \$5.71 Billion



Travel Spending by Sector — Overnight Visitors



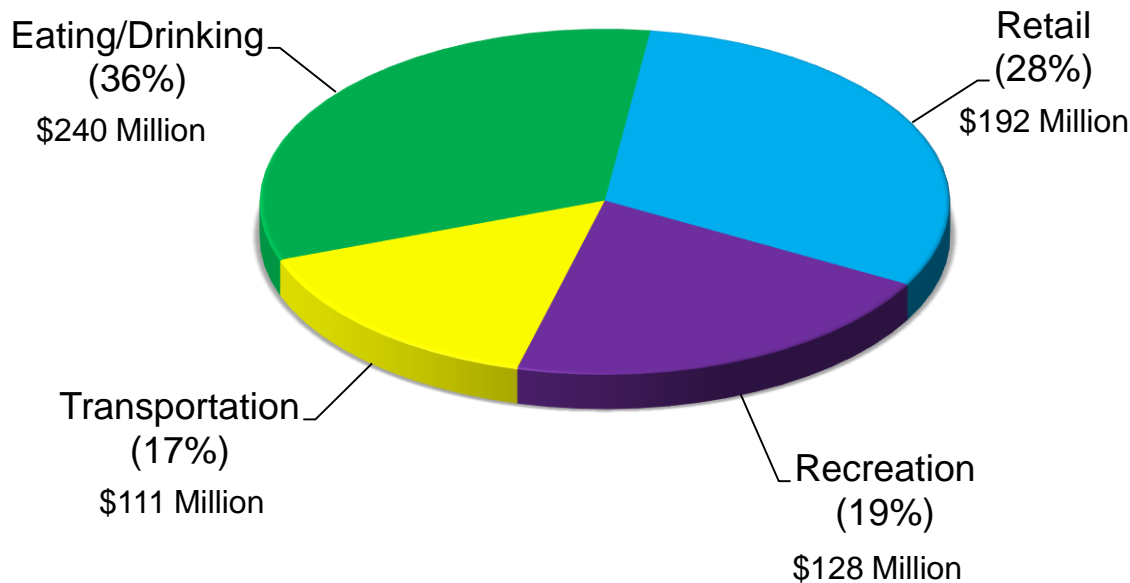
Total Spending = \$5.04 Billion



Travel Spending by Sector — Day Visitors



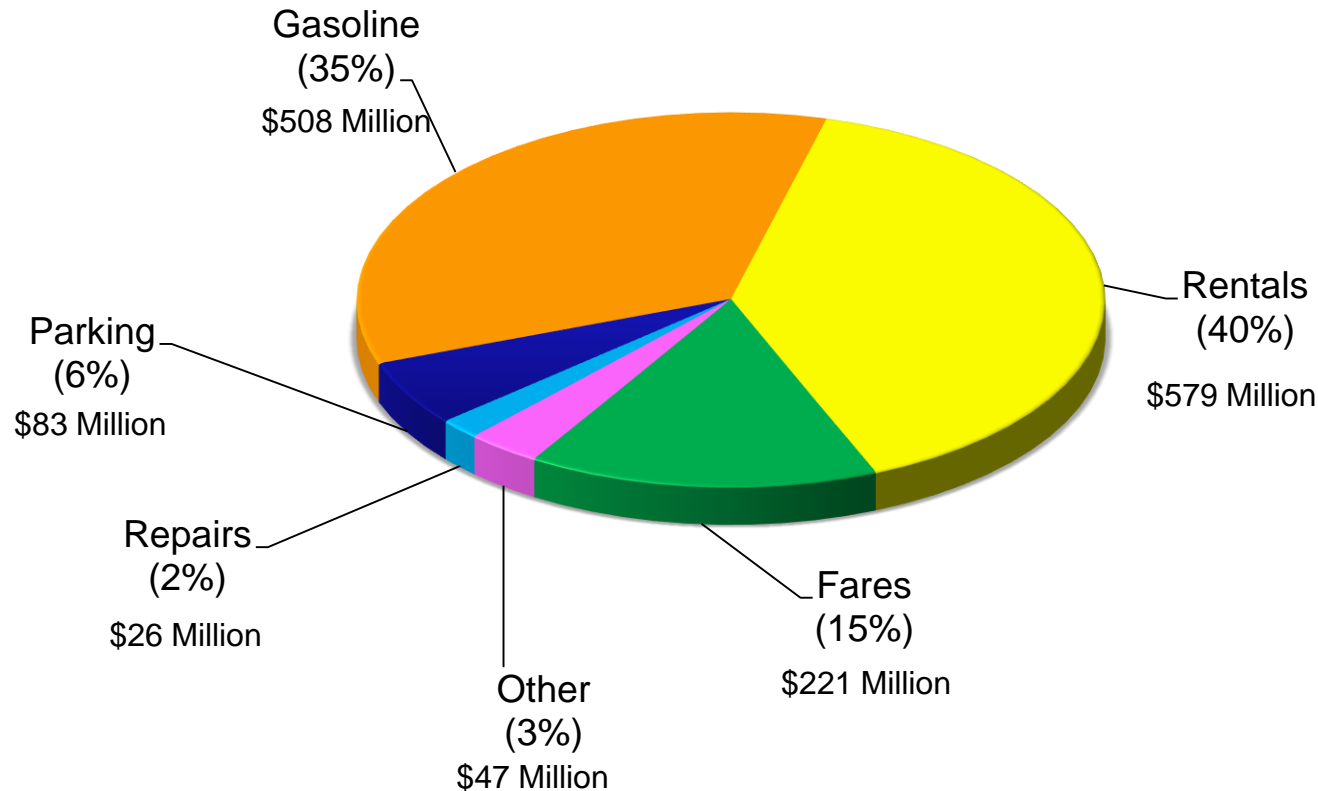
Total Spending = \$671 Million



Ground Transportation Expenditures — Overnight Visitors



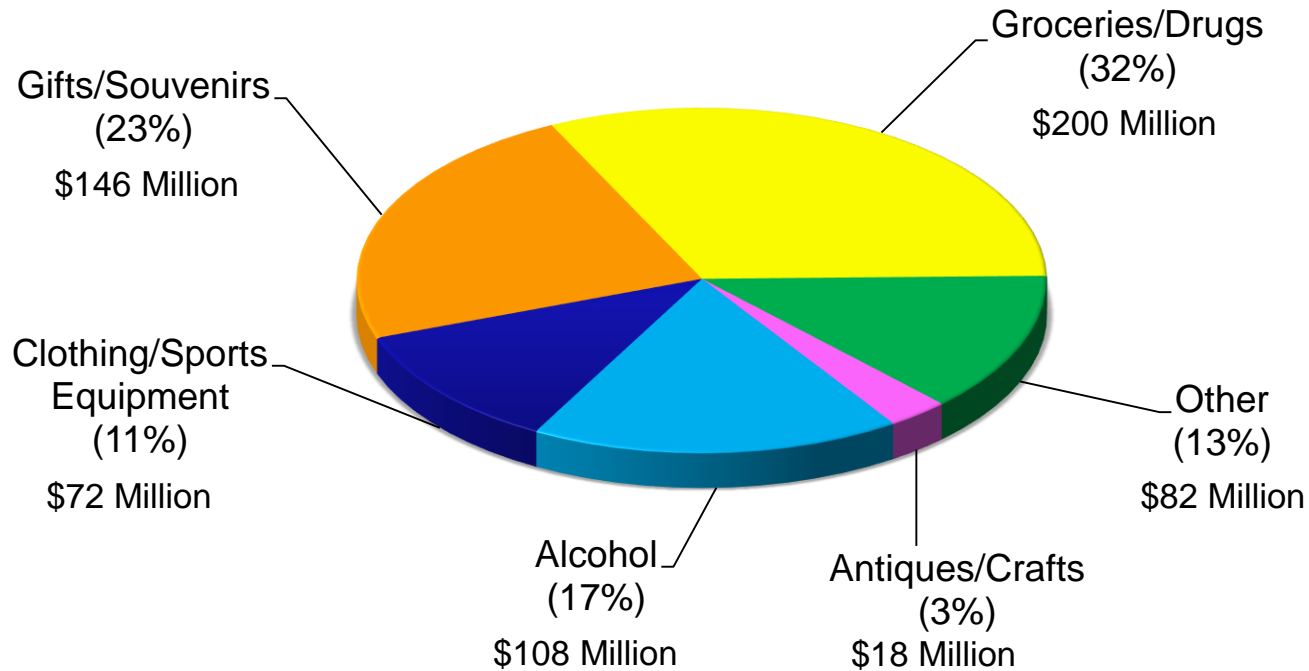
Total = \$1.46 Billion



Retail Expenditures — Overnight Visitors



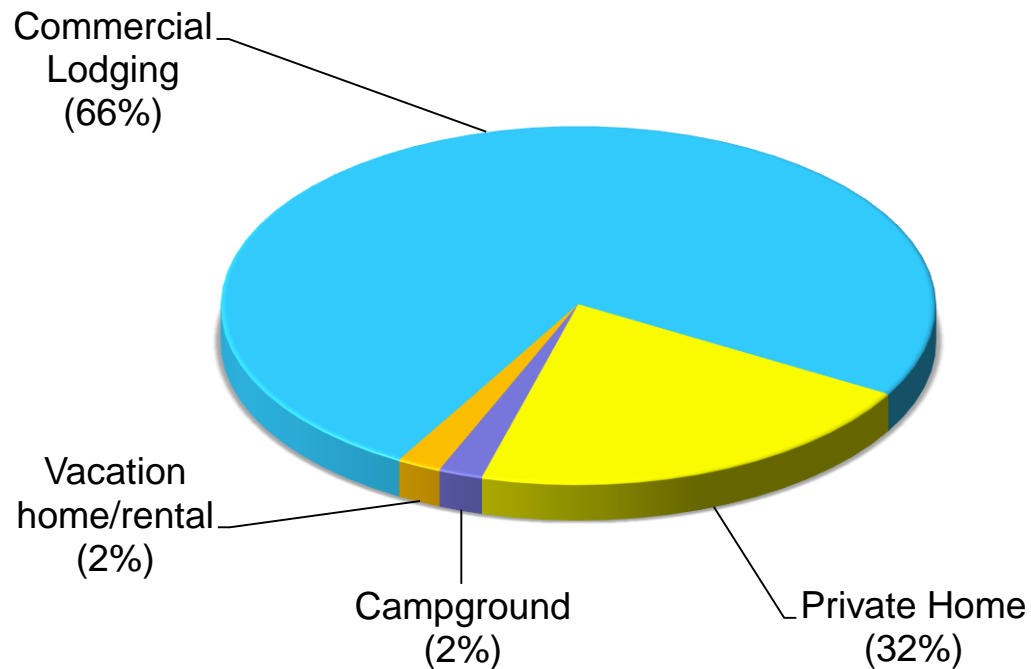
Total = \$627 Million



Travel Spending by Type of Accommodation



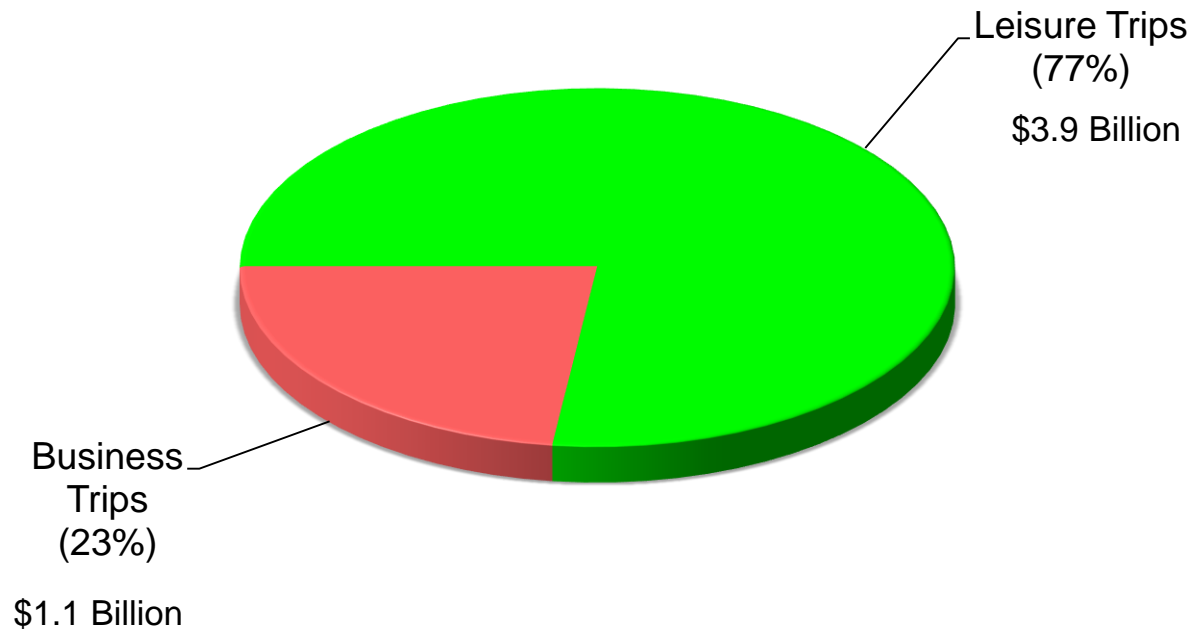
Total = \$5.0 Billion



Business vs. Leisure Spending — Overnight Visitors



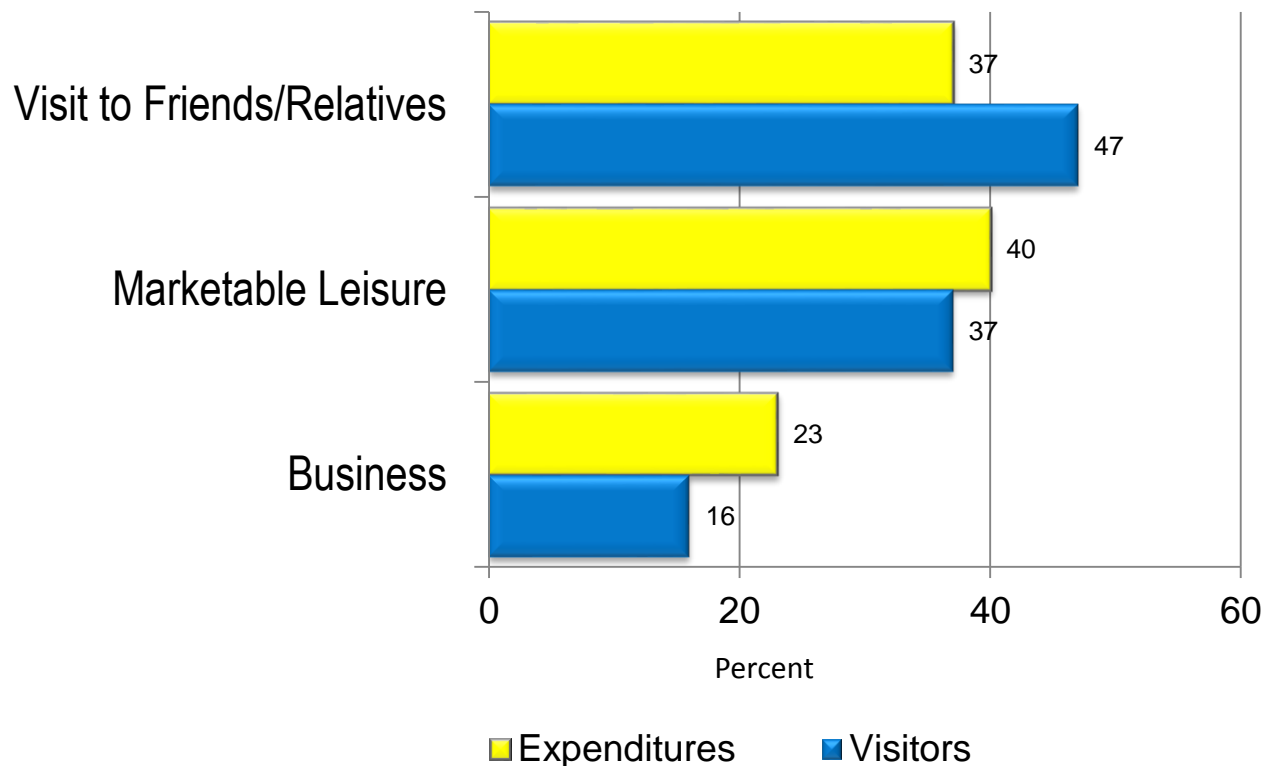
Total = \$5.0 Billion



Contribution to Expenditures/Visitor Volumes



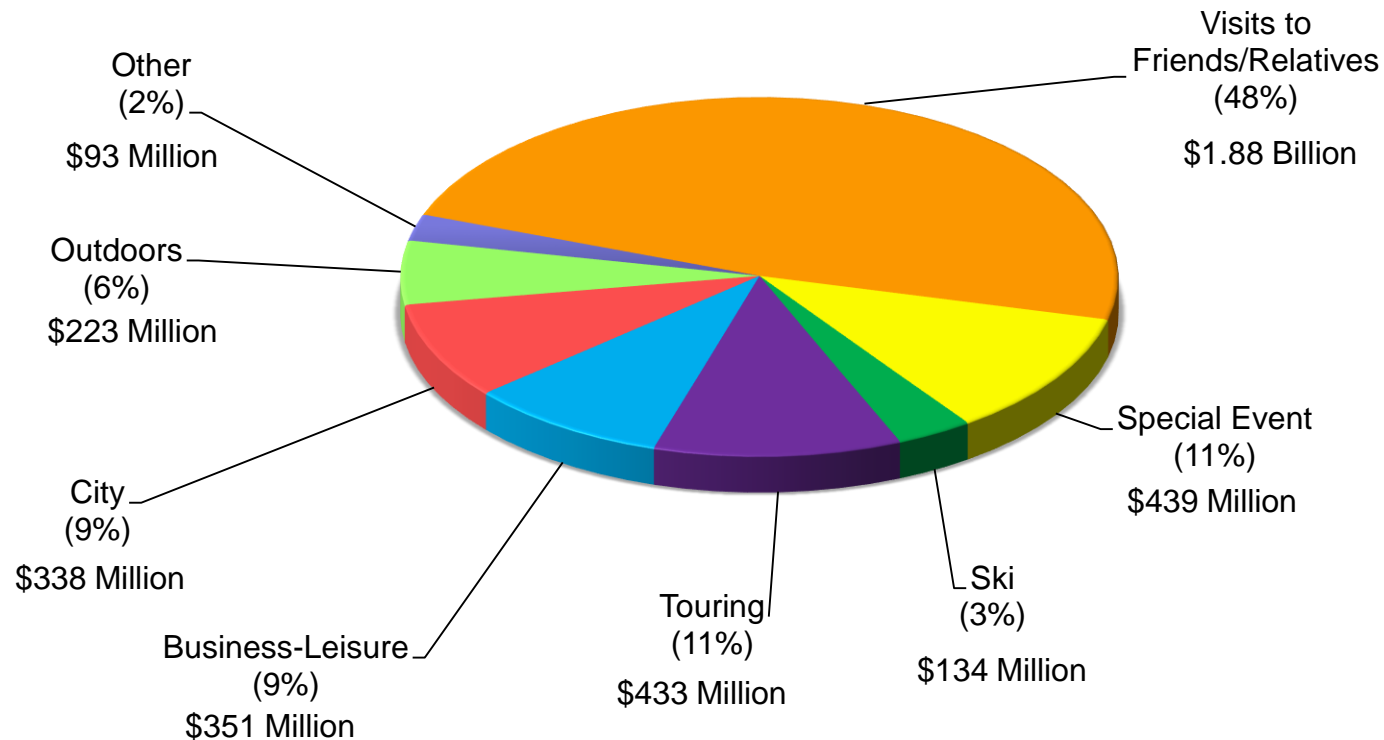
Base: Overnight Visitors



Overnight Leisure Travel Spending by Purpose of Trip



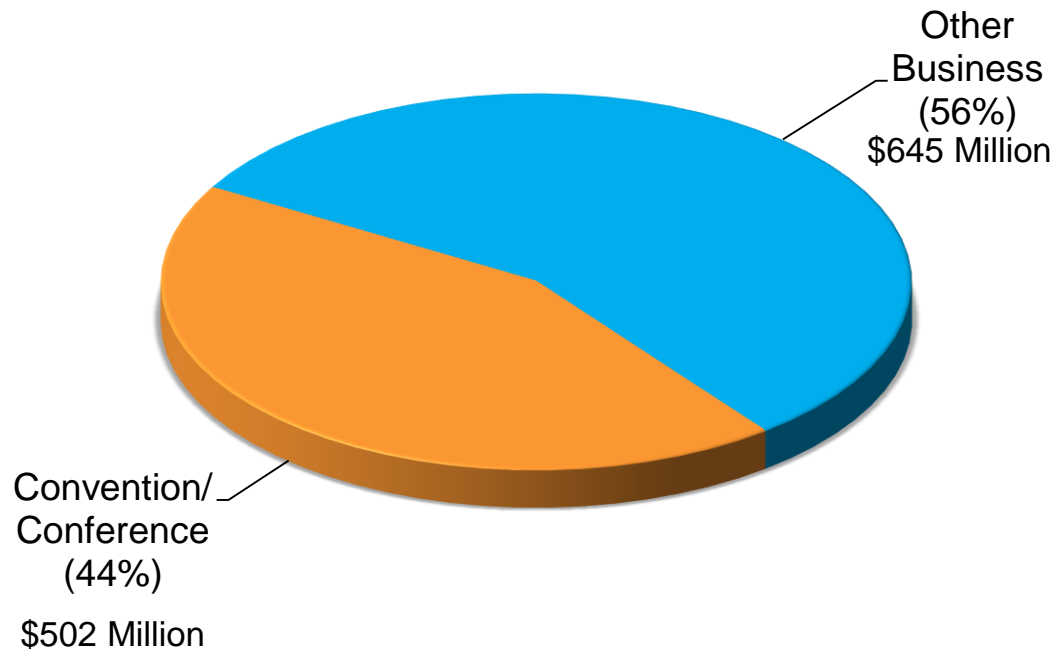
Total = \$3.9 Billion



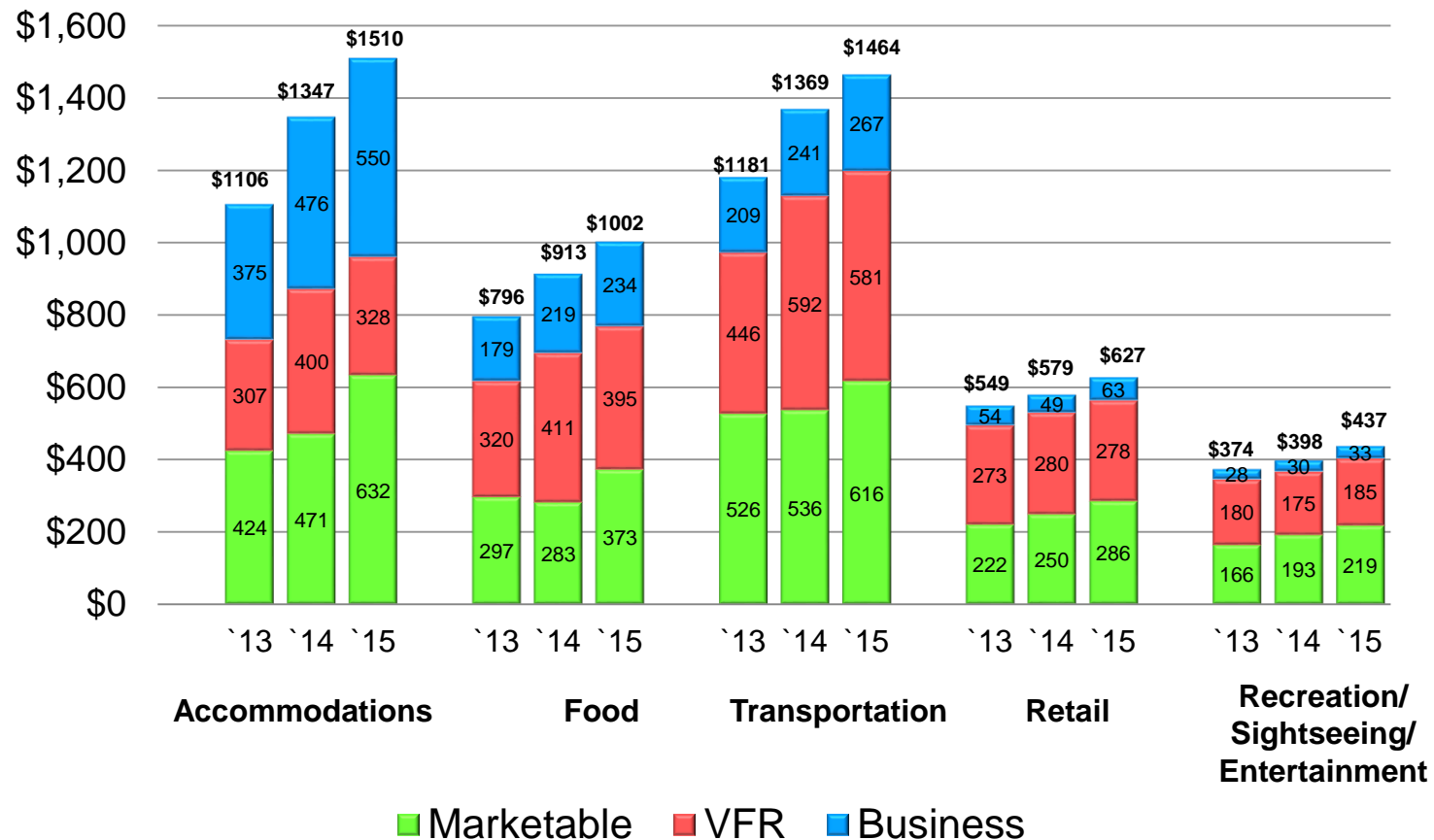
Overnight Business Travel Spending by Purpose of Trip



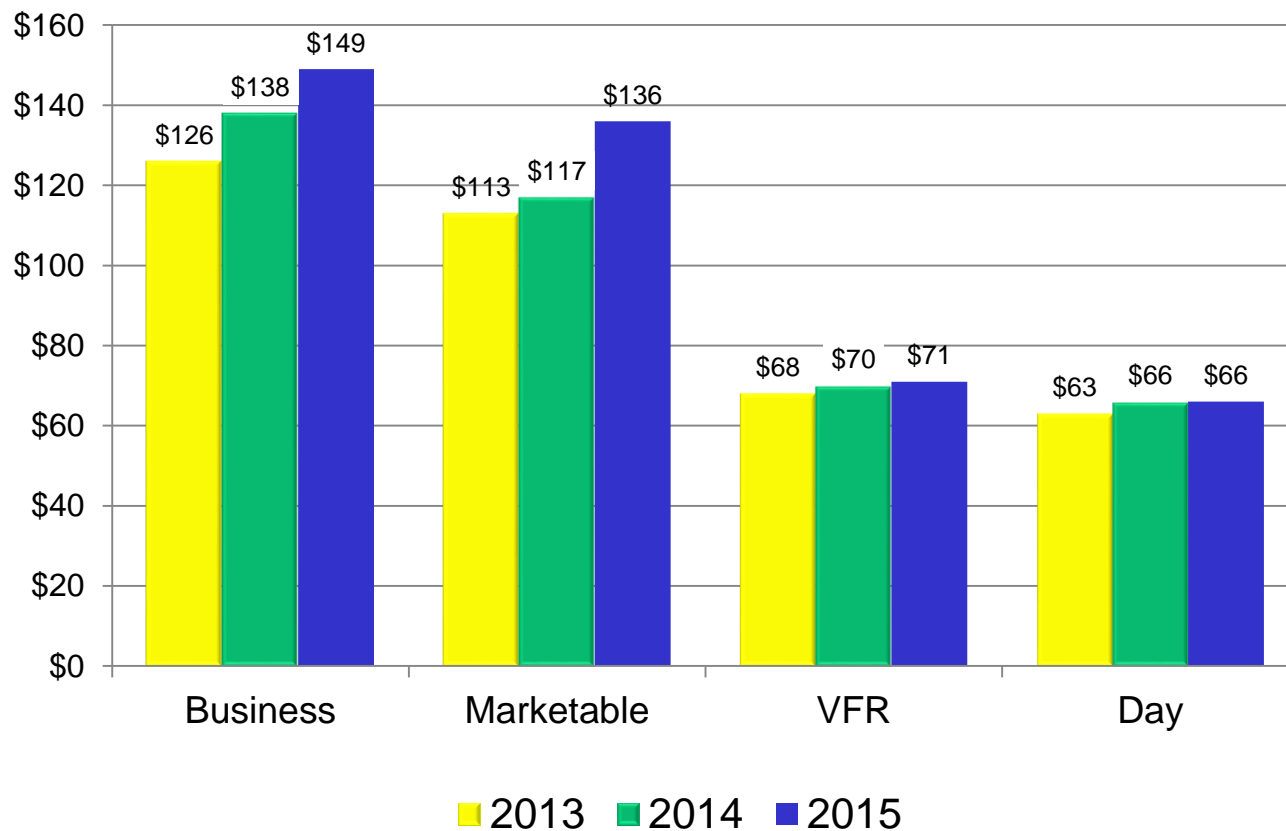
Total = \$1.1 Billion



Total Overnight Expenditures By Category



Average Daily Expenditures — Per Visitor



Average Daily Expenditures — Per Visitor

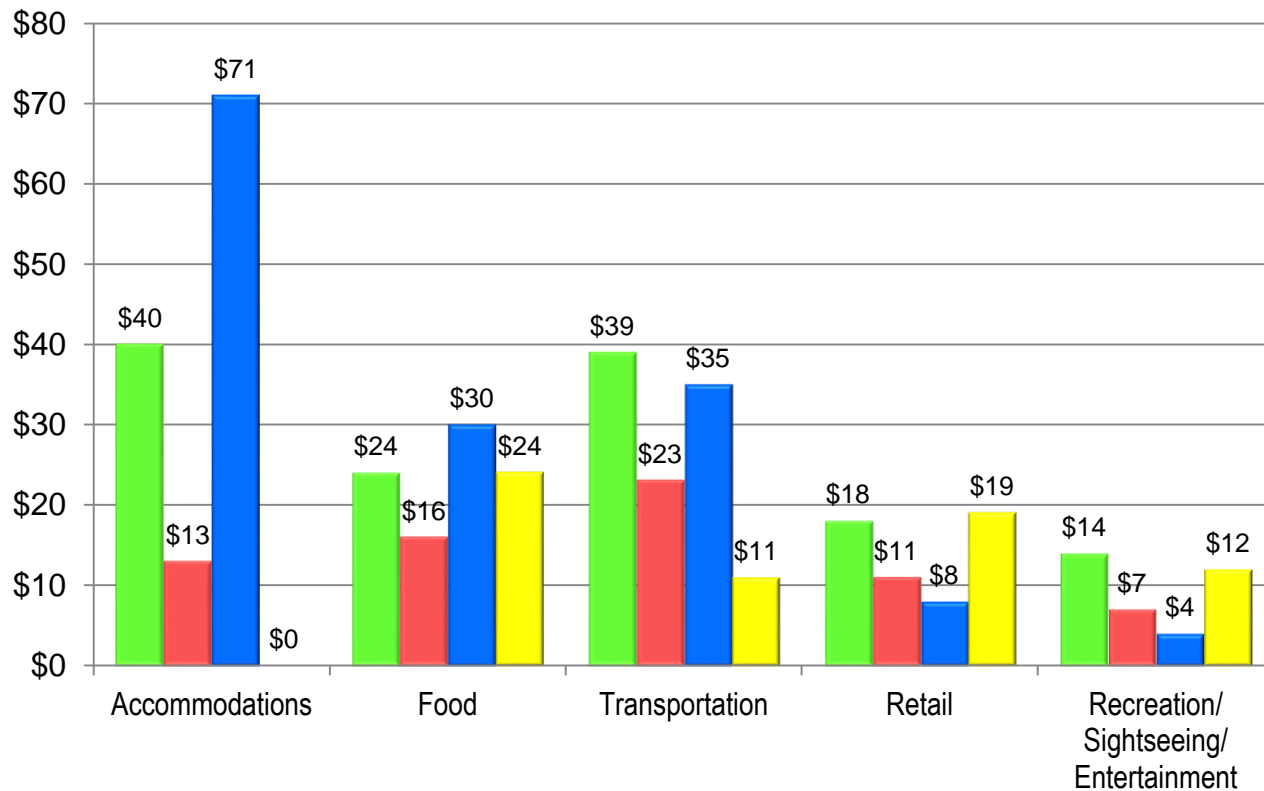


Marketable=\$136

VFR=\$71

Business=\$149

Day=\$66



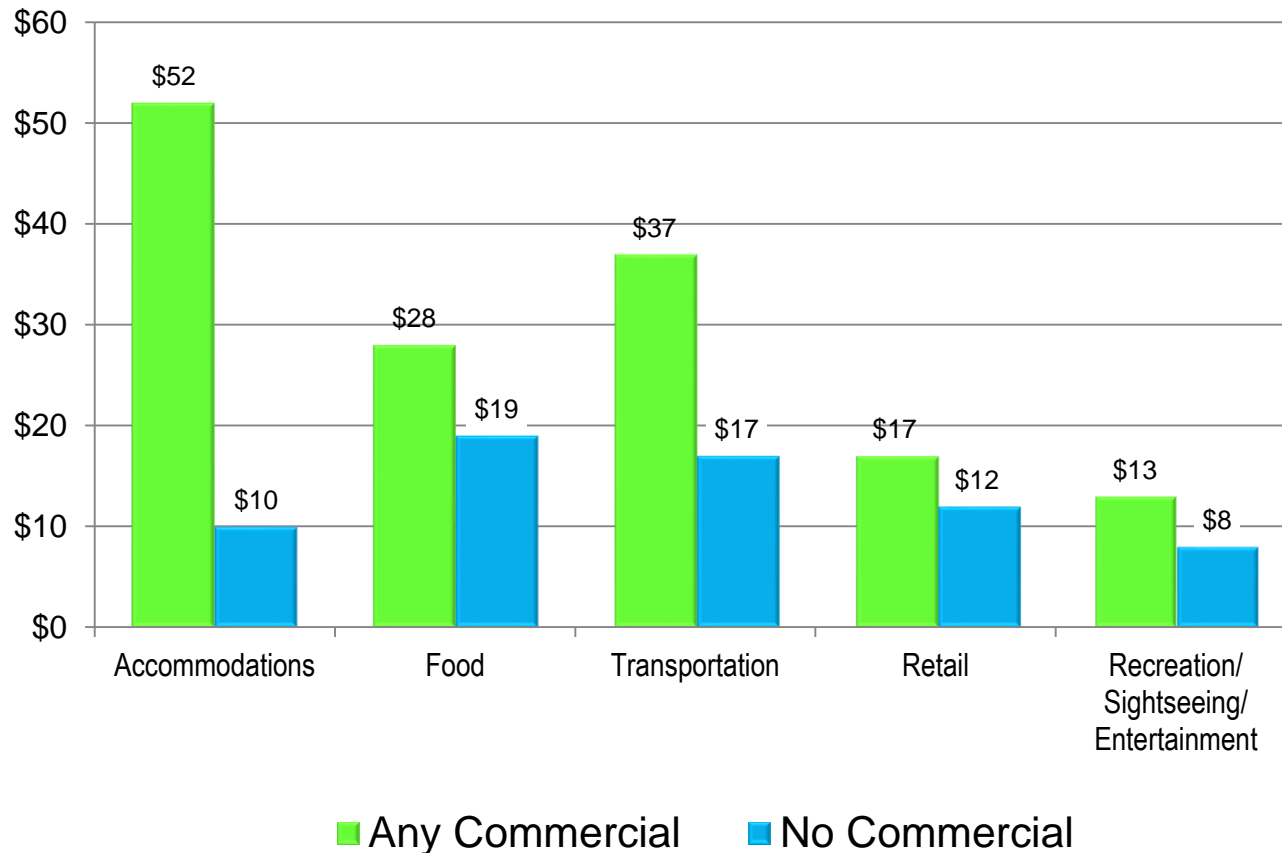
■ Marketable ■ VFR ■ Business ■ Day

Average Daily Expenditures Per Overnight Visitor - By Type of Accommodation



Any Commercial = \$147

No Commercial = \$66

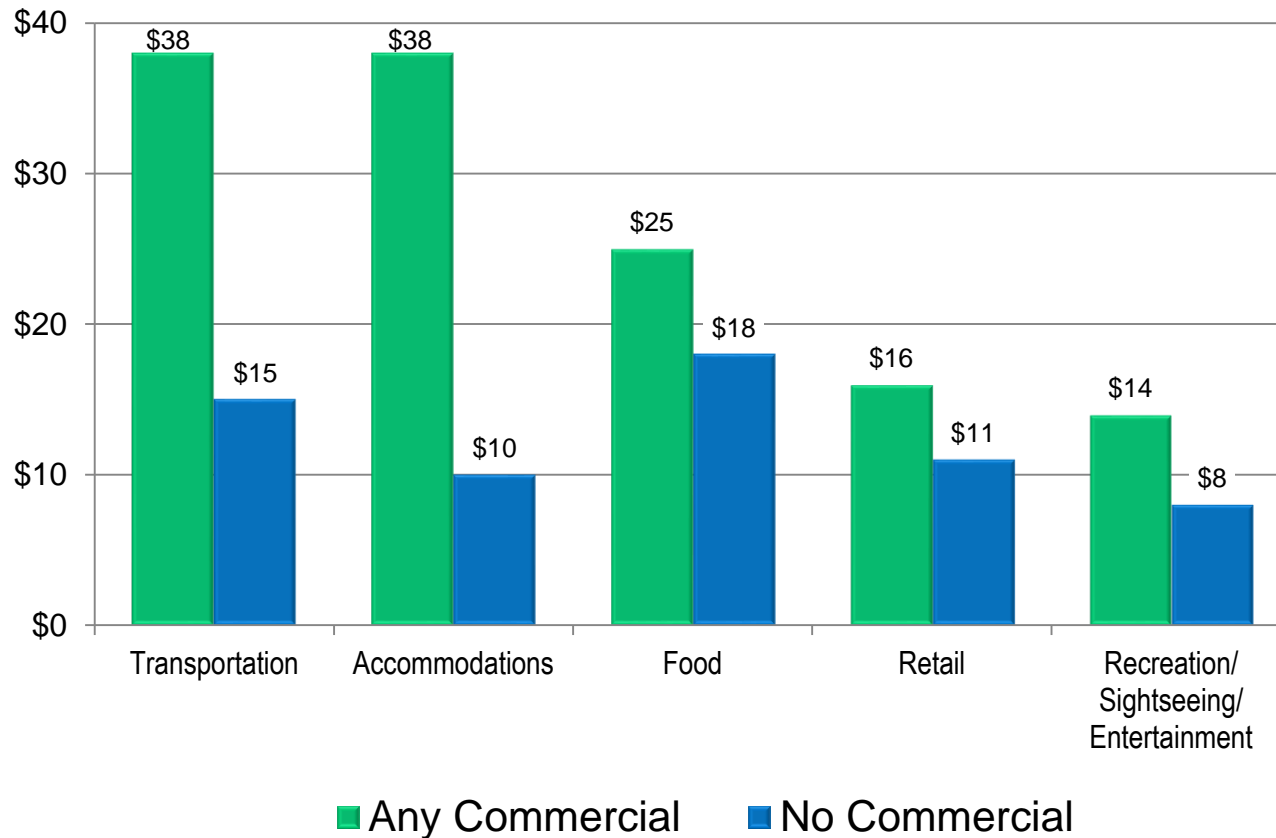


Average Daily Expenditures Per Overnight Leisure Visitor— By Type of Accommodation



Any Commercial = \$132

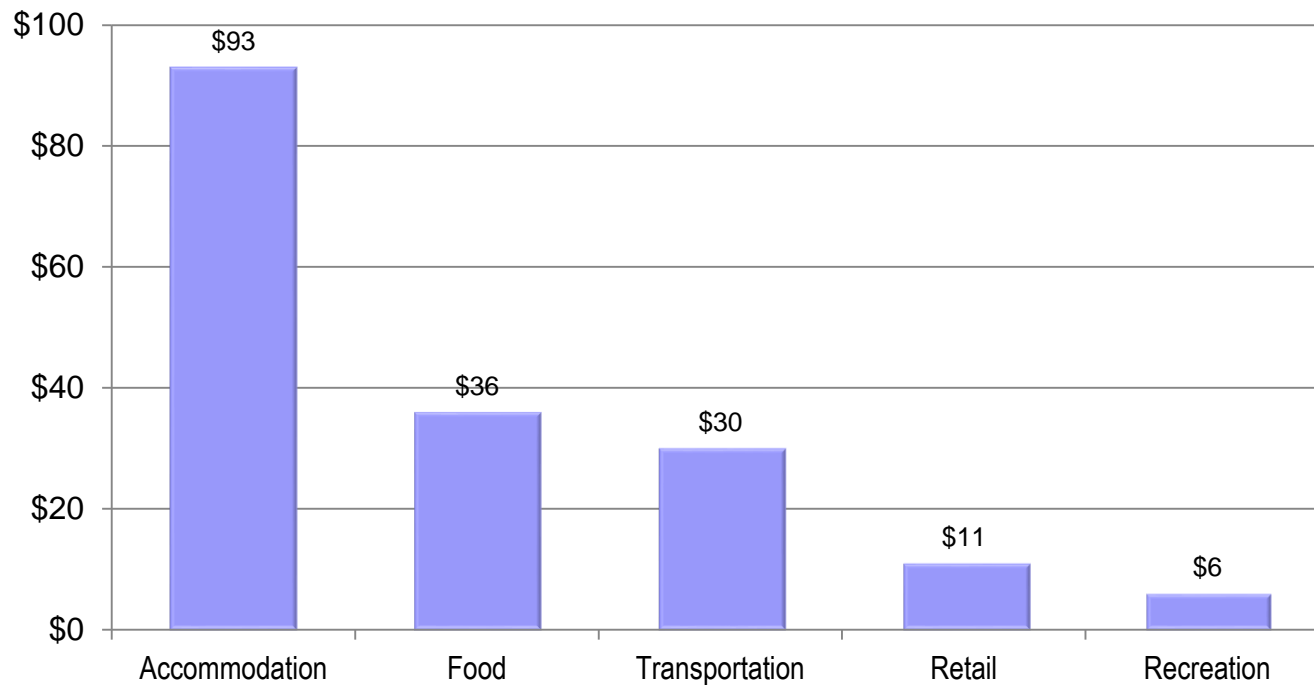
No Commercial = \$63



Average Daily Expenditures Per Overnight Business Visitor Staying in Commercial Accommodations*



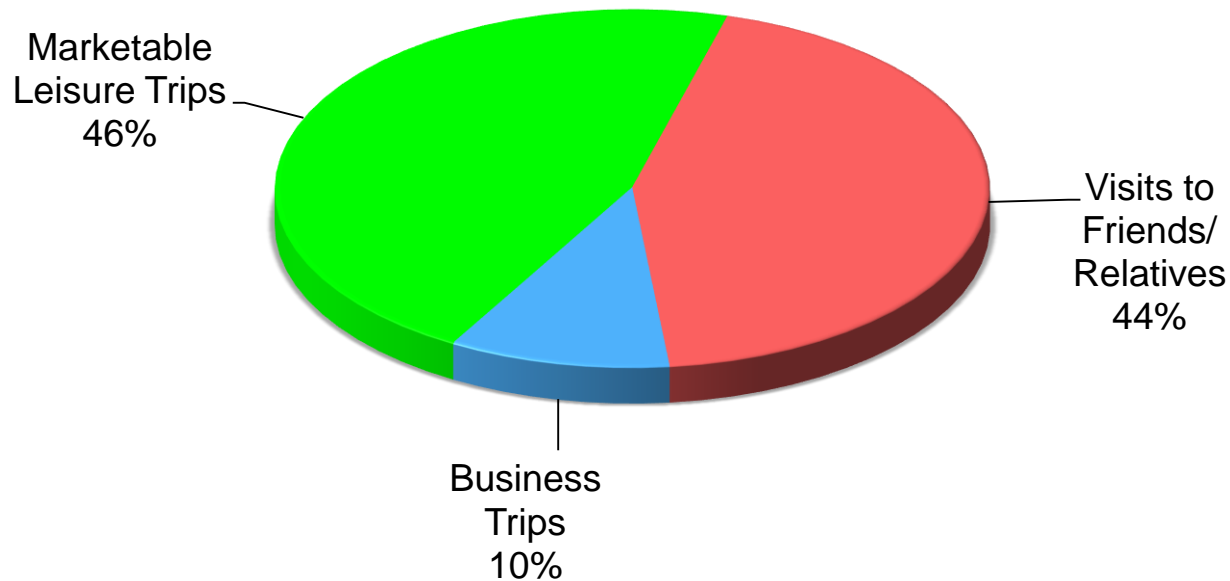
Average = \$176



*Data for business travelers staying in non-commercial accommodations are not shown due to extremely small base size

Key Travel Trends

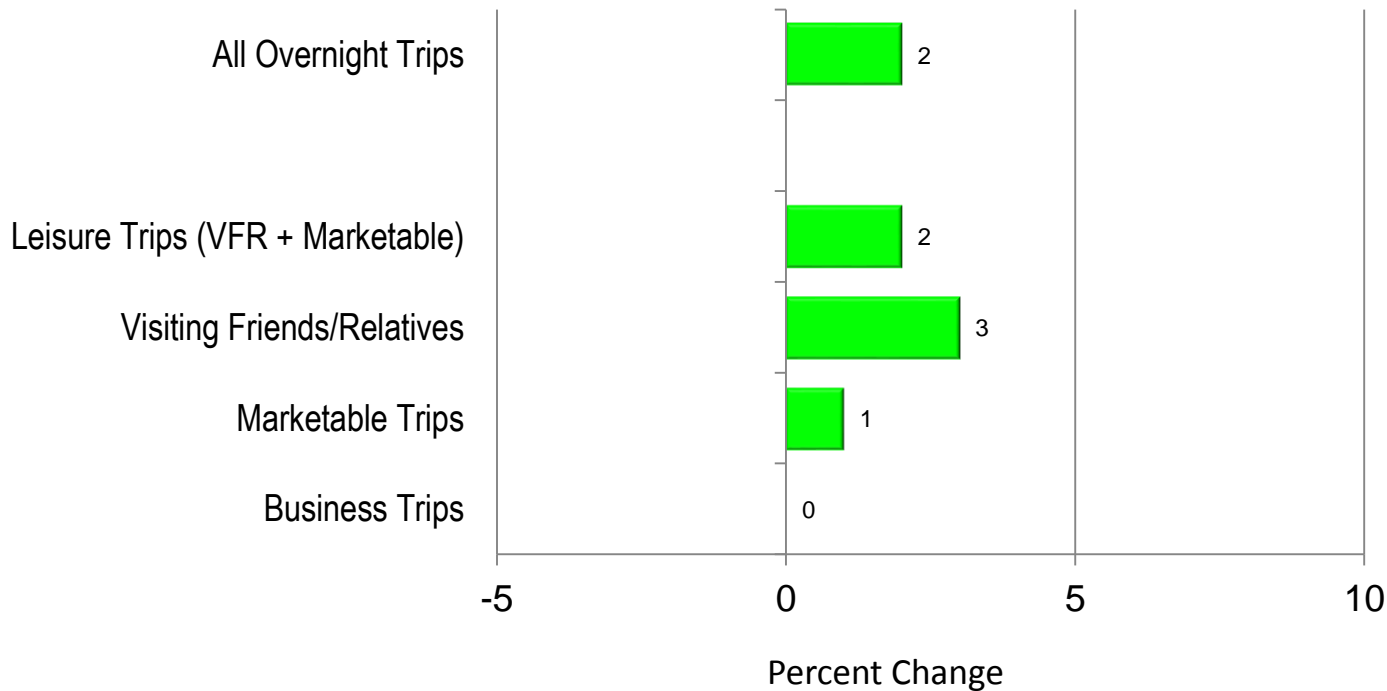
Structure of the U.S. Travel Market — 2015 Overnight Trips



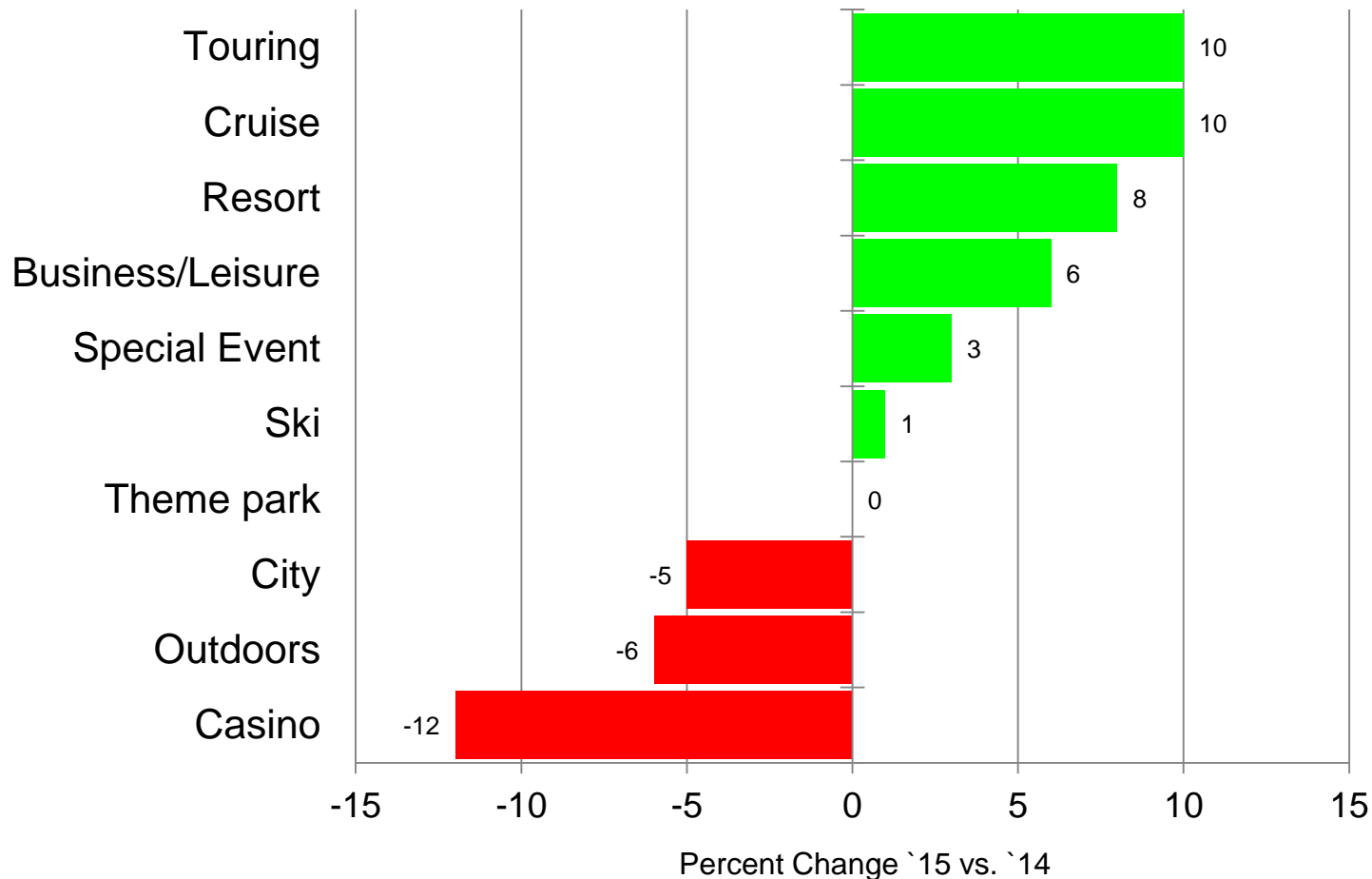
U.S. Market Trends for Overnight Trips — 2015 vs. 2014



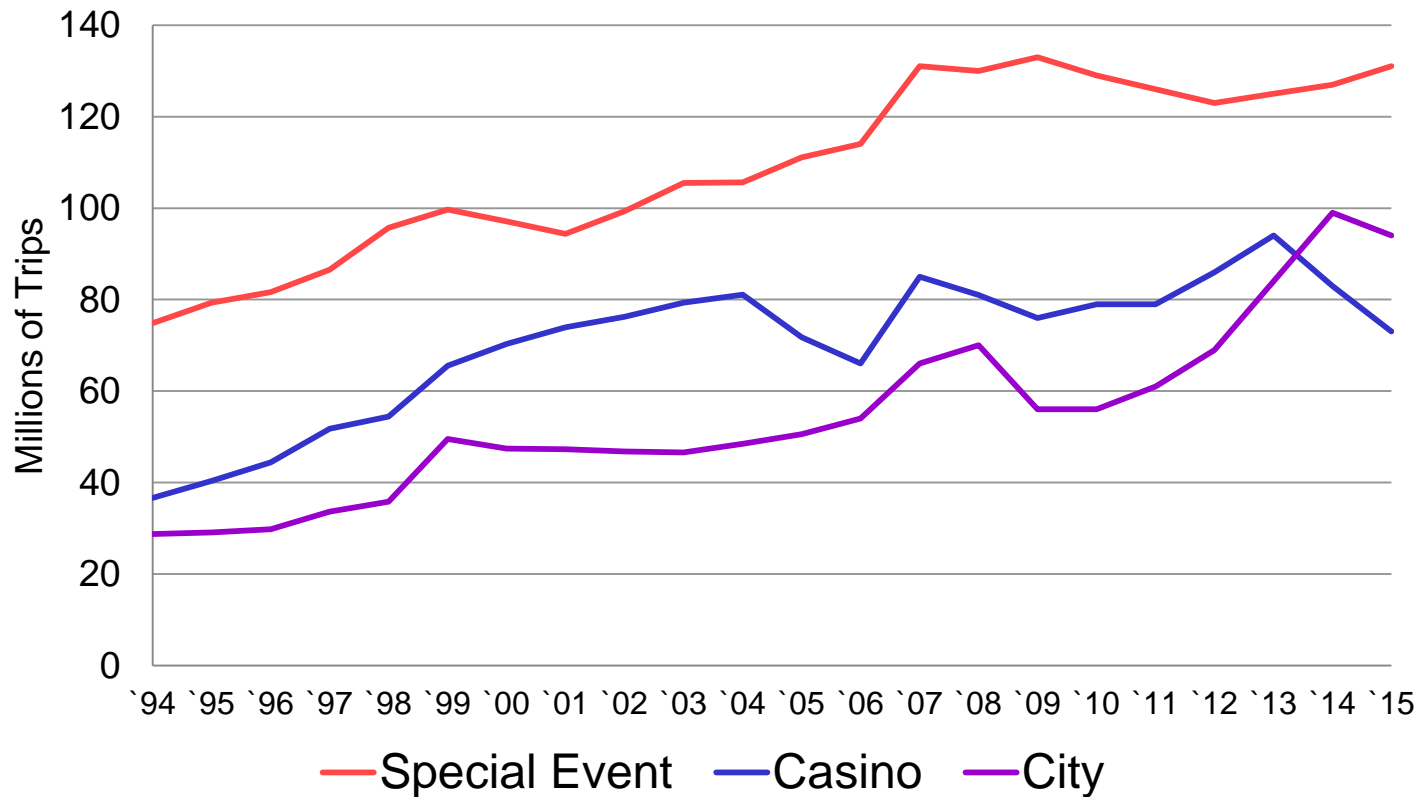
Base: Adult Overnight Trips



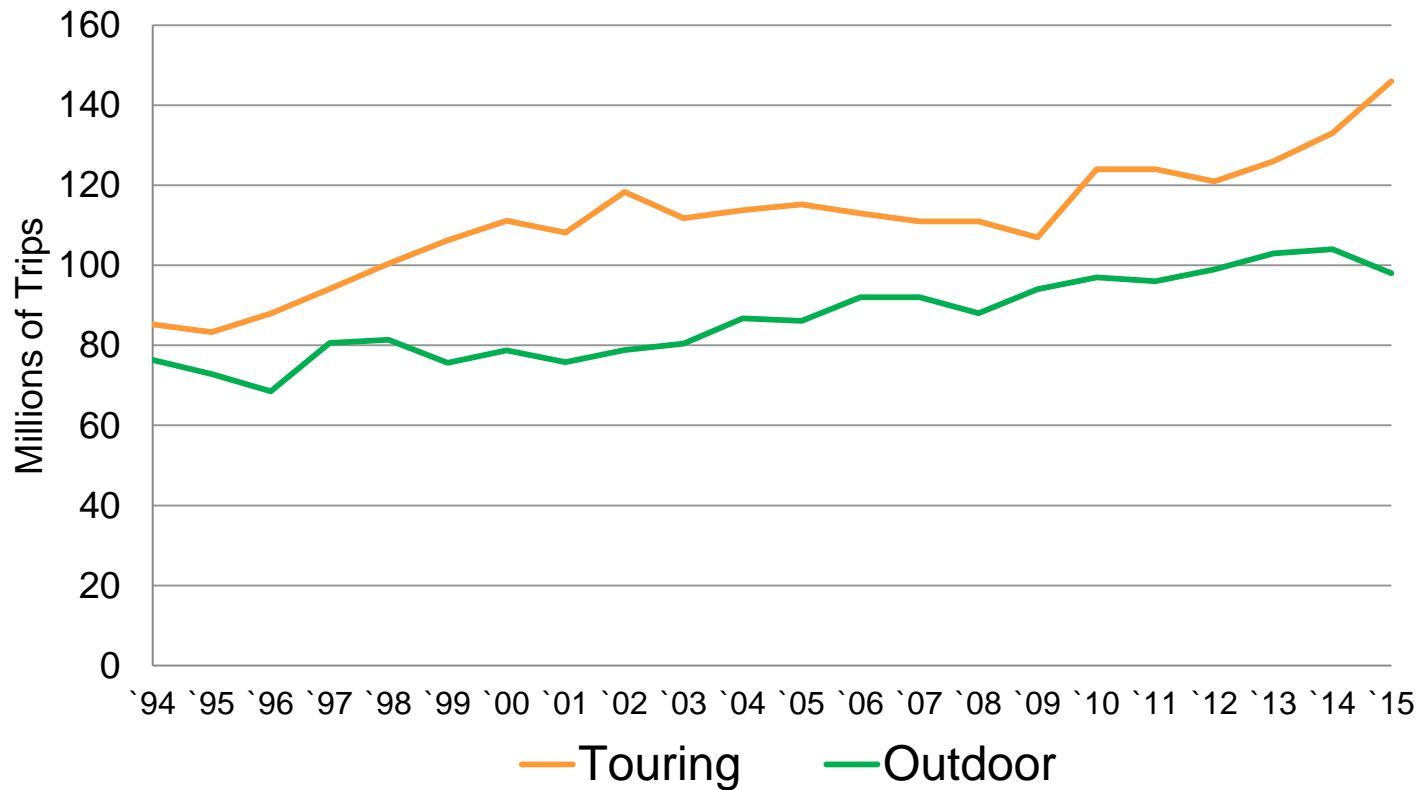
U.S. Overnight Marketable Trip Trends — 2015 Travel Year



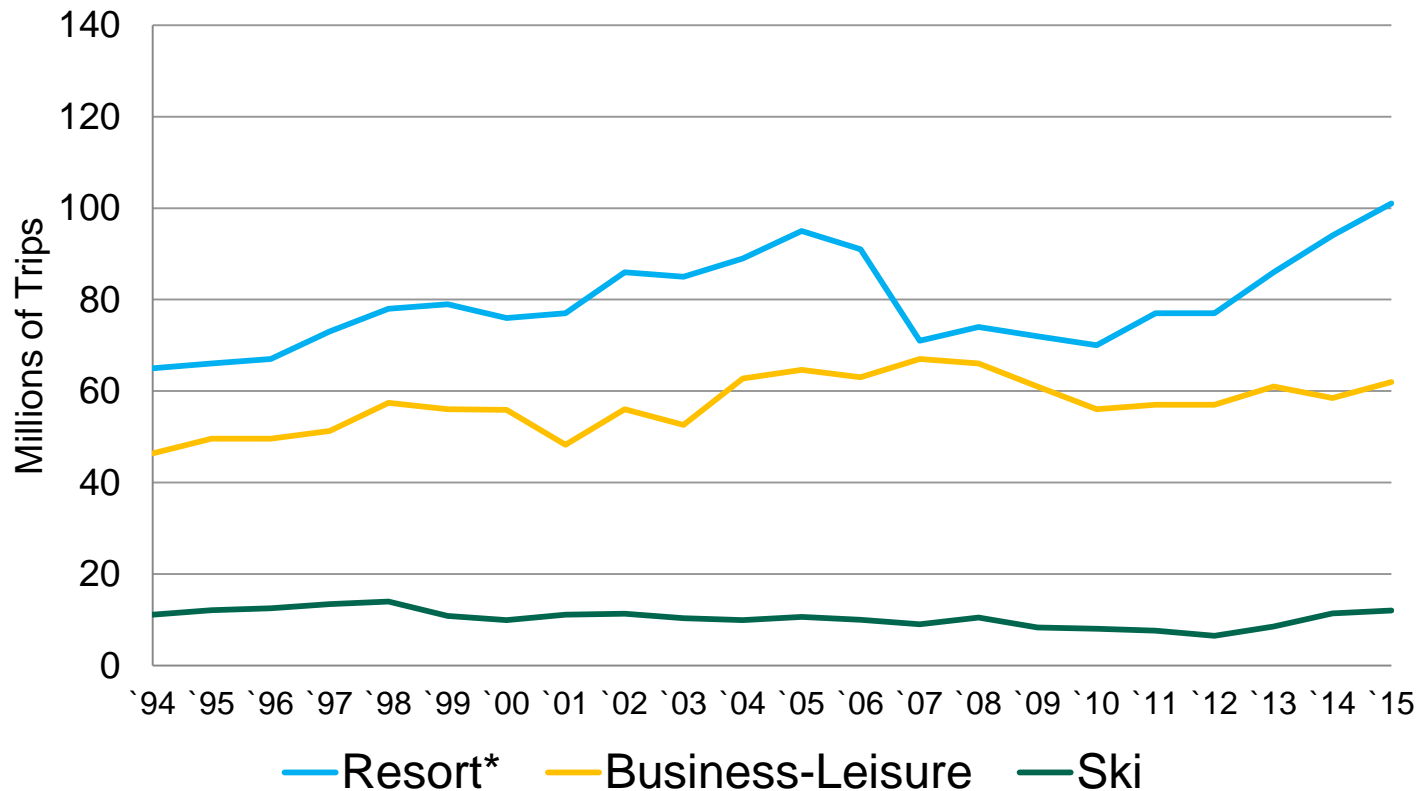
U.S. Marketable Trips — Special Event, Casino & City Trips



U.S. Marketable Trips — Touring & Outdoor Trips

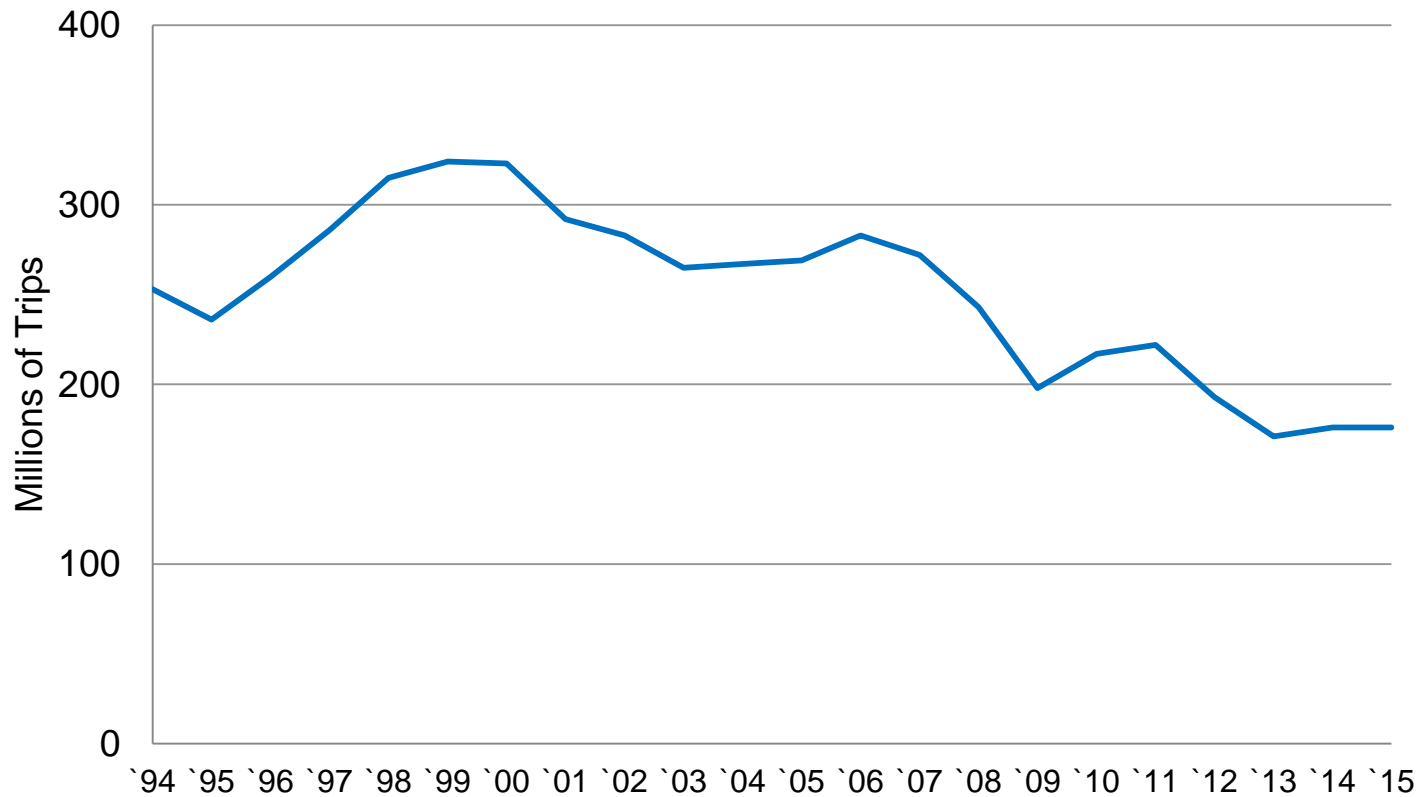


U.S. Marketable Trips — Business/Leisure, Resort* & Ski Trips

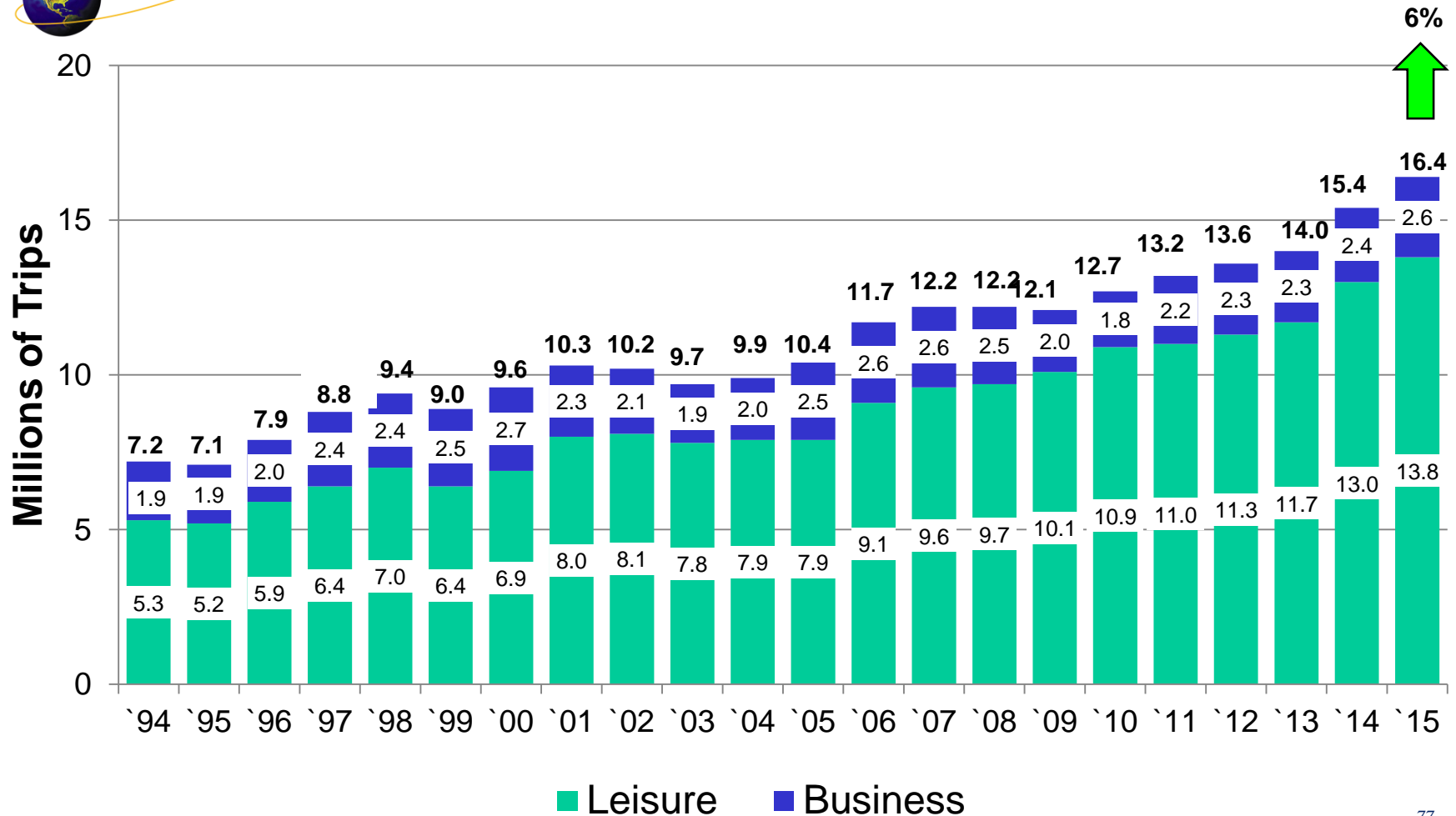


* Combines Country and Beach starting in 2007 and Resort plus Golf starting in 2013

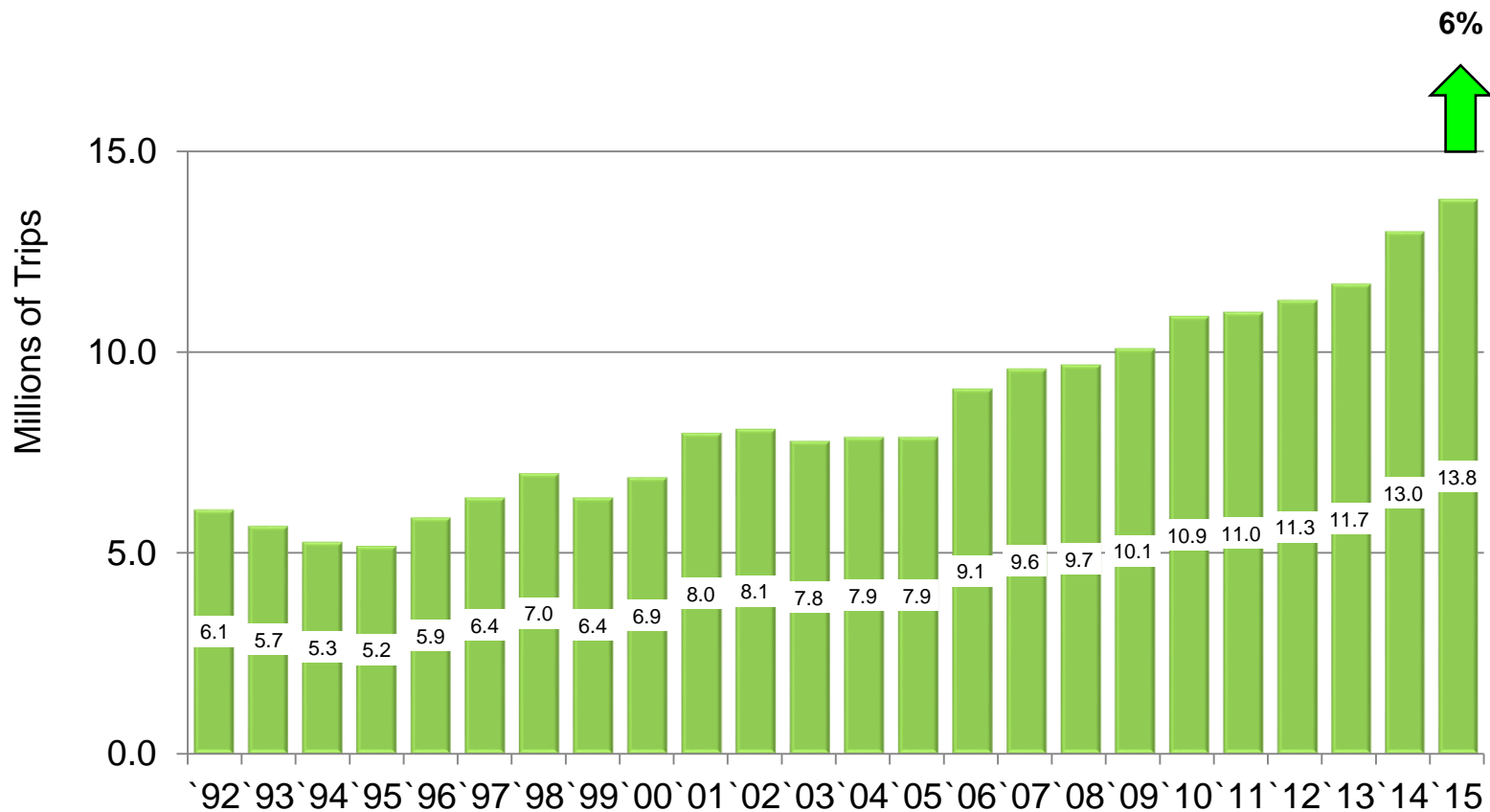
U.S. Business Trips



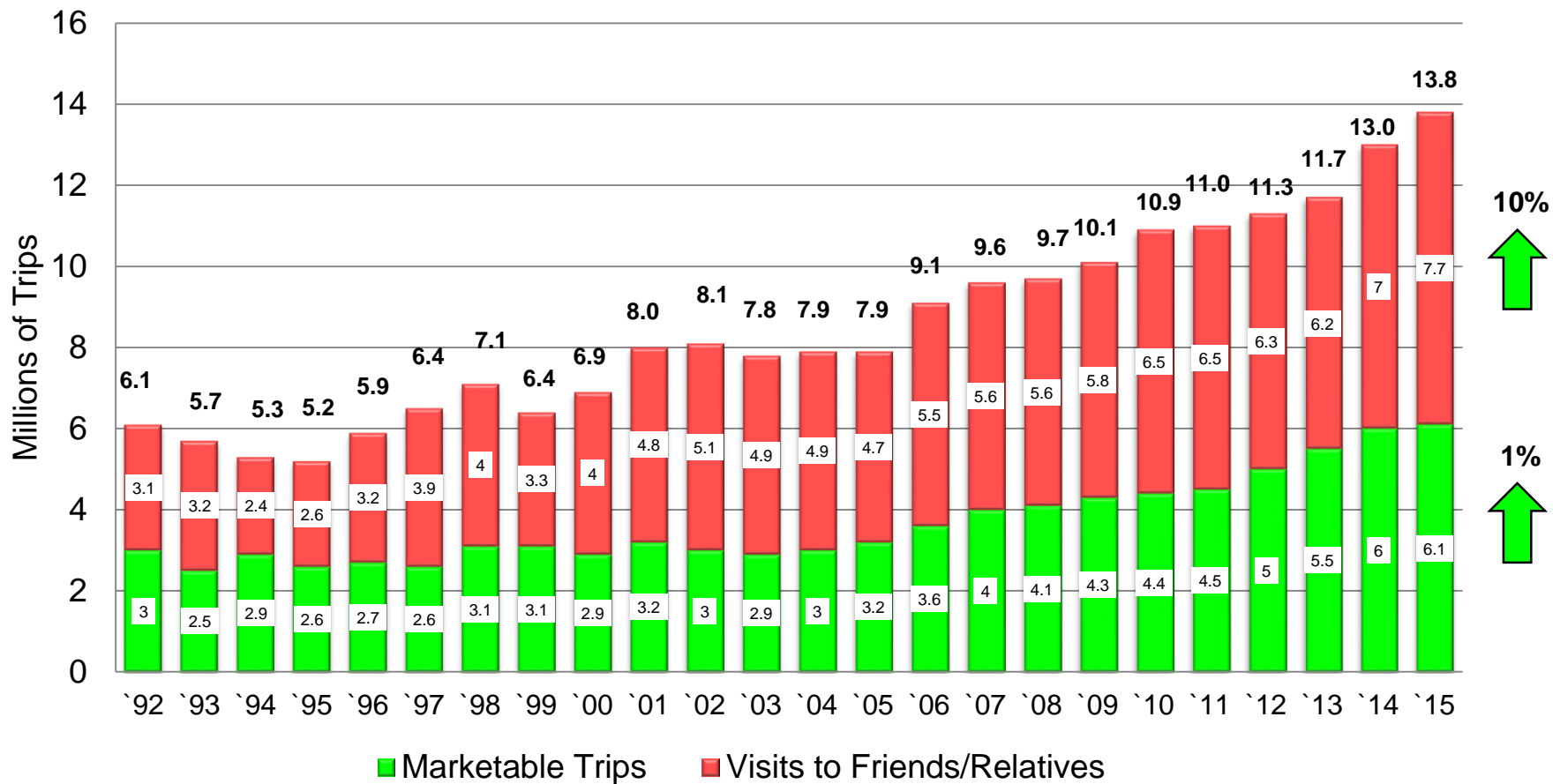
Total Overnight Trips to Denver — 1994 to 2015



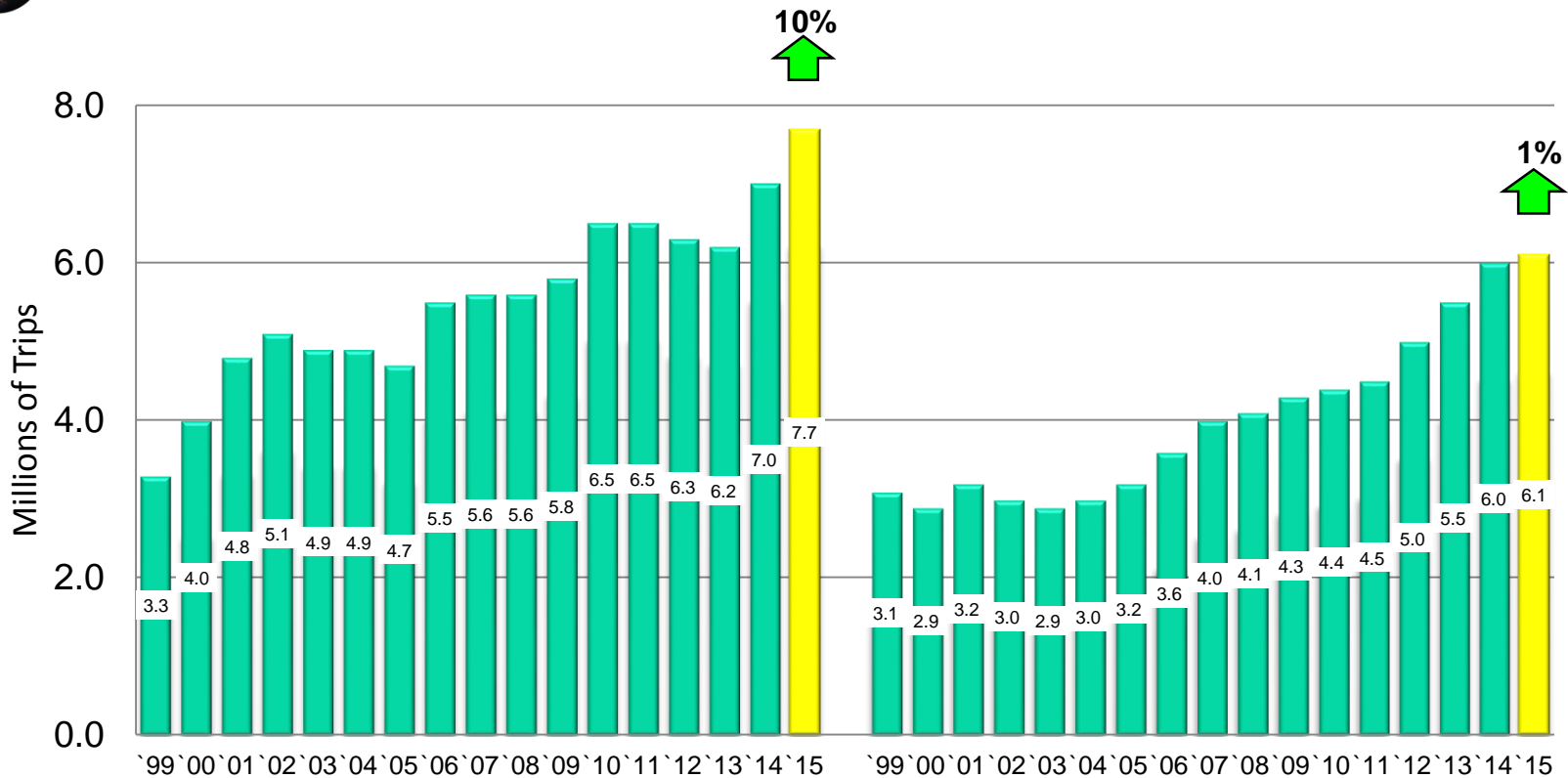
Overnight Leisure Trips to Denver



Structure of Denver's Overnight Leisure Travel Market



Overnight Leisure Trips to Denver



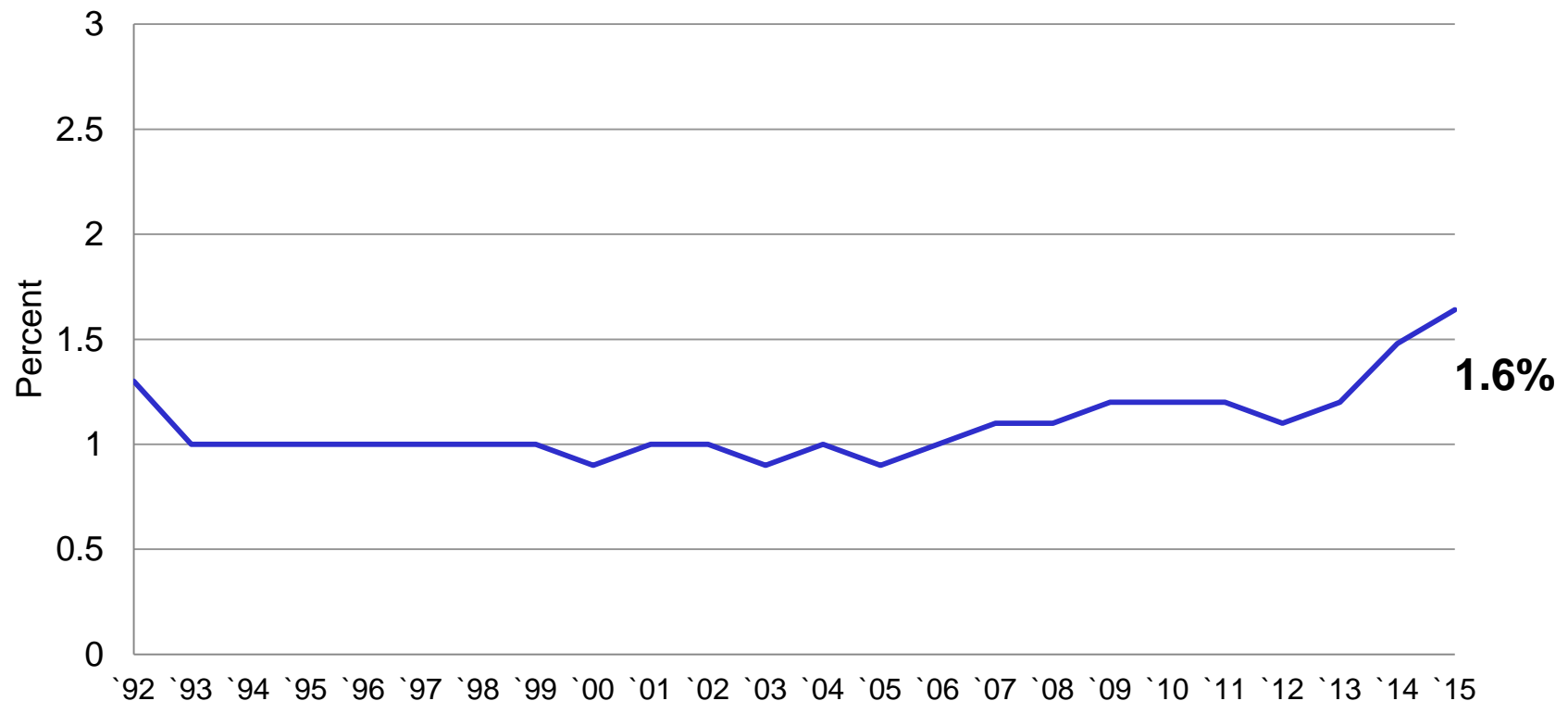
Visit Friends/Relatives

Marketable Trips

Denver's Travel Market Share



Percent Identifying Denver as Main Destination of Leisure Trip



Top U.S. City Destinations — Share of All Overnight Trips



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
Orlando	2.9%	3.0%	3.5%
New York City	2.9%	3.0%	3.3%
Los Angeles	2.7%	2.8%	3.2%
Las Vegas	3.0%	2.7%	2.6%
San Francisco	1.9%	2.0%	2.1%
San Diego	1.7%	1.7%	1.8%
Chicago	1.8%	1.8%	1.7%
Miami	1.3%	1.4%	1.5%
Atlanta	1.4%	1.4%	1.3%
Dallas	1.4%	1.4%	1.3%
Fort Lauderdale	0.9%	1.0%	1.3%
Houston	1.1%	1.2%	1.2%
Anaheim	n/a	1.2%	1.2%
Tampa Bay	1.1%	1.2%	1.1%
Denver	0.8%	1.1%	1.1%
Atlantic City	1.6%	1.3%	1.0%
Boston	0.8%	0.9%	1.0%
Seattle	0.9%	0.9%	1.0%

Top U.S. City Destinations – Visits to Friends/Relatives



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
Los Angeles	2.8%	2.9%	3.3%
New York City	2.6%	3.1%	3.2%
San Francisco	1.7%	2.0%	2.1%
Orlando	1.7%	1.8%	1.9%
Chicago	1.7%	1.9%	1.7%
San Diego	1.5%	1.6%	1.7%
Dallas	1.6%	1.6%	1.5%
Atlanta	1.5%	1.6%	1.5%
Houston	1.4%	1.4%	1.4%
Miami	1.1%	1.2%	1.3%
Tampa Bay	1.1%	1.2%	1.2%
Denver	0.9%	1.2%	1.2%
Boston	0.9%	1.1%	1.1%
Phoenix	1.3%	1.0%	1.1%
Las Vegas	1.1%	1.1%	1.0%

Top U.S. City Destinations – Marketable Leisure Trips



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
Orlando	4.3%	4.3%	5.3%
Las Vegas	4.9%	4.4%	4.3%
New York City	3.1%	3.4%	3.3%
Los Angeles	2.6%	2.6%	3.1%
San Francisco	1.9%	1.9%	2.1%
San Diego	1.9%	1.9%	2.0%
Miami	1.6%	1.6%	1.8%
Atlantic City	2.6%	2.1%	1.7%
Anaheim	n/a	1.5%	1.6%
Chicago	1.5%	1.5%	1.5%
Fort Lauderdale	0.9%	1.1%	1.4%
Myrtle Beach	1.3%	1.3%	1.3%
Tampa Bay	1.1%	1.2%	1.0%
Daytona Beach	1.2%	1.0%	1.0%
Atlanta	1.0%	1.0%	1.0%
Washington DC	1.1%	0.8%	1.0%
New Orleans	0.8%	0.8%	0.9%
Denver	0.8%	0.9%	0.9%
Dallas	0.8%	0.9%	0.9%

Top U.S. City Destinations — Touring Trips



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
San Francisco	3.0%	2.5%	3.0%
Los Angeles	2.8%	2.5%	3.0%
New York City	3.2%	3.0%	2.9%
Washington D.C.	2.9%	2.1%	2.2%
San Diego	2.1%	1.7%	1.8%
New Orleans	1.6%	1.4%	1.7%
Las Vegas	2.0%	1.7%	1.6%
Miami	1.5%	1.5%	1.5%
Savannah	1.3%	1.2%	1.4%
Orlando	1.1%	1.2%	1.3%
Seattle	1.0%	0.8%	1.2%
Denver	0.7%	1.2%	1.2%
San Antonio	1.2%	1.2%	1.1%
Chicago	1.1%	1.2%	1.1%

Top U.S. City Destinations — Special Event Trips



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
New York City	2.8%	3.3%	3.2%
Los Angeles	2.5%	2.6%	3.2%
Las Vegas	2.4%	2.8%	2.6%
Chicago	2.2%	2.1%	2.5%
Orlando	1.5%	2.1%	2.3%
San Francisco	2.0%	1.9%	1.8%
Atlanta	1.8%	1.8%	1.6%
San Diego	1.6%	1.7%	1.6%
Dallas	1.8%	1.5%	1.6%
New Orleans	0.9%	1.1%	1.3%
Nashville	0.9%	1.2%	1.1%
Indianapolis	1.0%	1.1%	1.1%
Boston	1.0%	1.1%	1.1%
Miami	0.8%	1.3%	1.0%
Denver	1.2%	1.1%	0.9%
Houston	1.1%	1.1%	0.9%
Austin	1.0%	1.1%	0.9%

Top U.S. City Destinations — Combined Business/Leisure Trips



	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
New York City	4.0%	4.2%	4.8%
Los Angeles	3.2%	3.5%	3.7%
San Francisco	2.1%	2.0%	2.9%
Orlando	3.0%	1.9%	2.7%
Las Vegas	2.8%	2.9%	2.6%
Miami	1.8%	1.8%	2.1%
San Diego	1.8%	1.8%	2.1%
Atlanta	2.0%	1.8%	1.9%
Chicago	1.4%	2.4%	1.8%
Dallas	2.0%	1.7%	1.6%
Tampa Bay	1.4%	1.6%	1.5%
Denver	1.1%	1.4%	1.4%
Seattle	1.1%	1.5%	1.2%
Washington DC	1.2%	1.2%	1.2%

Top U.S. City Destinations — Ski Trips



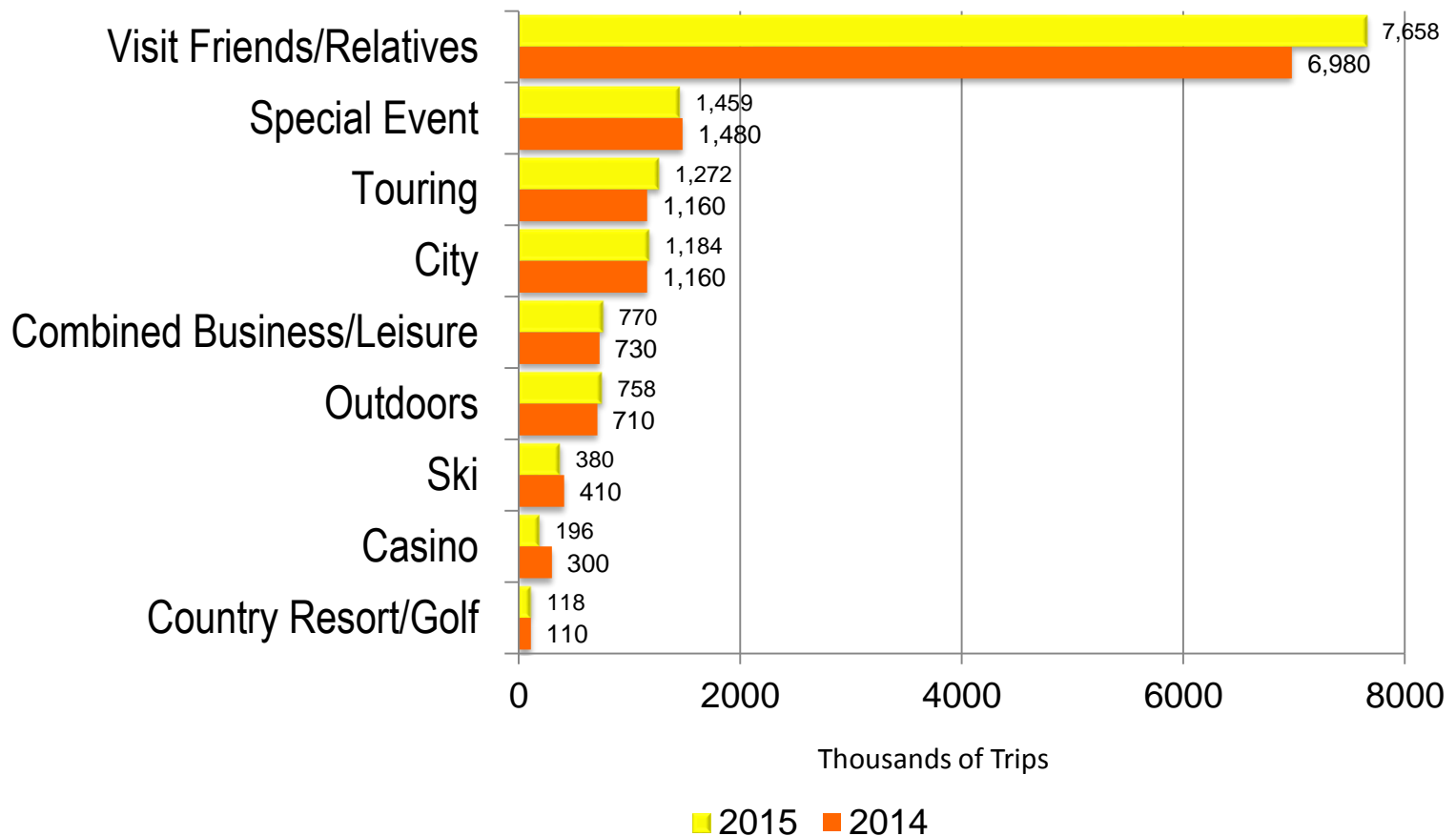
	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
Breckenridge	3.0%	4.7%	6.5%
Denver	4.8%	4.5%	5.1%
Vail	3.8%	6.2%	4.8%
Park City	1.9%	2.4%	2.1%

Top U.S. City Destinations — City Trips

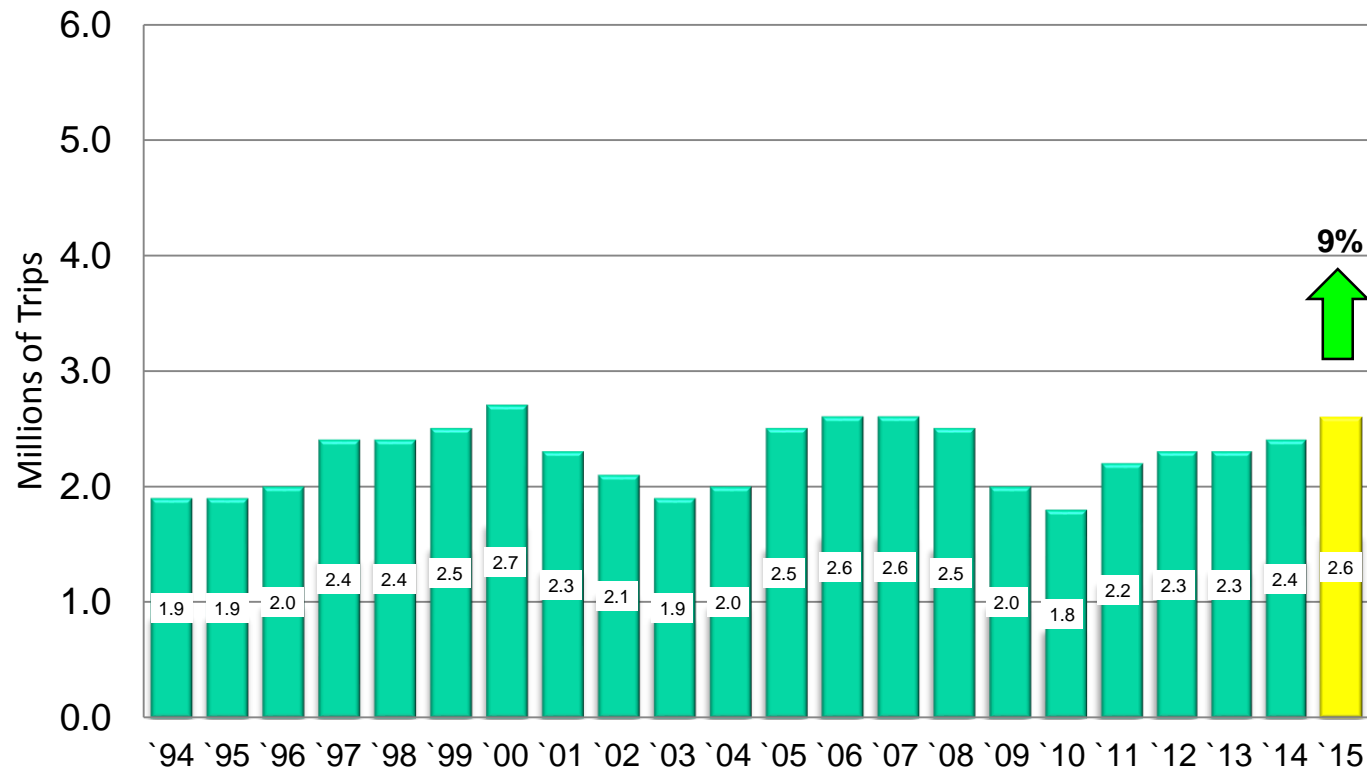


	2013	2014	2015
	<i>Share</i>	<i>Share</i>	<i>Share</i>
New York City	10.8%	11.3%	11.5%
Chicago	5.3%	4.5%	4.7%
Los Angeles	3.5%	3.7%	4.0%
Las Vegas	3.5%	3.7%	3.9%
San Francisco	3.9%	3.9%	3.6%
San Diego	2.4%	2.5%	2.6%
Miami	1.9%	1.6%	1.9%
Orlando	1.5%	1.5%	1.7%
Boston	1.2%	1.5%	1.7%
Houston	1.0%	1.2%	1.7%
Atlanta	1.9%	1.9%	1.6%
Washington, DC	2.0%	1.7%	1.6%
Seattle	1.4%	1.5%	1.6%
New Orleans	1.4%	1.3%	1.6%
Dallas	1.7%	1.8%	1.5%
San Antonio	1.3%	1.4%	1.3%
Nashville	1.3%	1.3%	1.3%
Atlantic City	1.4%	1.5%	1.1%
Denver	1.3%	1.1%	1.0%

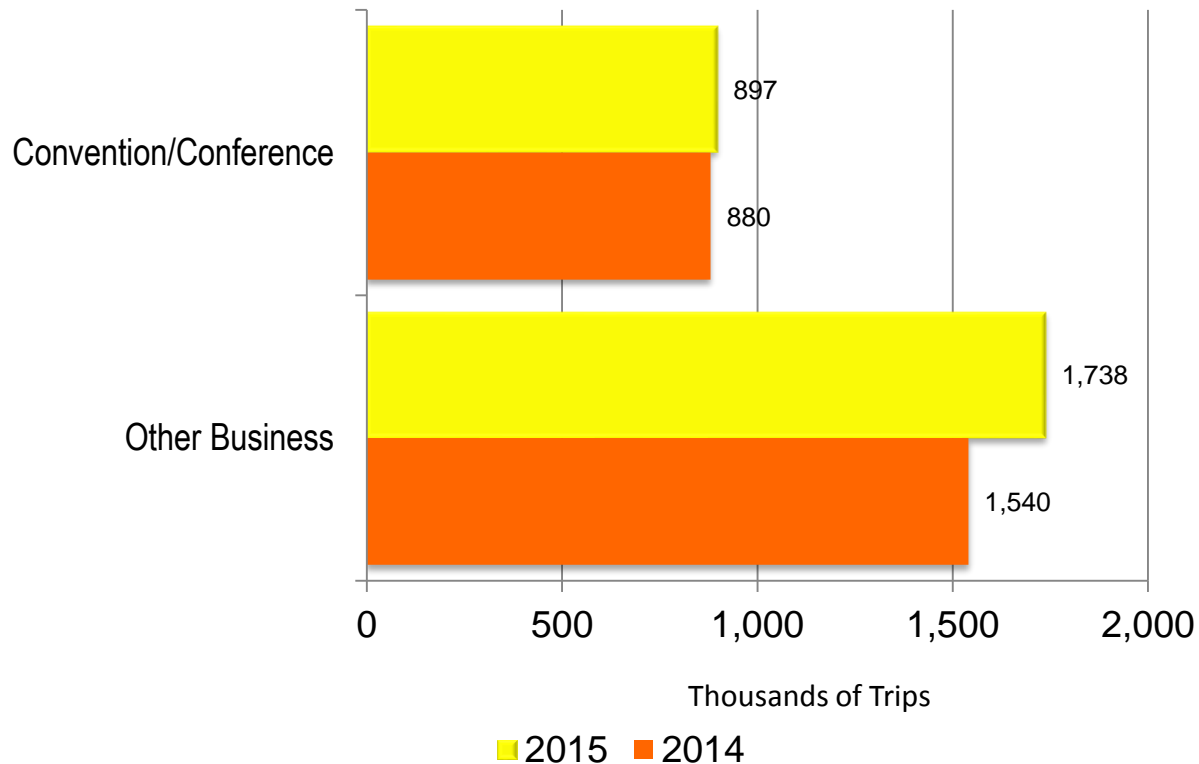
Denver's Overnight Leisure Trips — 2015 vs. 2014



Overnight Business Trips to Denver



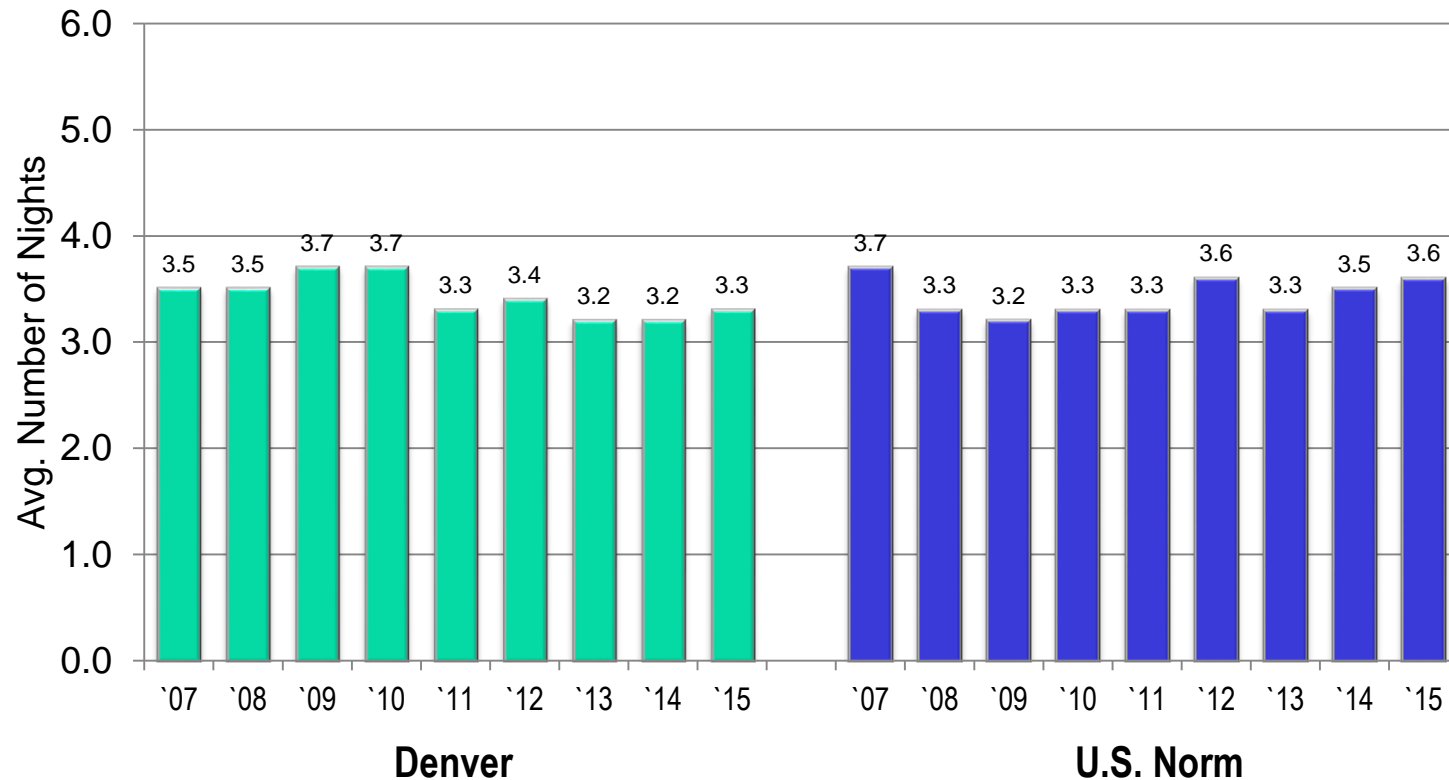
Denver's Overnight Business Trips — 2015 vs. 2014



Length of Stay — Leisure



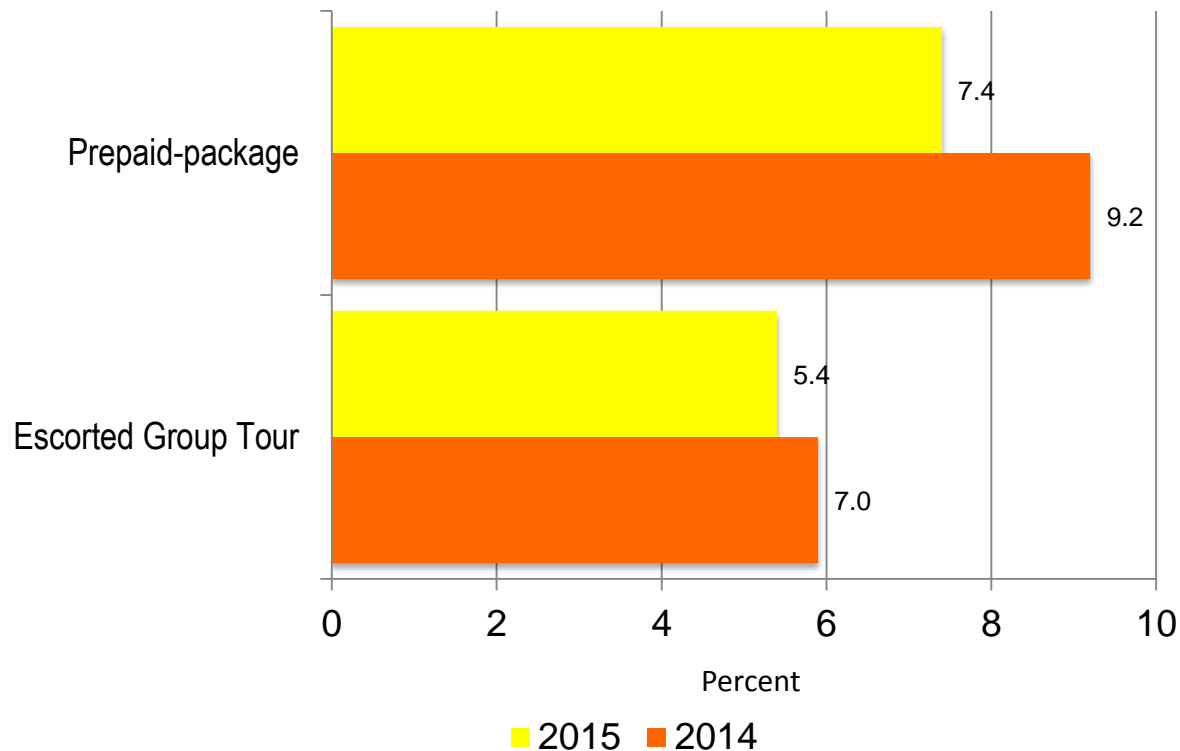
Base: Overnight Leisure Trips



Use of Escorted Tours/Prepaid Packages — Leisure



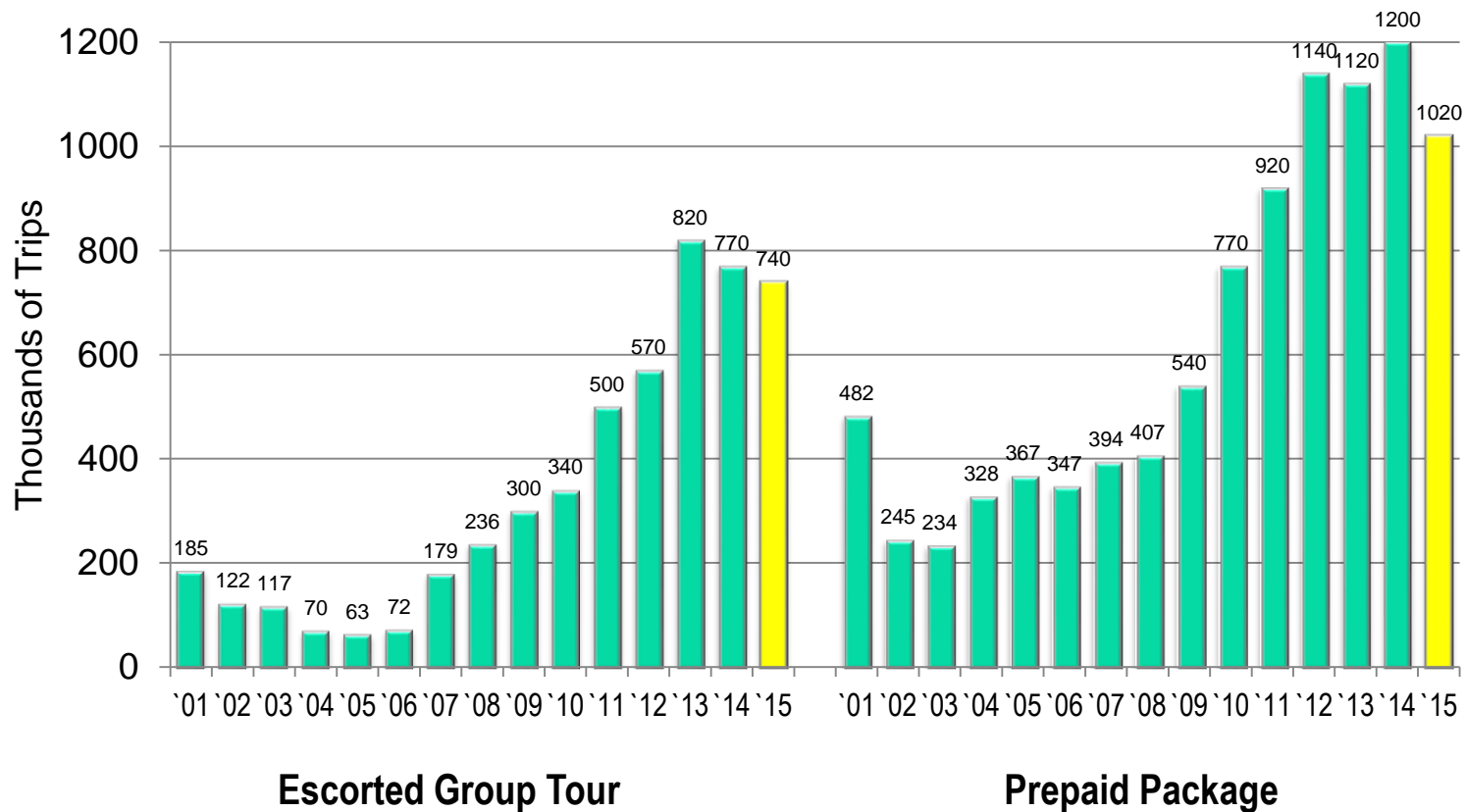
Base: Overnight Leisure Trips



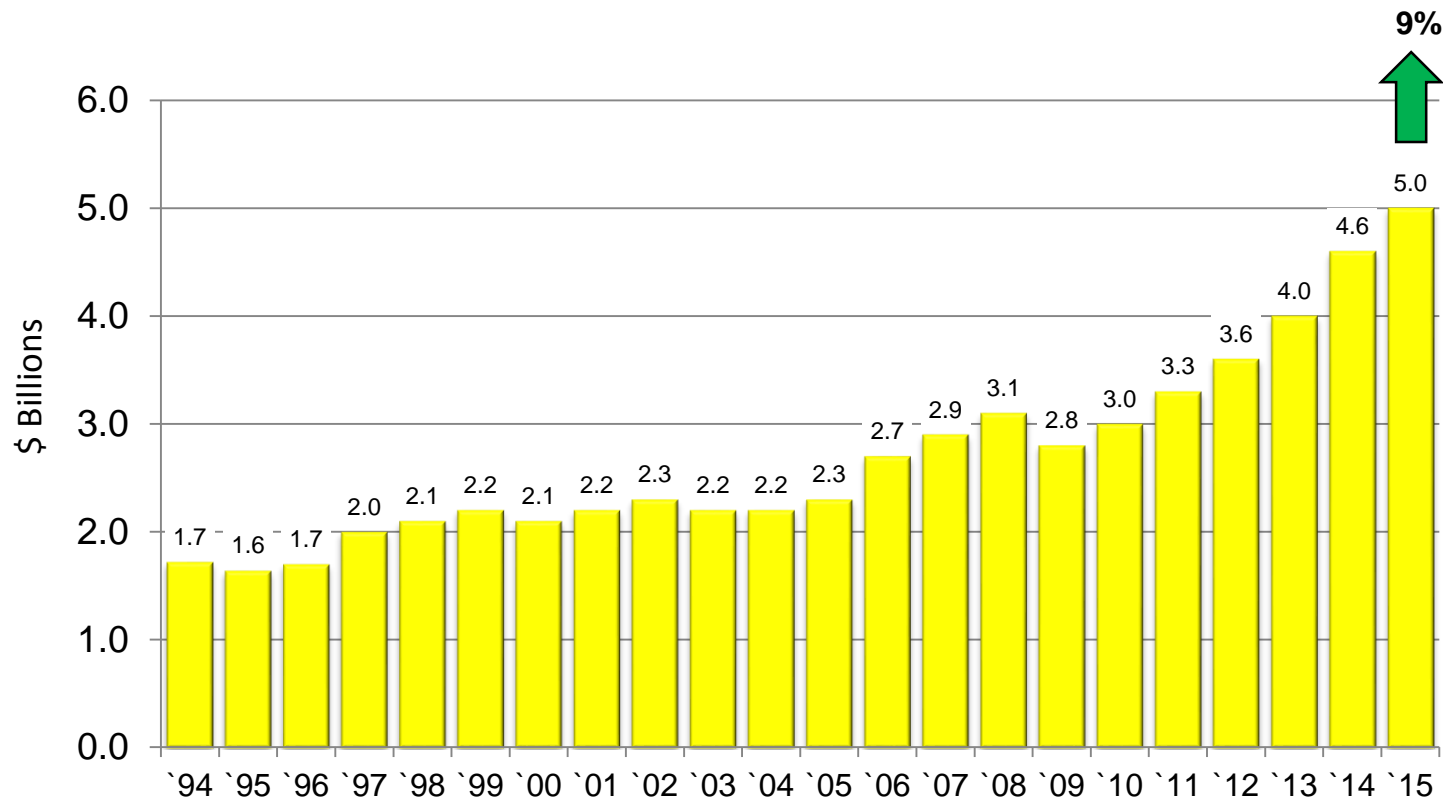
Escorted Tours & Prepaid Packages to Denver — Leisure



Base: Overnight Leisure Trips

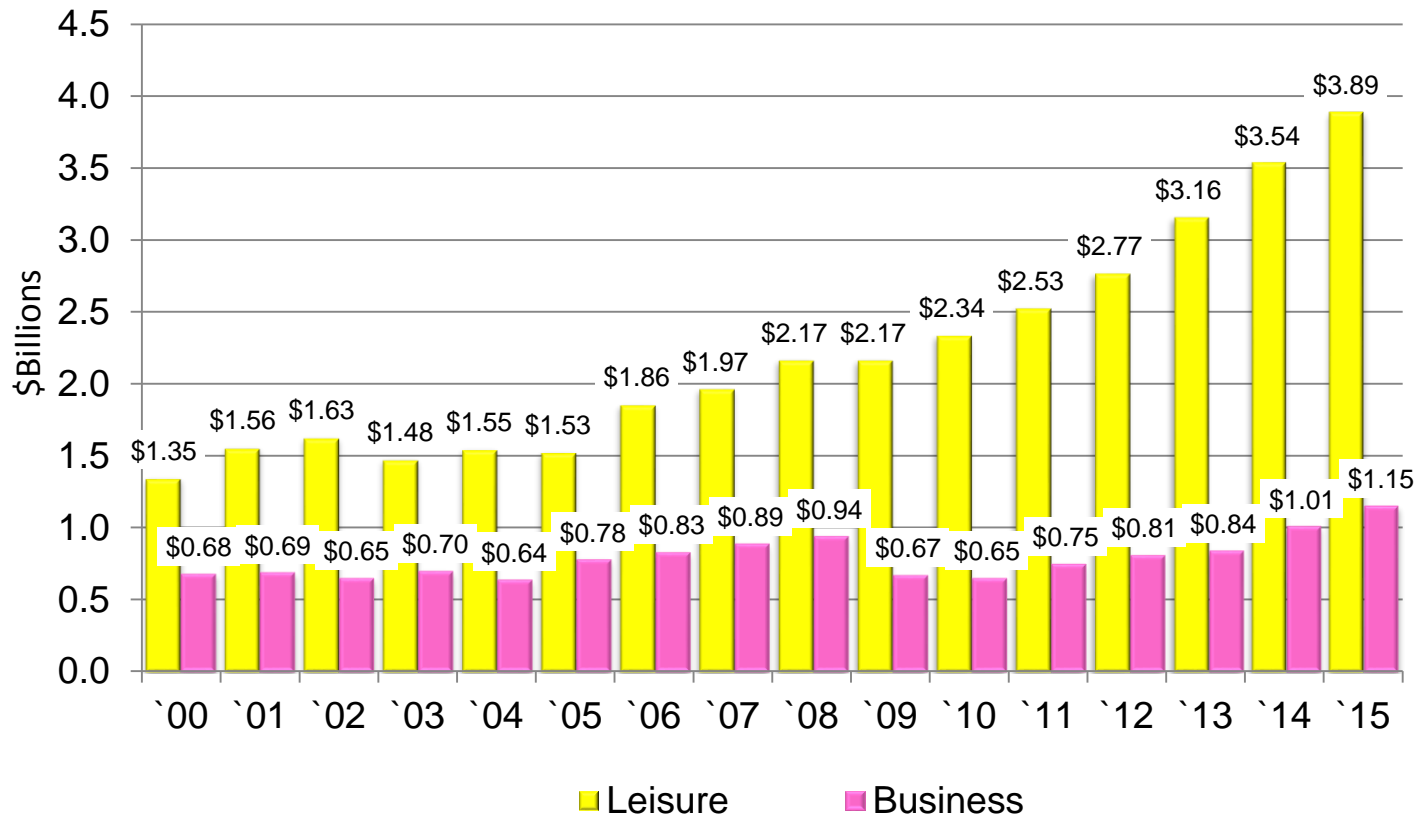


Total Travel Spending* in Denver — Overnight Trips



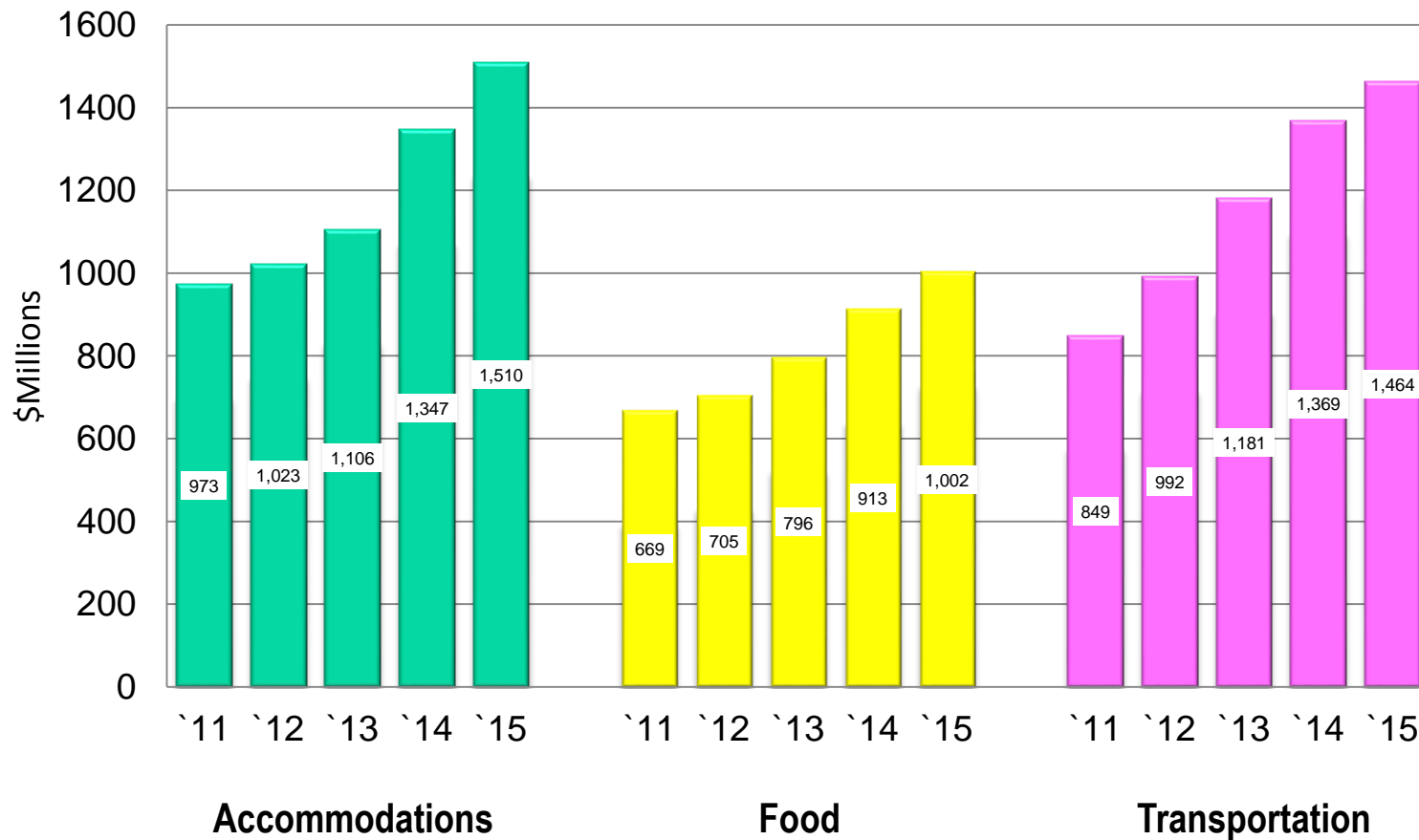
*In actual dollars (not adjusted for inflation)

Total Travel Spending* in Denver — Overnight Trips

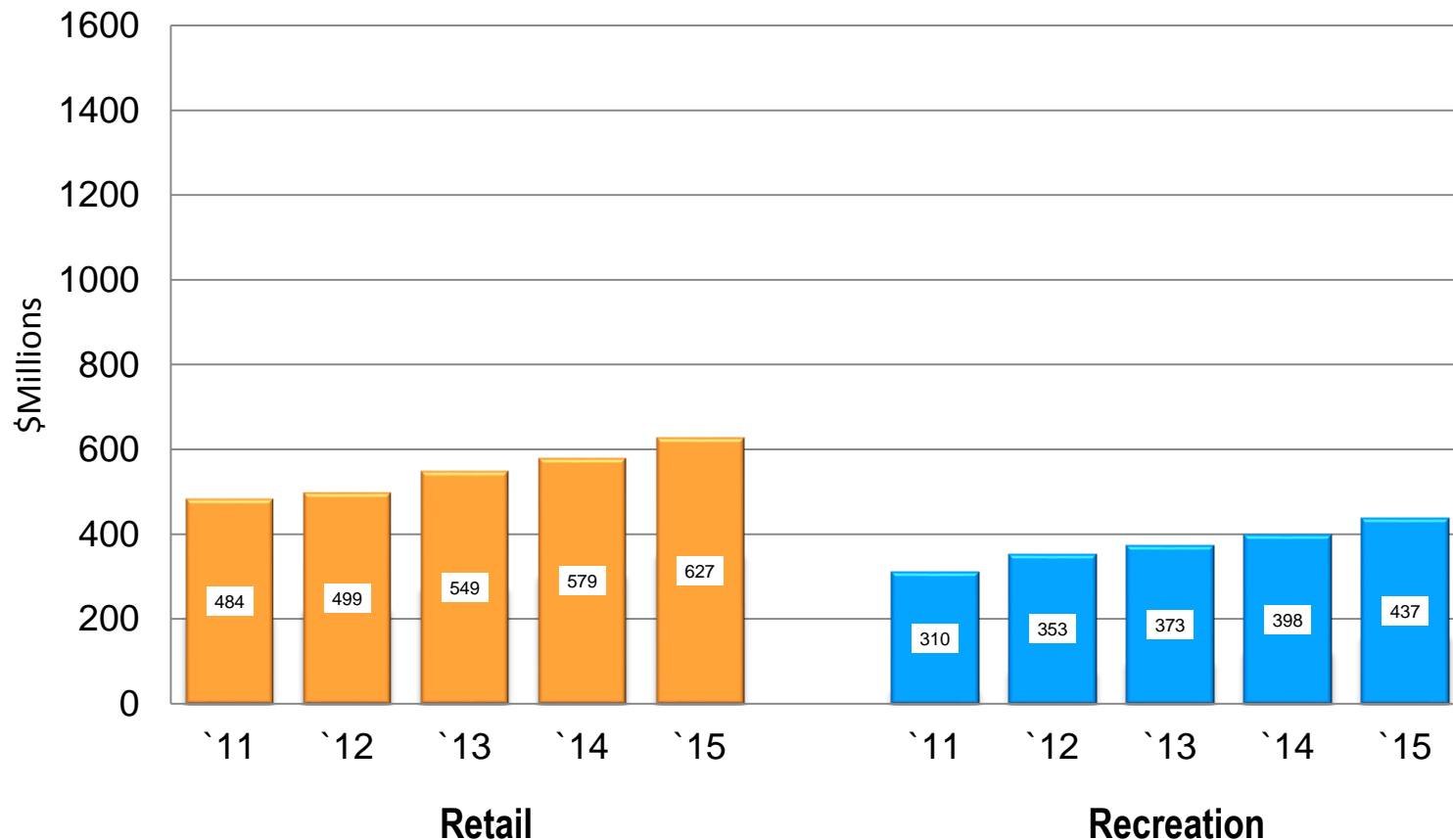


*In actual dollars (not adjusted for inflation)

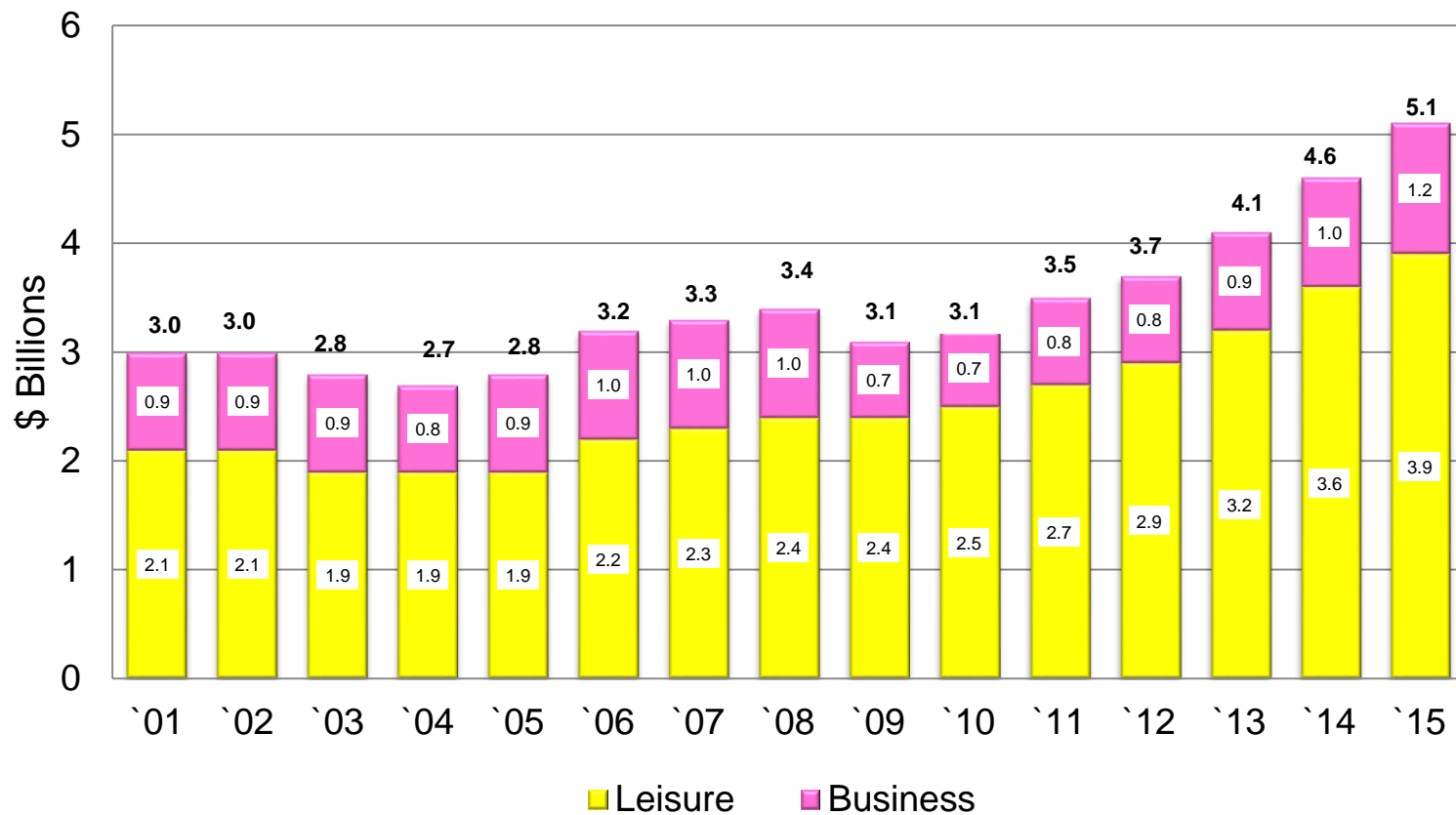
Travel Spending* by Business Sector — Overnight Trips



Travel Spending* by Business Sector — Overnight Trips (Cont'd)



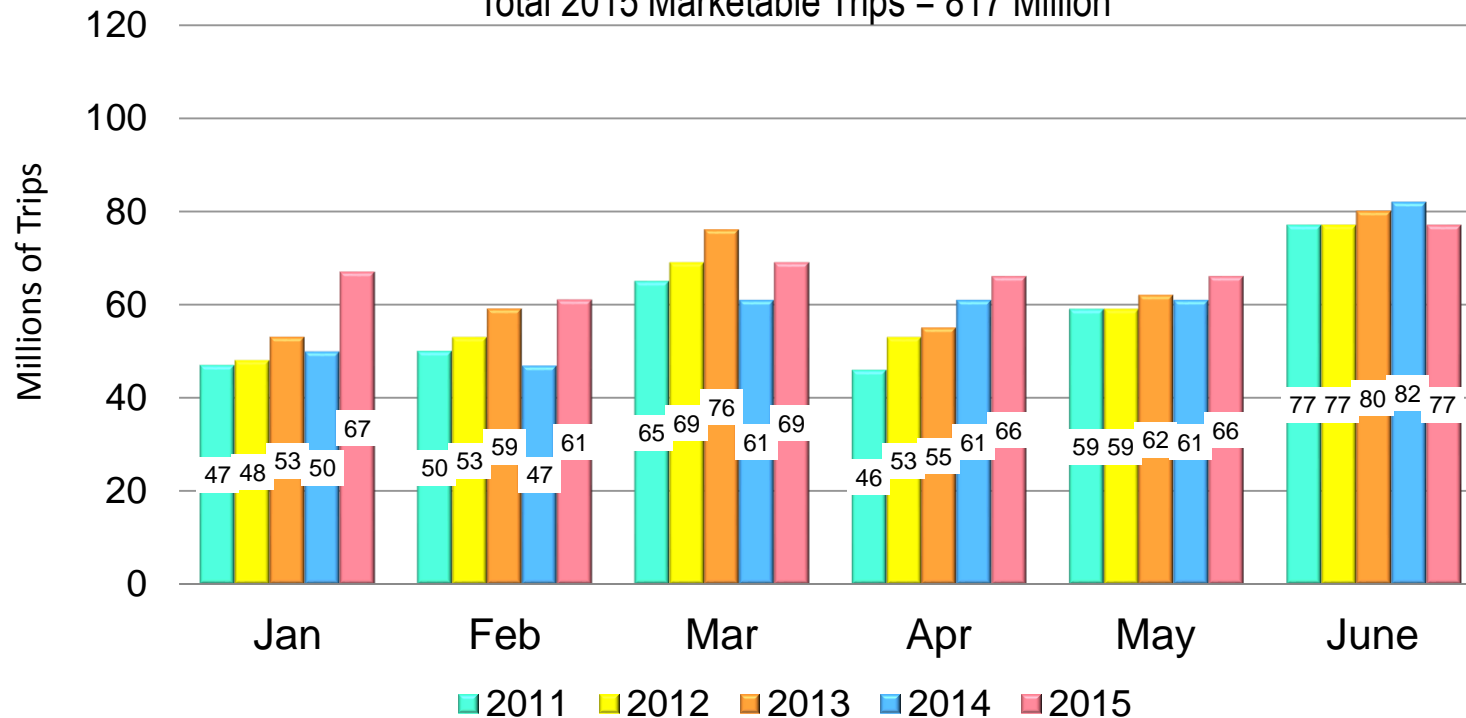
Inflation Adjusted Overnight Travel Spending in Denver



U.S. Overnight Marketable Leisure Trips by Month



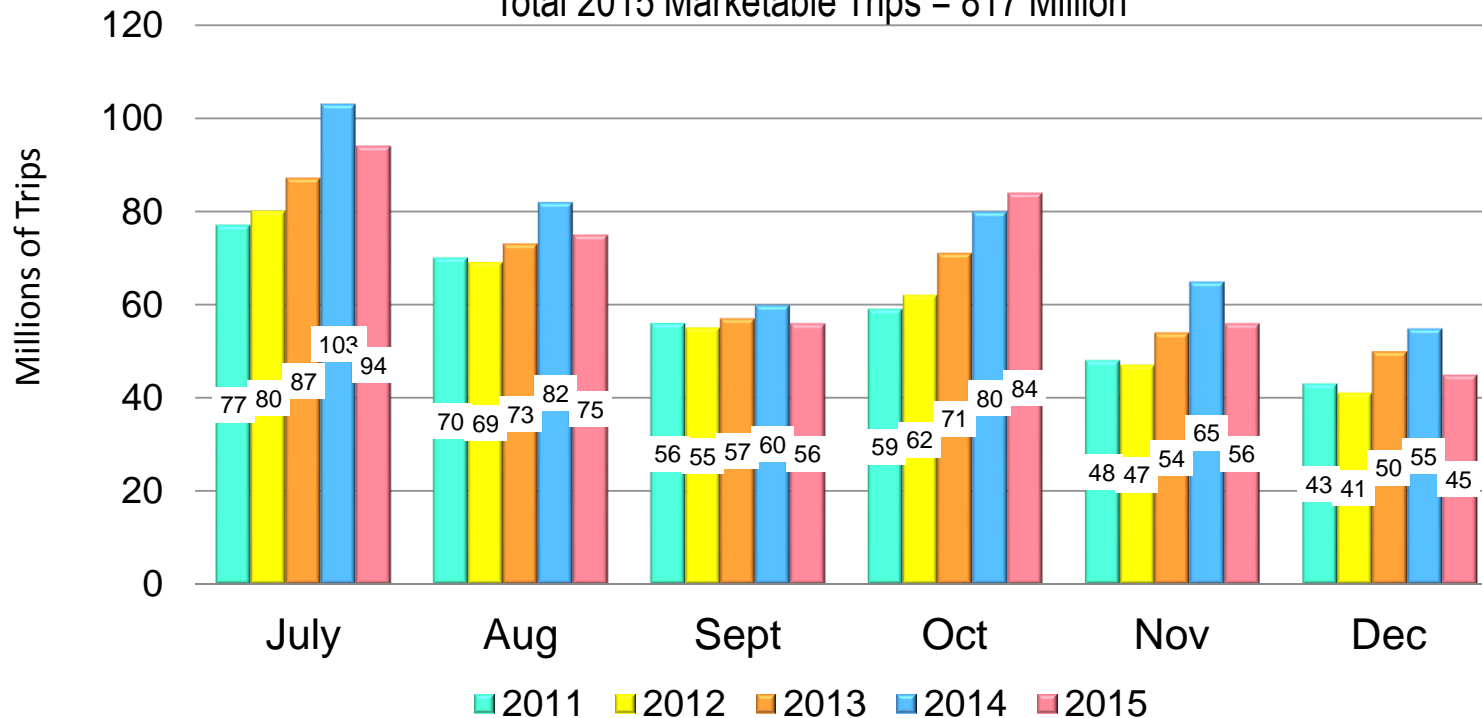
Total 2011 Marketable Trips = 695 Million
Total 2012 Marketable Trips = 715 Million
Total 2013 Marketable Trips = 777 Million
Total 2014 Marketable Trips = 806 Million
Total 2015 Marketable Trips = 817 Million



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



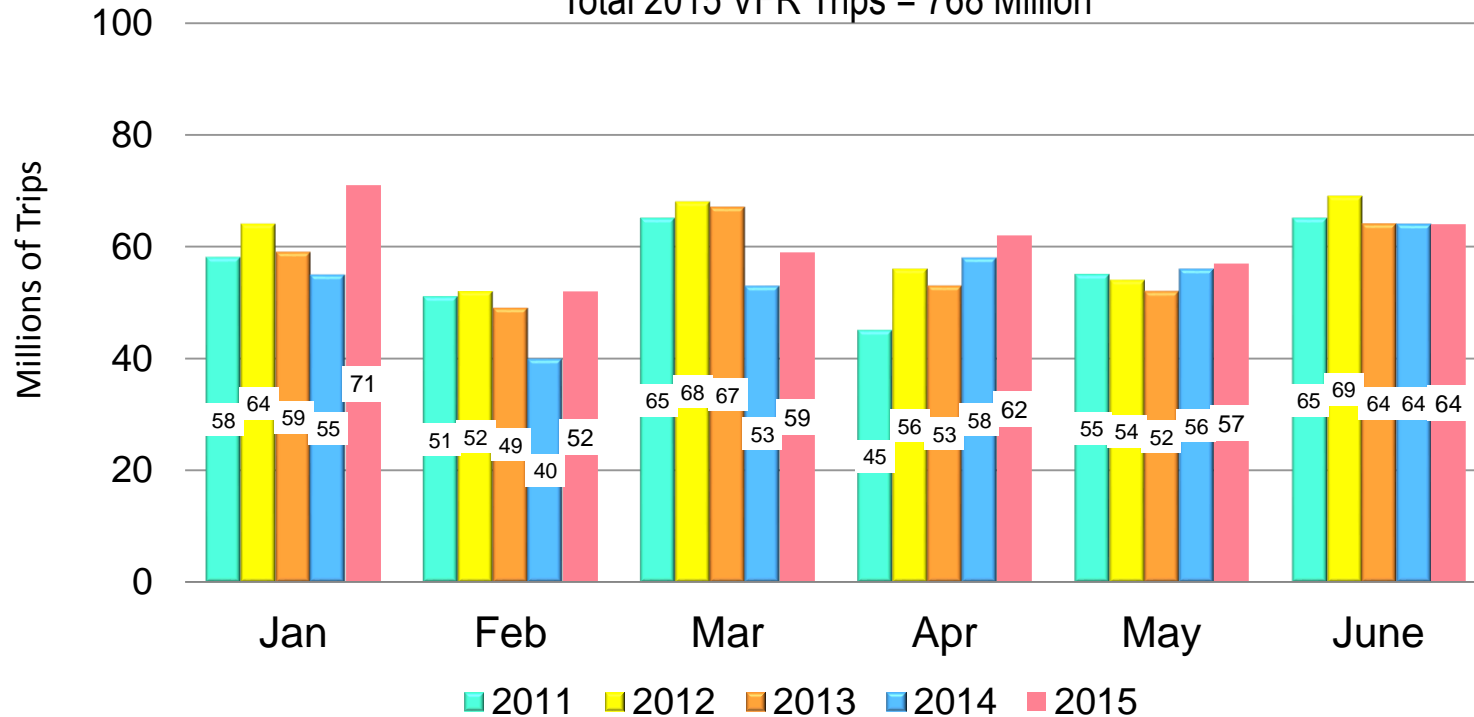
Total 2011 Marketable Trips = 695 Million
 Total 2012 Marketable Trips = 715 Million
 Total 2013 Marketable Trips = 777 Million
 Total 2014 Marketable Trips = 806 Million
 Total 2015 Marketable Trips = 817 Million



U.S Overnight VFR Trips by Month



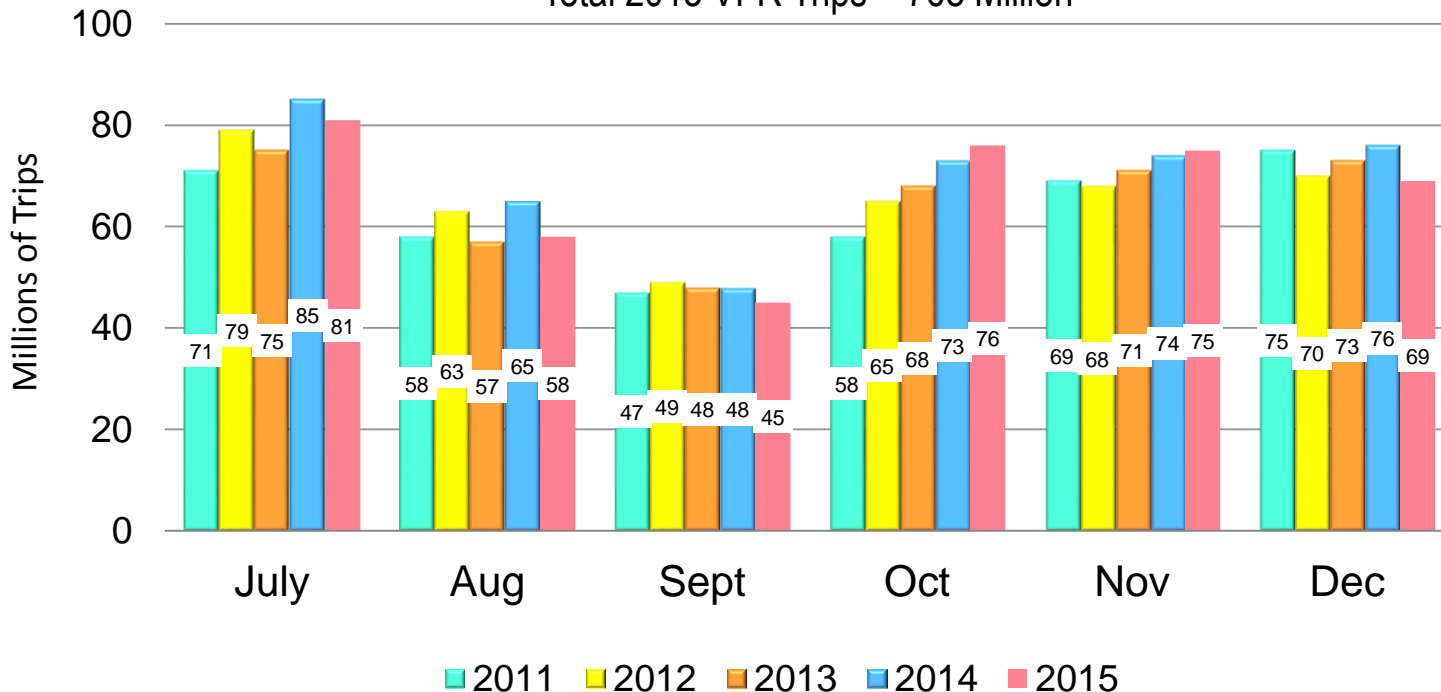
Total 2011 VFR Trips = 718 Million
Total 2012 VFR Trips = 760 Million
Total 2013 VFR Trips = 736 Million
Total 2014 VFR Trips = 746 Million
Total 2015 VFR Trips = 768 Million



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



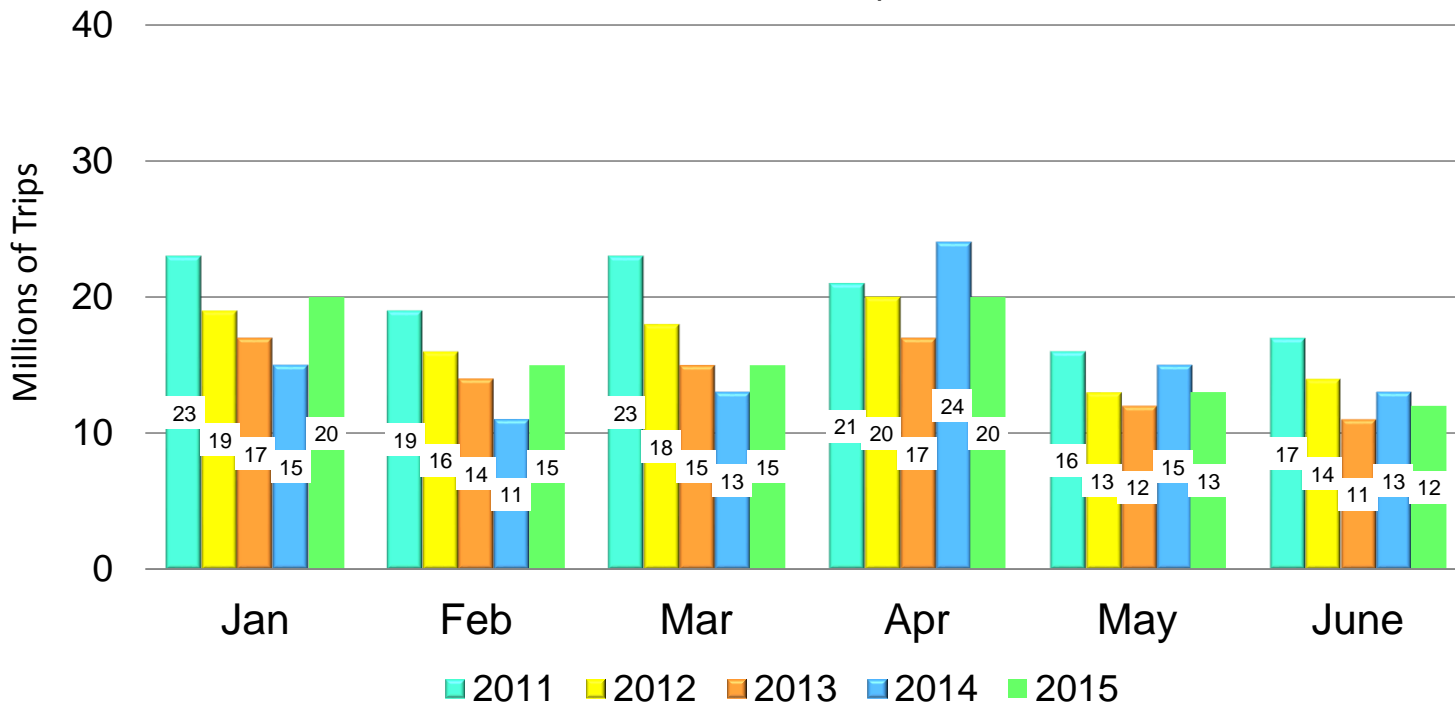
Total 2011 VFR Trips = 718 Million
Total 2012 VFR Trips = 760 Million
Total 2013 VFR Trips = 736 Million
Total 2014 VFR Trips = 746 Million
Total 2015 VFR Trips = 768 Million



U.S Overnight Business Trips by Month



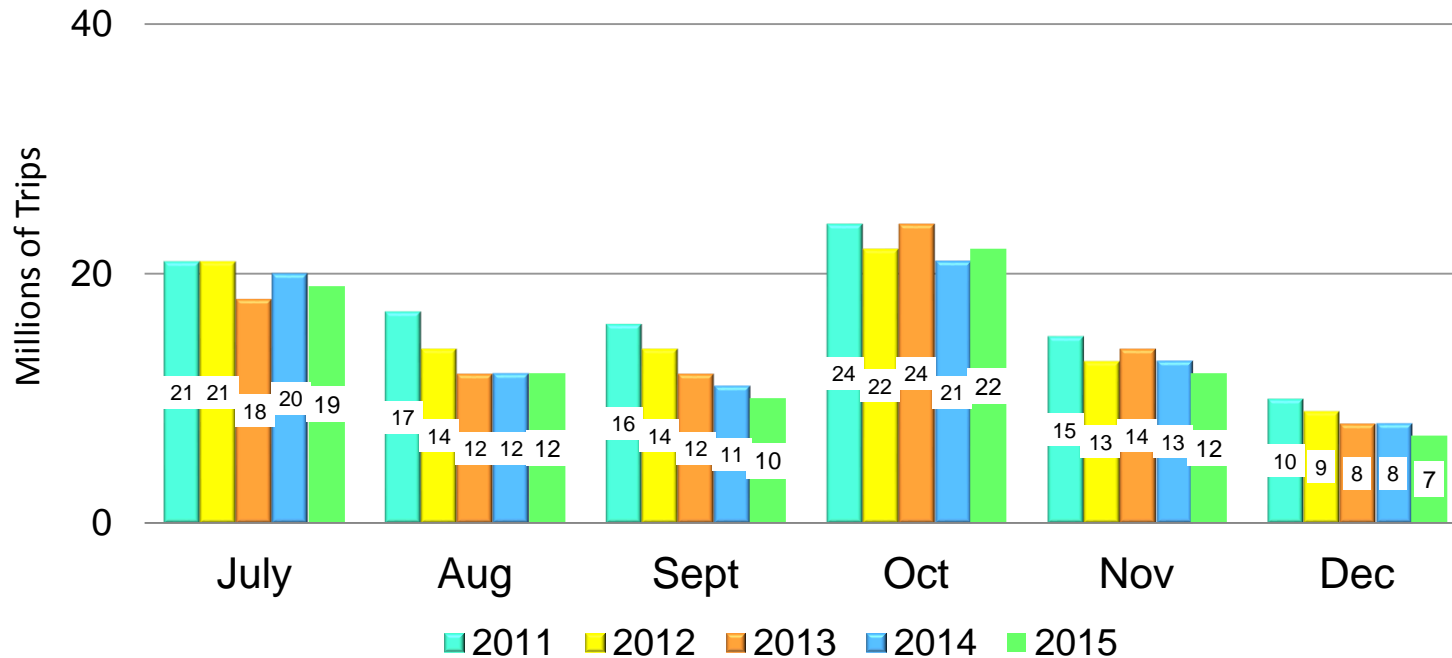
Total 2011 Business Trips = 222 Million
Total 2012 Business Trips = 193 Million
Total 2013 Business Trips = 171 Million
Total 2014 Business Trips = 176 Million
Total 2015 Business Trips = 176 Million



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



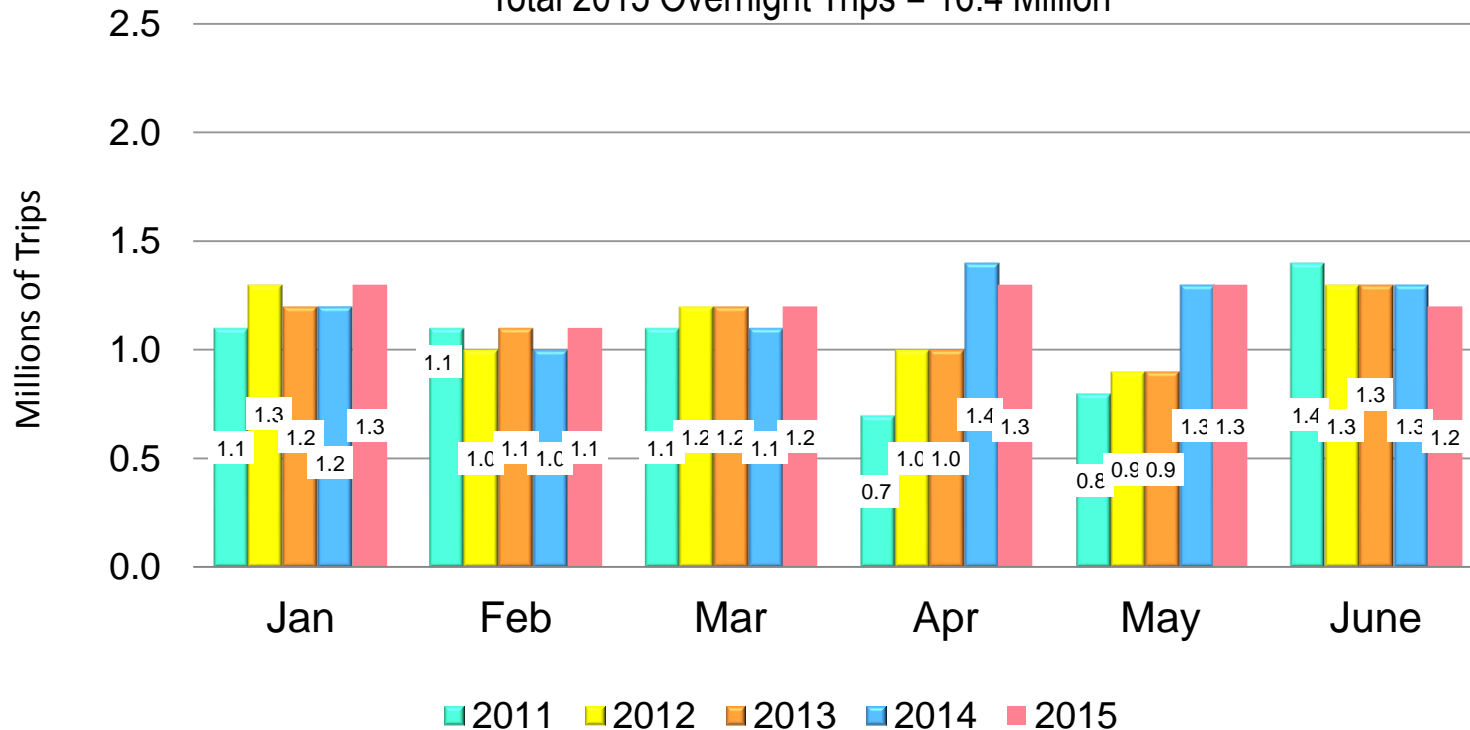
Total 2011 Business Trips = 222 Million
Total 2012 Business Trips = 193 Million
Total 2013 Business Trips = 171 Million
Total 2014 Business Trips = 176 Million
Total 2015 Business Trips = 176 Million



Overnight Trips to Denver by Month



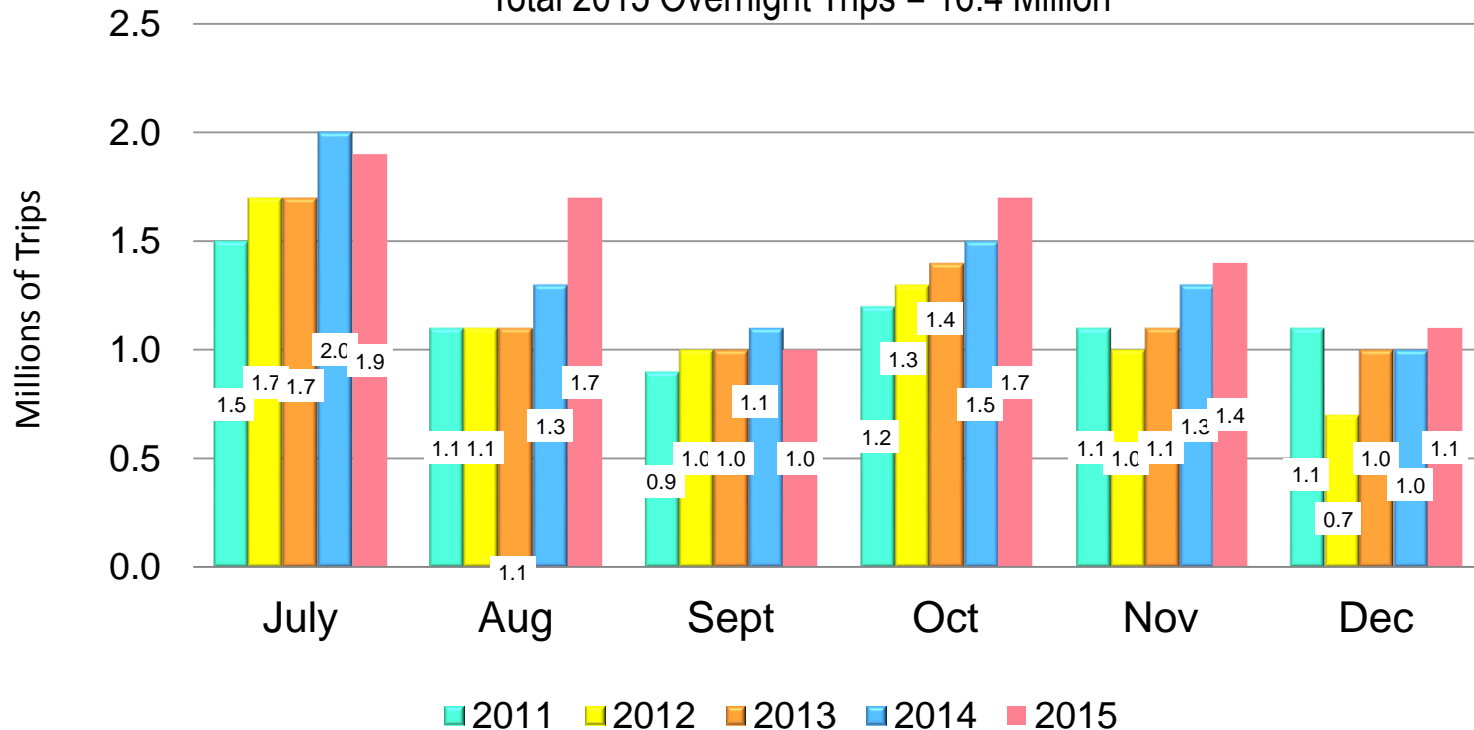
Total 2011 Overnight Trips = 13.2 Million
Total 2012 Overnight Trips = 13.6 Million
Total 2013 Overnight Trips = 14.0 Million
Total 2014 Overnight Trips = 15.4 Million
Total 2015 Overnight Trips = 16.4 Million



Overnight Trips to Denver by Month (Cont'd)



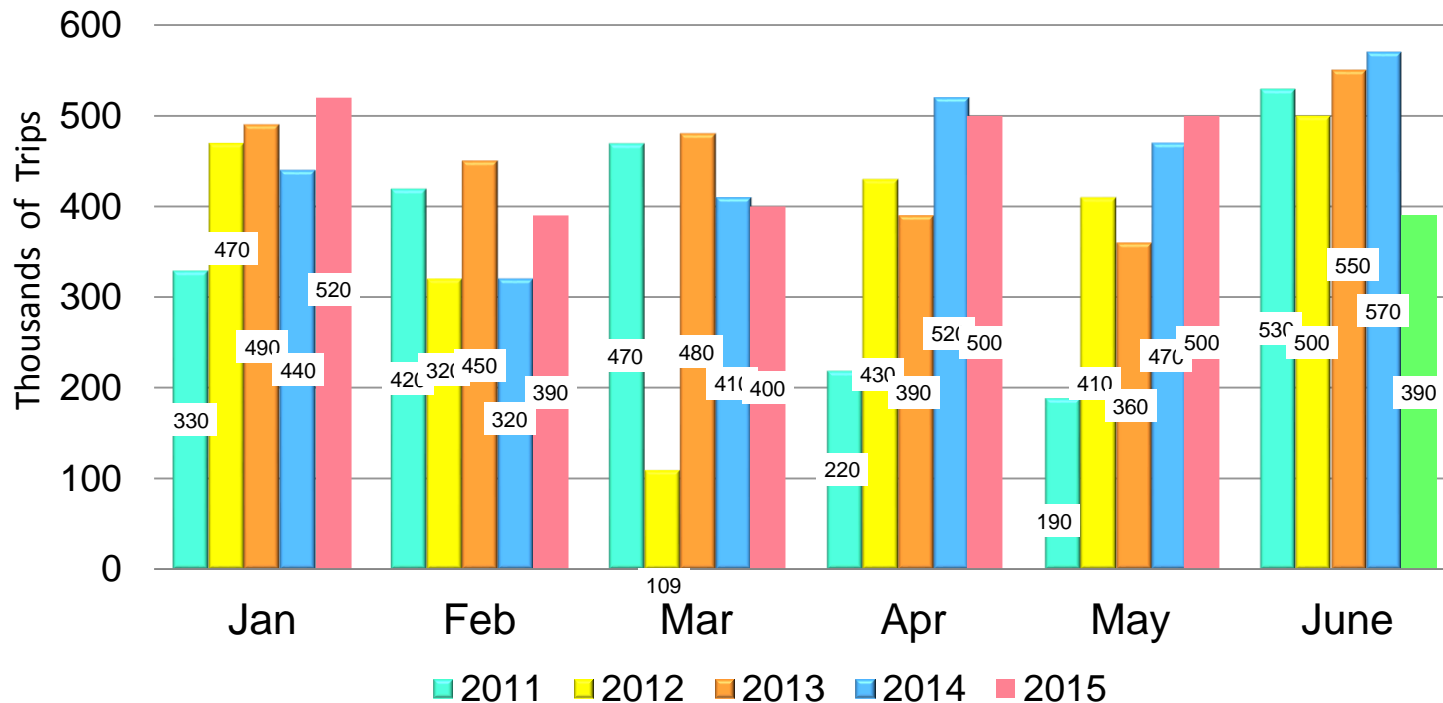
Total 2011 Overnight Trips = 13.2 Million
Total 2012 Overnight Trips = 13.6 Million
Total 2013 Overnight Trips = 14.0 Million
Total 2014 Overnight Trips = 15.4 Million
Total 2015 Overnight Trips = 16.4 Million



Overnight Marketable Leisure Trips to Denver by Month



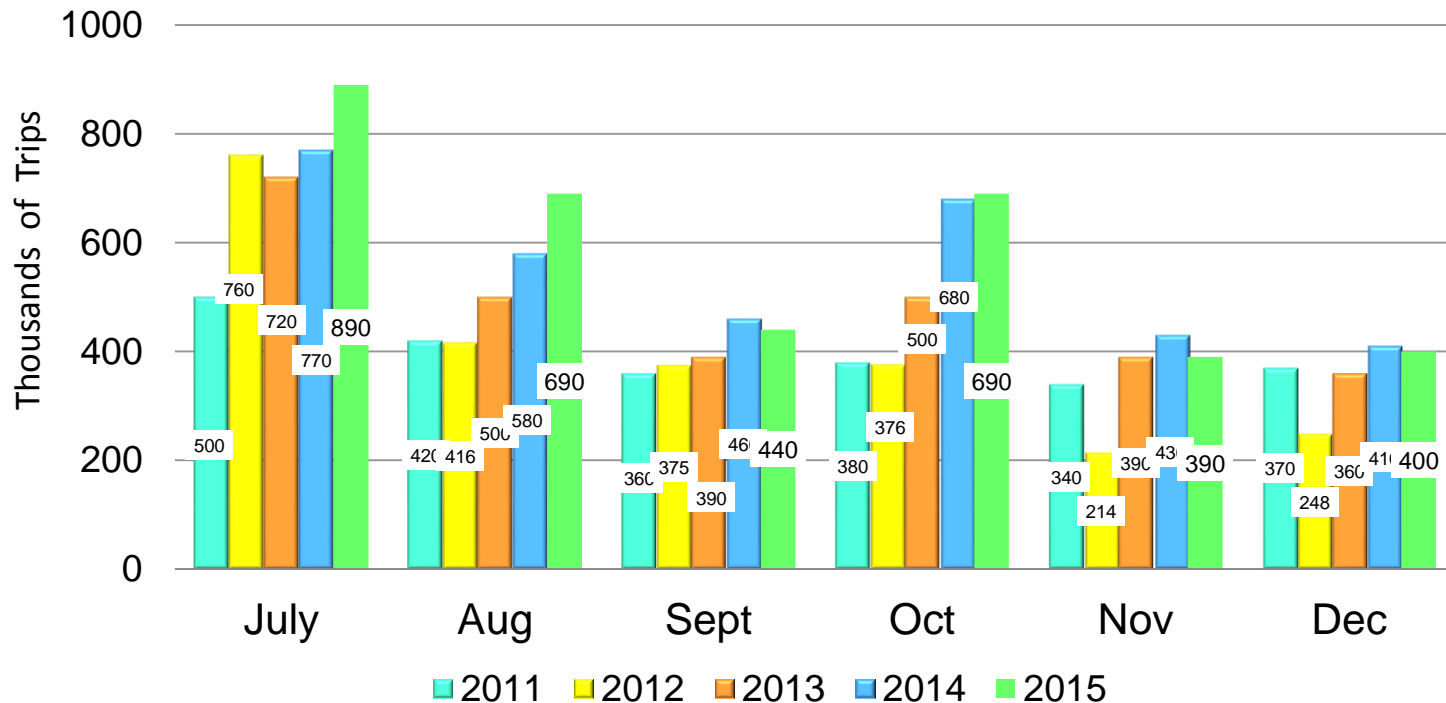
Total 2011 Marketable Trips = 4.5 Million
Total 2012 Marketable Trips = 4.9 Million
Total 2013 Marketable Trips = 5.6 Million
Total 2014 Marketable Trips = 6.1 Million
Total 2015 Marketable Trips = 6.1 Million



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



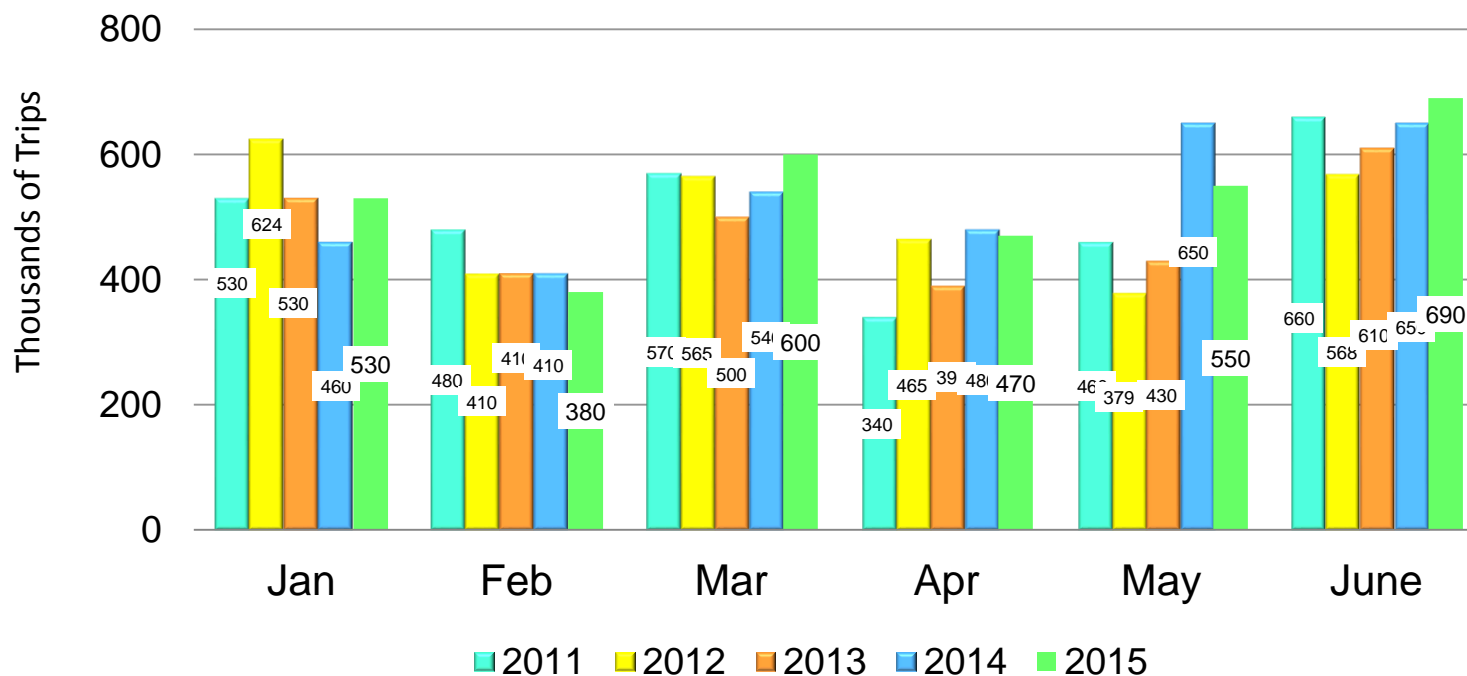
Total 2011 Marketable Trips = 4.5 Million
Total 2012 Marketable Trips = 4.9 Million
Total 2013 Marketable Trips = 5.6 Million
Total 2014 Marketable Trips = 6.1 Million
Total 2015 Marketable Trips = 6.1 Million



Overnight VFR Trips to Denver by Month



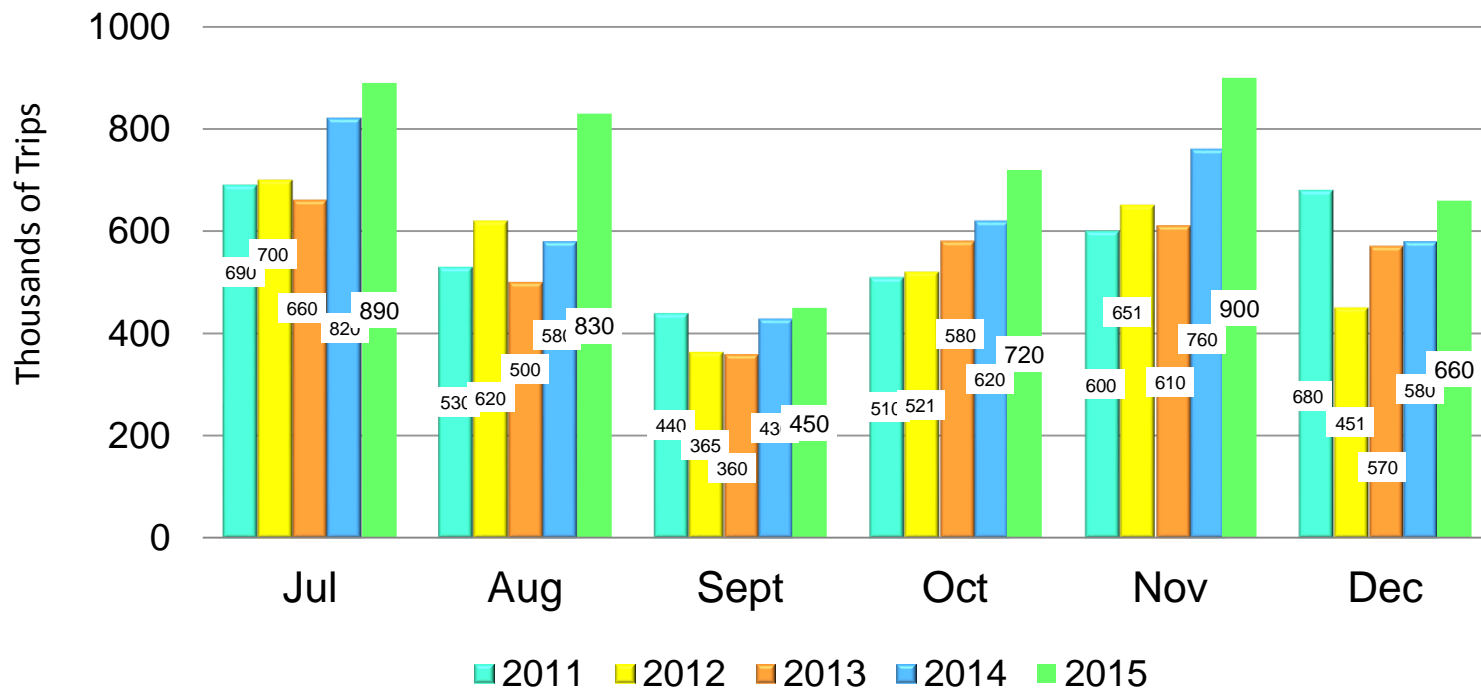
Total 2011 VFR Trips = 6.5 Million
Total 2012 VFR Trips = 6.3 Million
Total 2013 VFR Trips = 6.2 Million
Total 2014 VFR Trips = 7.0 Million
Total 2015 VFR Trips = 7.7 Million



Overnight VFR Trips to Denver by Month (Cont'd)



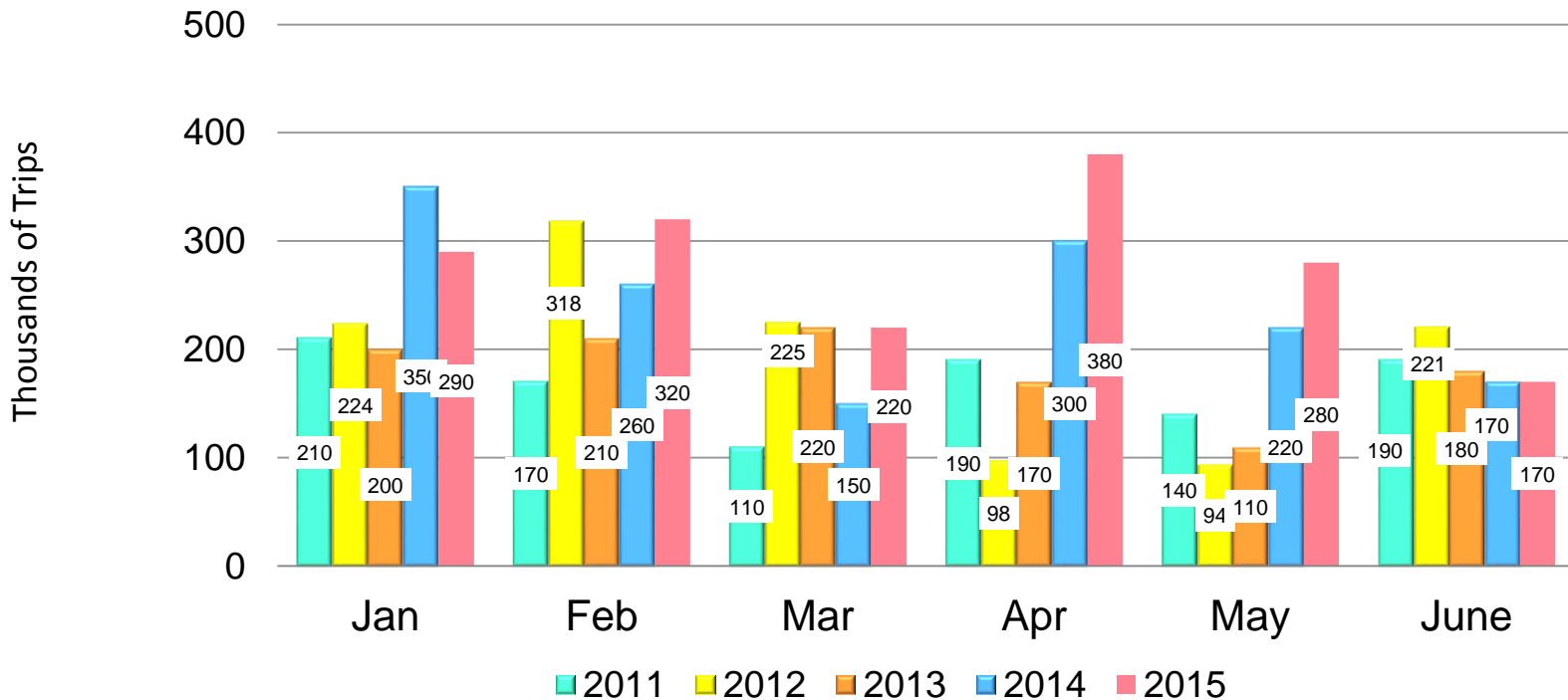
Total 2011 VFR Trips = 6.5 Million
Total 2012 VFR Trips = 6.3 Million
Total 2013 VFR Trips = 6.2 Million
Total 2014 VFR Trips = 7.0 Million
Total 2015 VFR Trips = 7.7 Million



Overnight Business Trips to Denver by Month



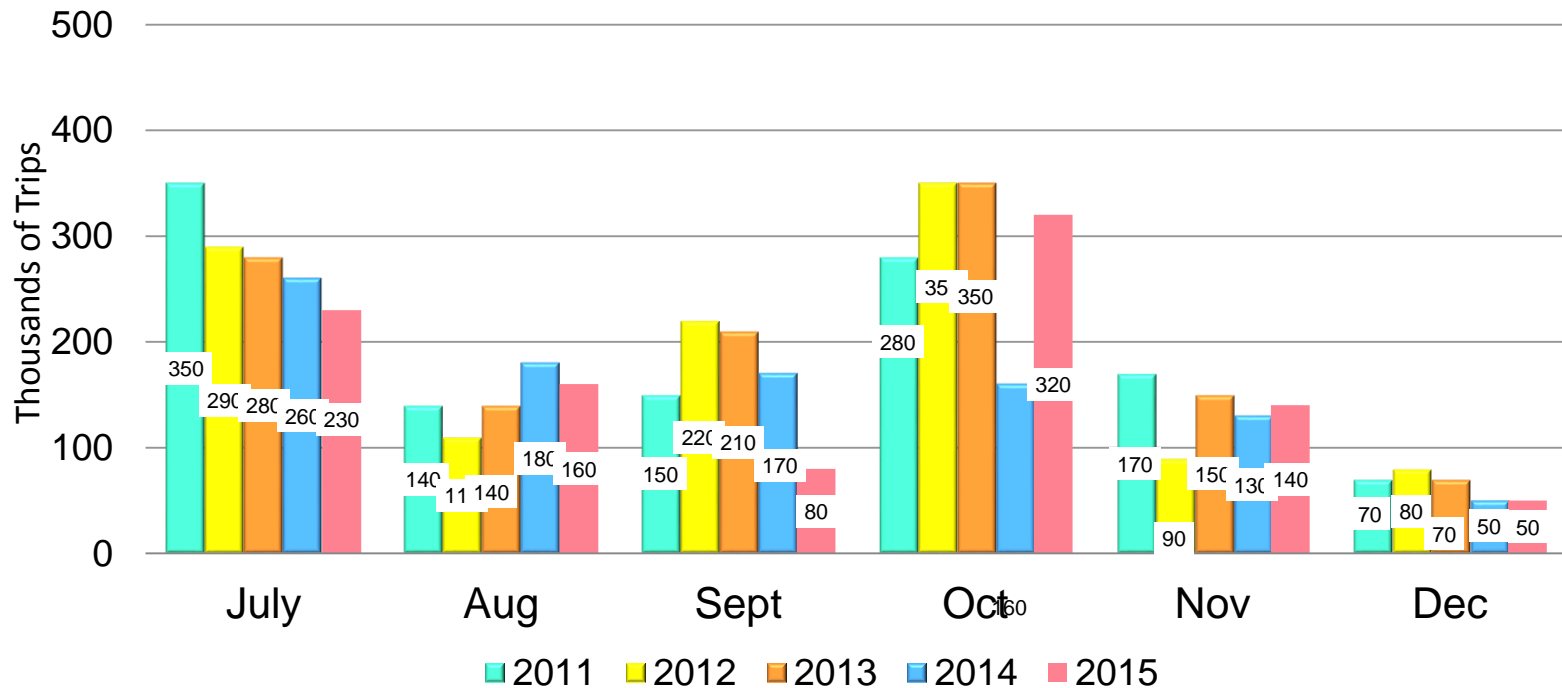
Total 2011 Business Trips = 2.2 Million
Total 2012 Business Trips = 2.3 Million
Total 2013 Business Trips = 2.3 Million
Total 2014 Business Trips = 2.4 Million
Total 2015 Business Trips = 2.6 Million



Overnight Business Trips to Denver by Month (Cont'd)



Total 2011 Business Trips = 2.2 Million
Total 2012 Business Trips = 2.3 Million
Total 2013 Business Trips = 2.3 Million
Total 2014 Business Trips = 2.4 Million
Total 2015 Business Trips = 2.6 Million

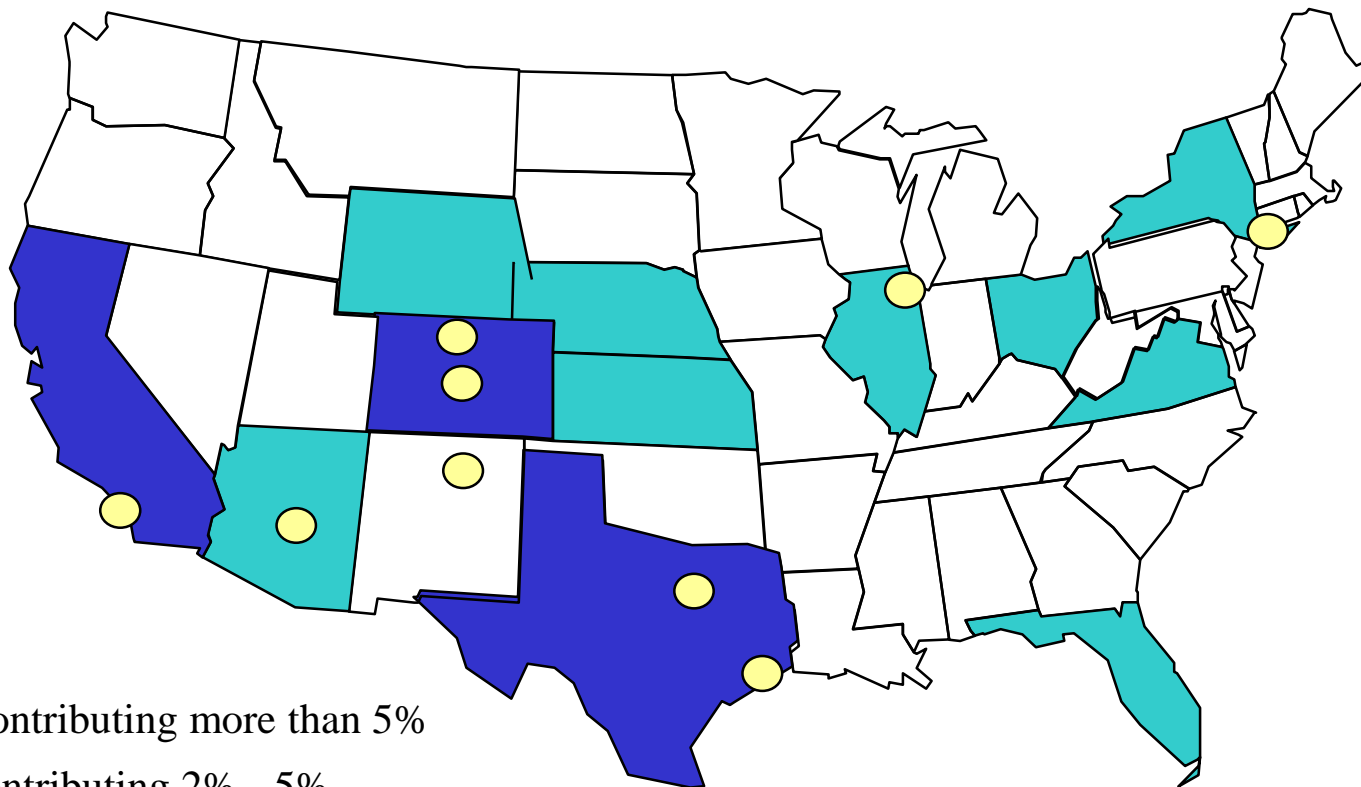


Sources of Business

Denver's Sources of Business



Base: Overnight Leisure Trips

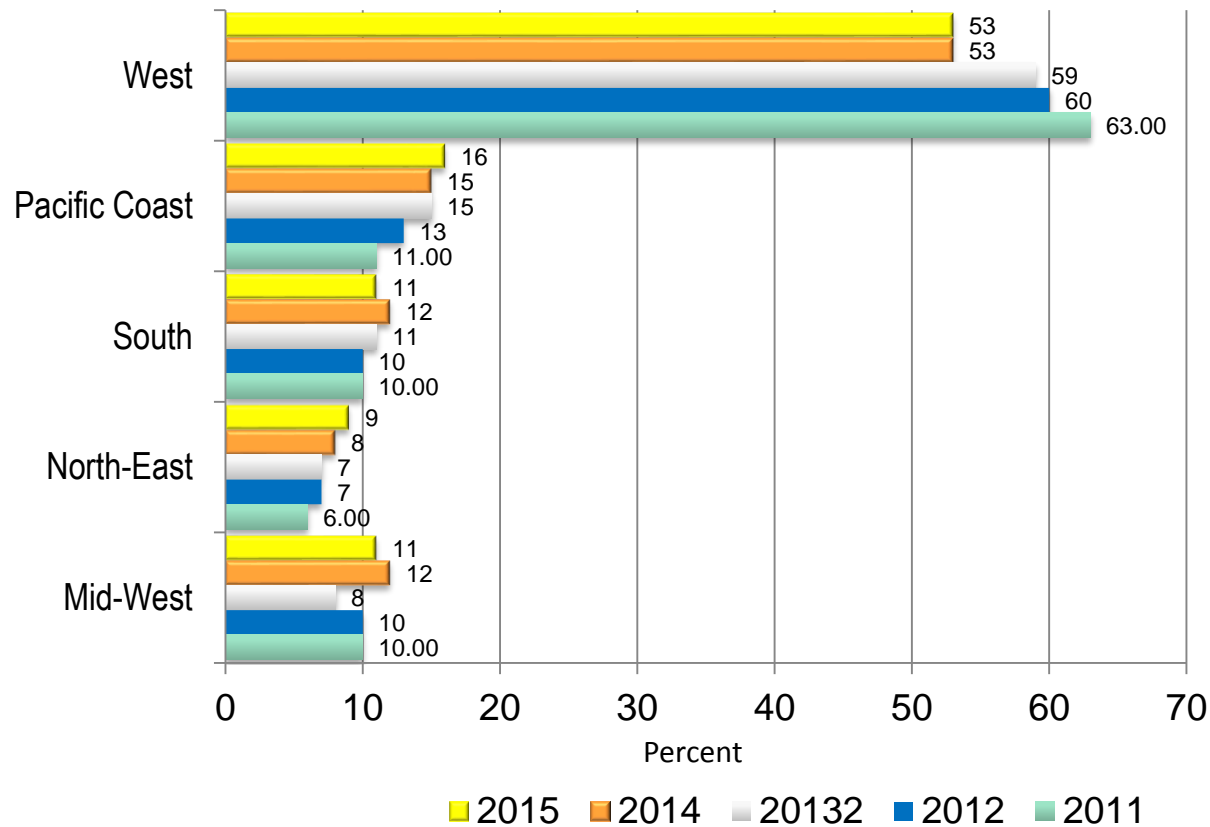


- States contributing more than 5%
- States contributing 2% - 5%
- DMAs contributing more than 2%

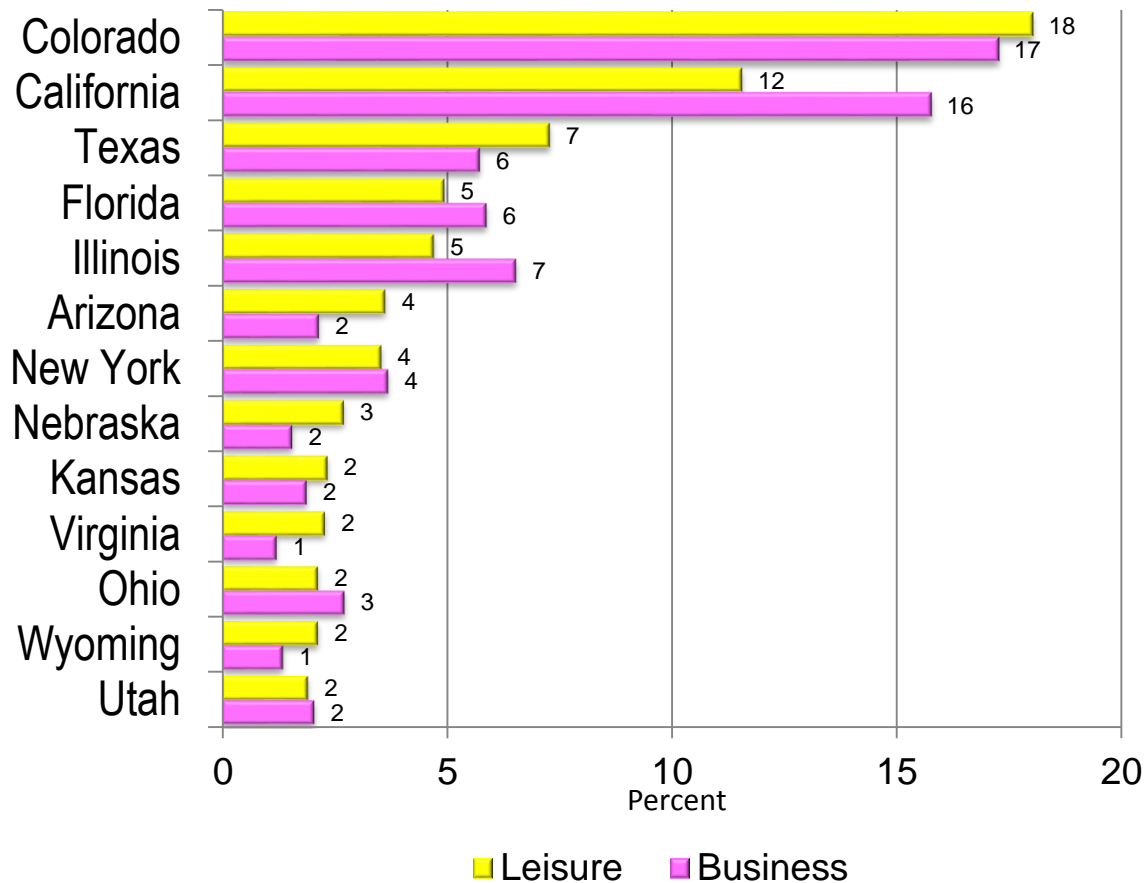
Regional Sources of Overnight Trips



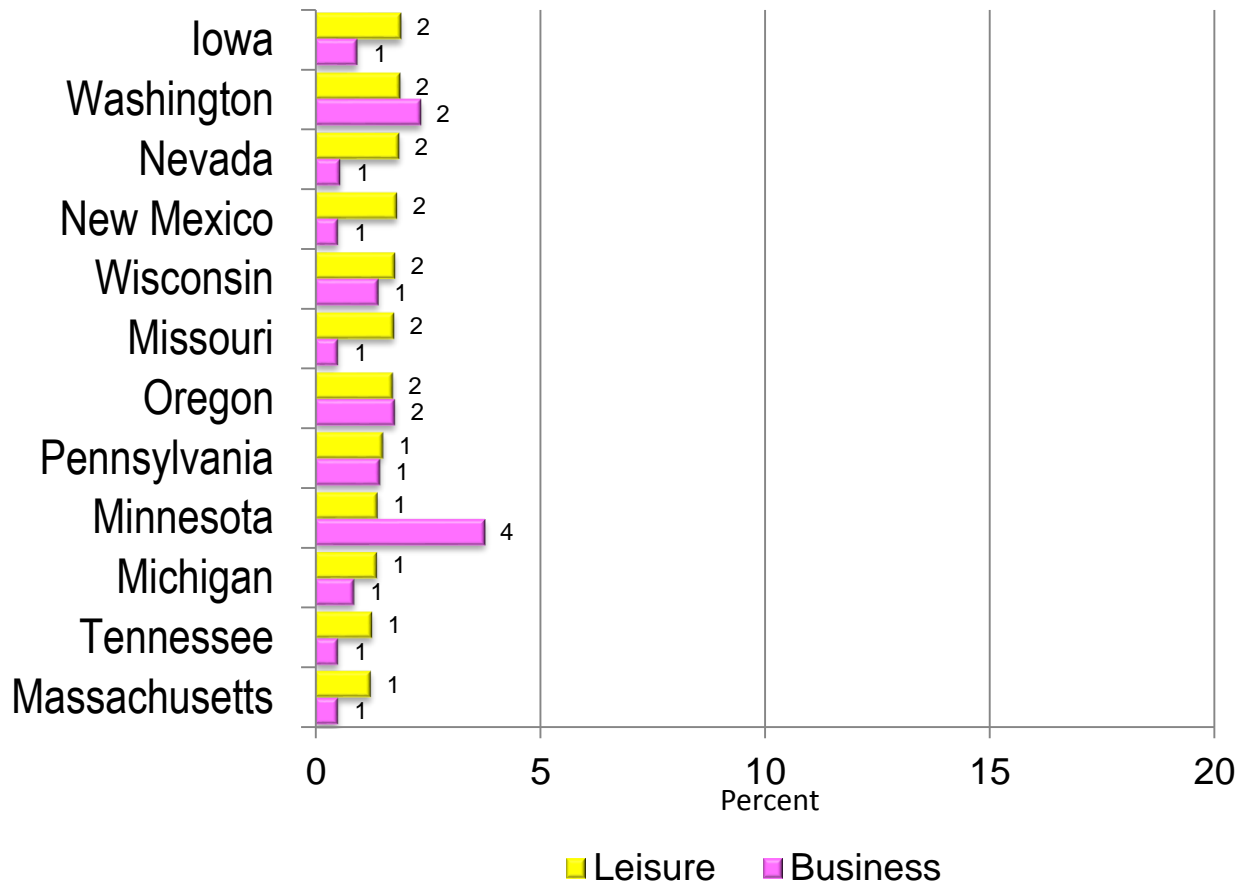
Base: Total Trips



State Sources of Overnight Trips



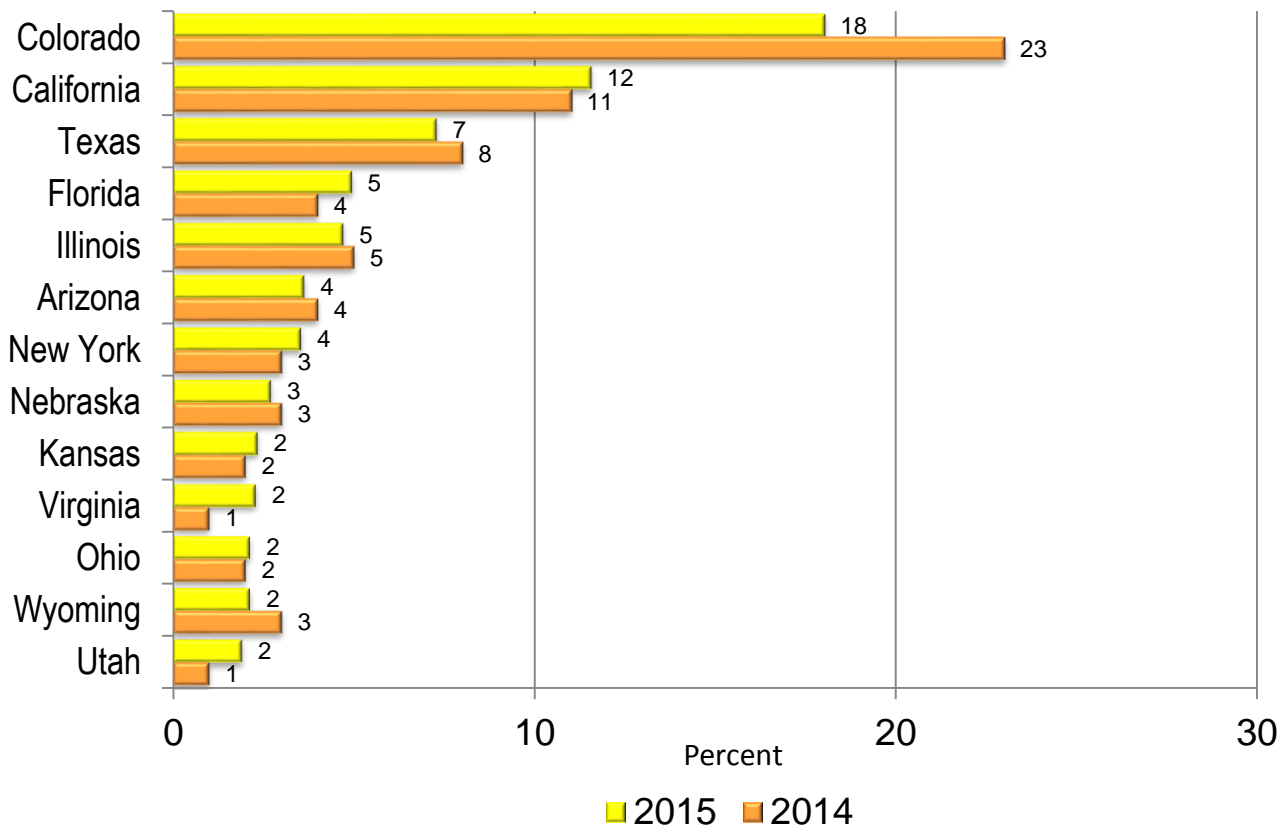
State Sources of Overnight Trips (Cont'd)



State Sources of Overnight Leisure Trips



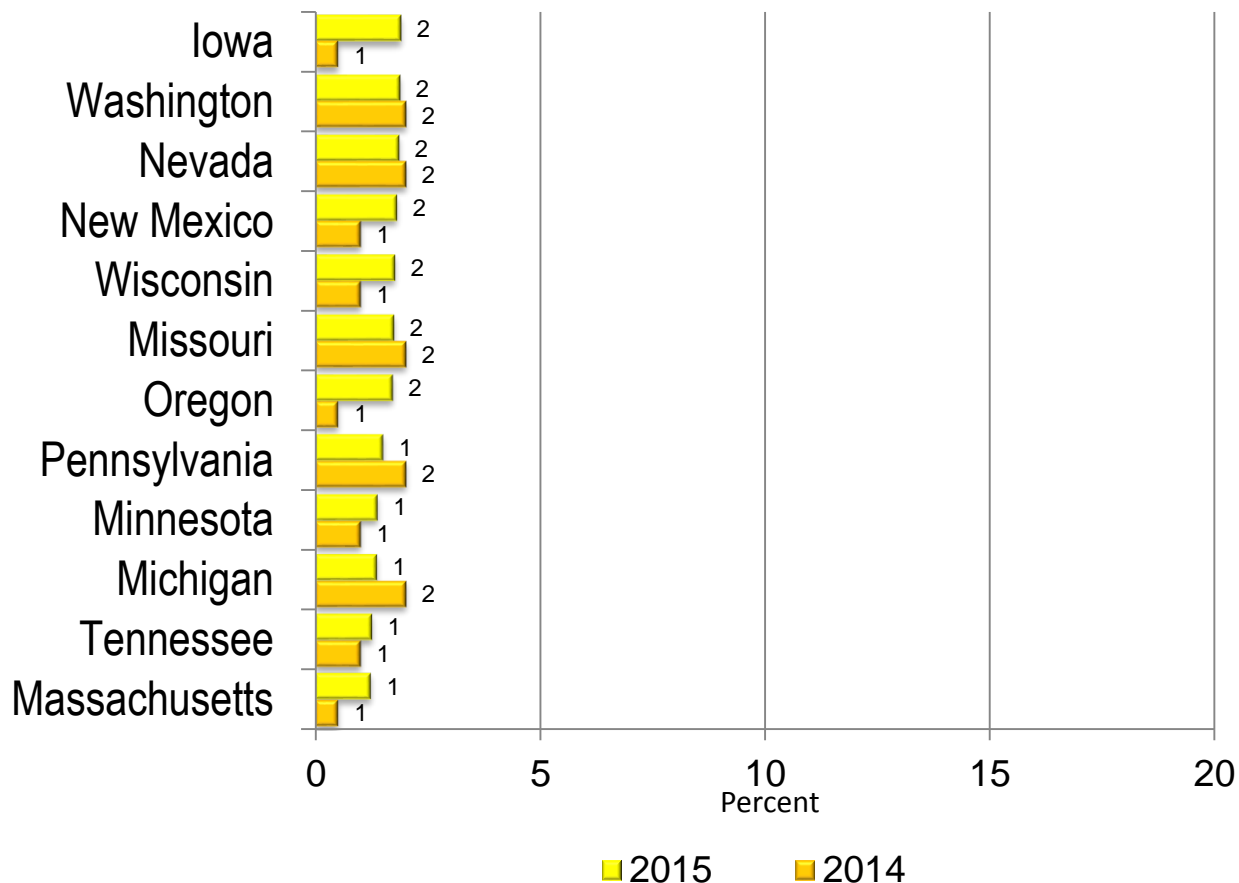
Base: Leisure Trips



State Sources of Overnight Leisure Trips (Cont'd)



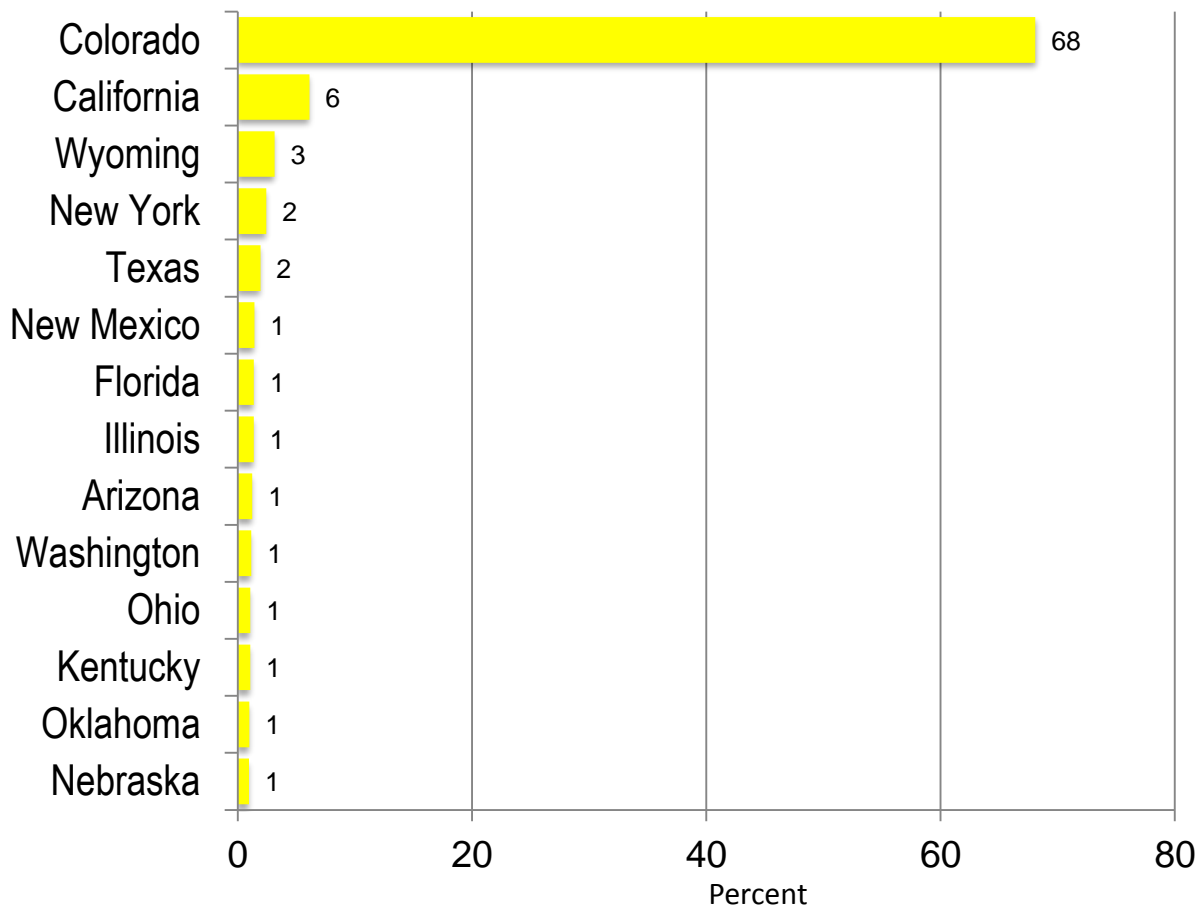
Base: Leisure Trips



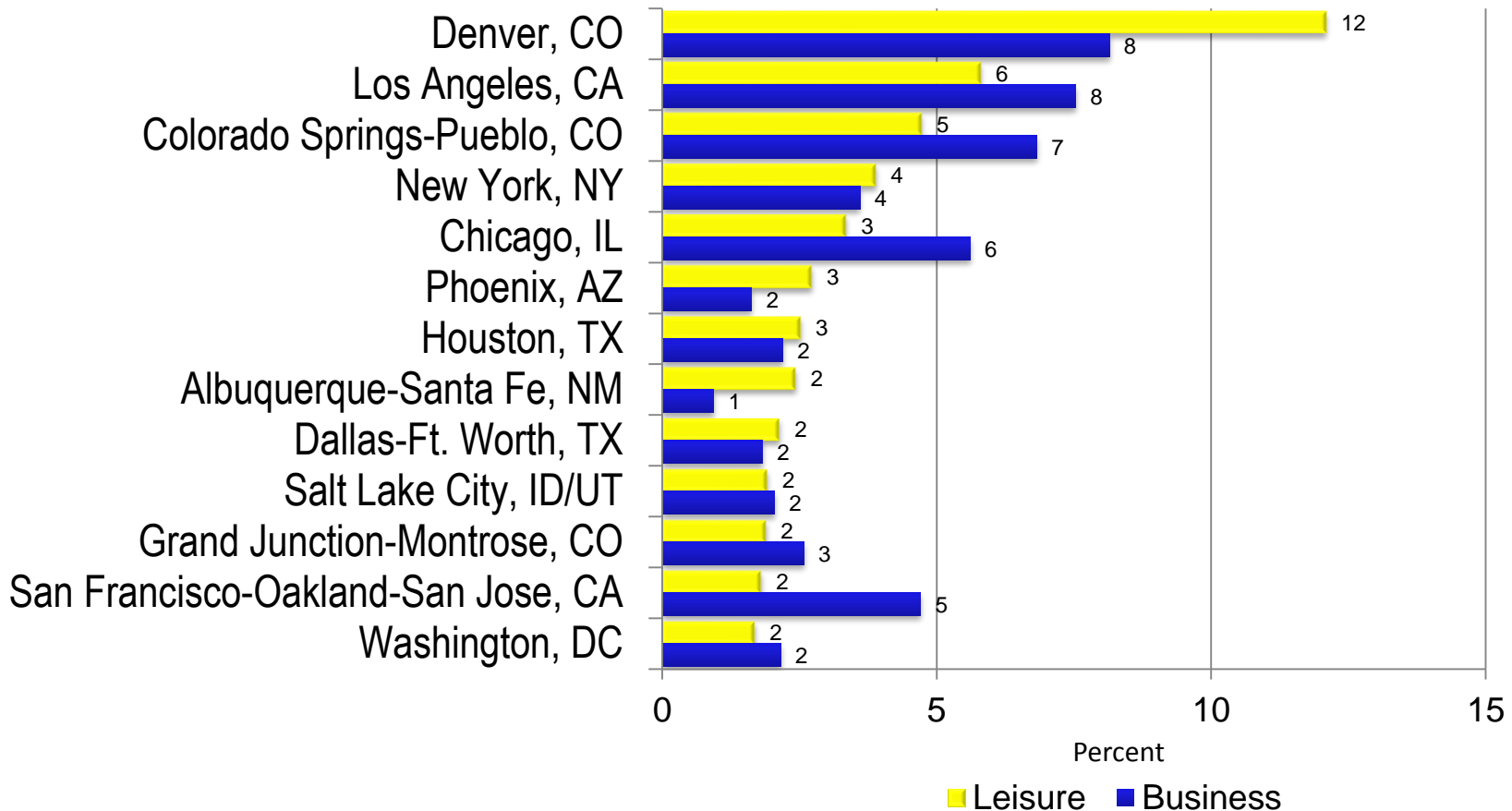
State Sources of Day Trips



Base: Leisure Trips



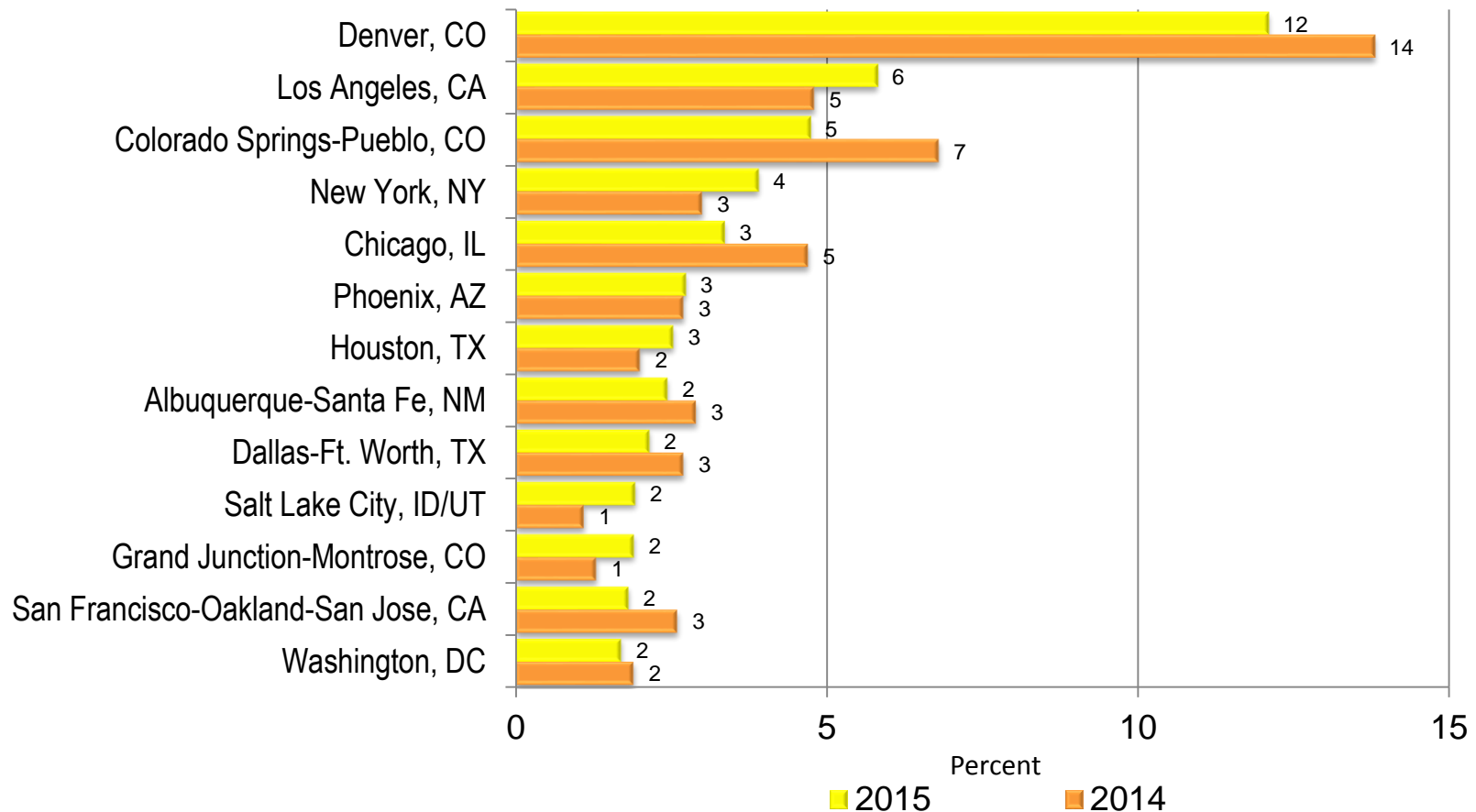
Urban Sources of Overnight Trips



Urban Sources of Overnight Leisure Trips



Base: Leisure Trips

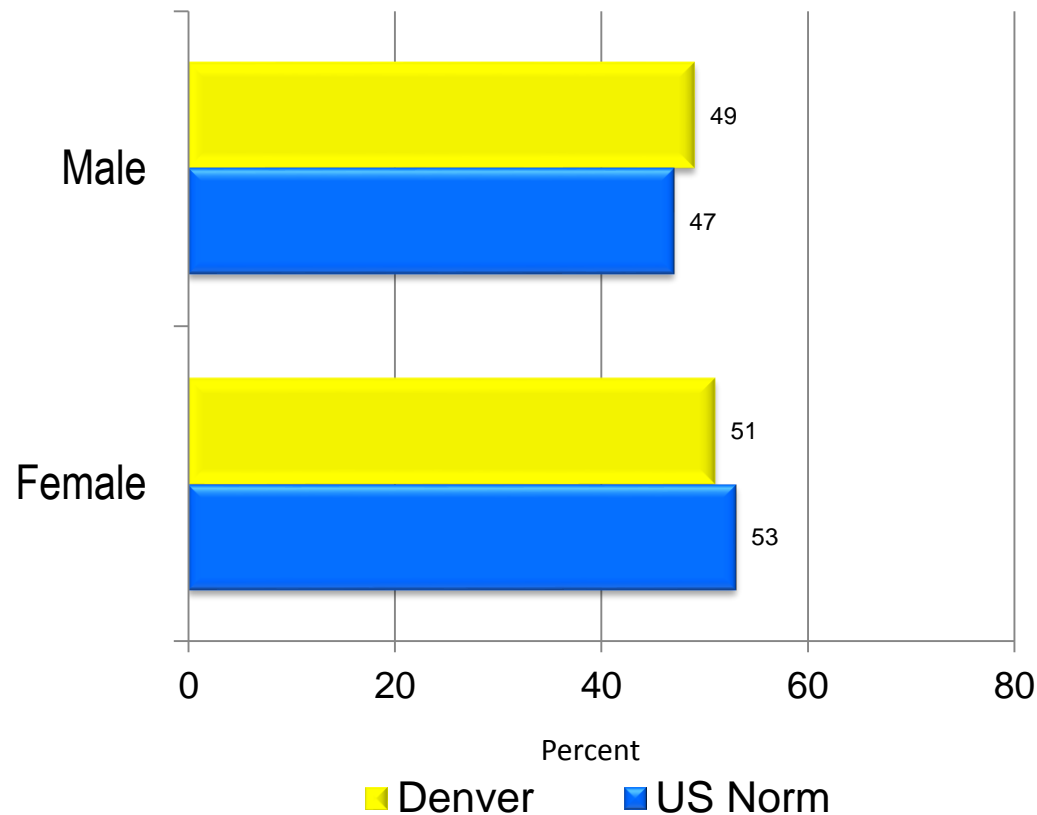


Visitor Profiles

Gender of Overnight Leisure Travelers to Denver



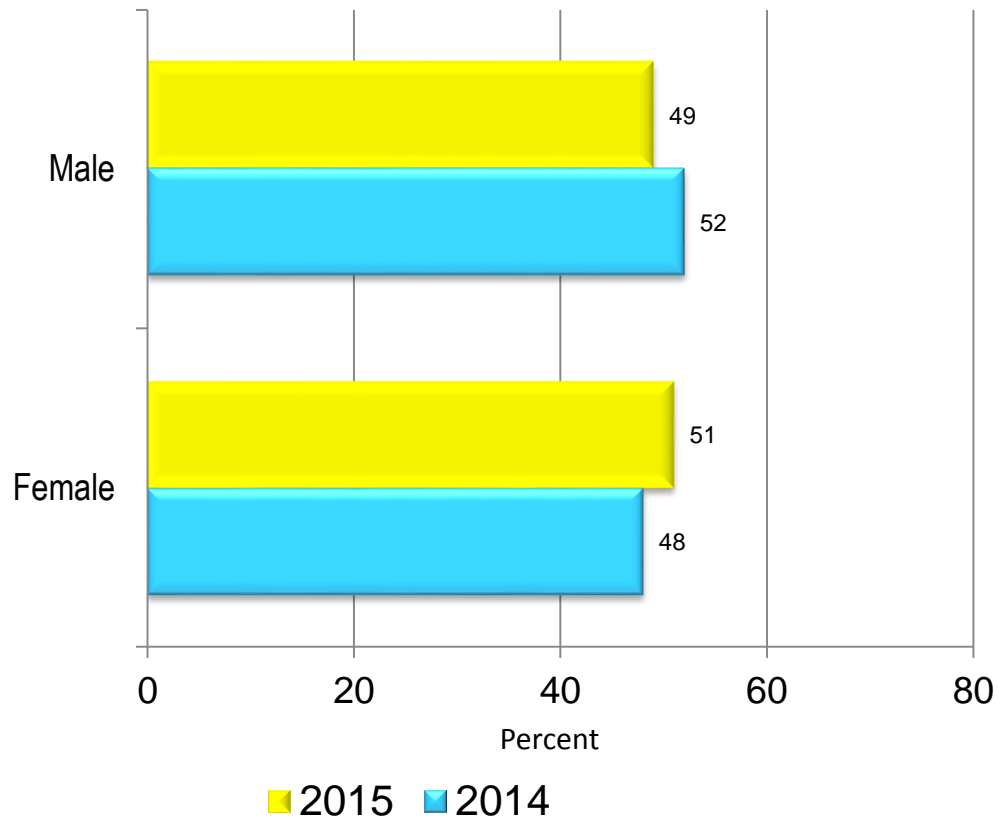
Base: Overnight Leisure Trips



Gender of Overnight Leisure Travelers to Denver



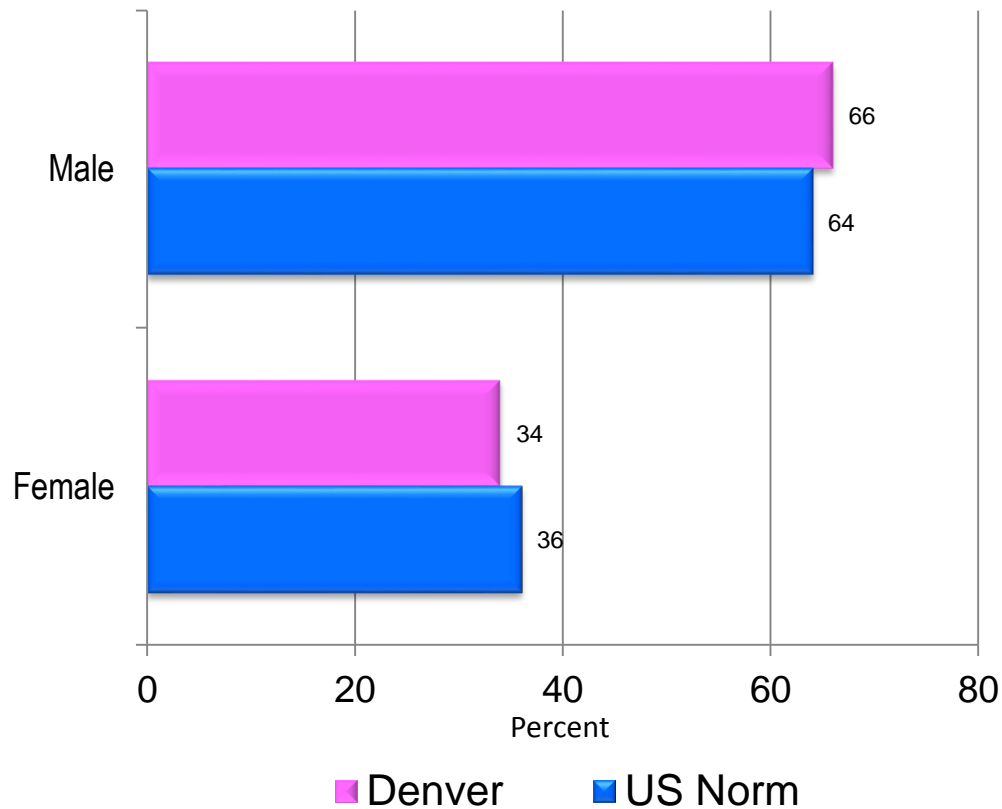
Base: Overnight Leisure Trips



Gender of Overnight Business Travelers to Denver



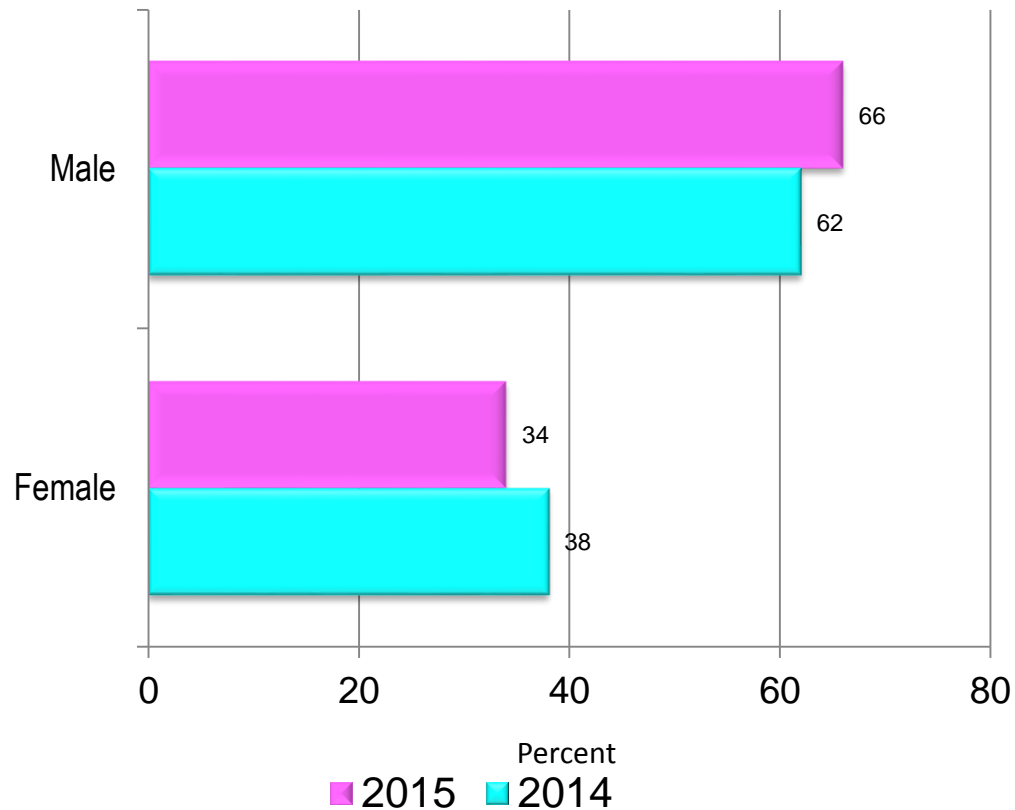
Base: Overnight Business Trips



Gender of Overnight Business Travelers to Denver



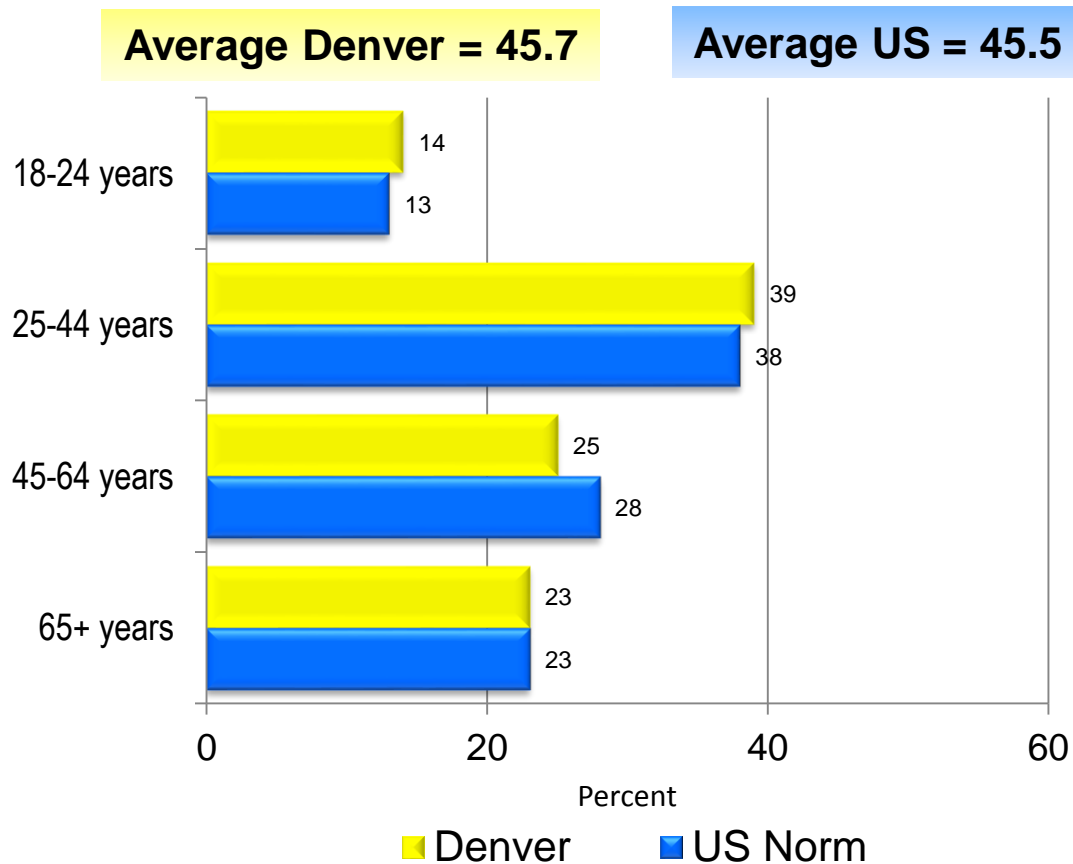
Base: Overnight Business Trips



Age of Overnight Leisure Travelers to Denver



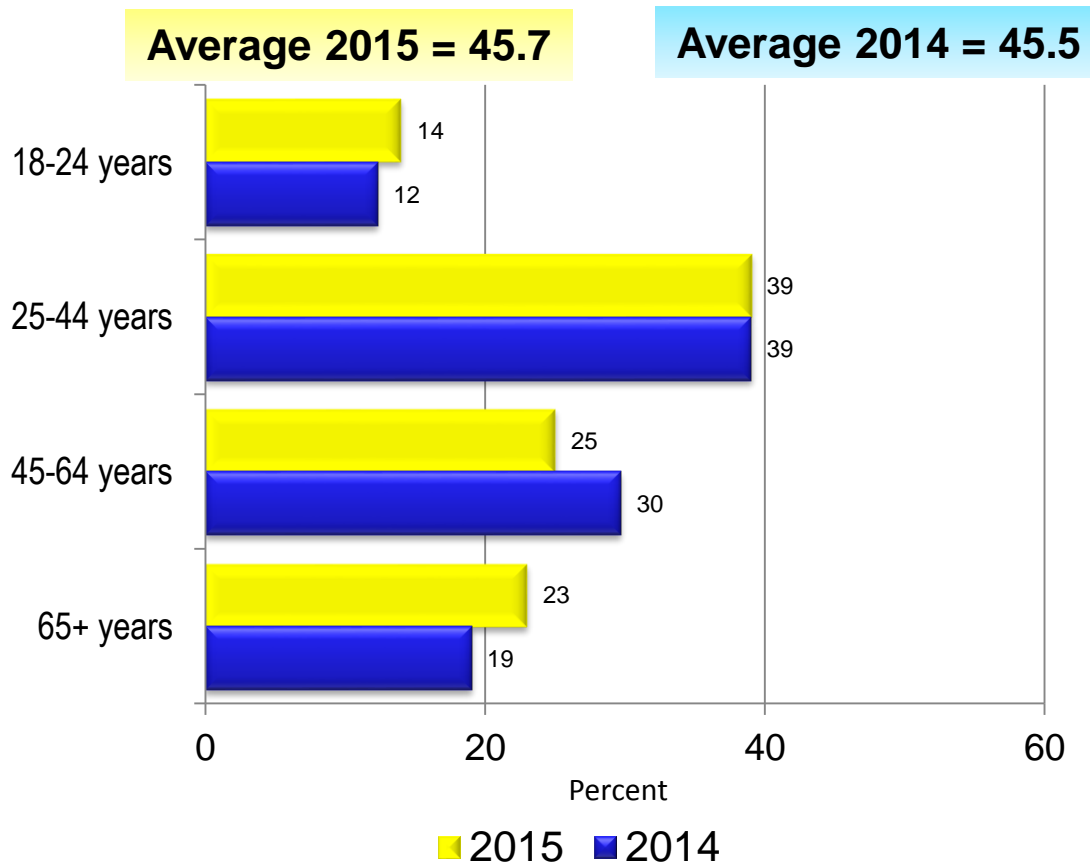
Base: Overnight Leisure Trips



Age of Overnight Leisure Travelers to Denver



Base: Overnight Leisure Trips



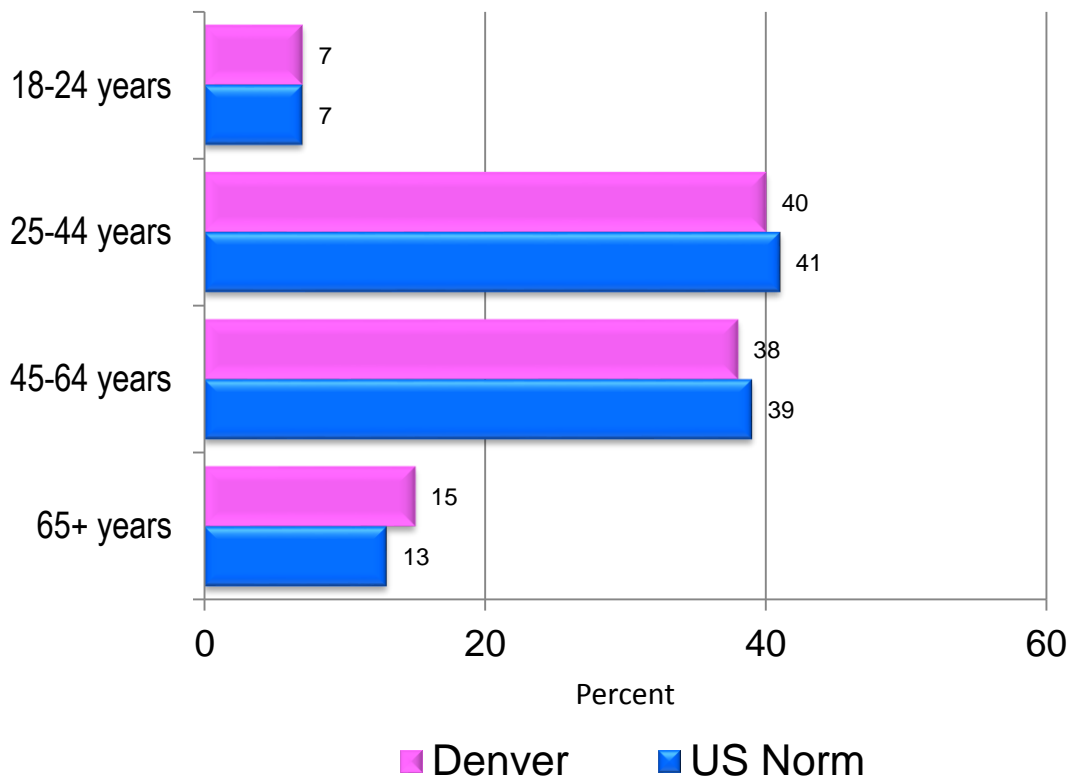
Age of Overnight Business Travelers to Denver



Base: Overnight Business Trips

Average Denver = 46.1

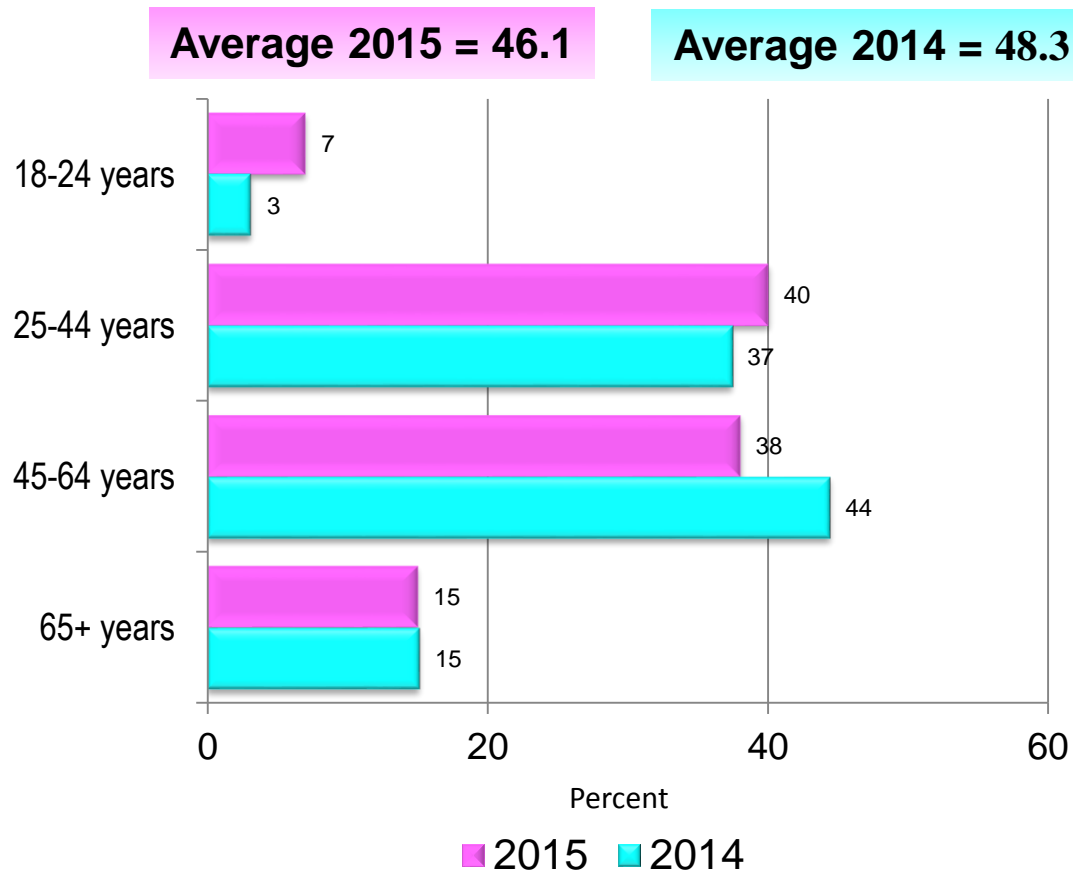
Average US = 46.2



Age of Overnight Business Travelers to Denver



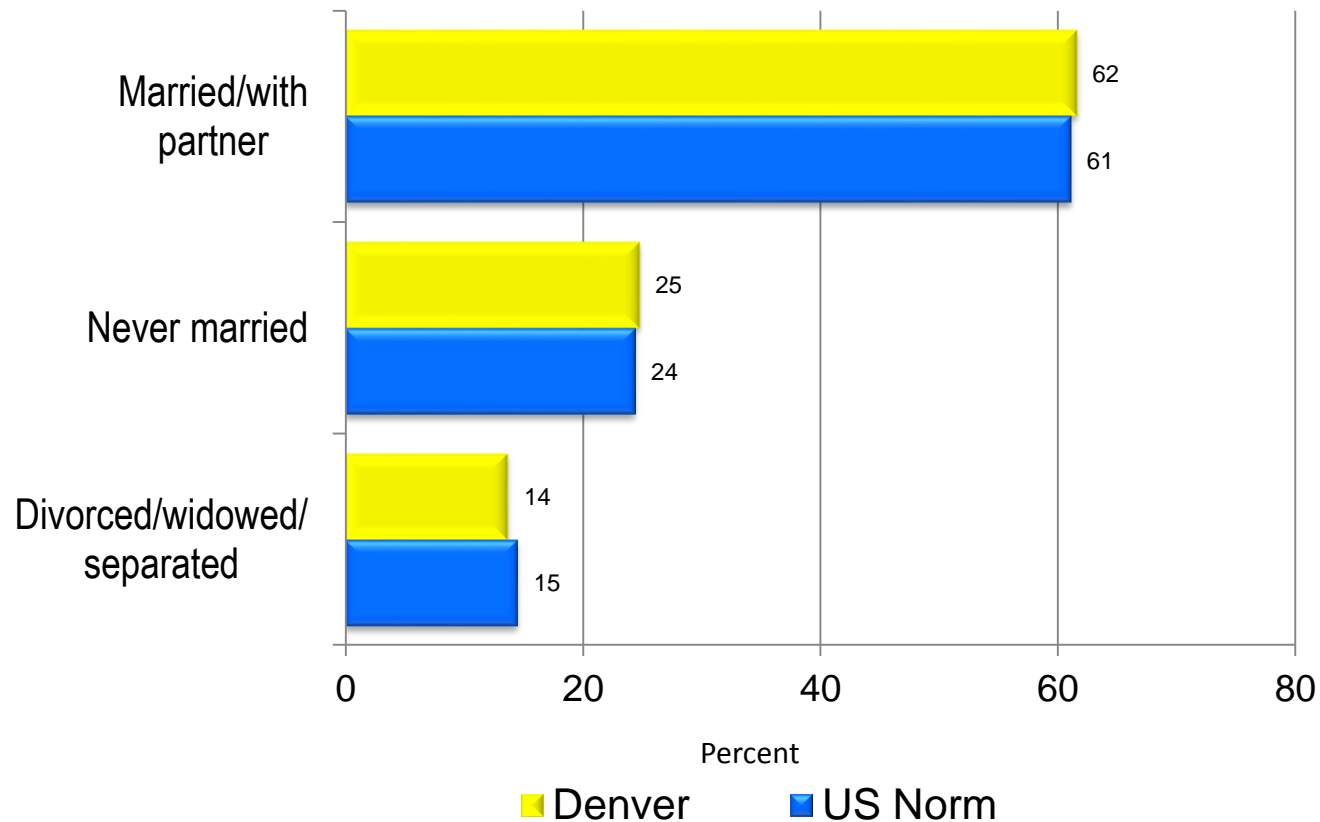
Base: Overnight Business Trips



Marital Status of Overnight Leisure Travelers to Denver



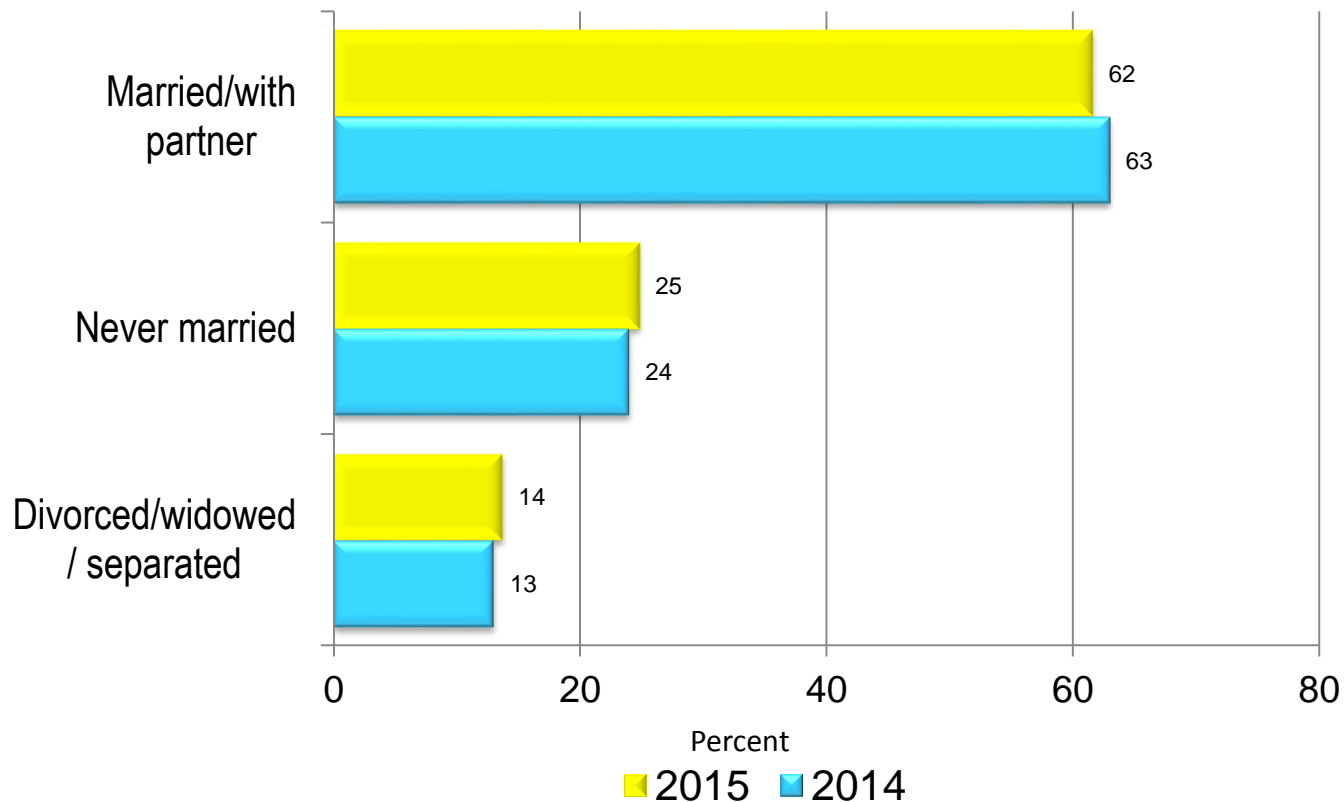
Base: Overnight Leisure Trips



Marital Status of Overnight Leisure Travelers to Denver



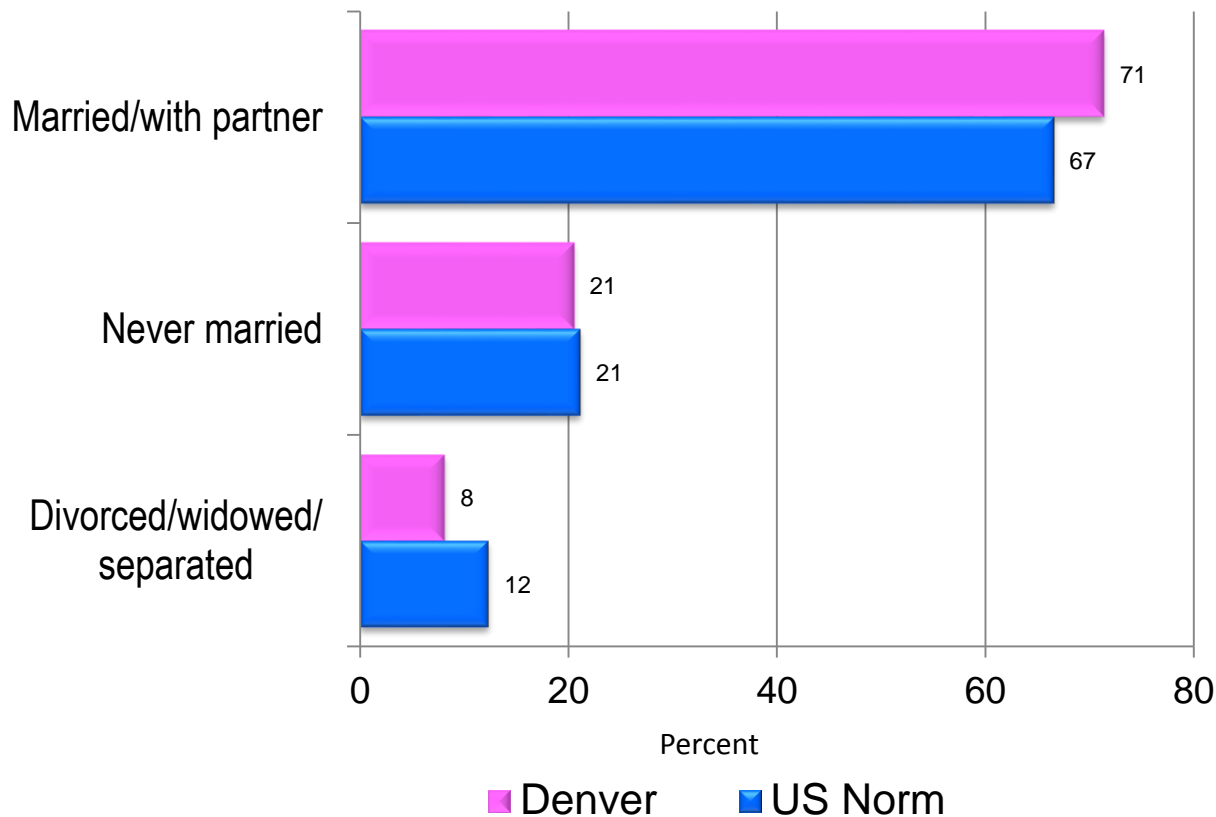
Base: Overnight Leisure Trips



Marital Status of Overnight Business Travelers to Denver



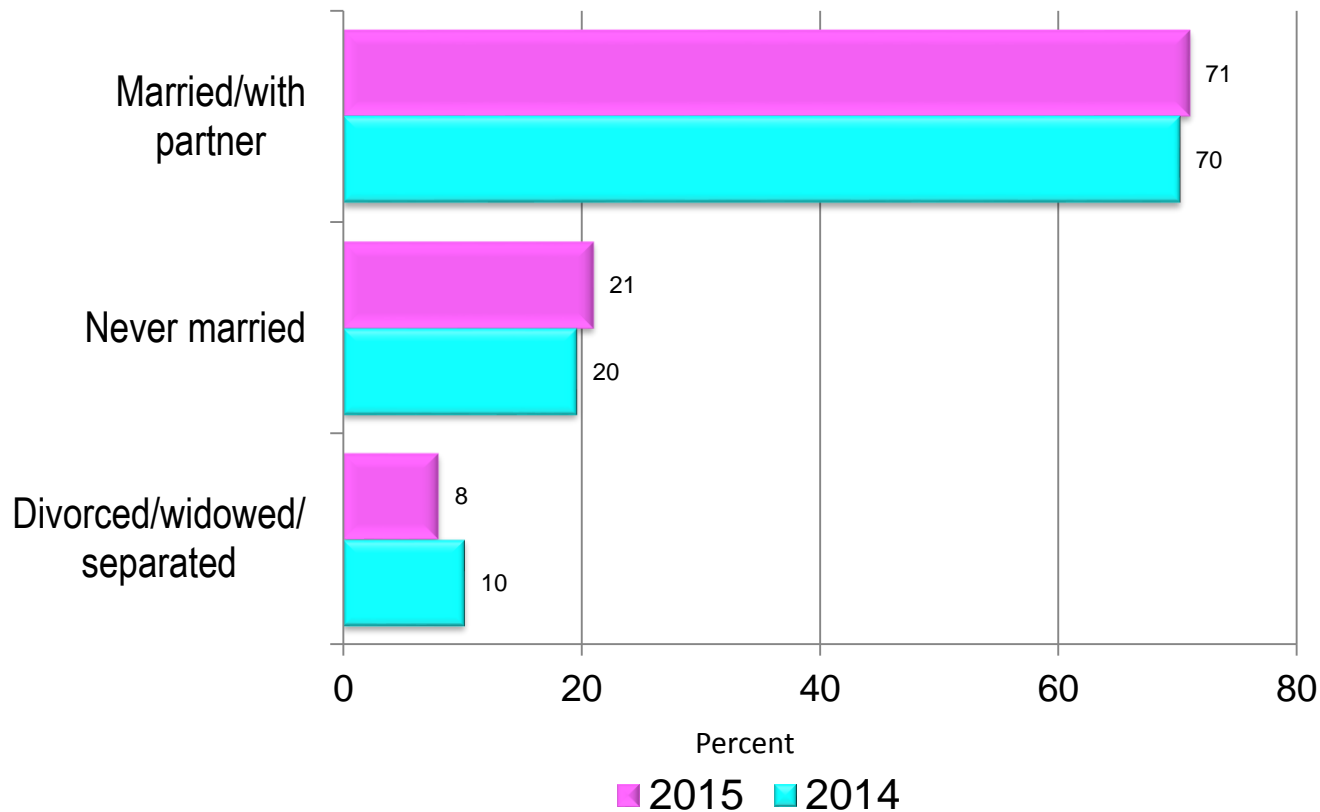
Base: Overnight Business Trips



Marital Status of Overnight Business Travelers to Denver



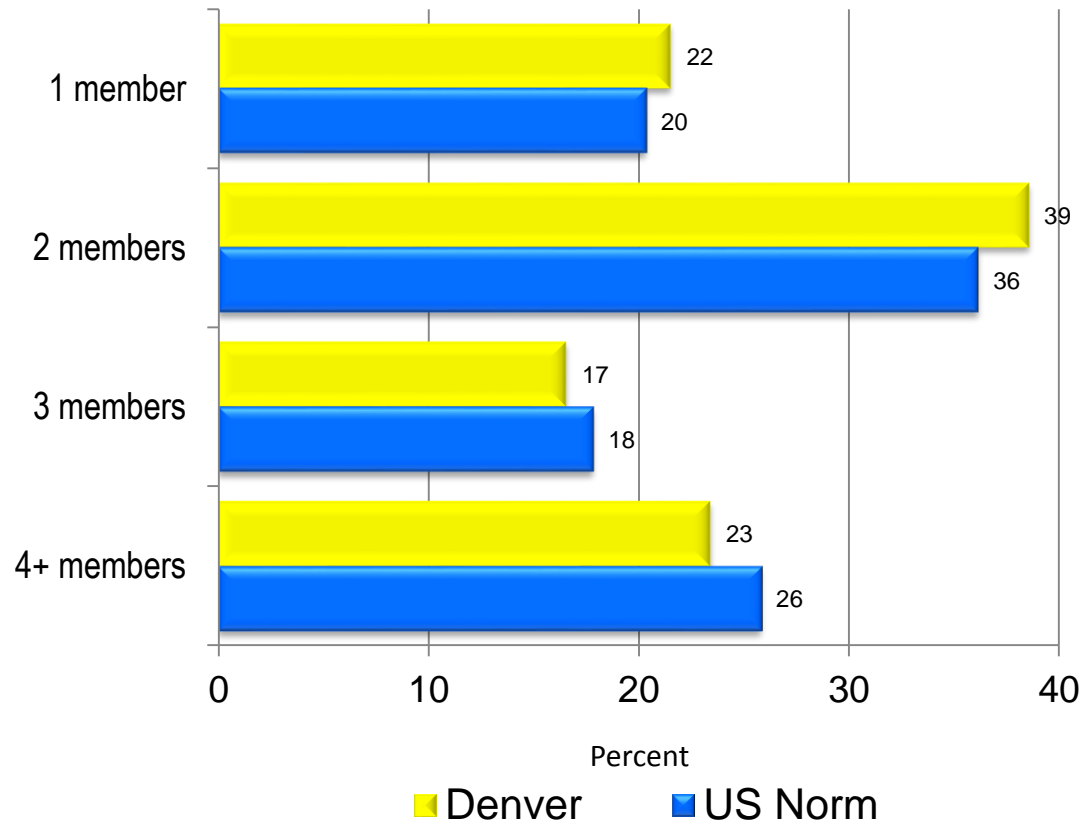
Base: Overnight Business Trips



Household Size of Overnight Leisure Travelers to Denver



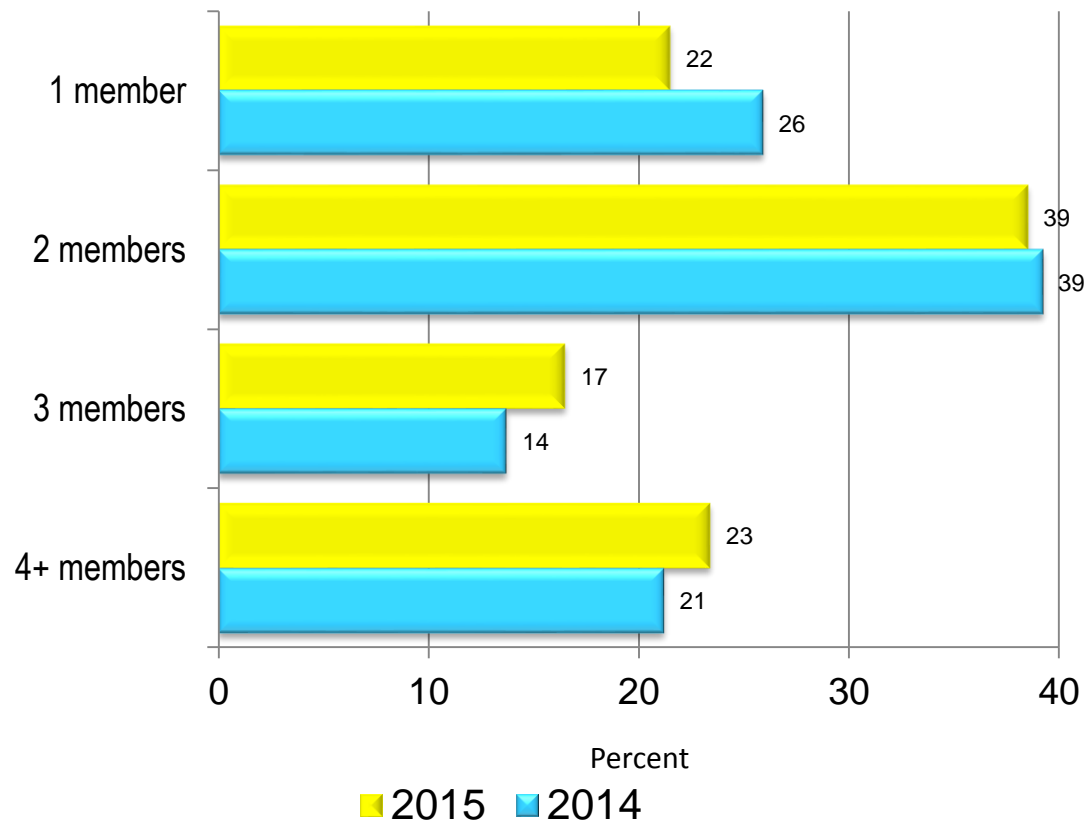
Base: Overnight Leisure Trips



Household Size of Overnight Leisure Travelers to Denver



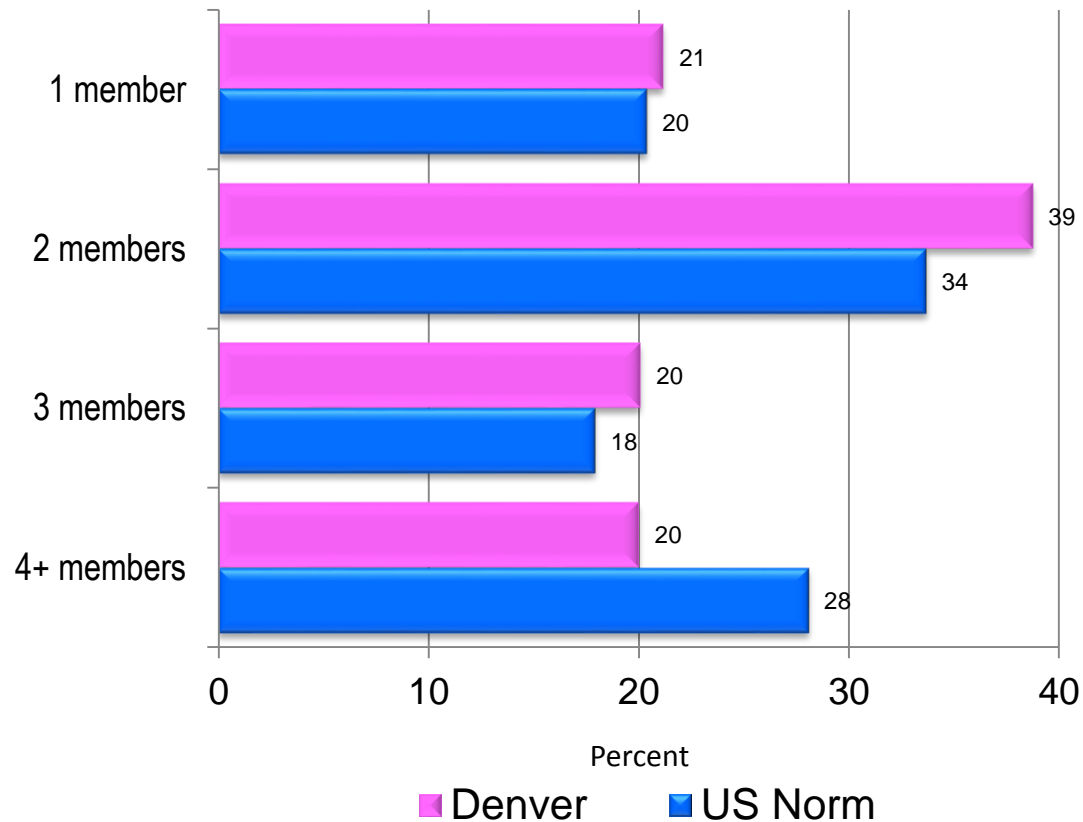
Base: Overnight Leisure Trips



Household Size of Overnight Business Travelers to Denver



Base: Overnight Business Trips



Household Size of Overnight Business Travelers to Denver



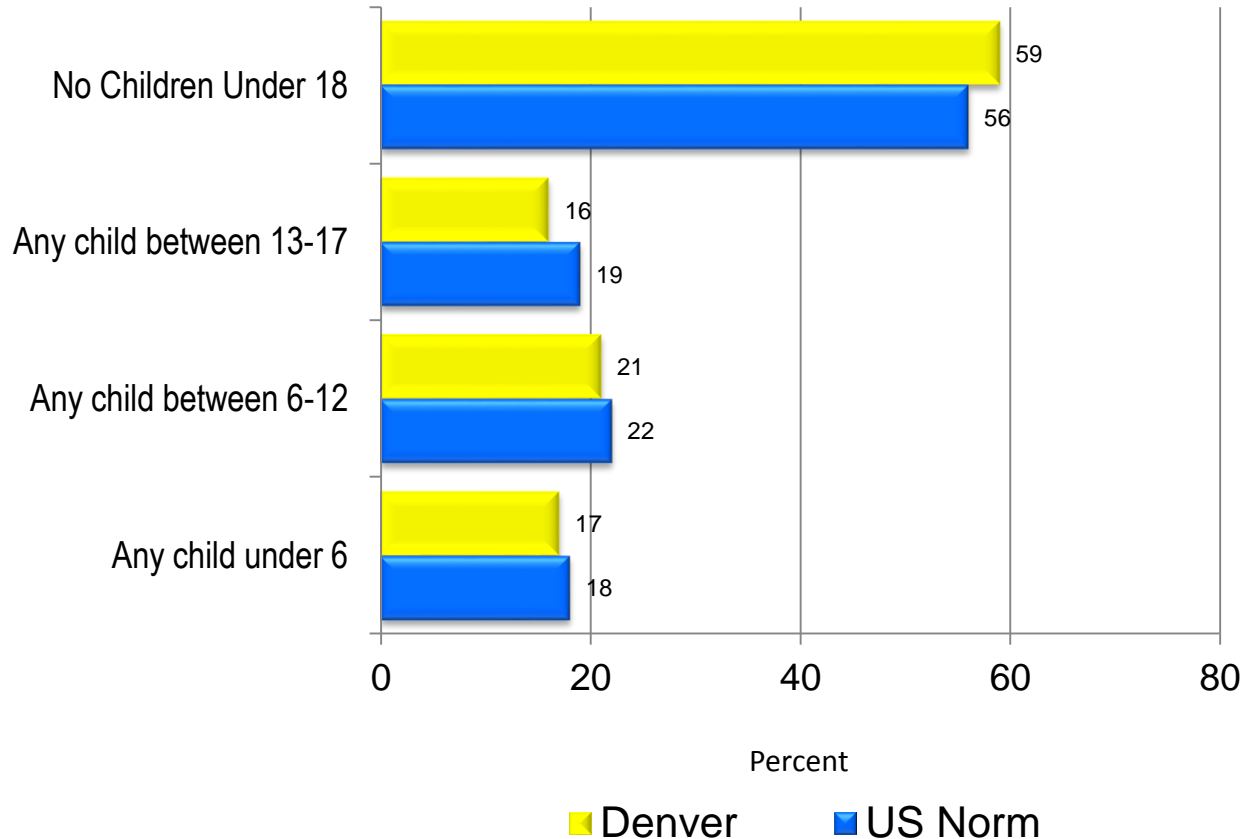
Base: Overnight Business Trips



Presence of Children in Household of Overnight Leisure Travelers to Denver



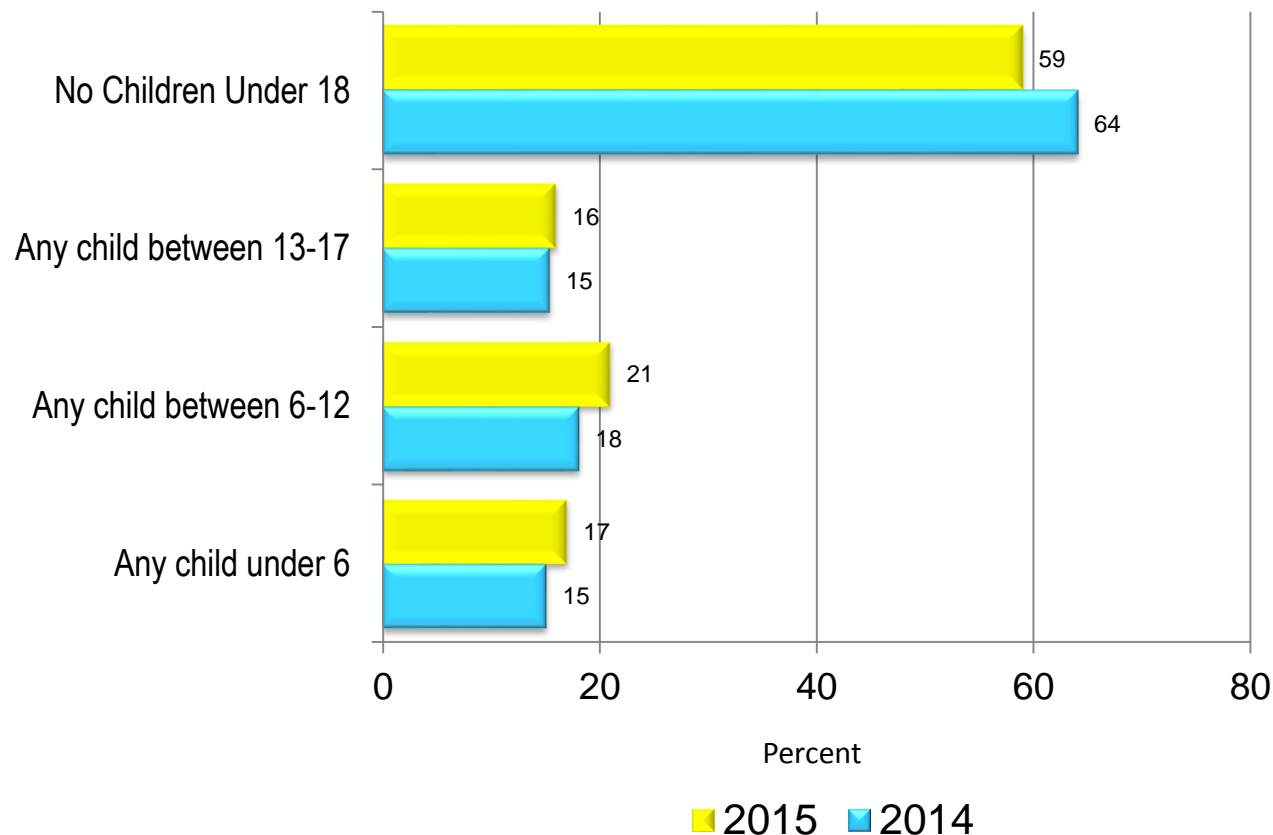
Base: Overnight Leisure Trips



Presence of Children in Household of Overnight Leisure Travelers to Denver



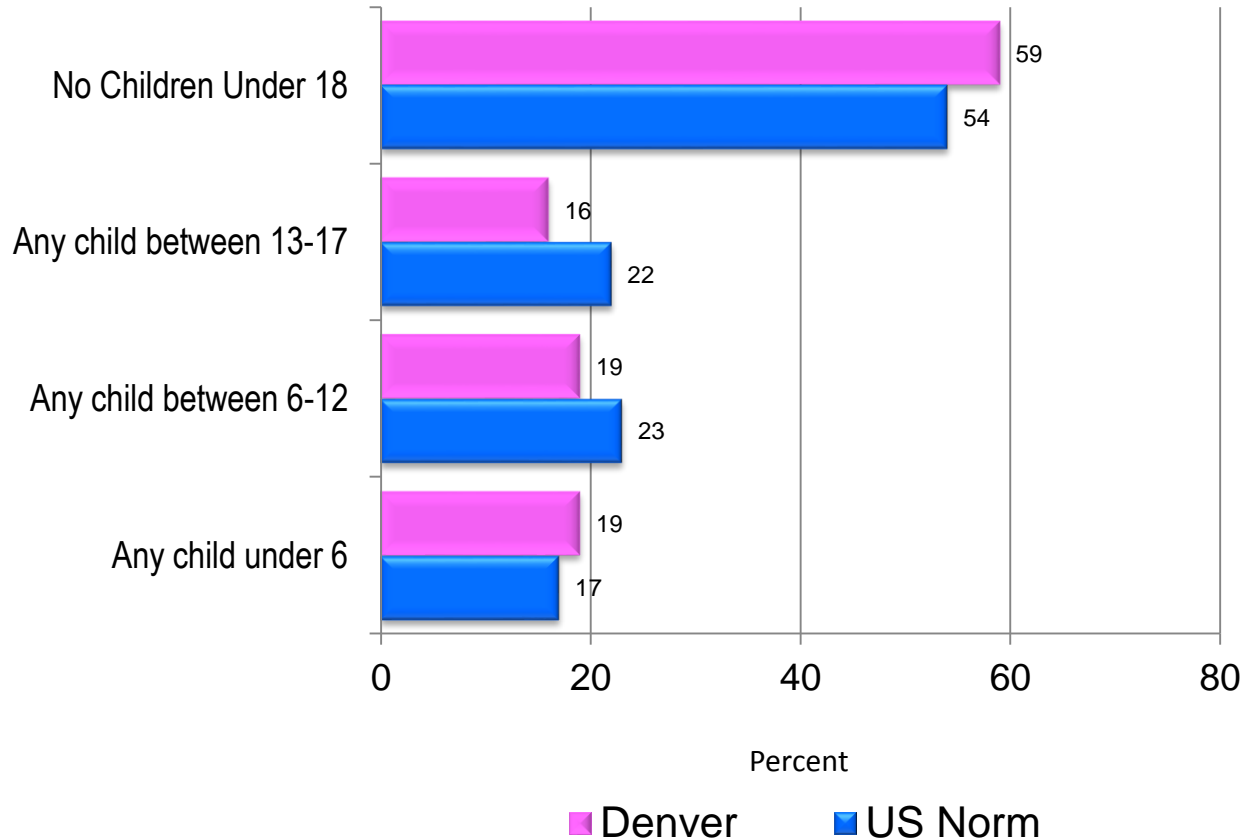
Base: Overnight Leisure Trips



Presence of Children in Household of Overnight Business Travelers to Denver



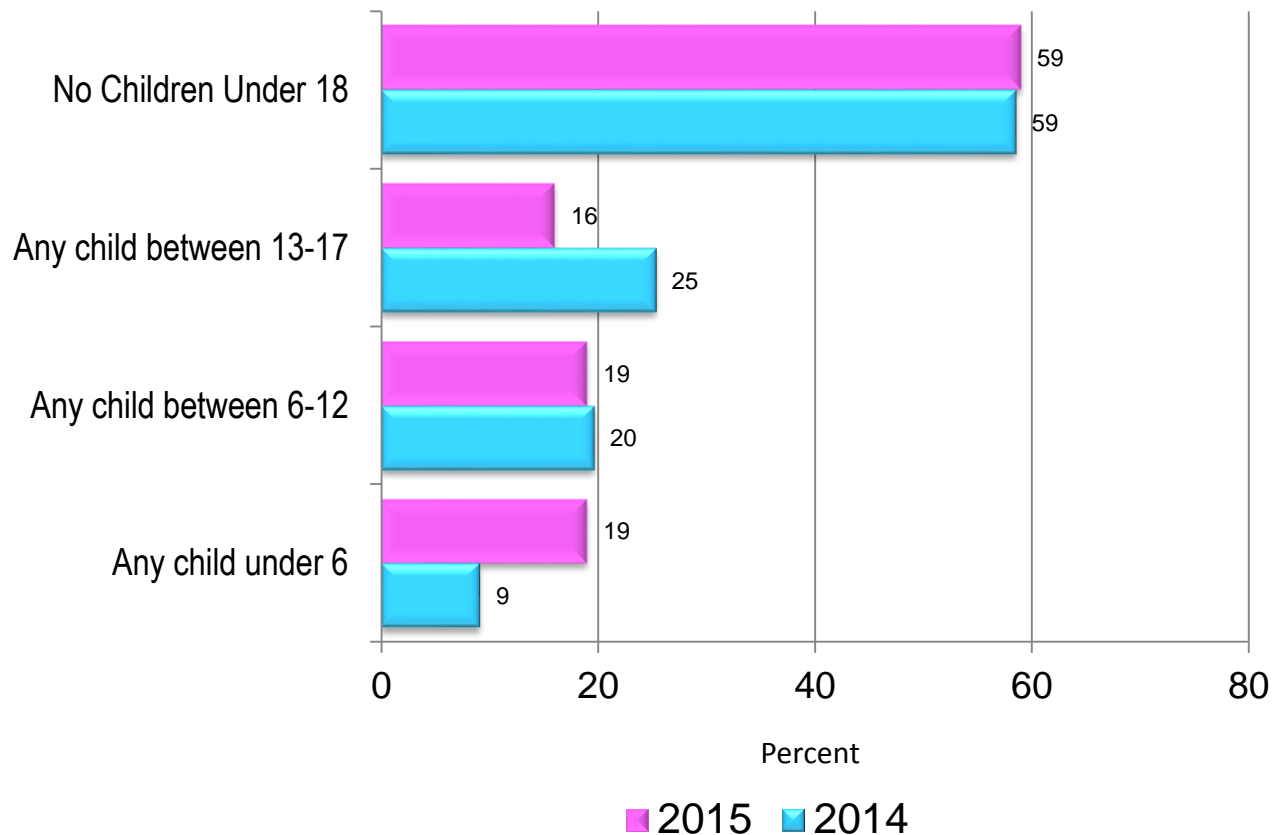
Base: Overnight Business Trips



Presence of Children in Household of Overnight Business Travelers to Denver



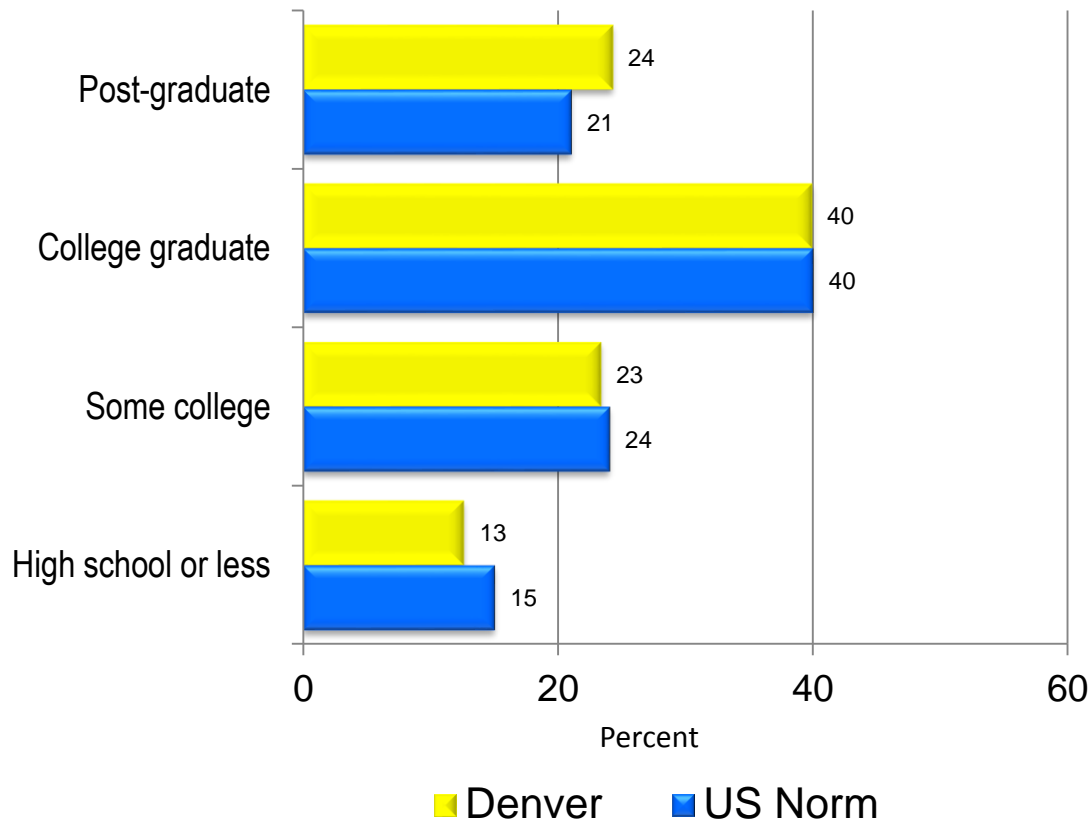
Base: Overnight Business Trips



Education of Overnight Leisure Travelers to Denver



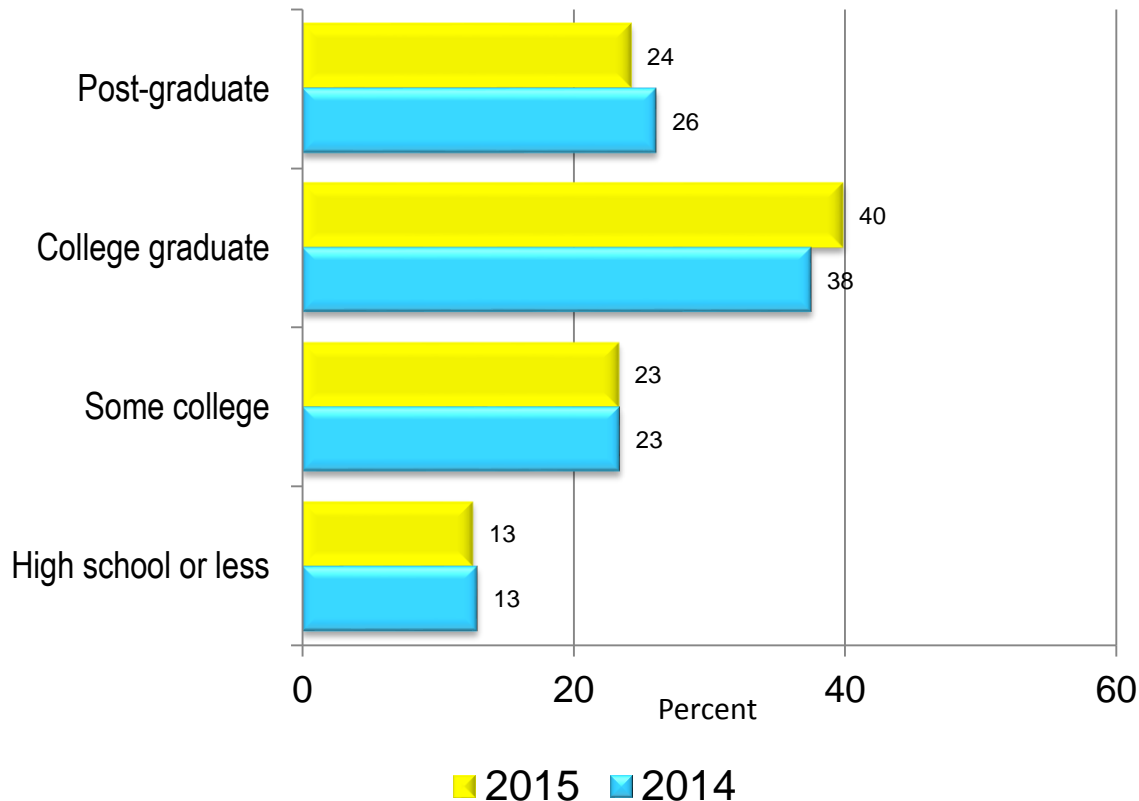
Base: Overnight Leisure Trips



Education of Overnight Leisure Travelers to Denver



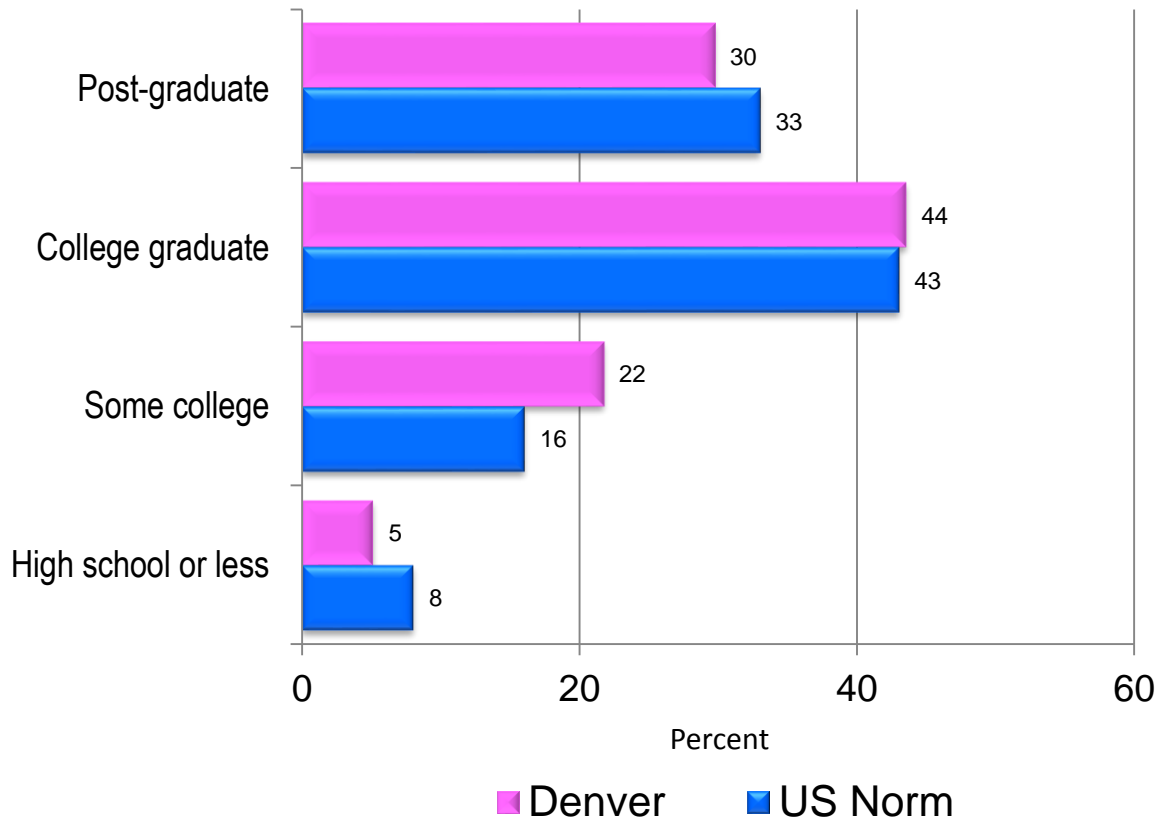
Base: Overnight Leisure Trips



Education of Overnight Business Travelers to Denver



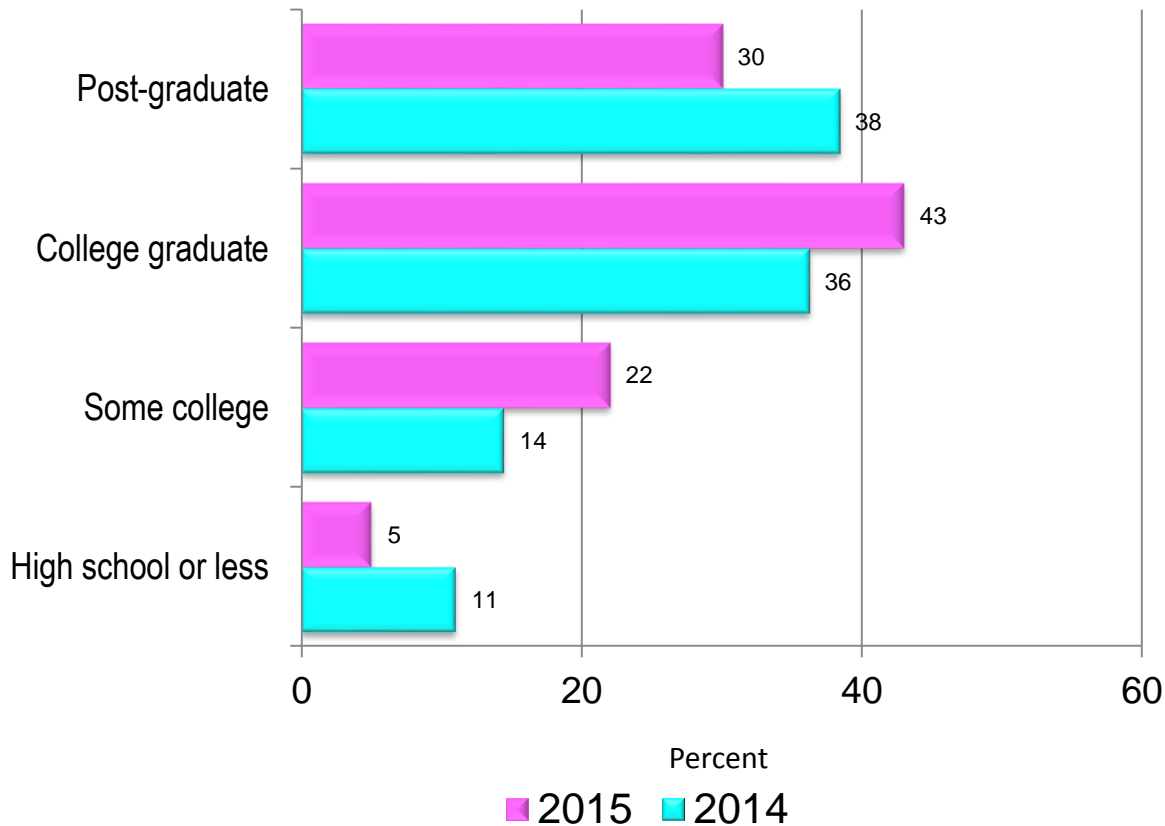
Base: Overnight Business Trips



Education of Overnight Business Travelers to Denver



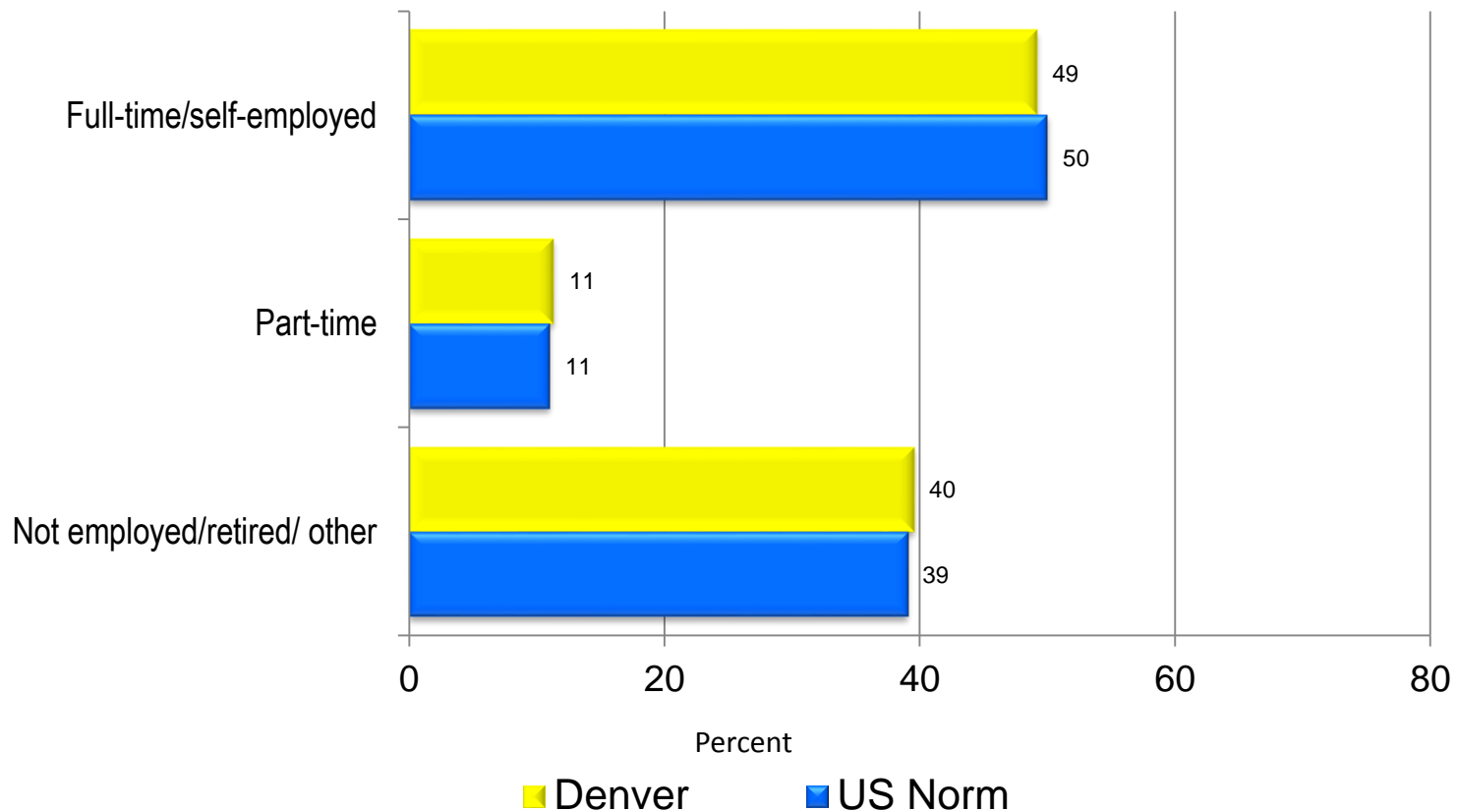
Base: Overnight Business Trips



Employment of Overnight Leisure Travelers to Denver



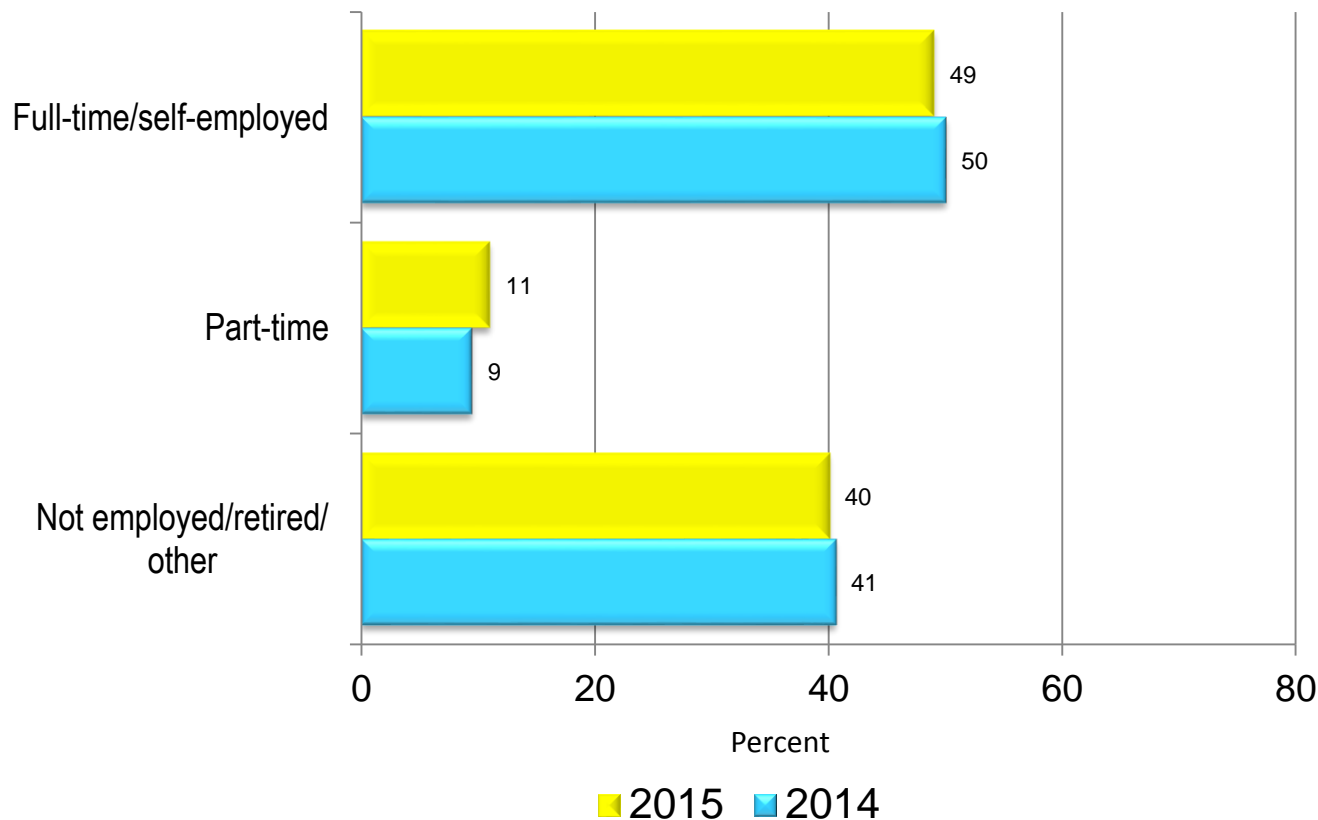
Base: Overnight Leisure Trips



Employment of Overnight Leisure Travelers to Denver



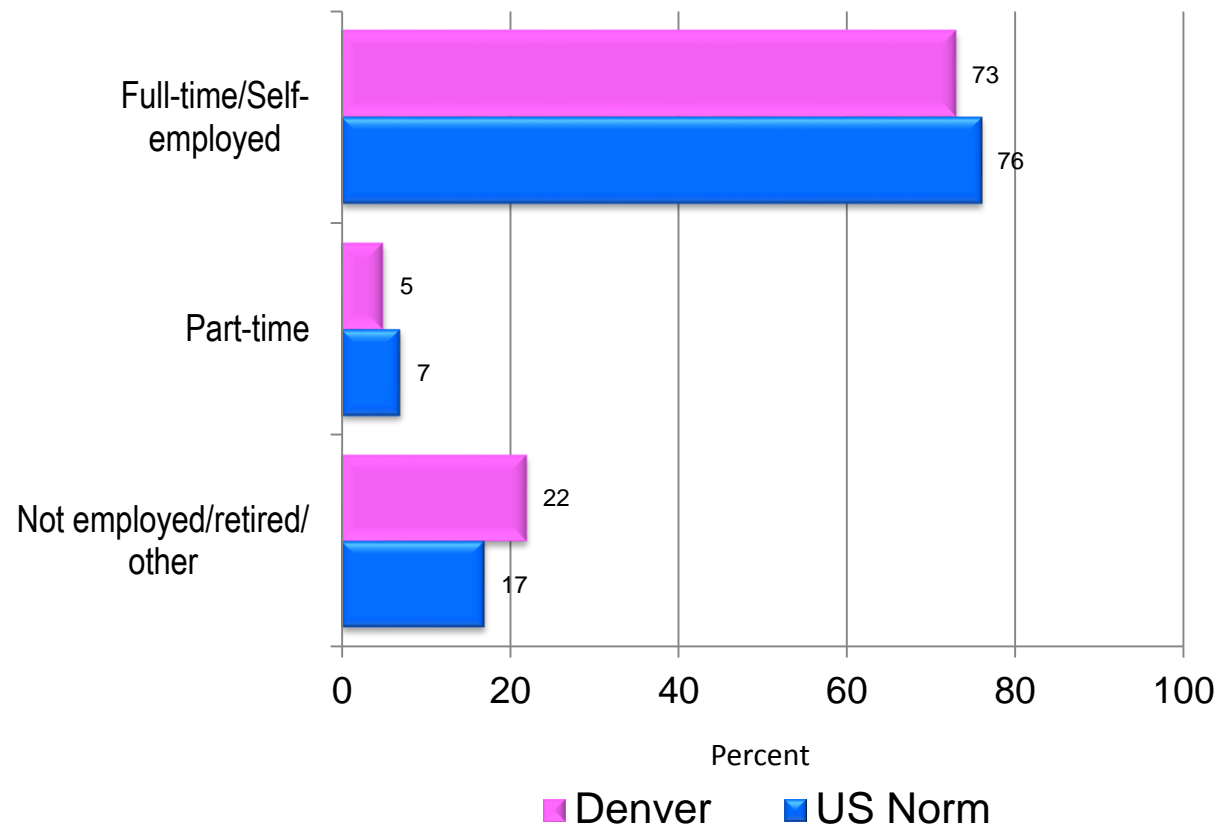
Base: Overnight Leisure Trips



Employment of Overnight Business Travelers to Denver



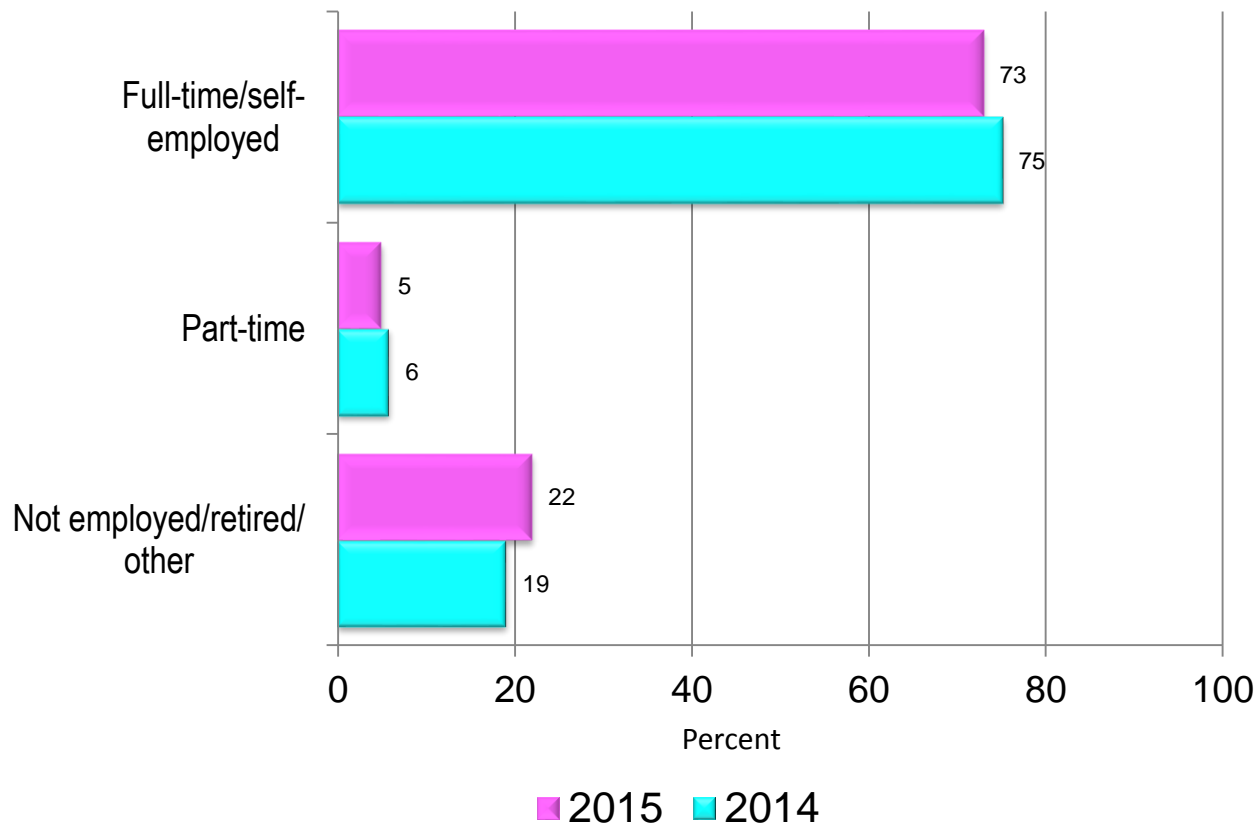
Base: Overnight Business Trips



Employment of Overnight Business Travelers to Denver



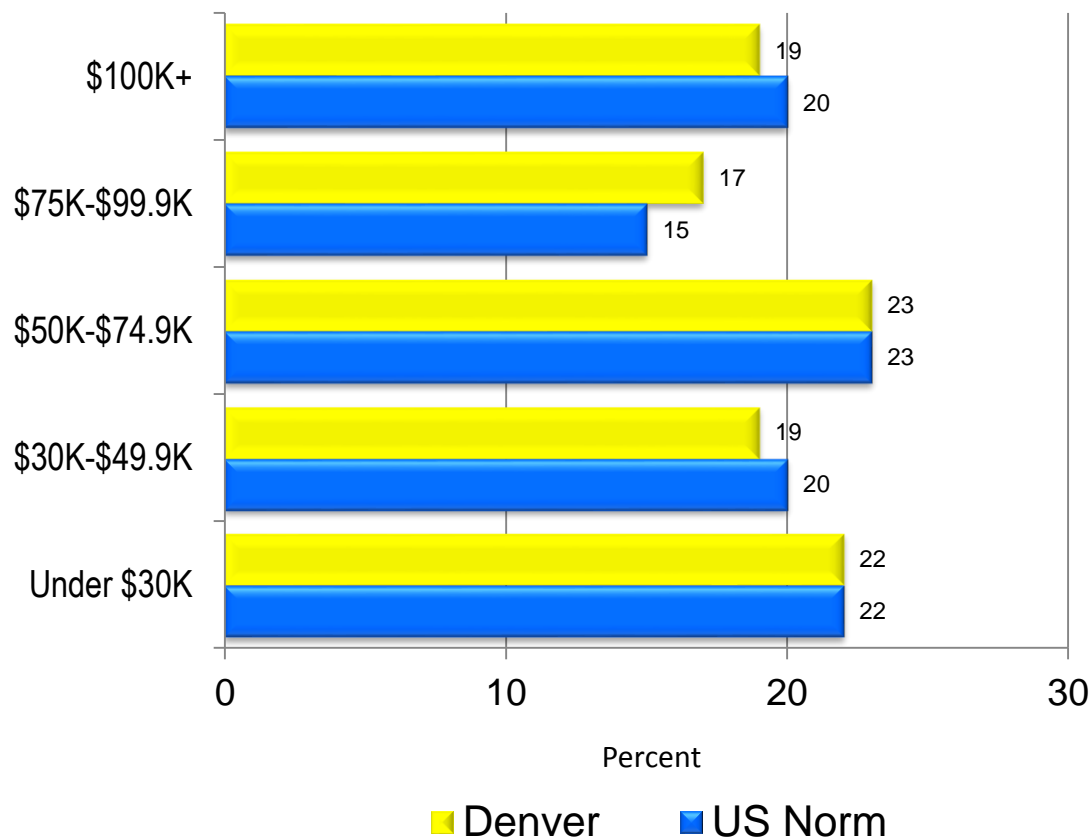
Base: Overnight Business Trips



Income of Overnight Leisure Travelers to Denver



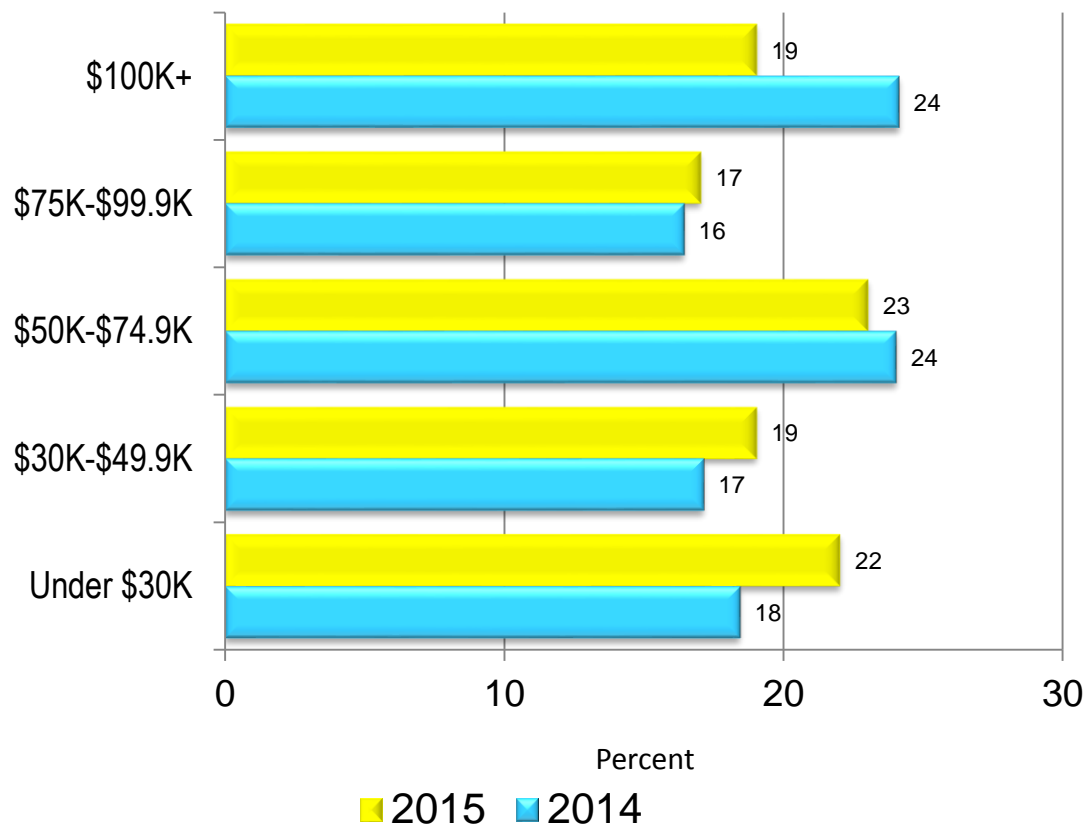
Base: Overnight Leisure Trips



Income of Overnight Leisure Travelers to Denver



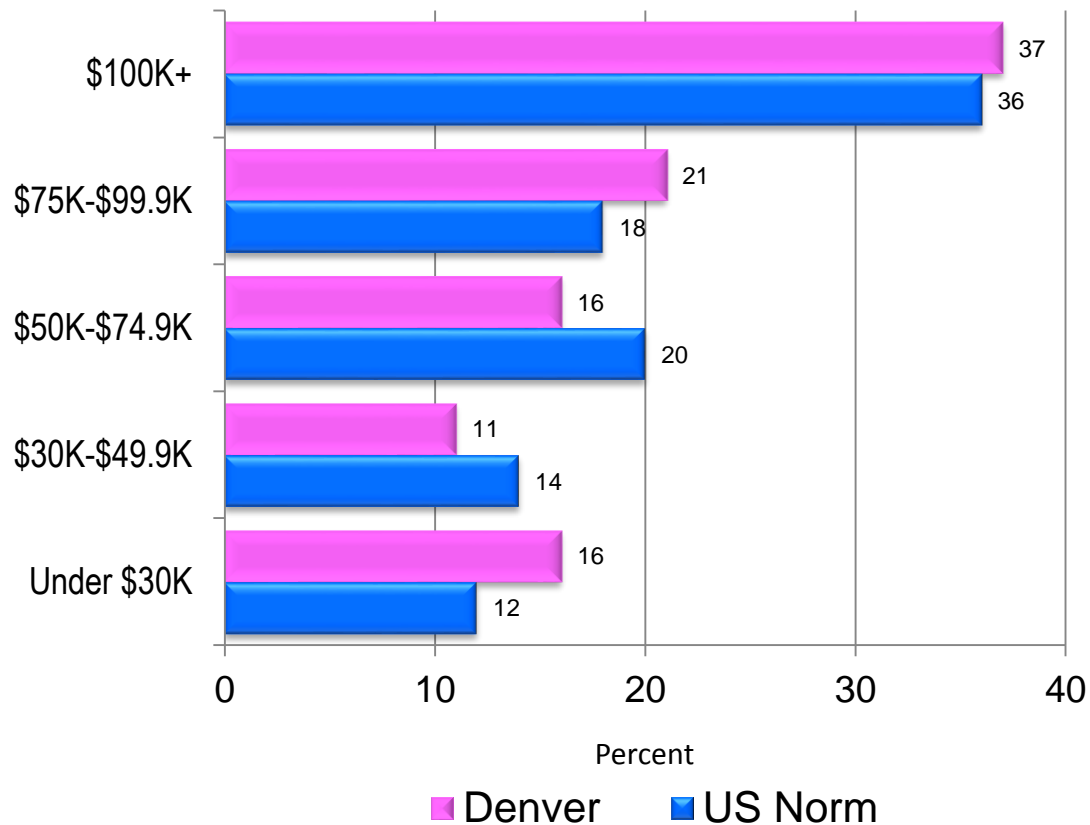
Base: Overnight Leisure Trips



Income of Overnight Business Travelers to Denver



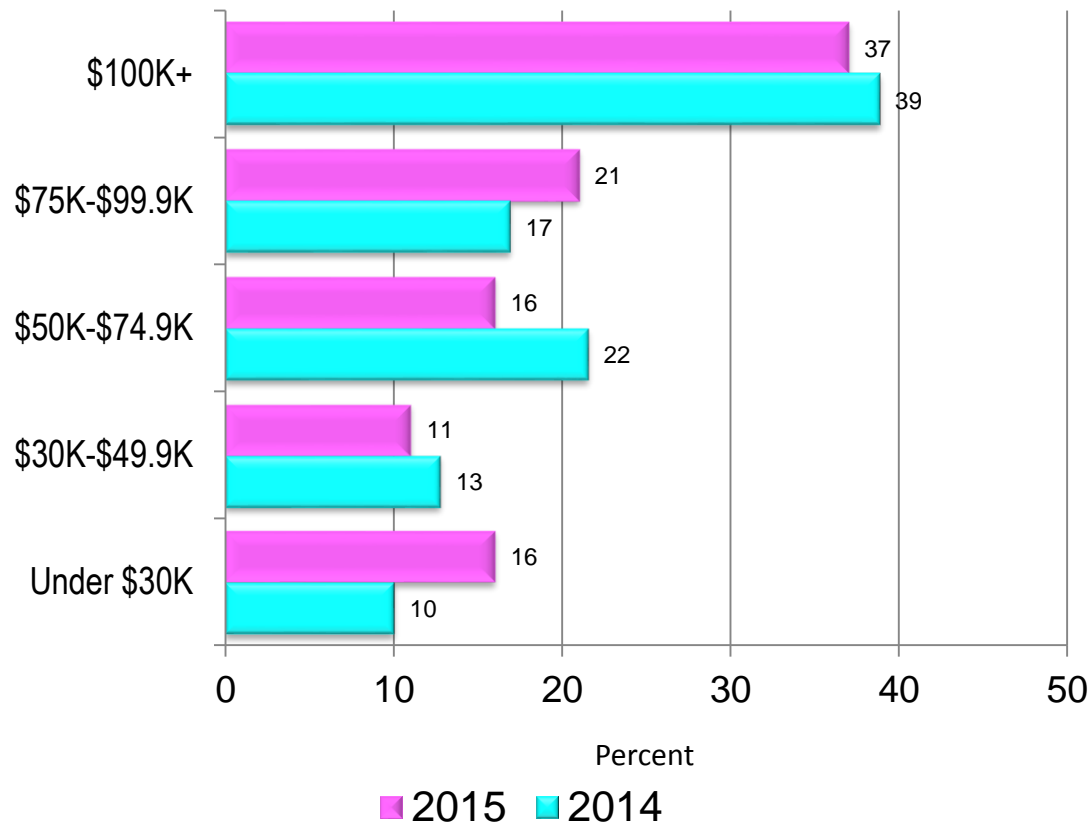
Base: Overnight Business Trips



Income of Overnight Business Travelers to Denver



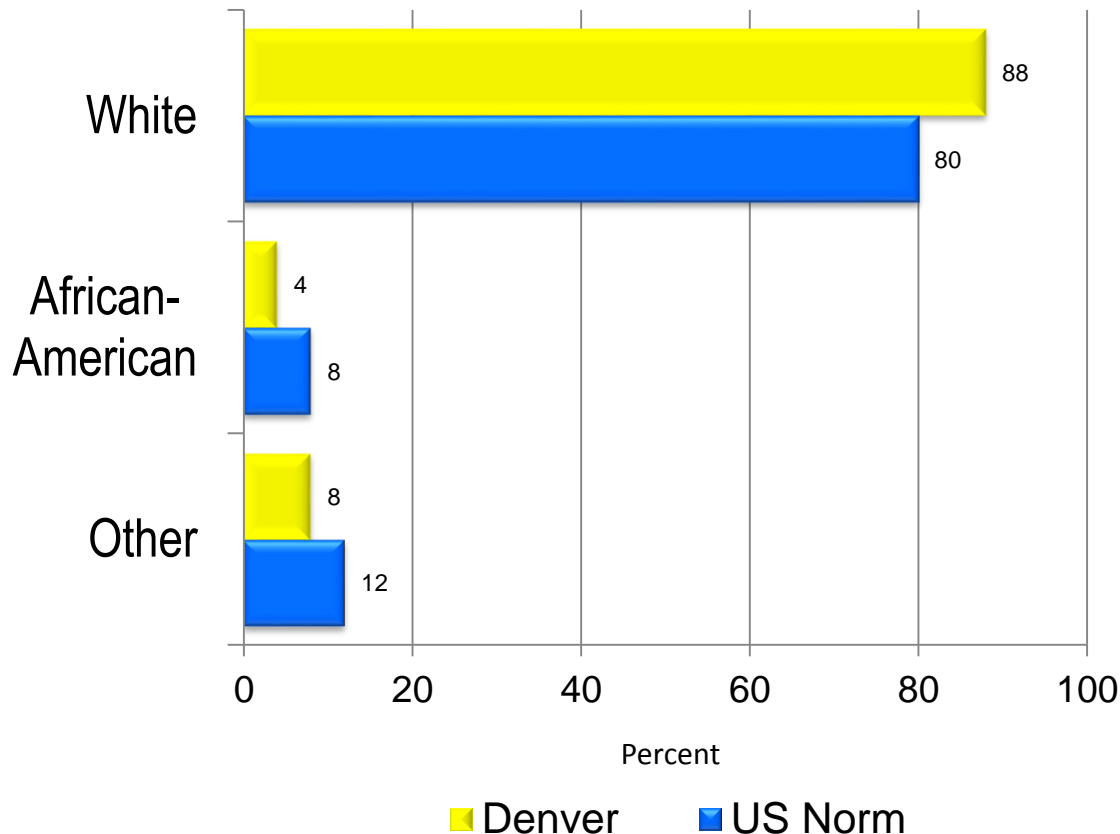
Base: Overnight Business Trips



Race/Ethnicity of Overnight Leisure Travelers to Denver



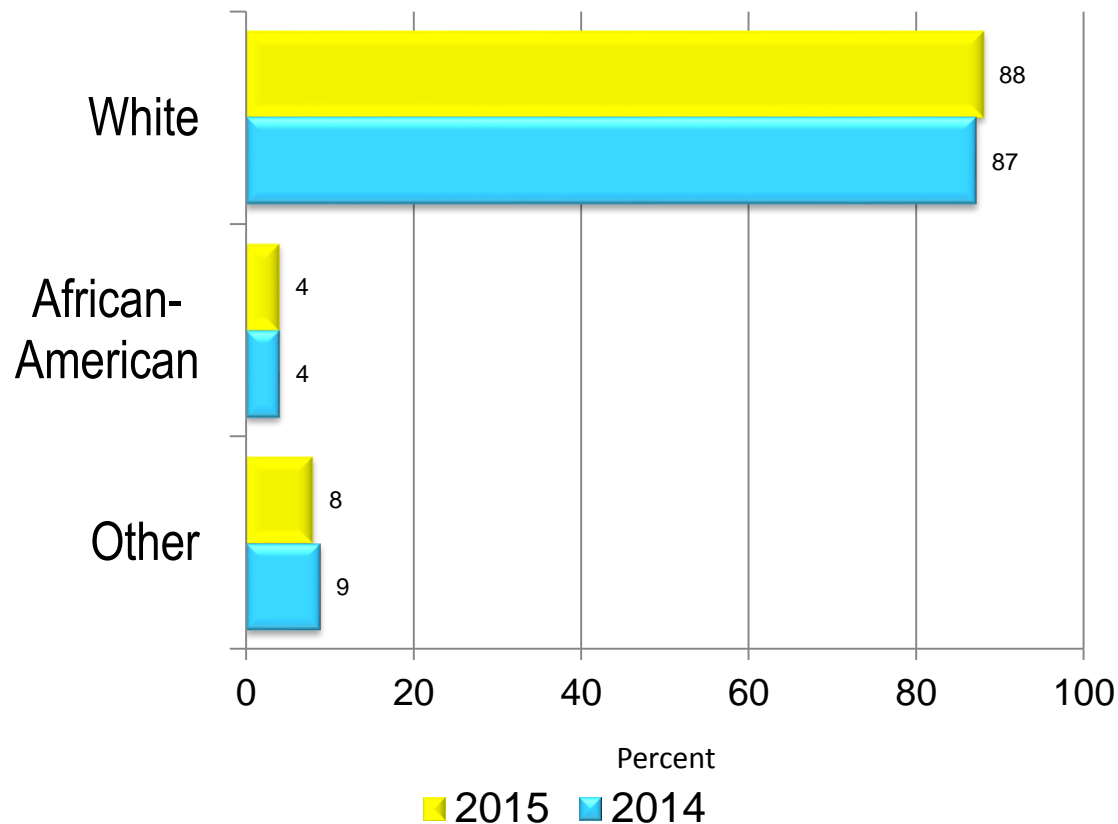
Base: Overnight Leisure Trips



Race/Ethnicity of Overnight Leisure Travelers to Denver



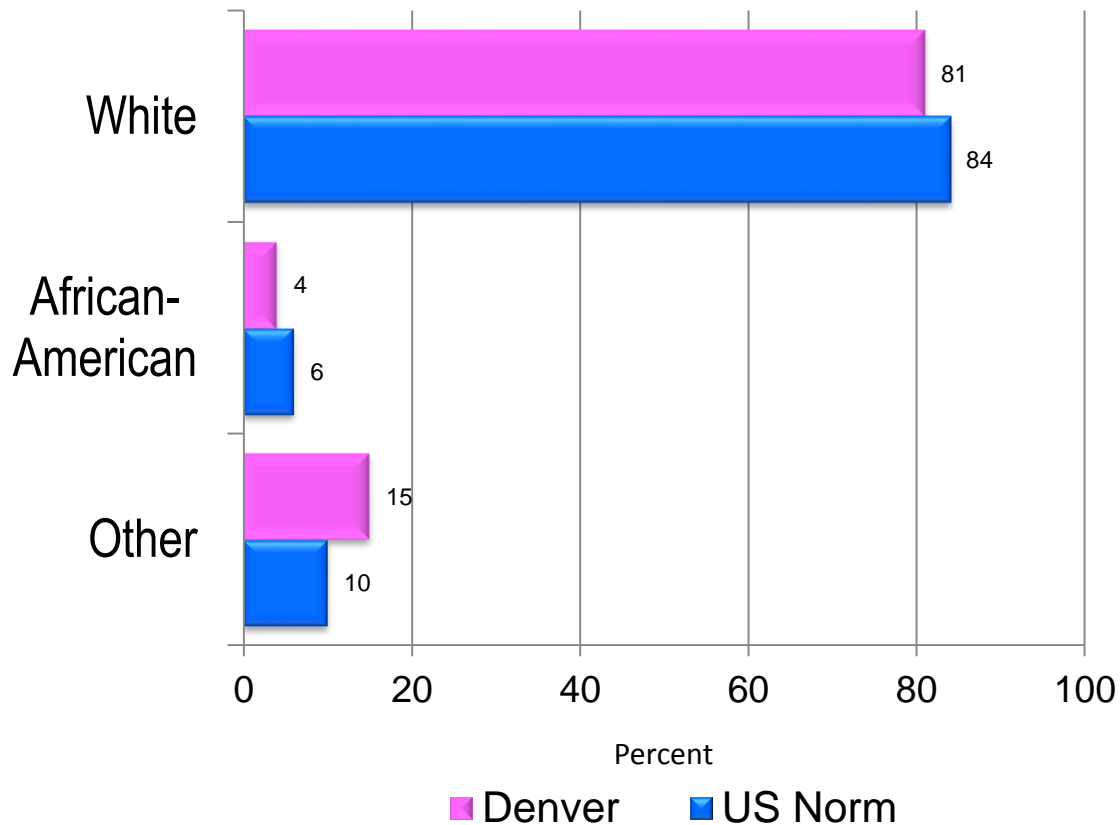
Base: Overnight Leisure Trips



Race/Ethnicity of Overnight Business Travelers to Denver



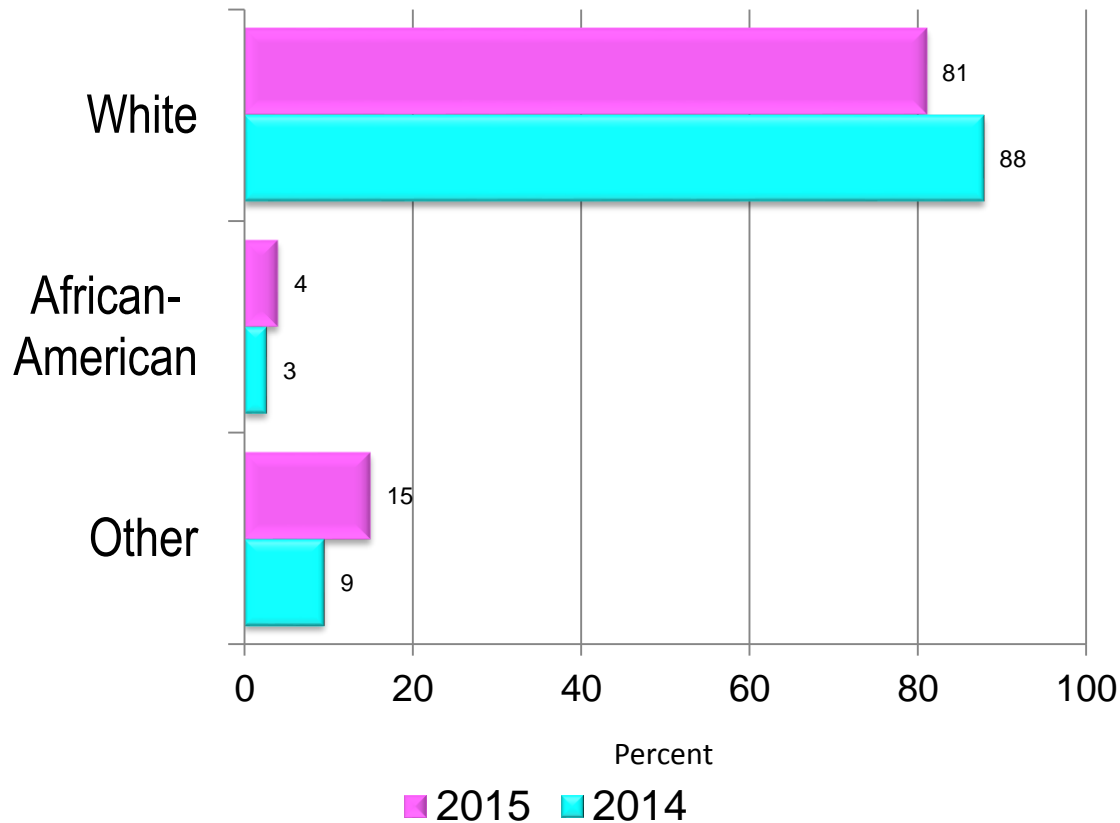
Base: Overnight Business Trips



Race/Ethnicity of Overnight Business Travelers to Denver



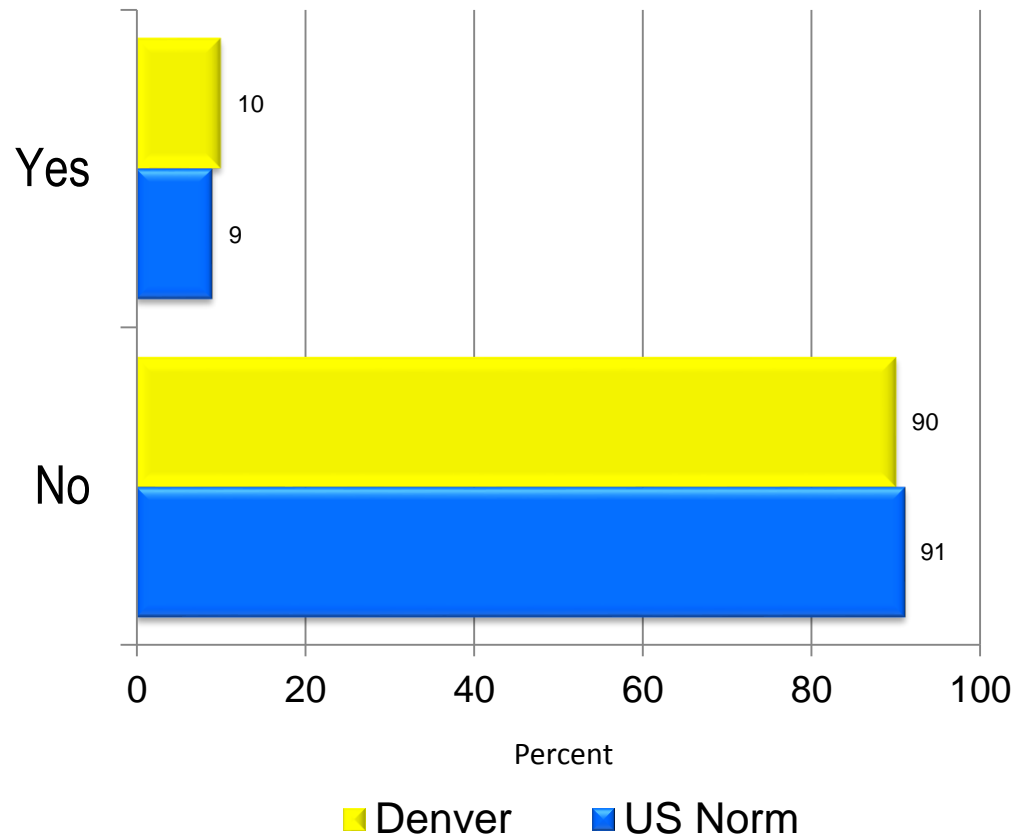
Base: Overnight Business Trips



Hispanic Background of Overnight Leisure Travelers to Denver



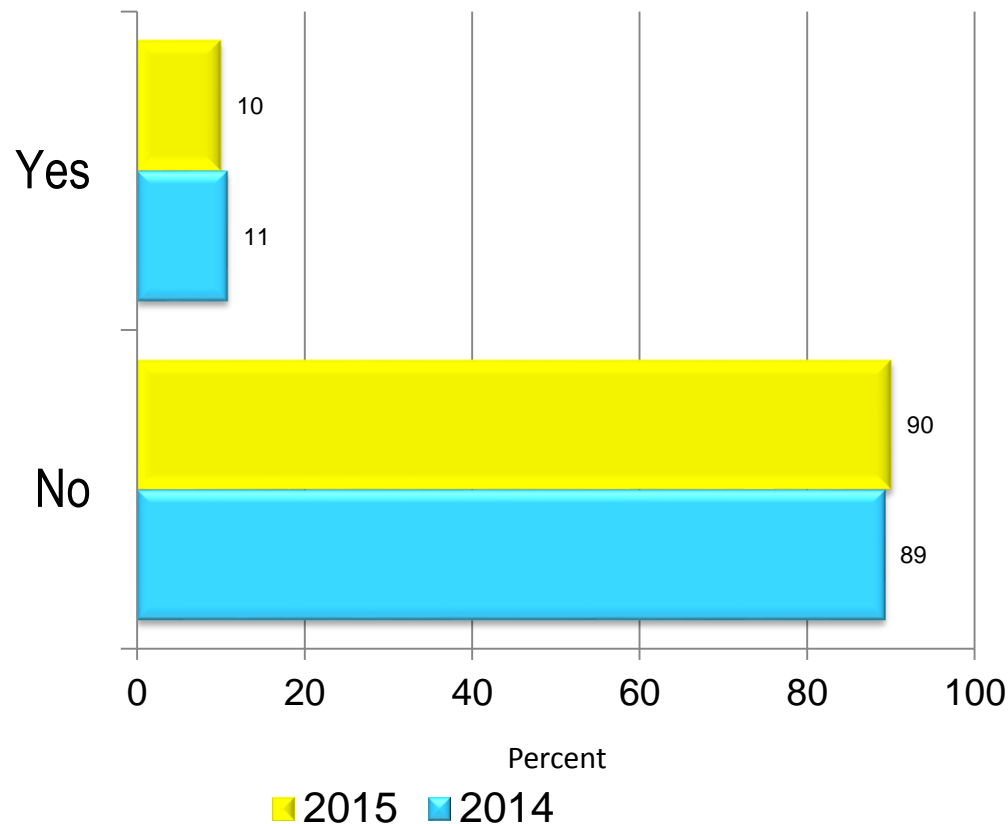
Base: Overnight Leisure Trips



Hispanic Background of Overnight Leisure Travelers to Denver



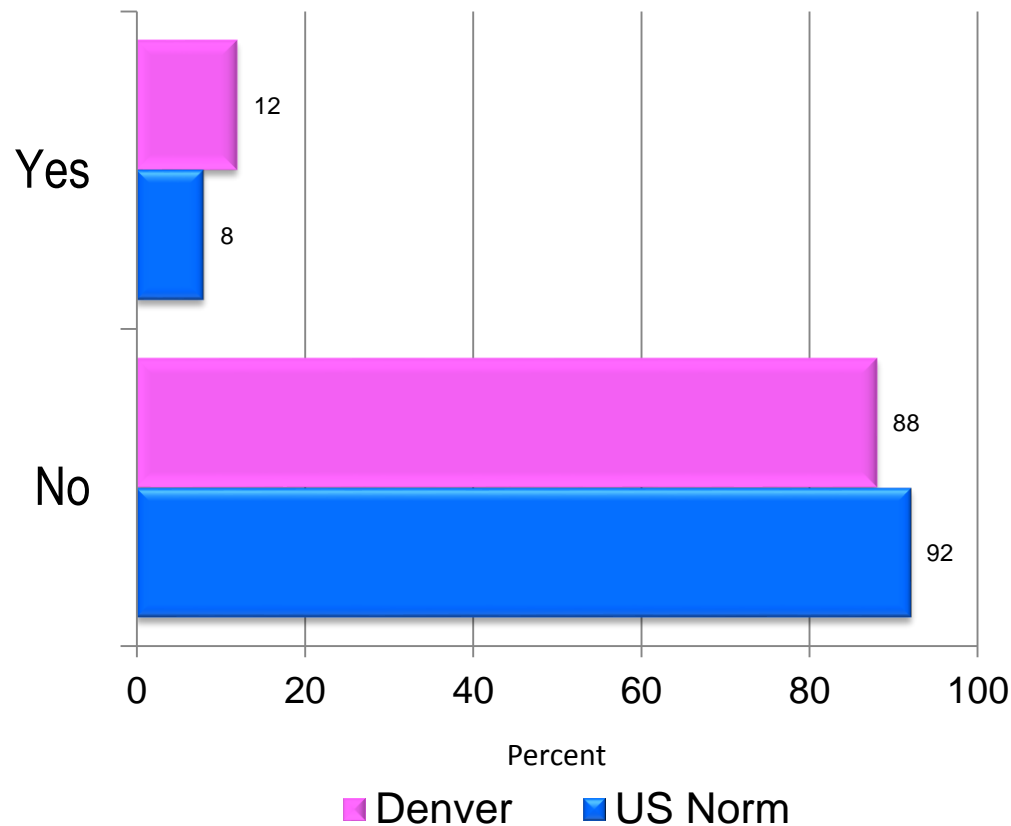
Base: Overnight Leisure Trips



Hispanic Background of Overnight Business Travelers to Denver



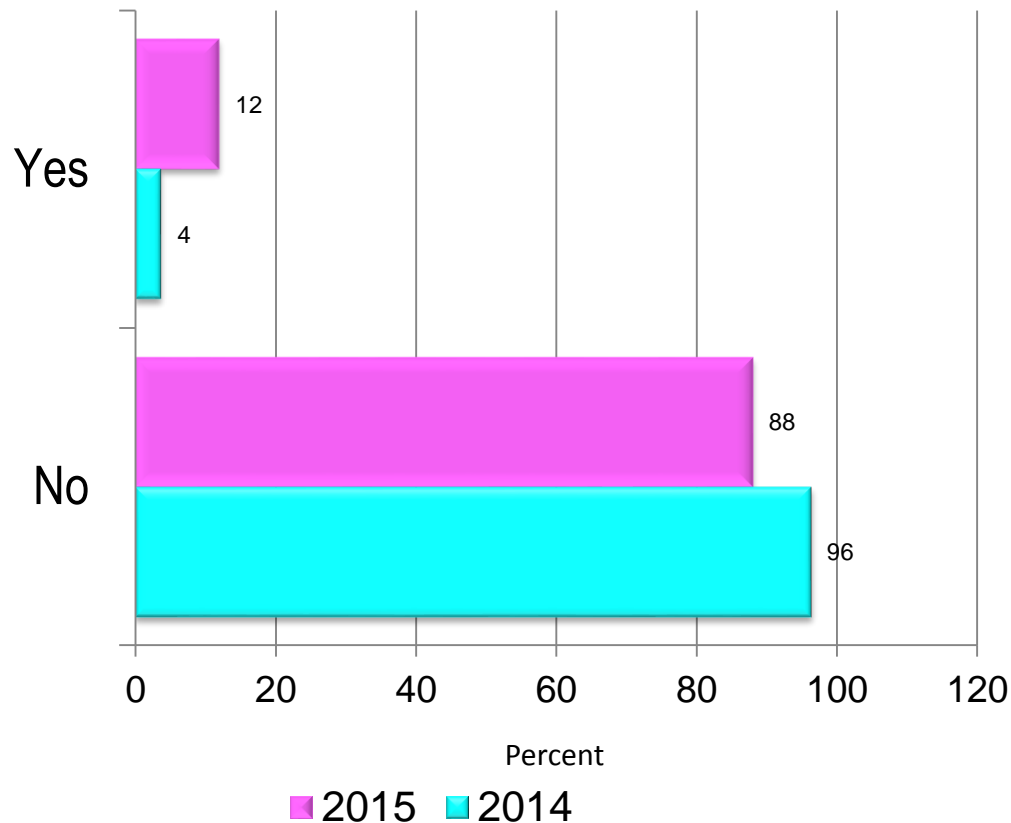
Base: Overnight Business Trips



Hispanic Background of Overnight Business Travelers to Denver



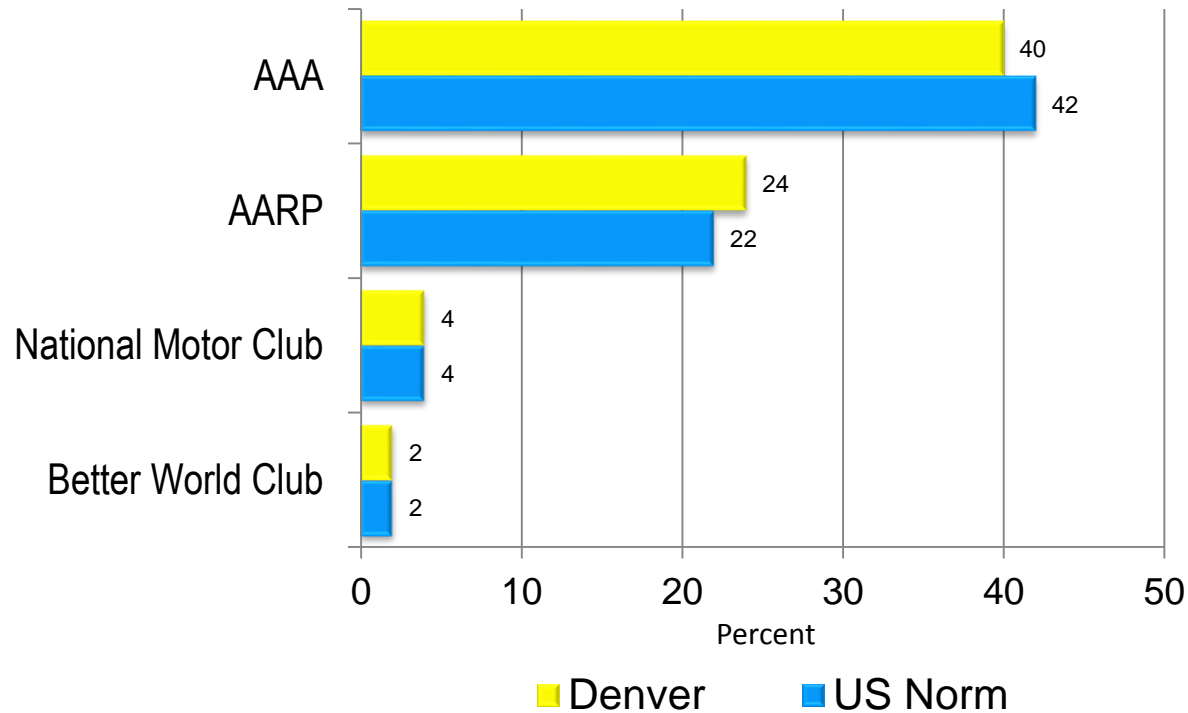
Base: Overnight Business Trips



Membership in Auto/Travel Association of Overnight Leisure Travelers to Denver



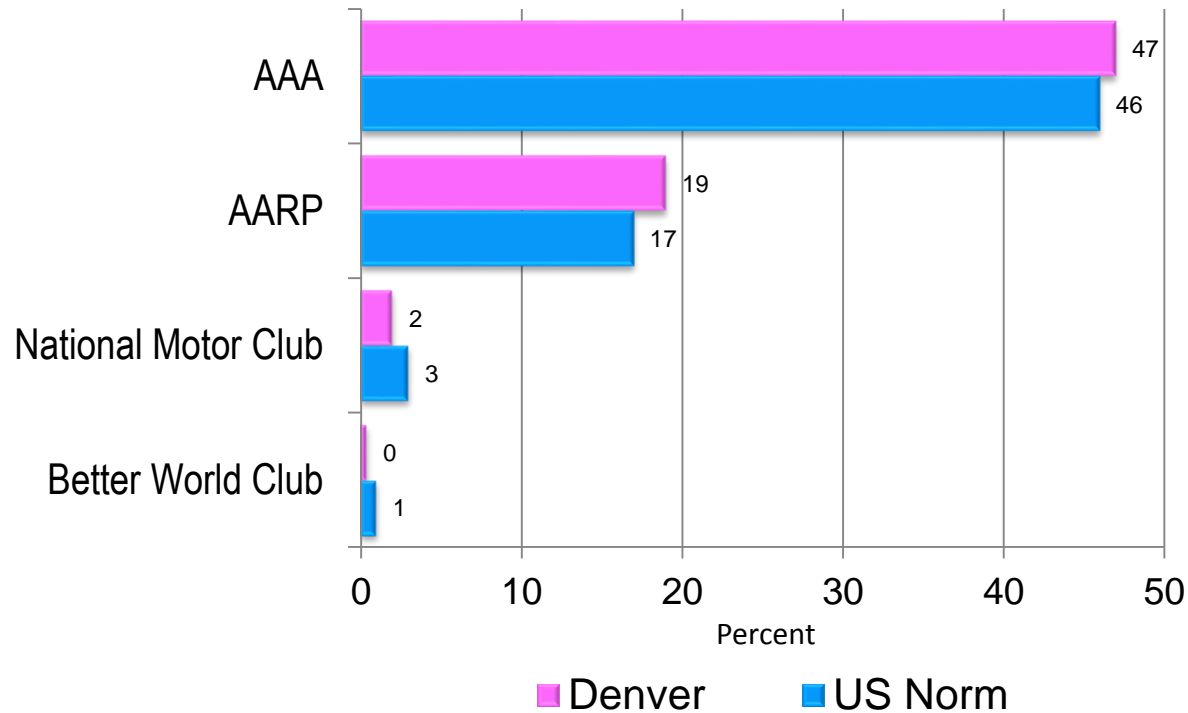
Base: Overnight Leisure Trips



Membership in Auto/Travel Association of Overnight Business Travelers to Denver



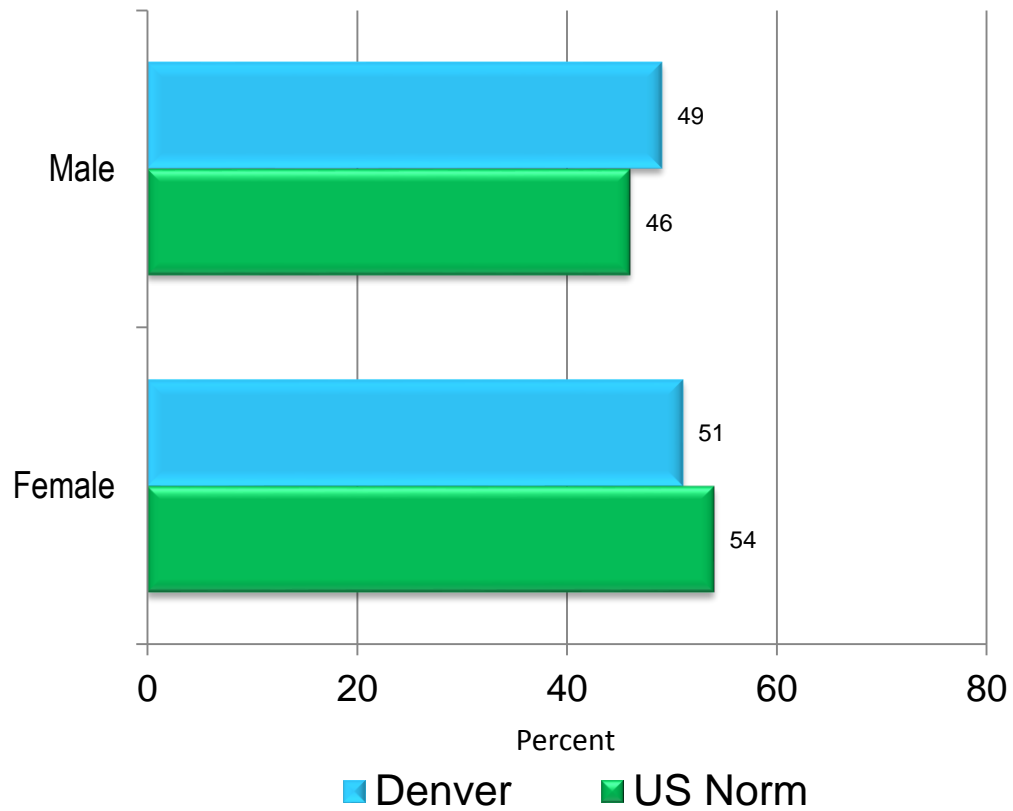
Base: Overnight Business Trips



Gender of Day Visitors



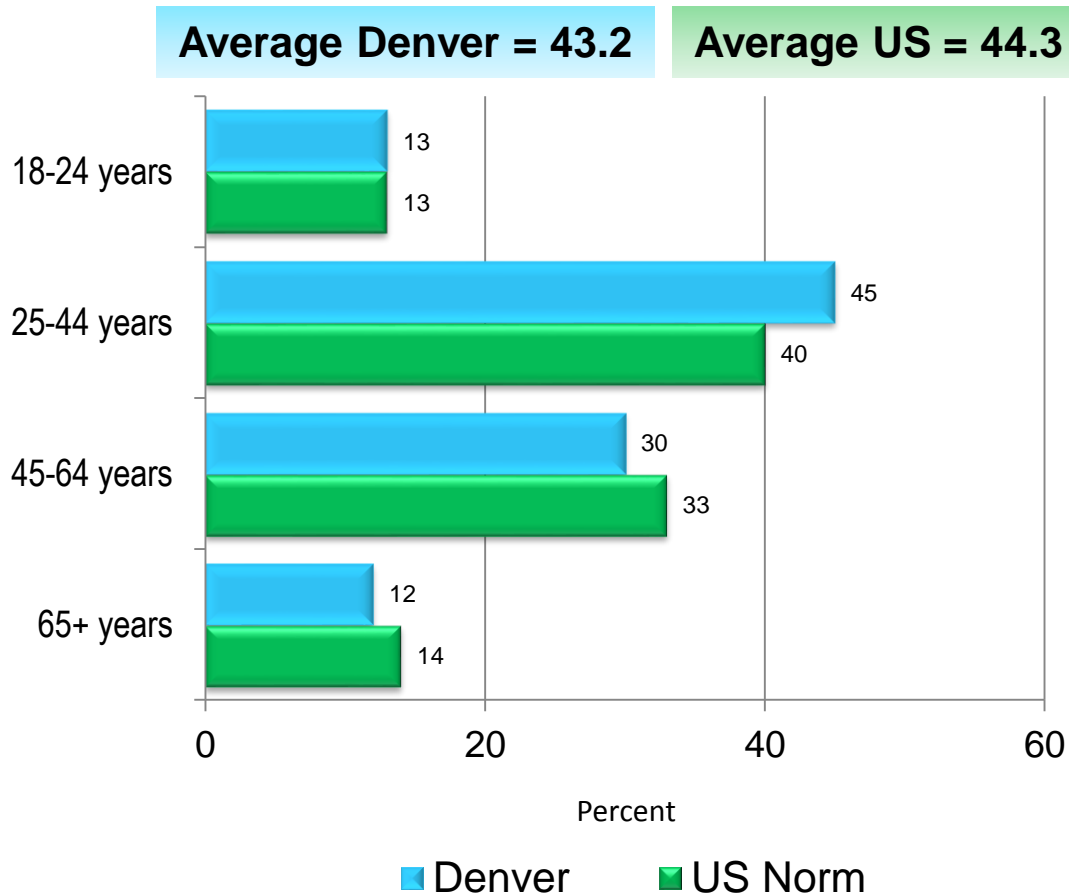
Base: Day Trips



Age of Day Visitors



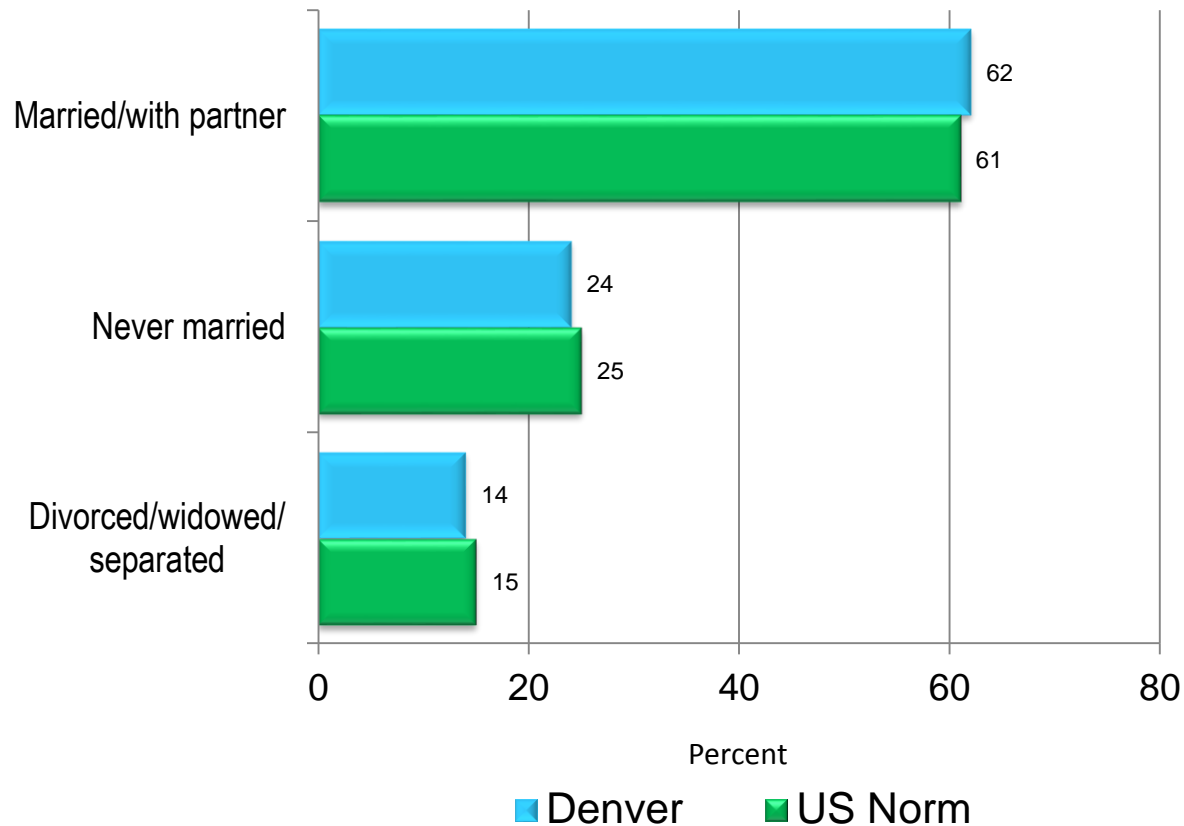
Base: Day Trips



Marital Status of Day Visitors



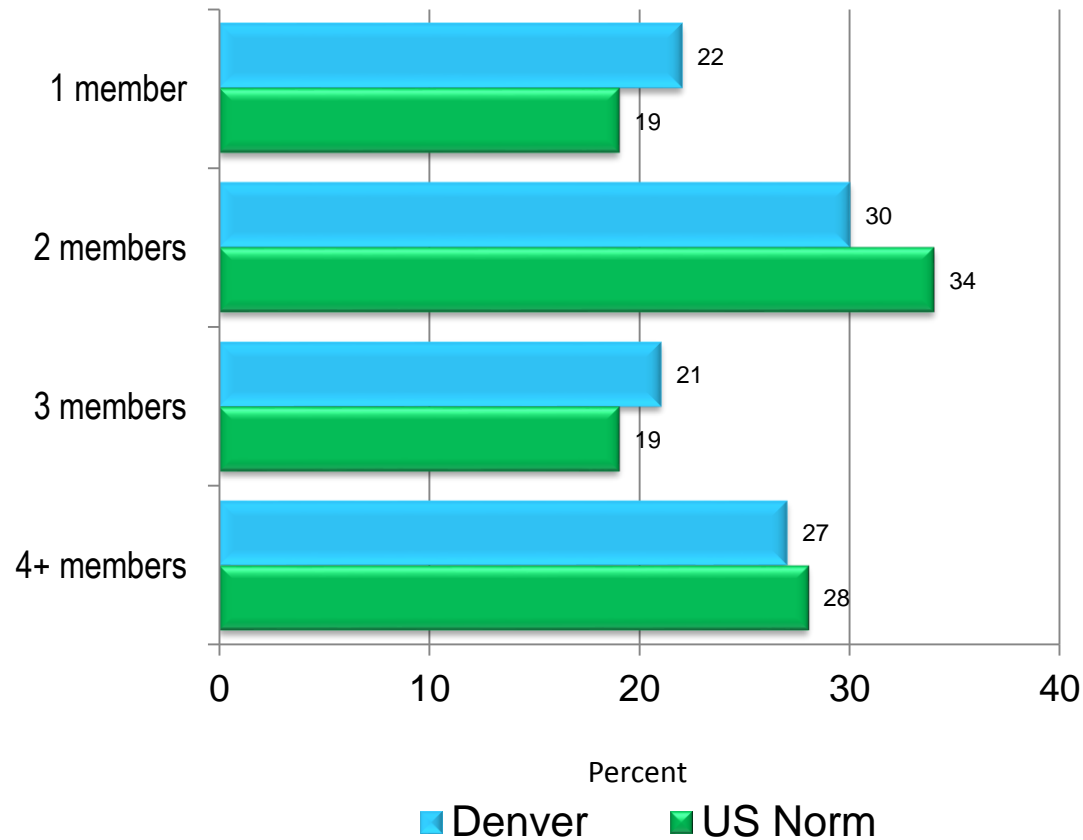
Base: Day Trips



Household Size of Day Visitors



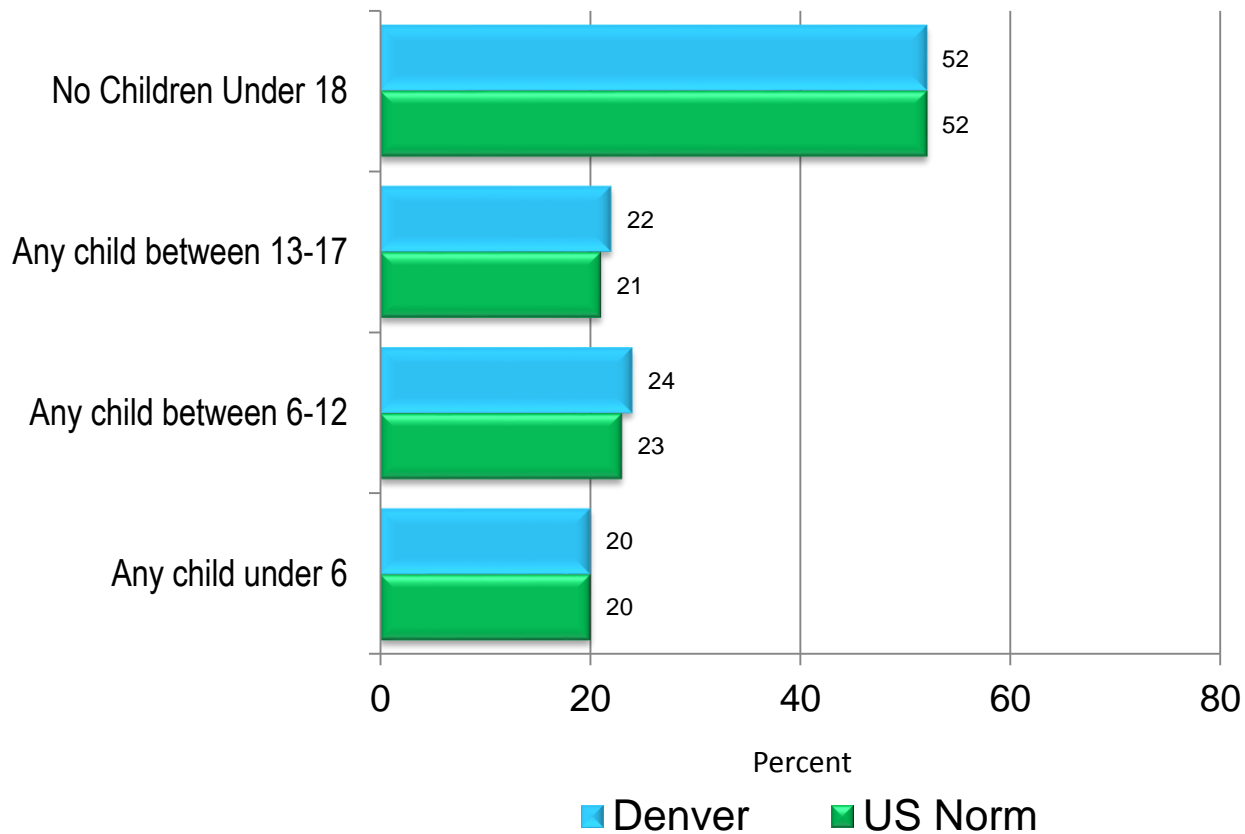
Base: Day Trips



Children in Household of Day Visitors



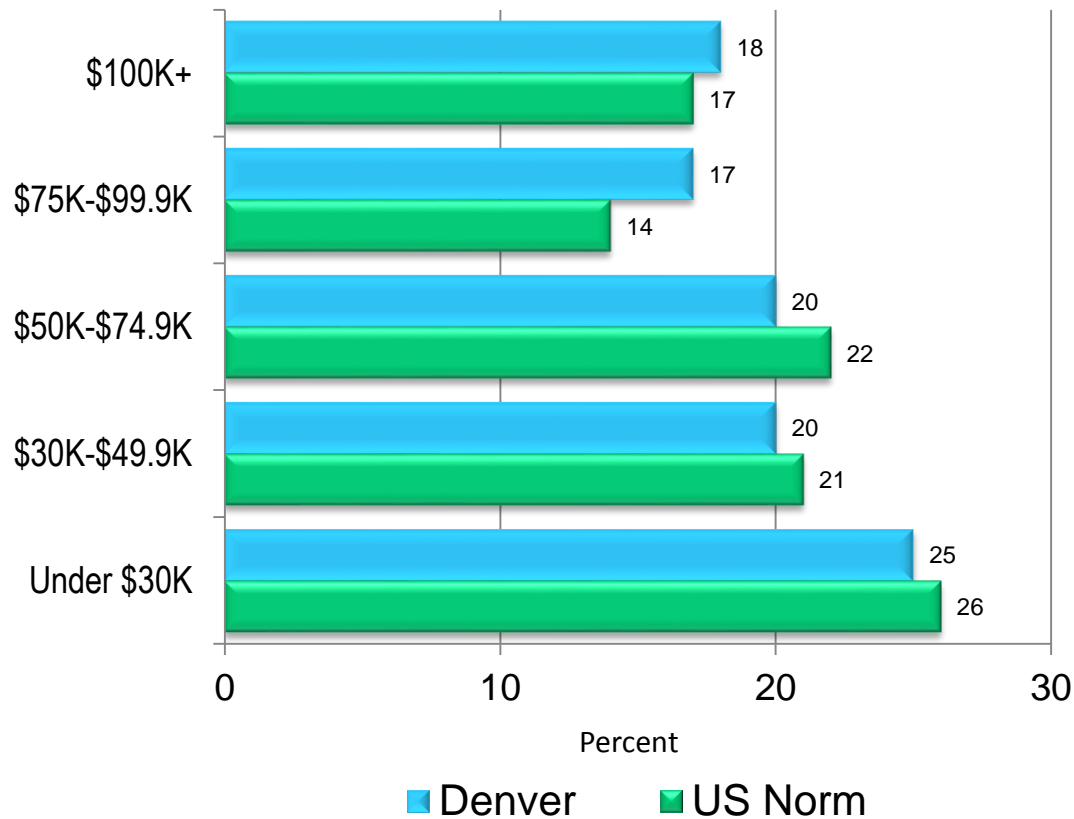
Base: Day Trips



Income of Day Visitors



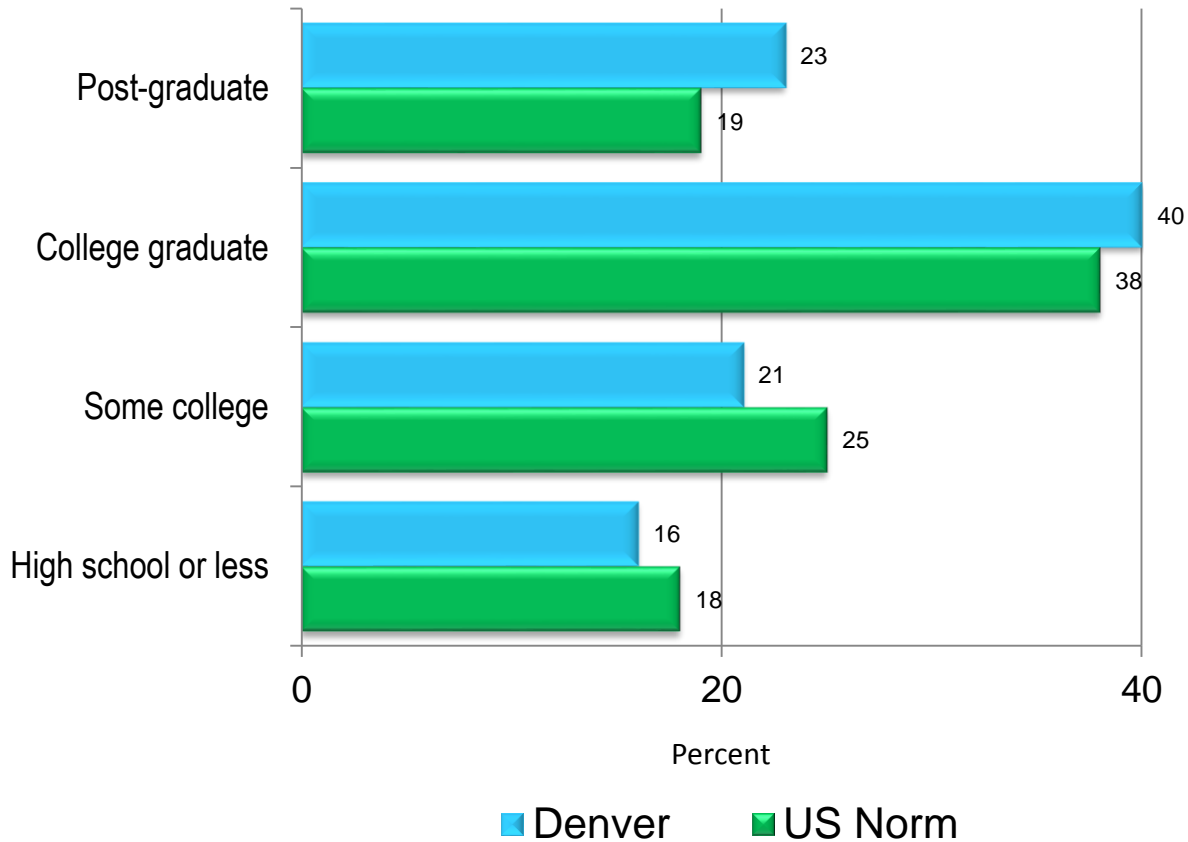
Base: Day Trips



Education of Day Visitors



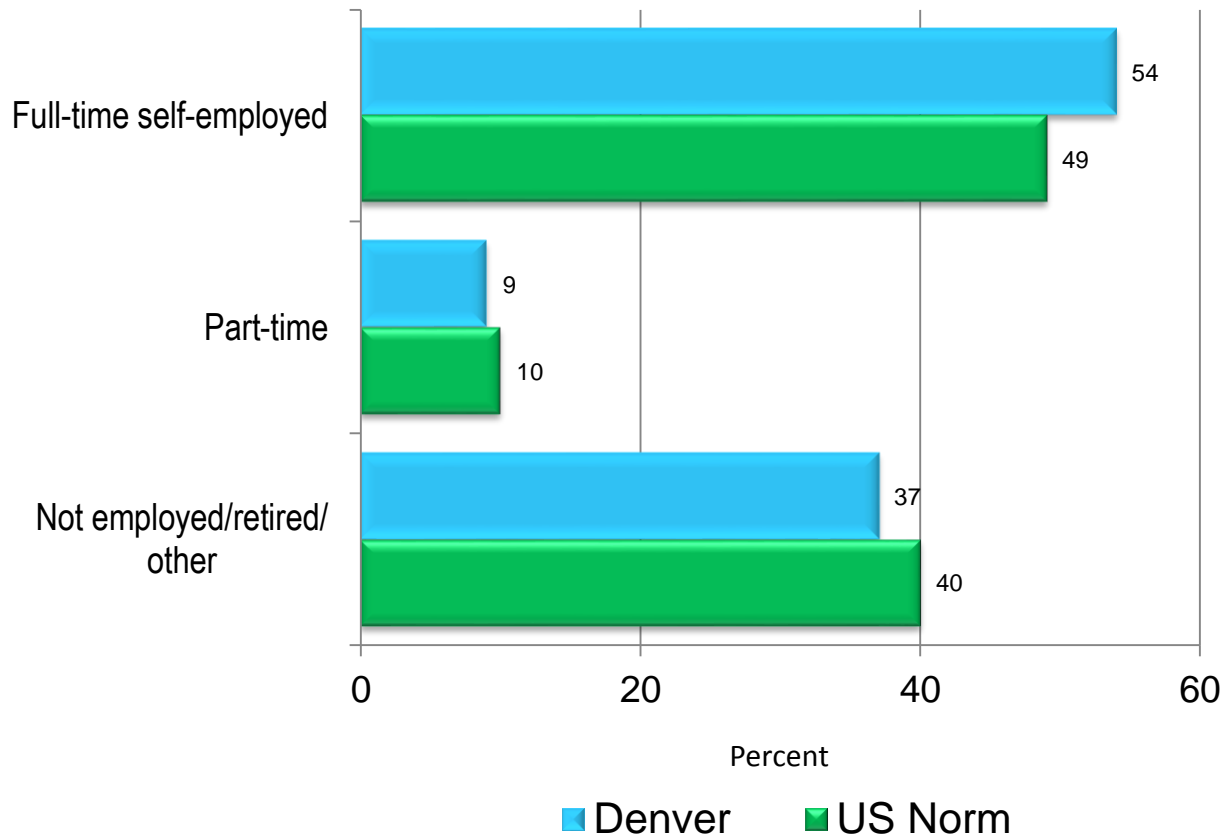
Base: Day Trips



Employment of Day Visitors



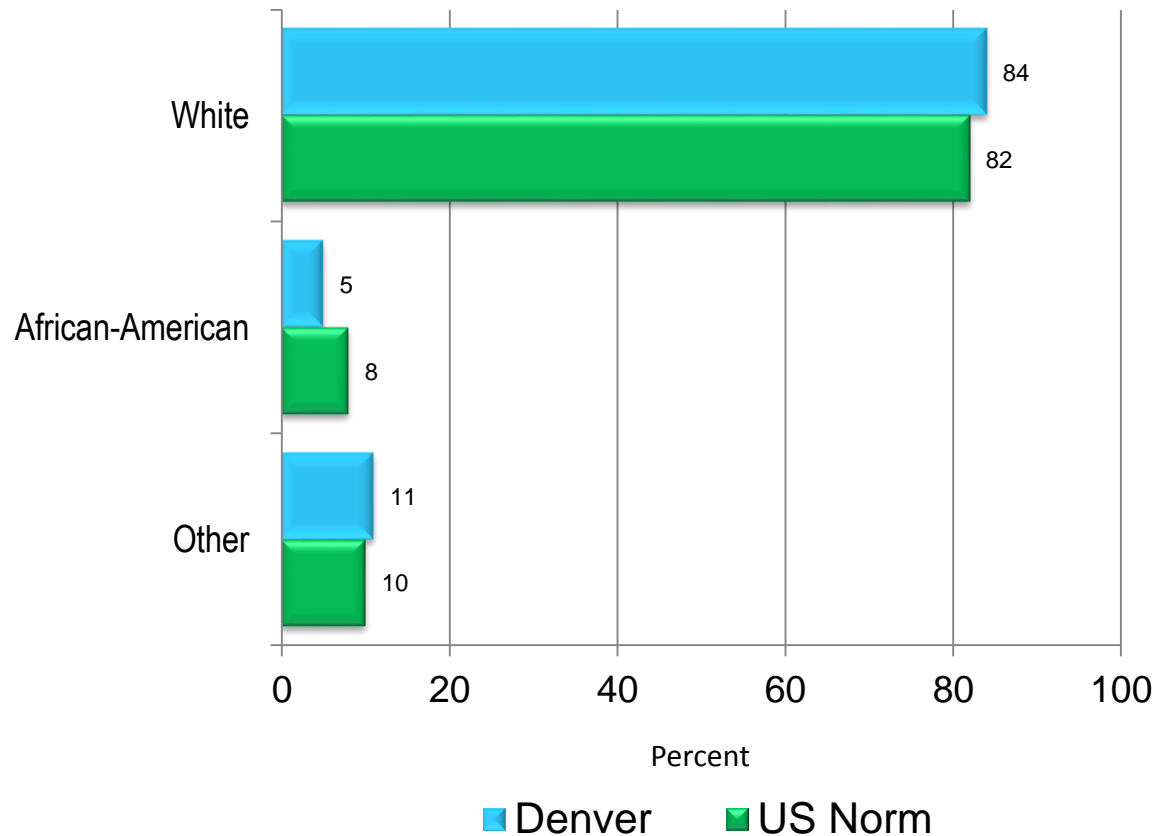
Base: Day Trips



Race/Ethnicity of Day Visitors



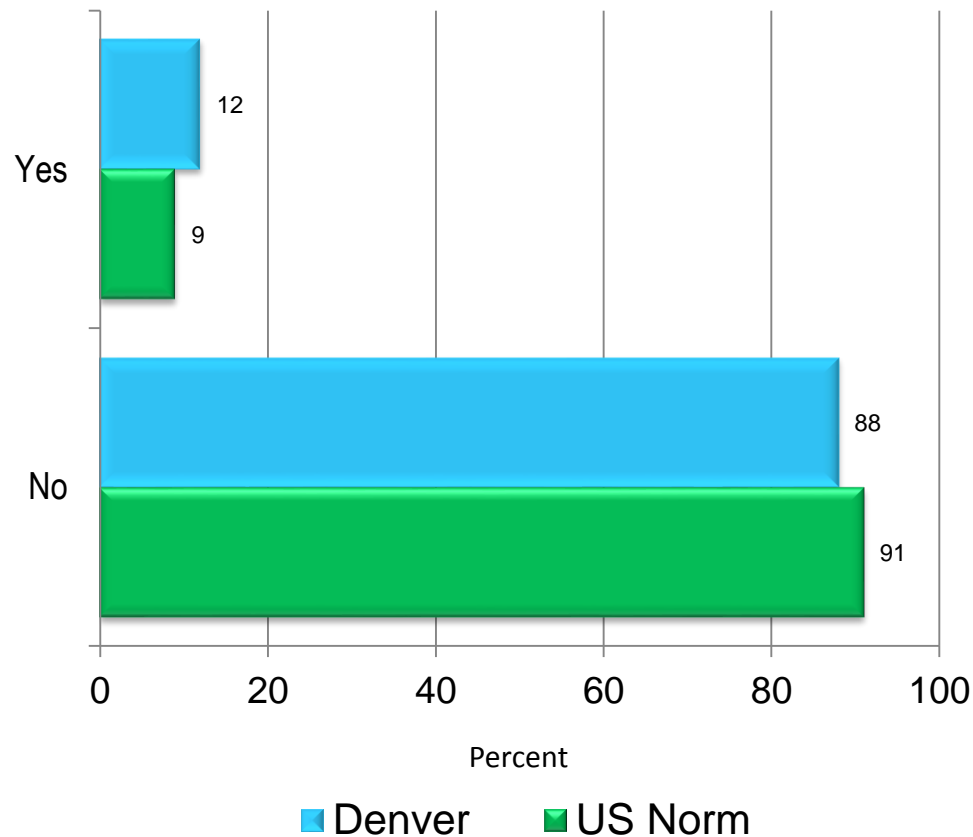
Base: Day Trips



Hispanic Background of Day Visitors

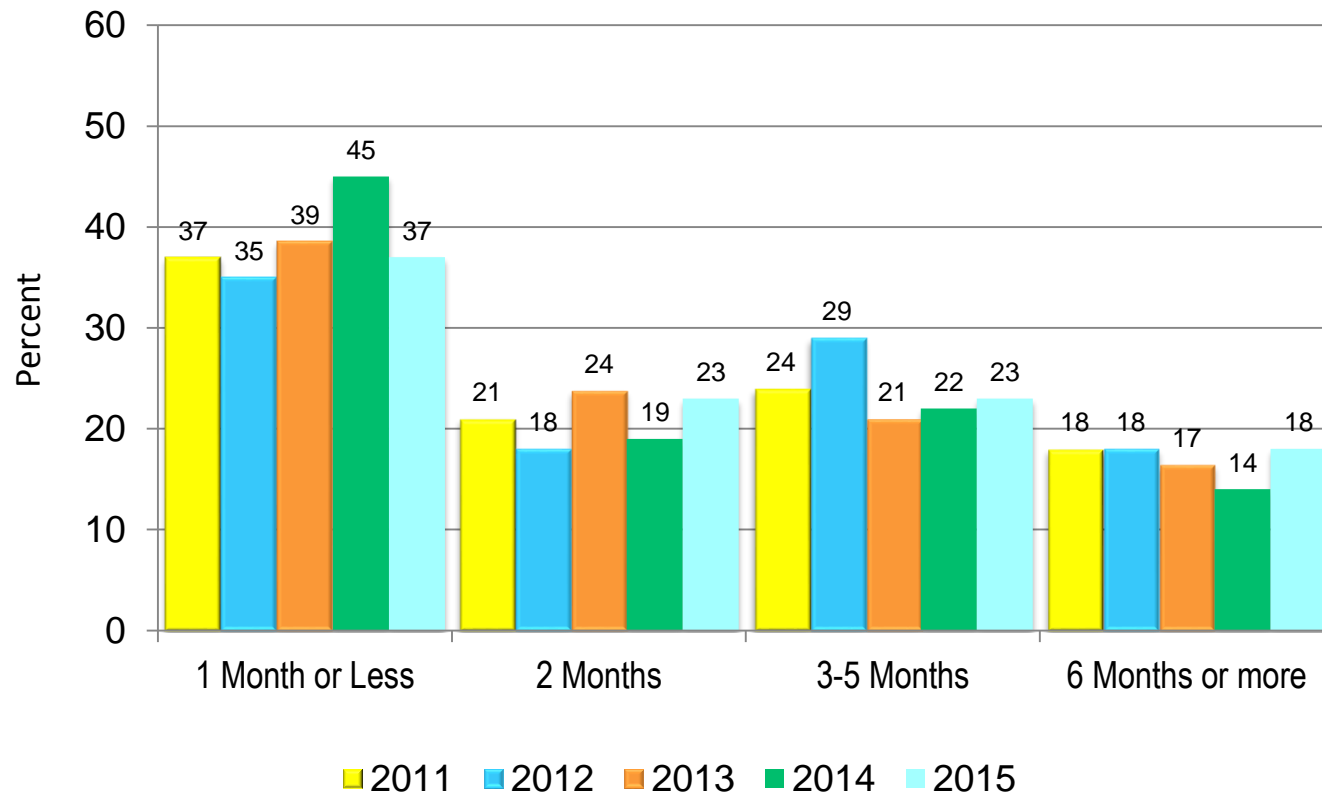


Base: Day Trips

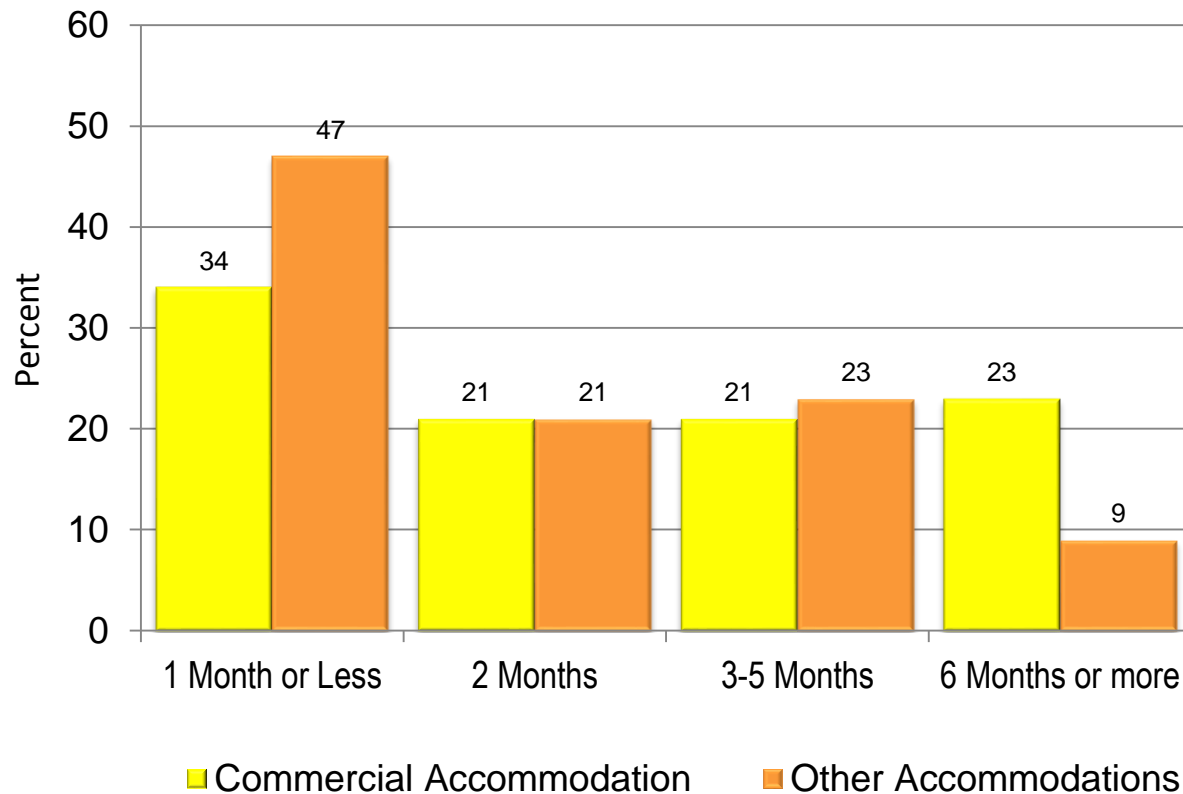


Denver Overnight Trip Planning & Booking

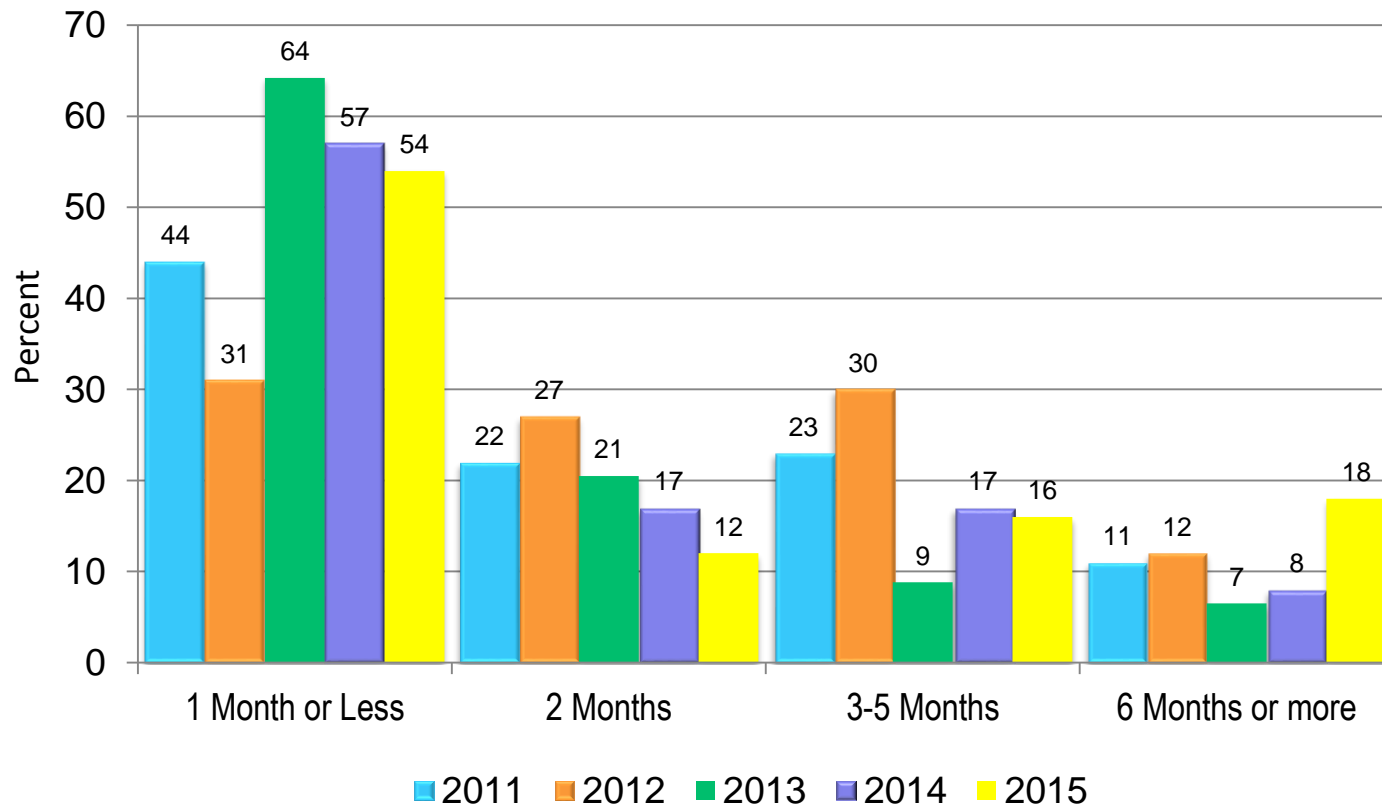
Denver's Planning Cycle — Leisure



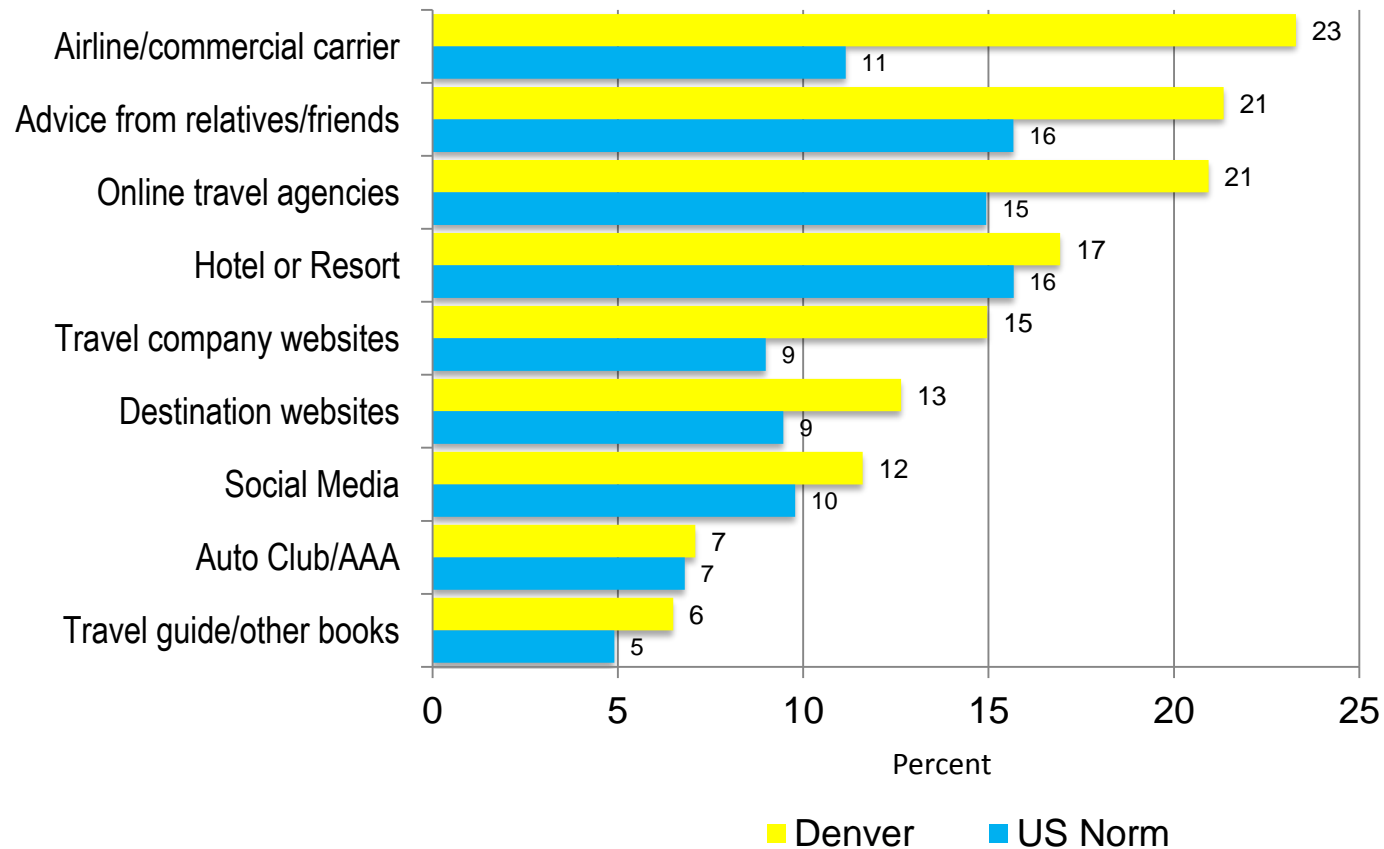
Planning Cycle — By Type of Accommodations



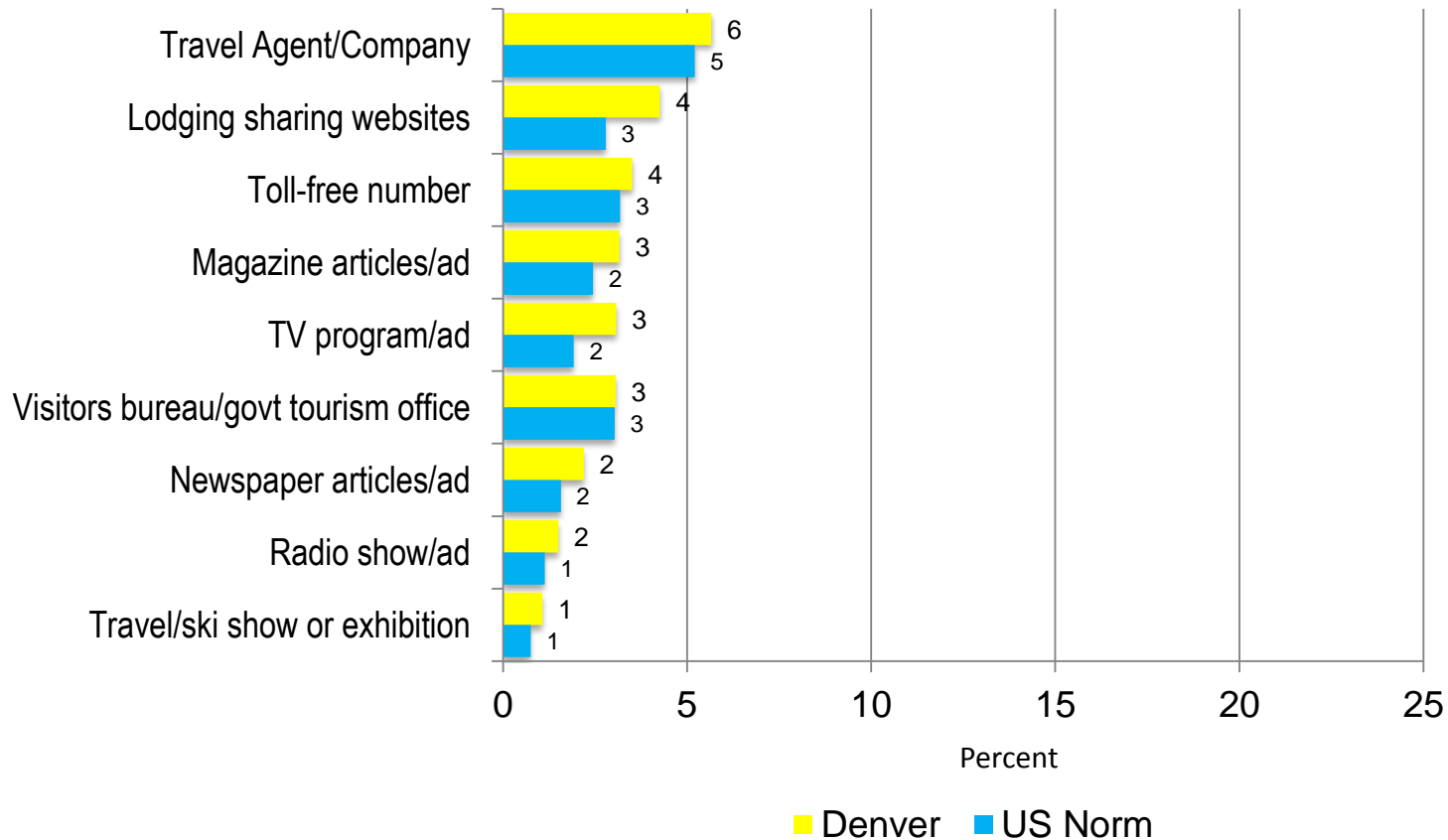
Denver's Planning Cycle — Business



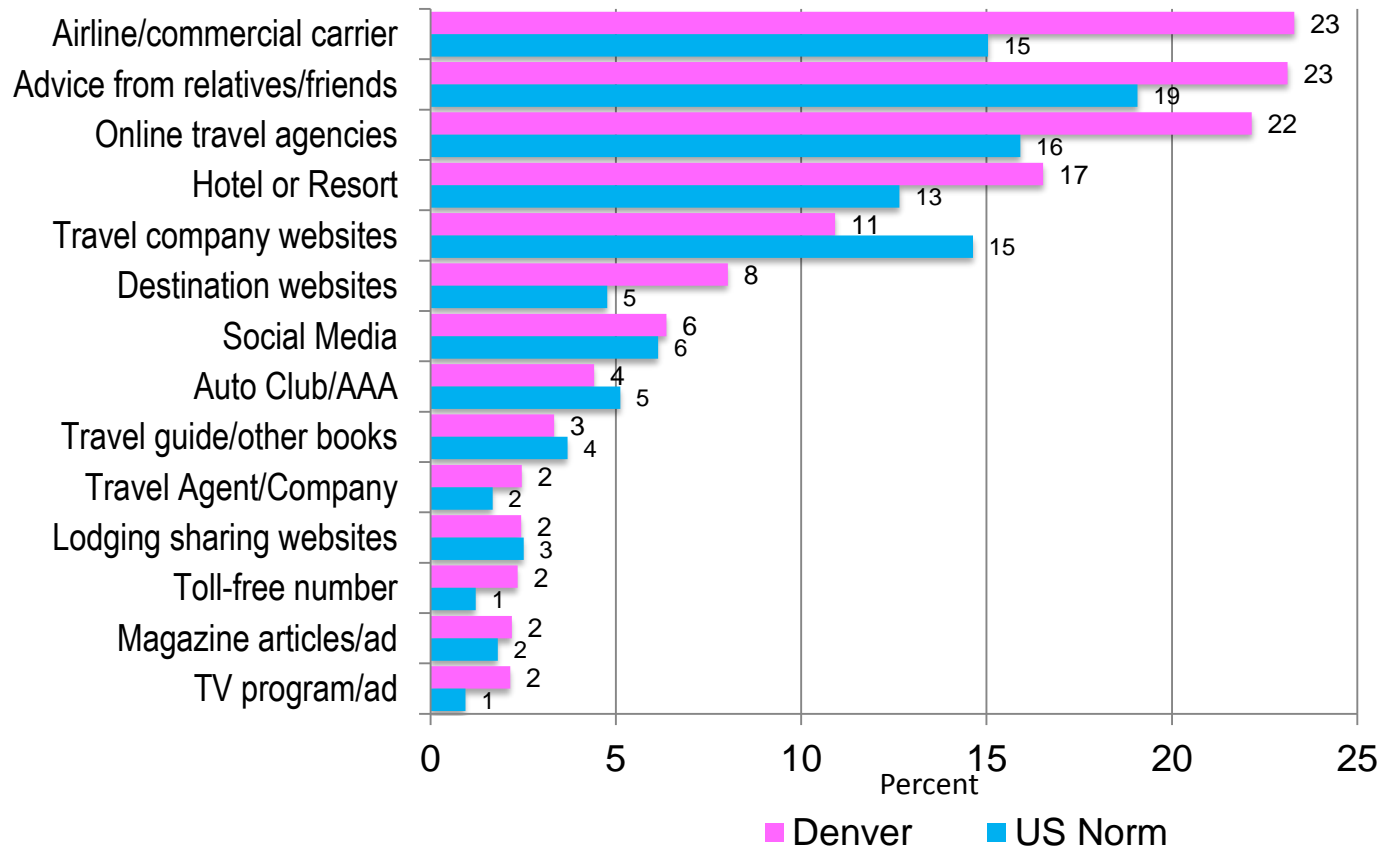
Information Sources Used For Planning - Leisure



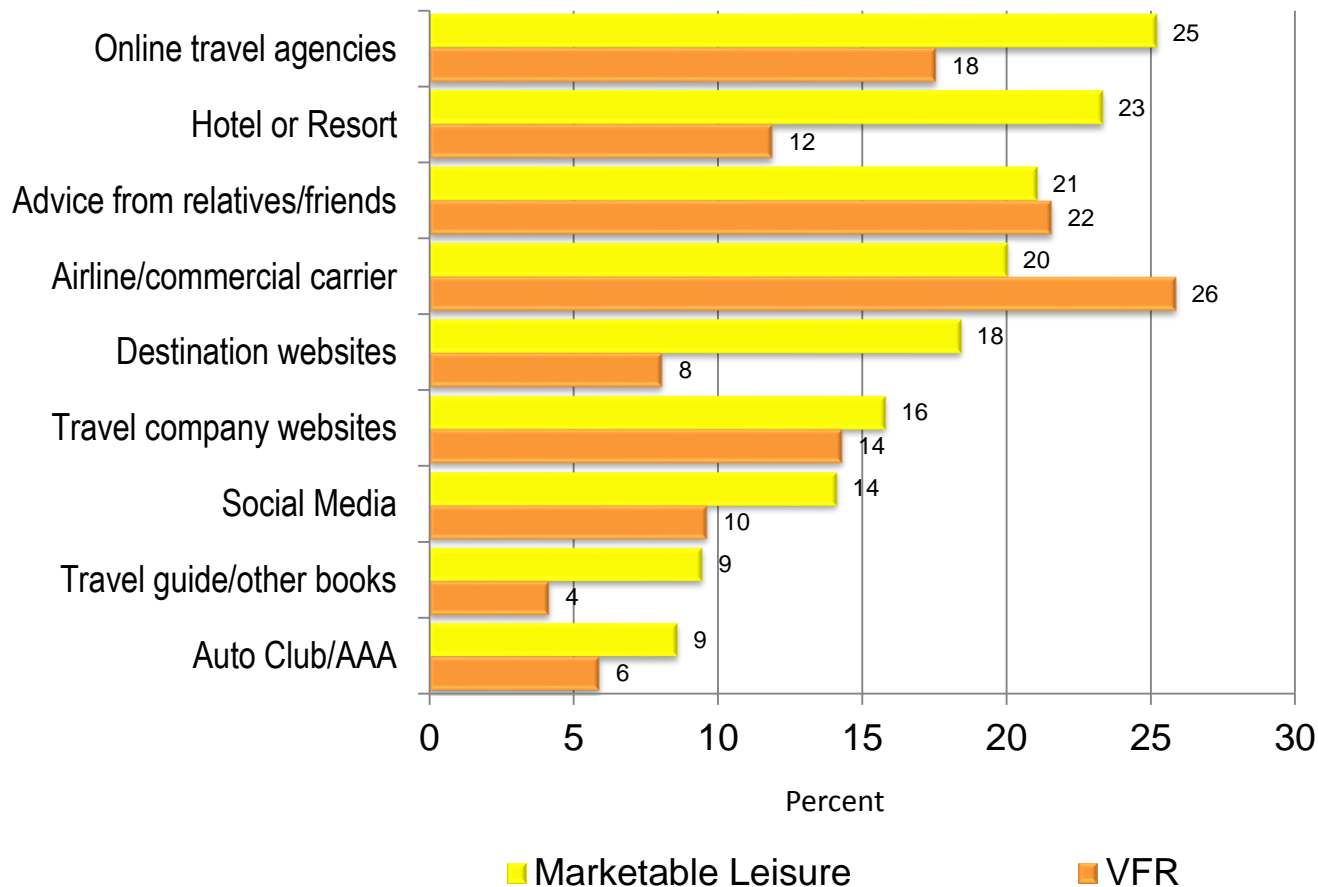
Information Sources Used For Planning – Leisure (Cont'd)



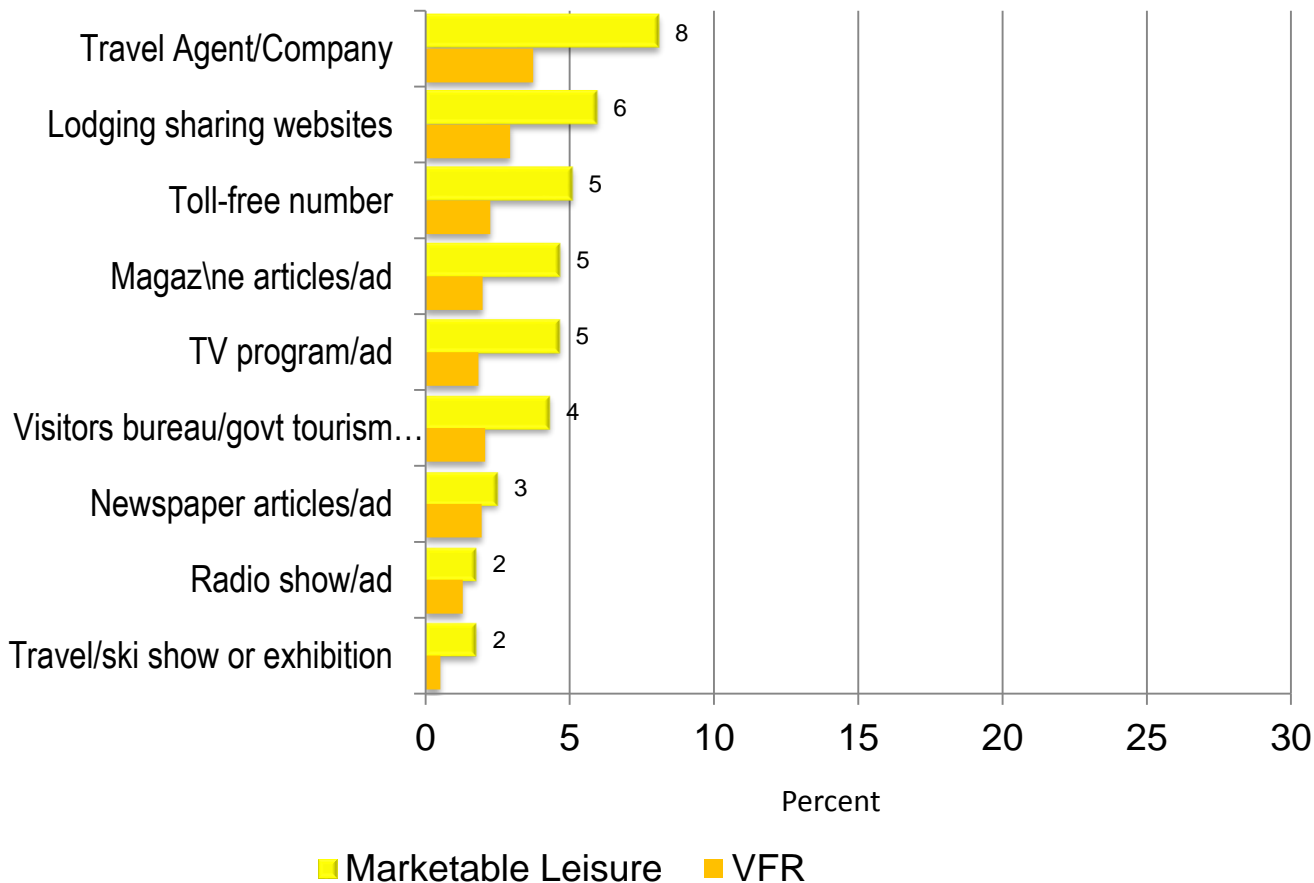
Information Sources Used For Planning – Business



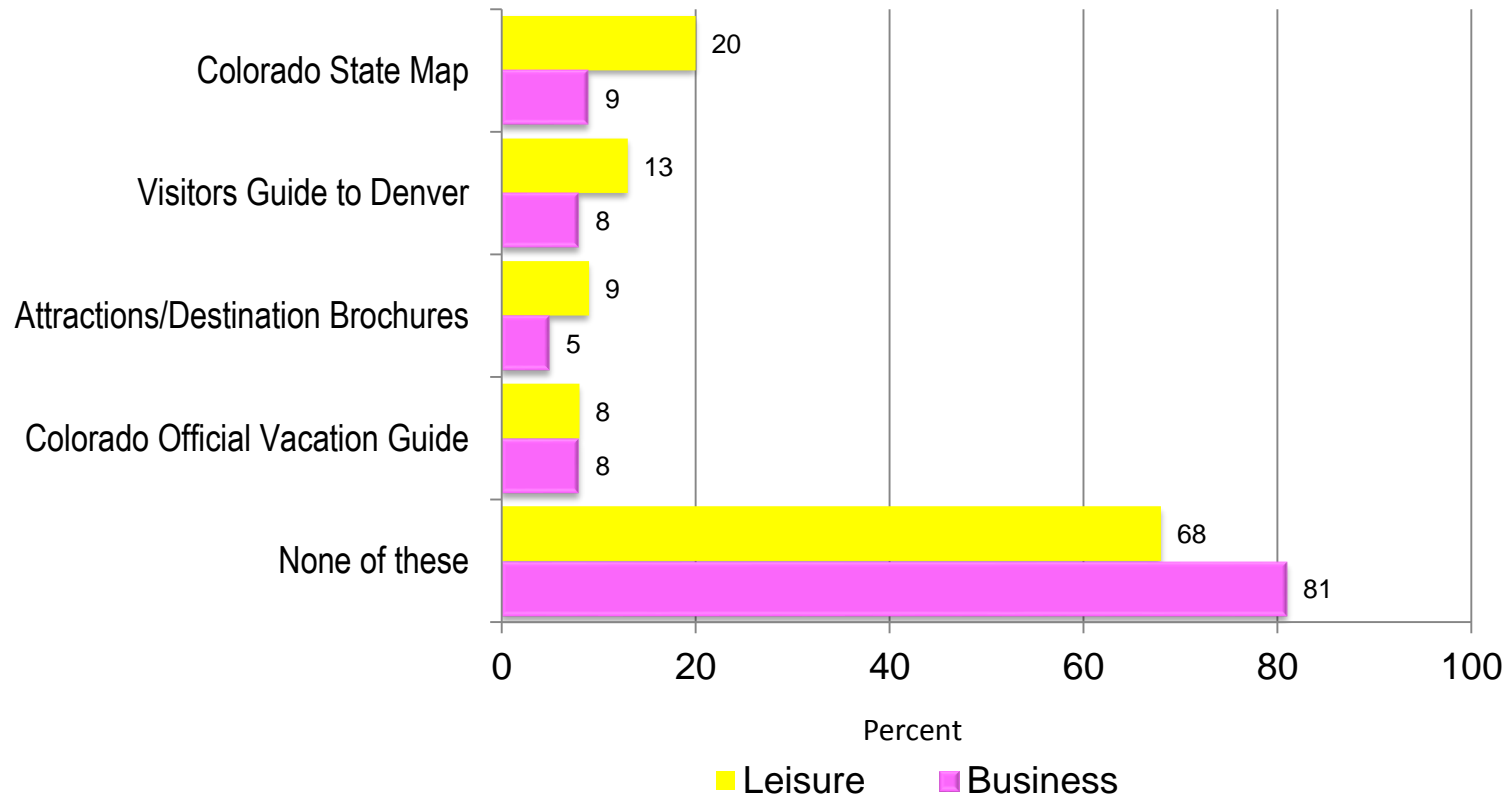
Information Sources Used For Planning Leisure Trip



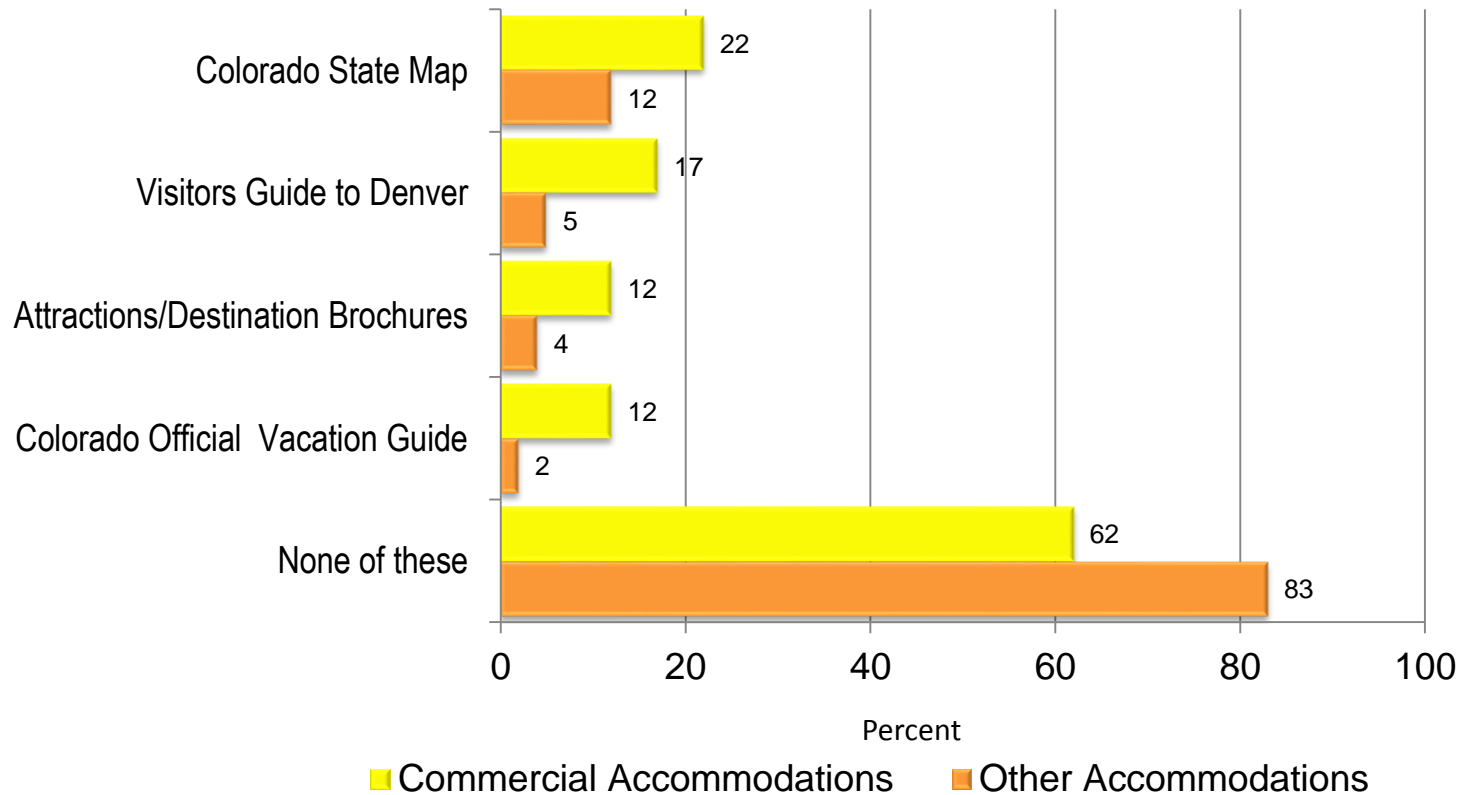
Information Sources Used For Planning Leisure Trip (Cont'd)



Publications Used For Trip Planning



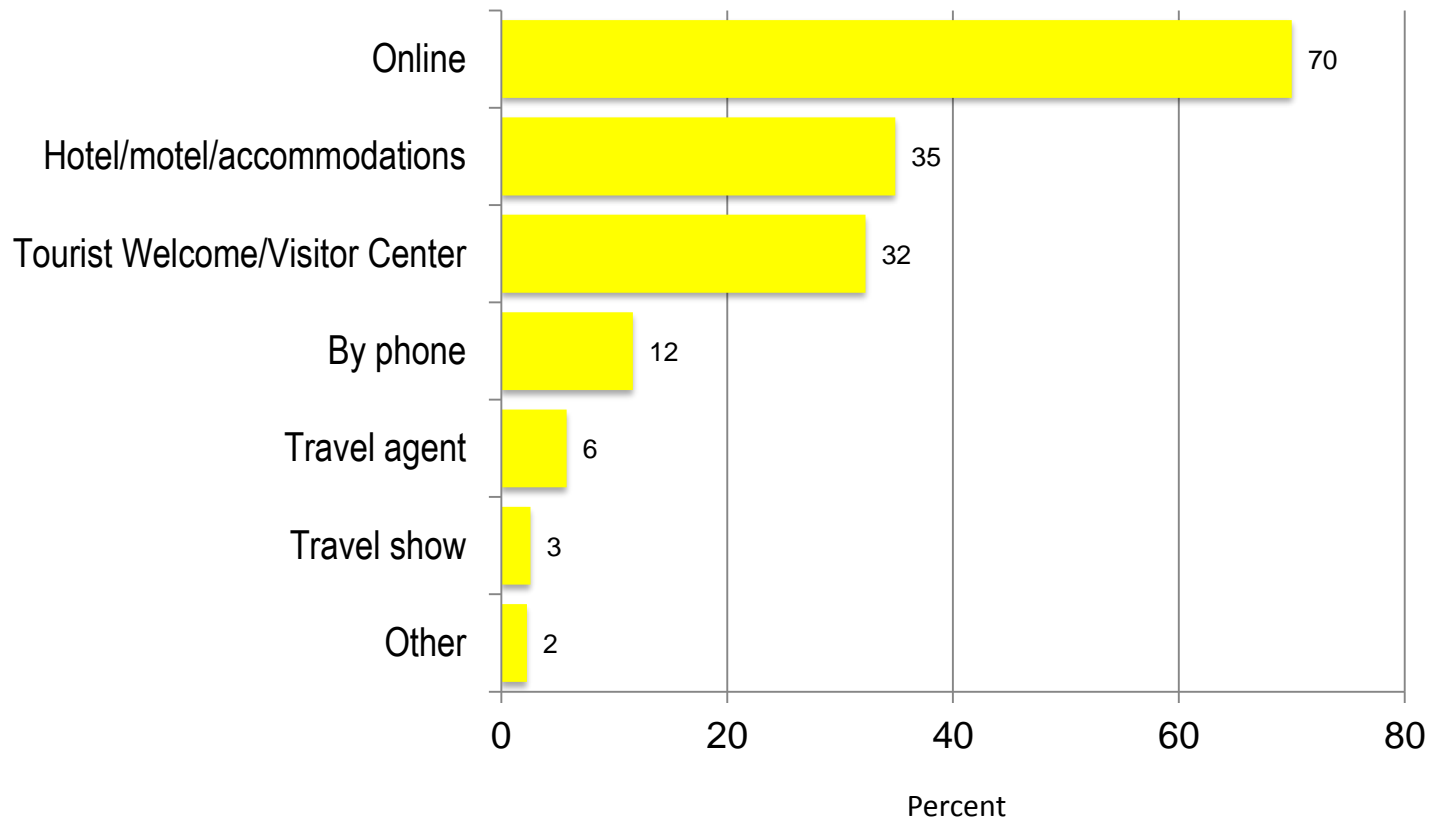
Publications Used For Trip Planning- By Type of Accommodations



Places Where Publications Were Obtained



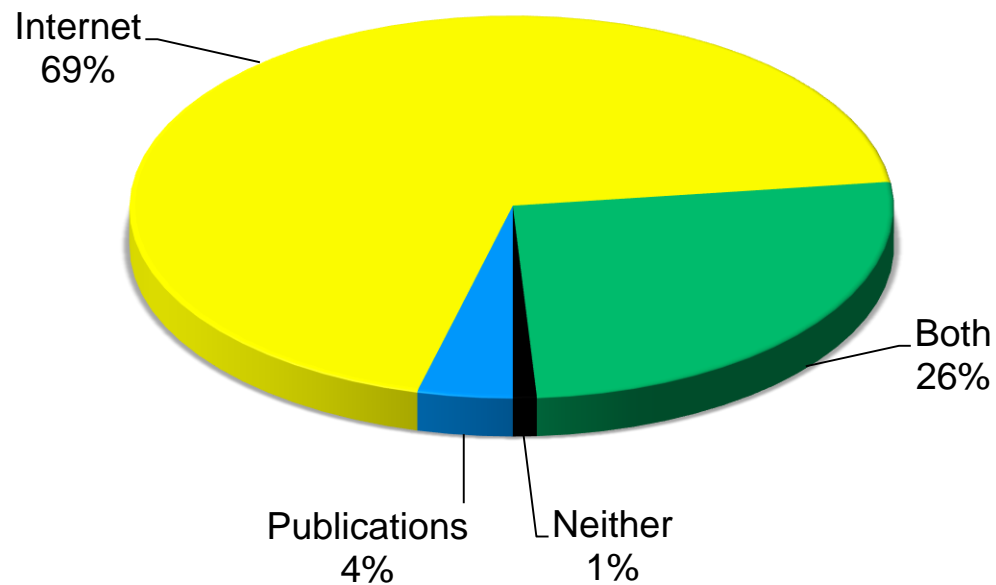
Base: Vacationers who used publications to plan trips



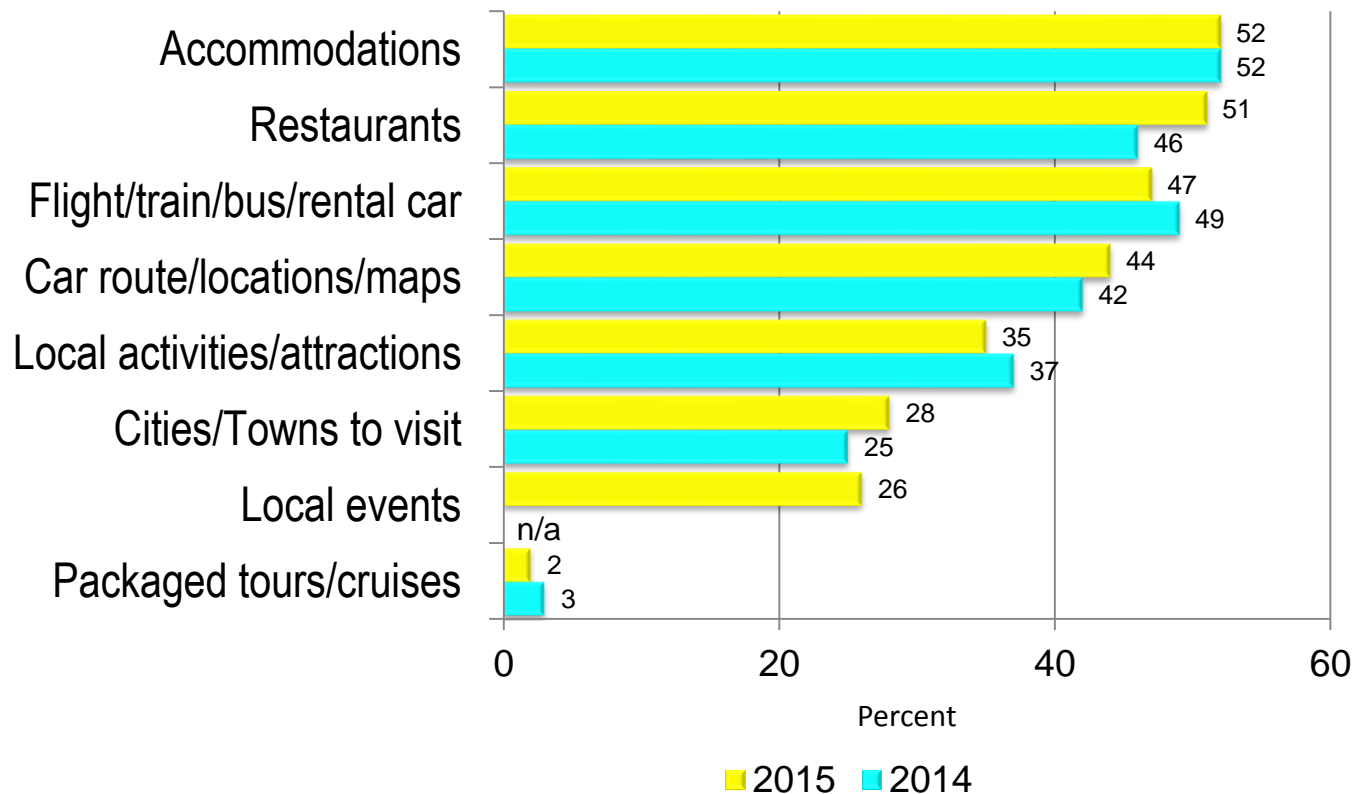
Which of Publications and Internet Were More Helpful?



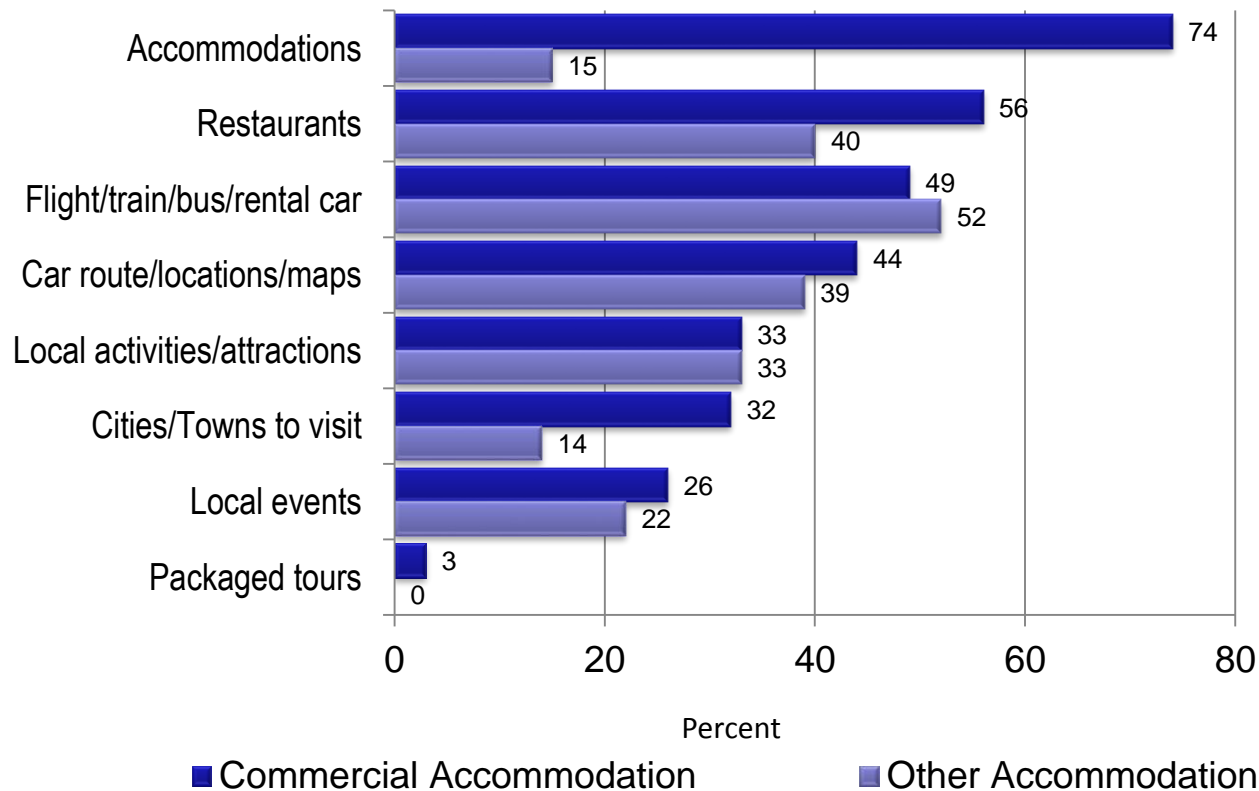
Base: Used Internet & Publications to Plan Trip



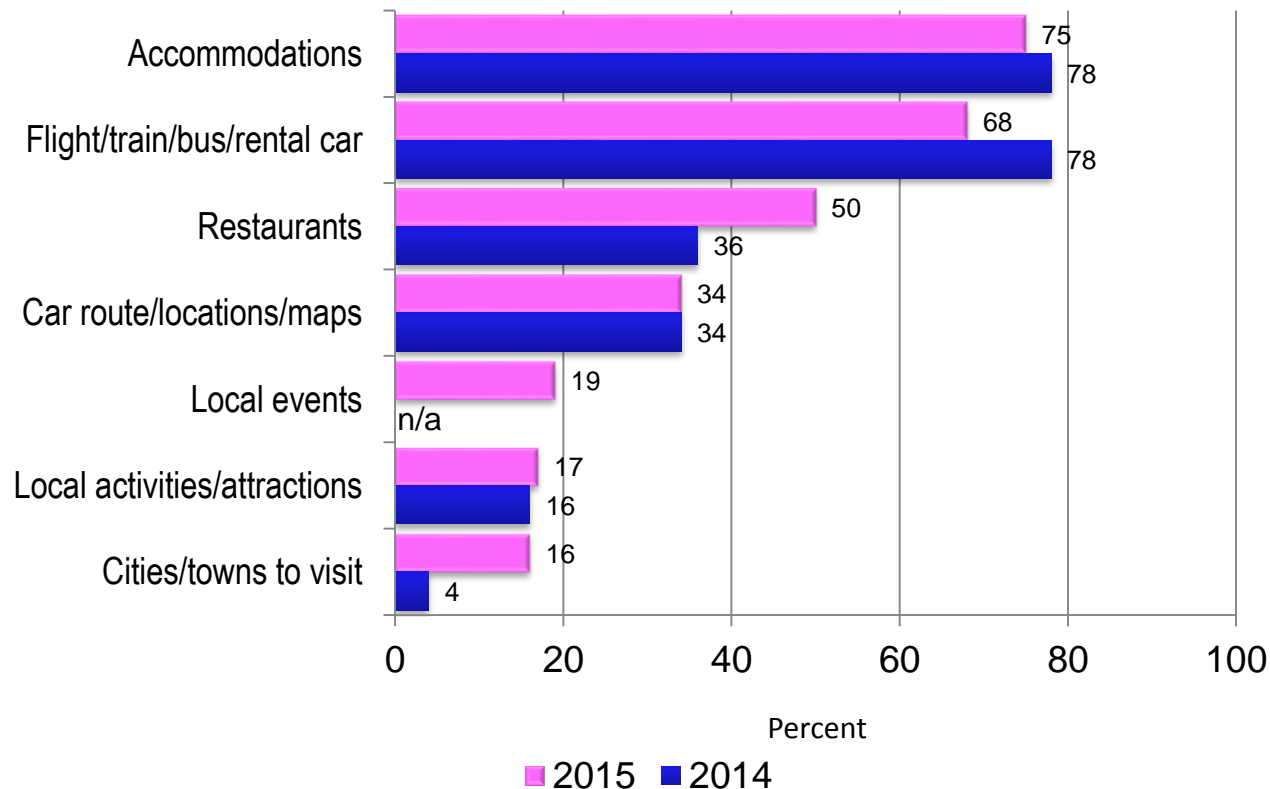
Elements of Trip Planned Online — Leisure



Elements of Trip Planned Online — By Type of Accommodations



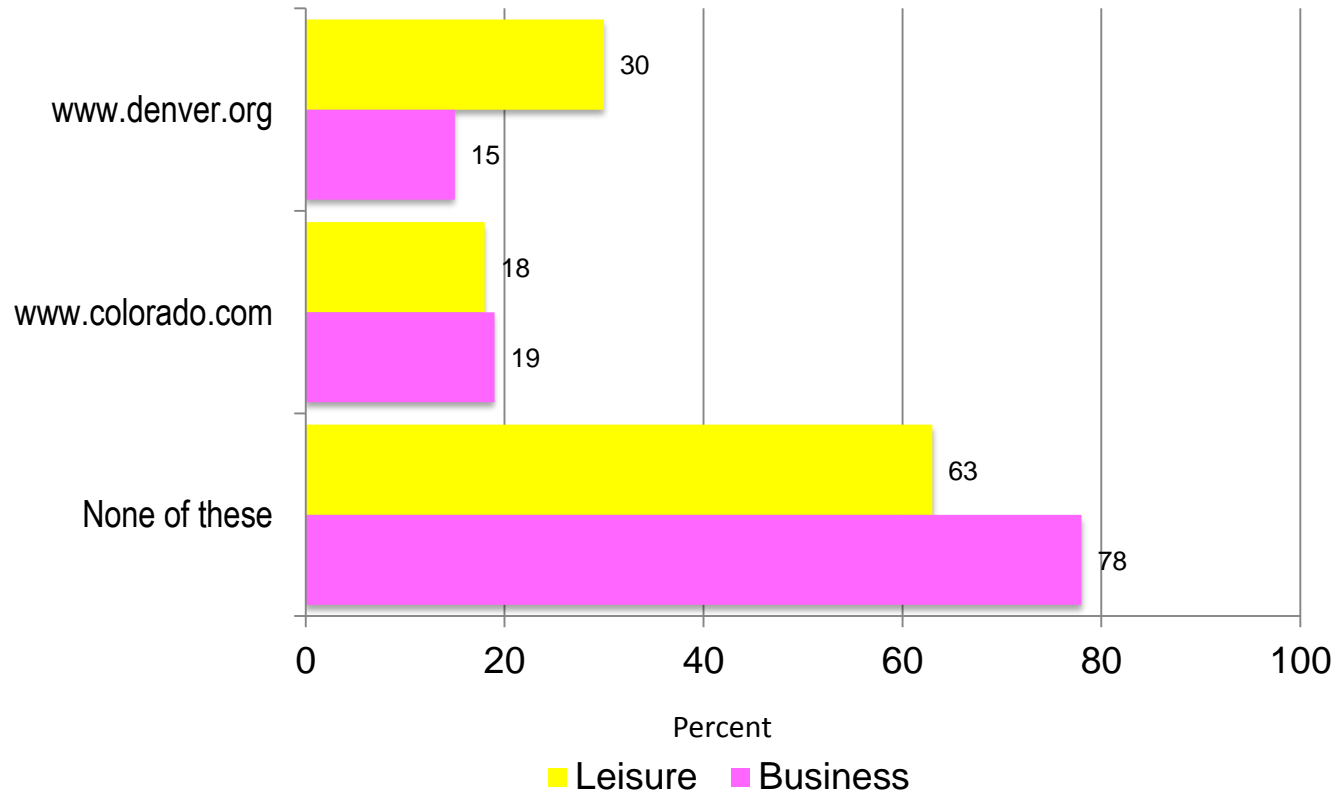
Elements of Trip Planned Online — Business



Internet Sites Used for Planning Trip



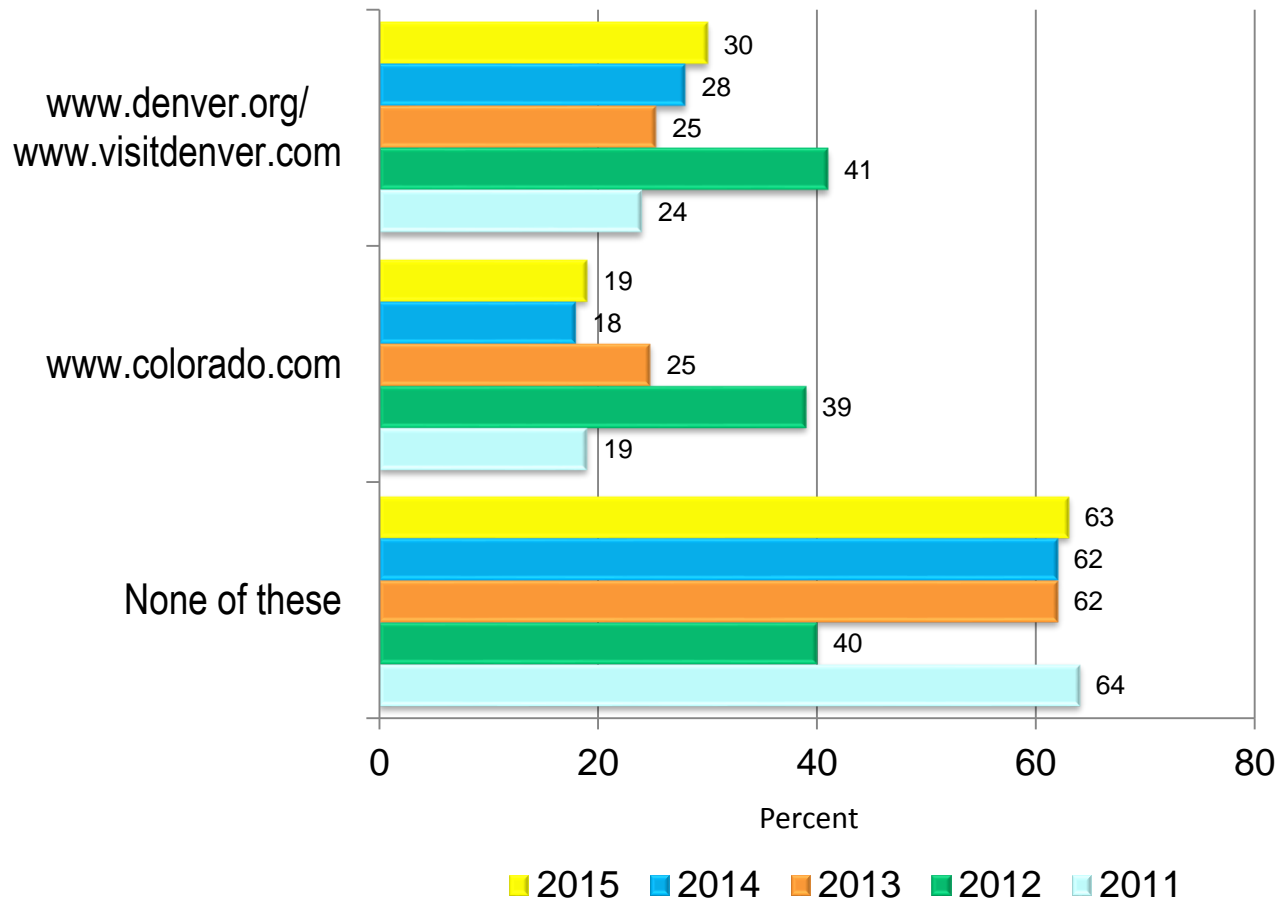
Base: Used Internet for trip planning



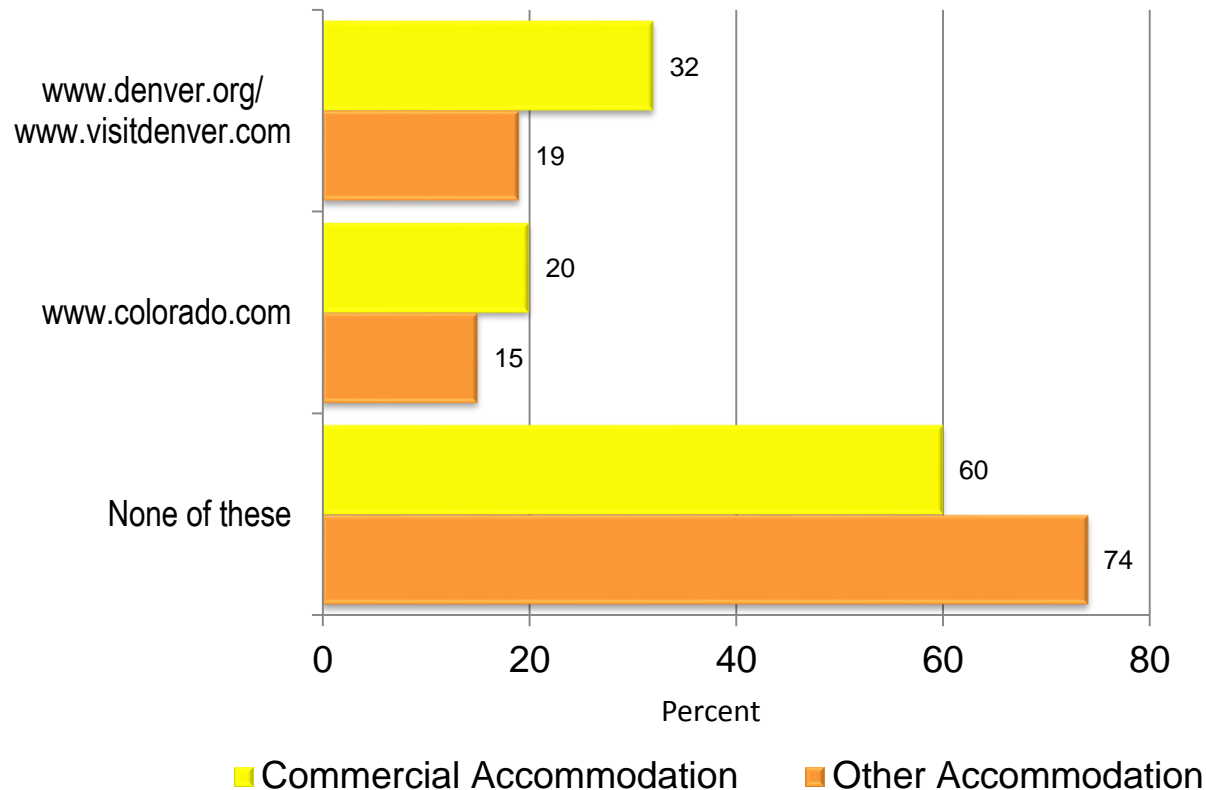
Internet Sites Used for Planning Leisure Trip



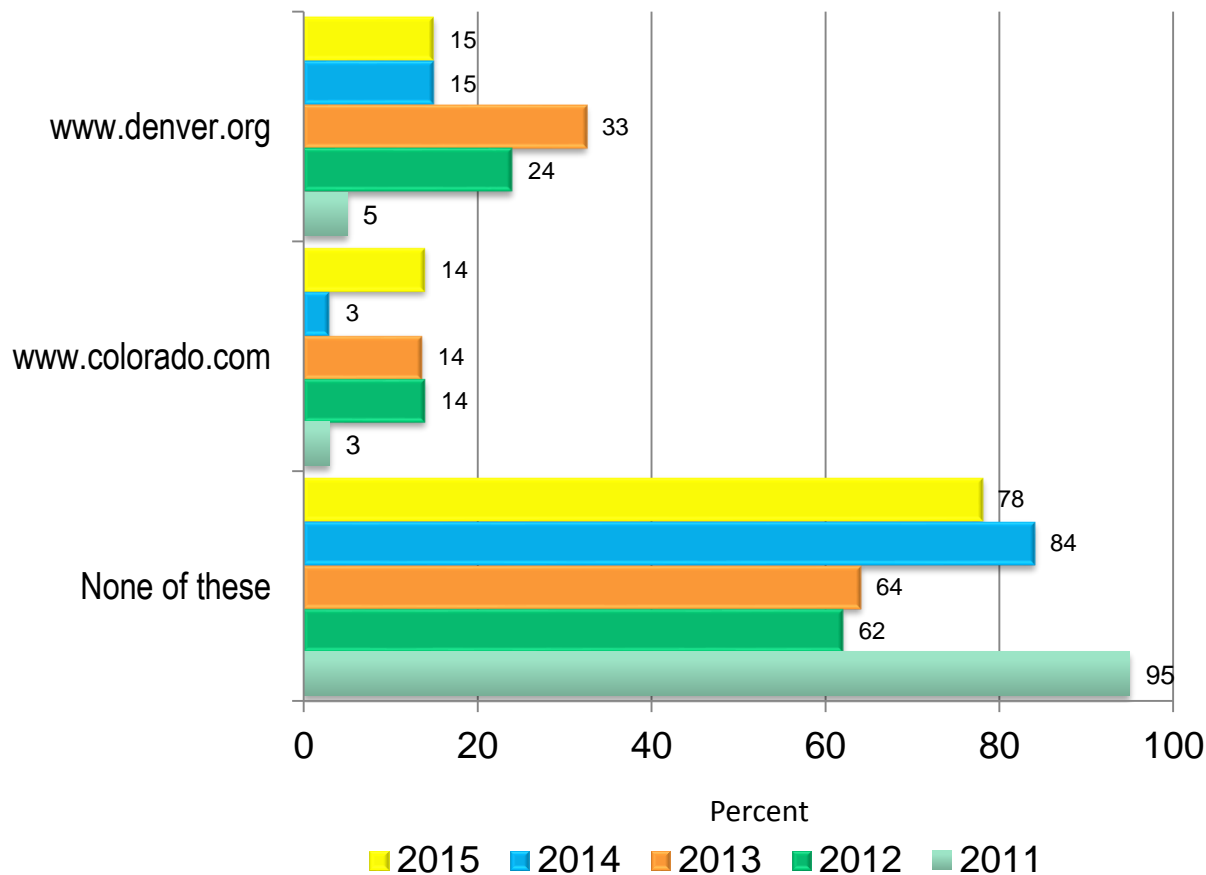
Base: Used Internet for trip planning



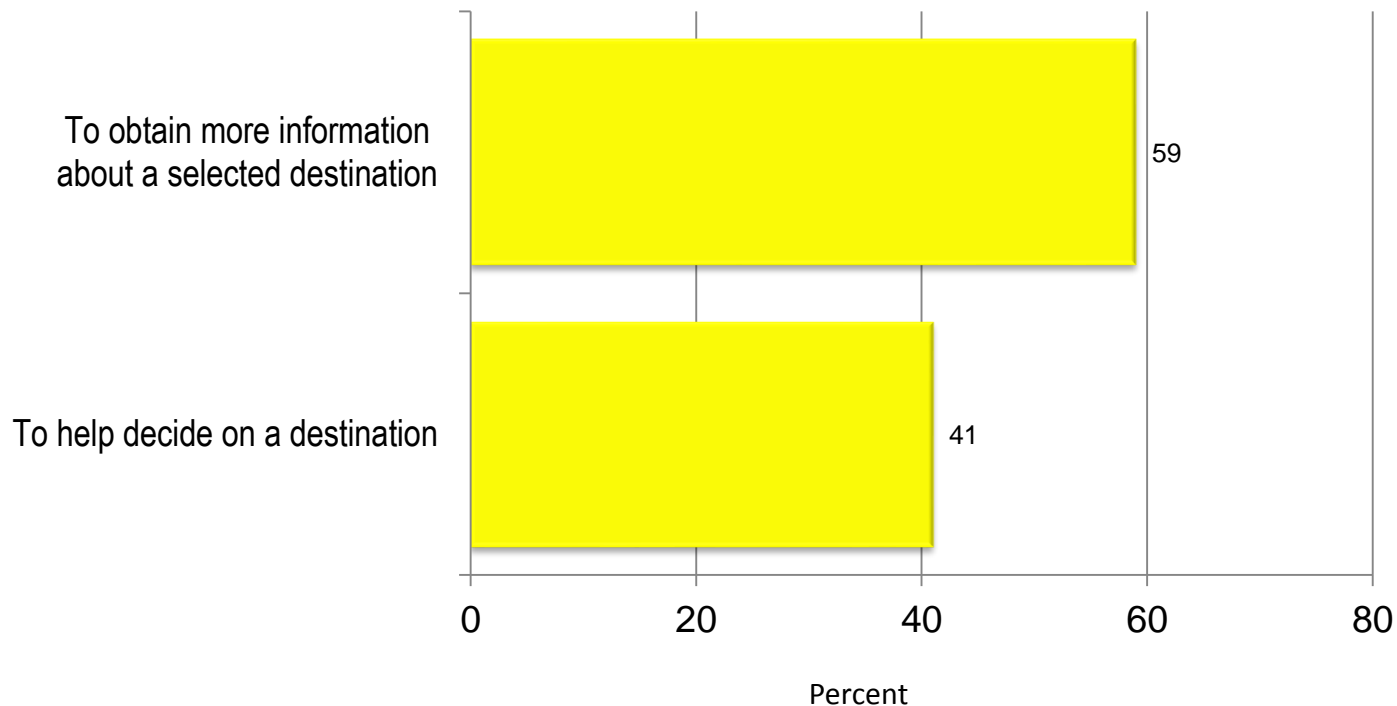
Internet Sites Used for Planning By Type of Accommodation



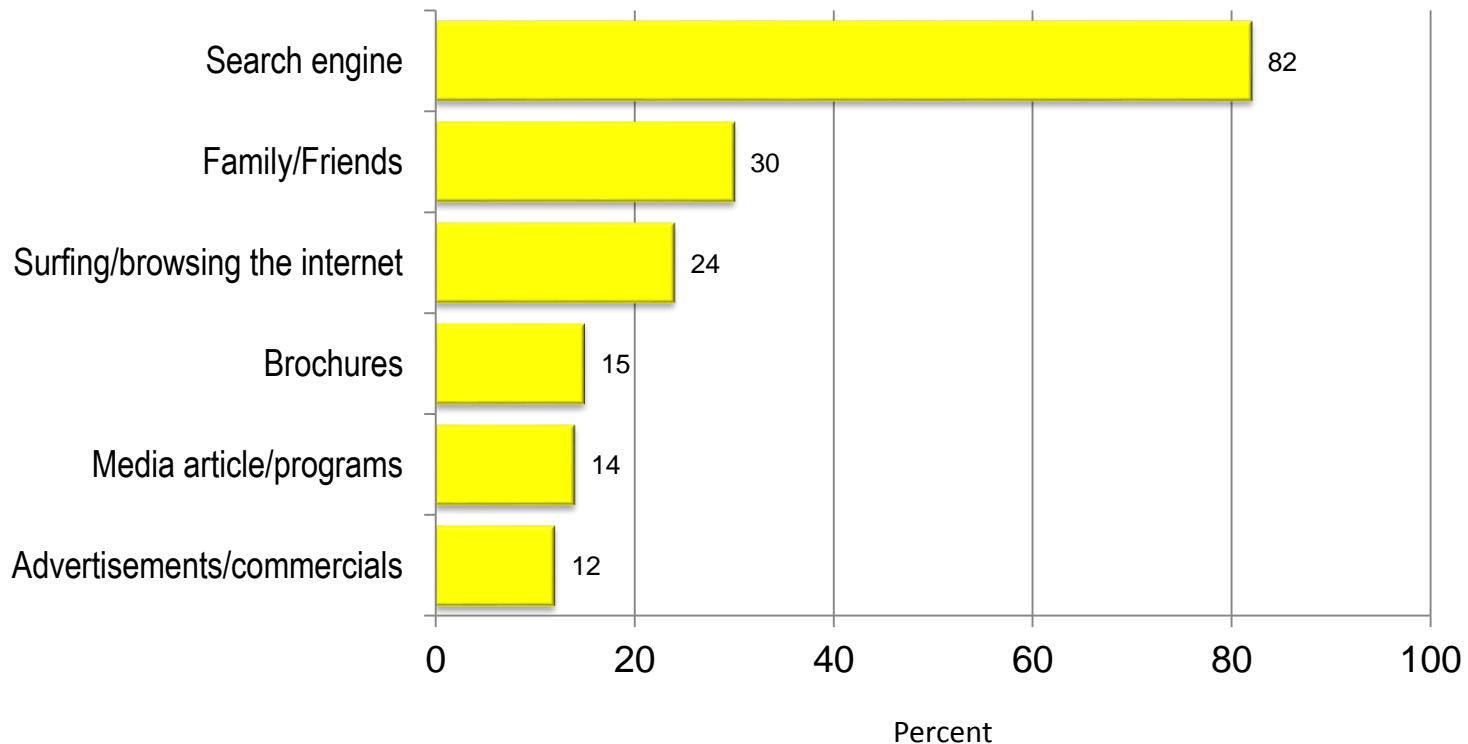
Internet Sites Used for Planning Trip - Business



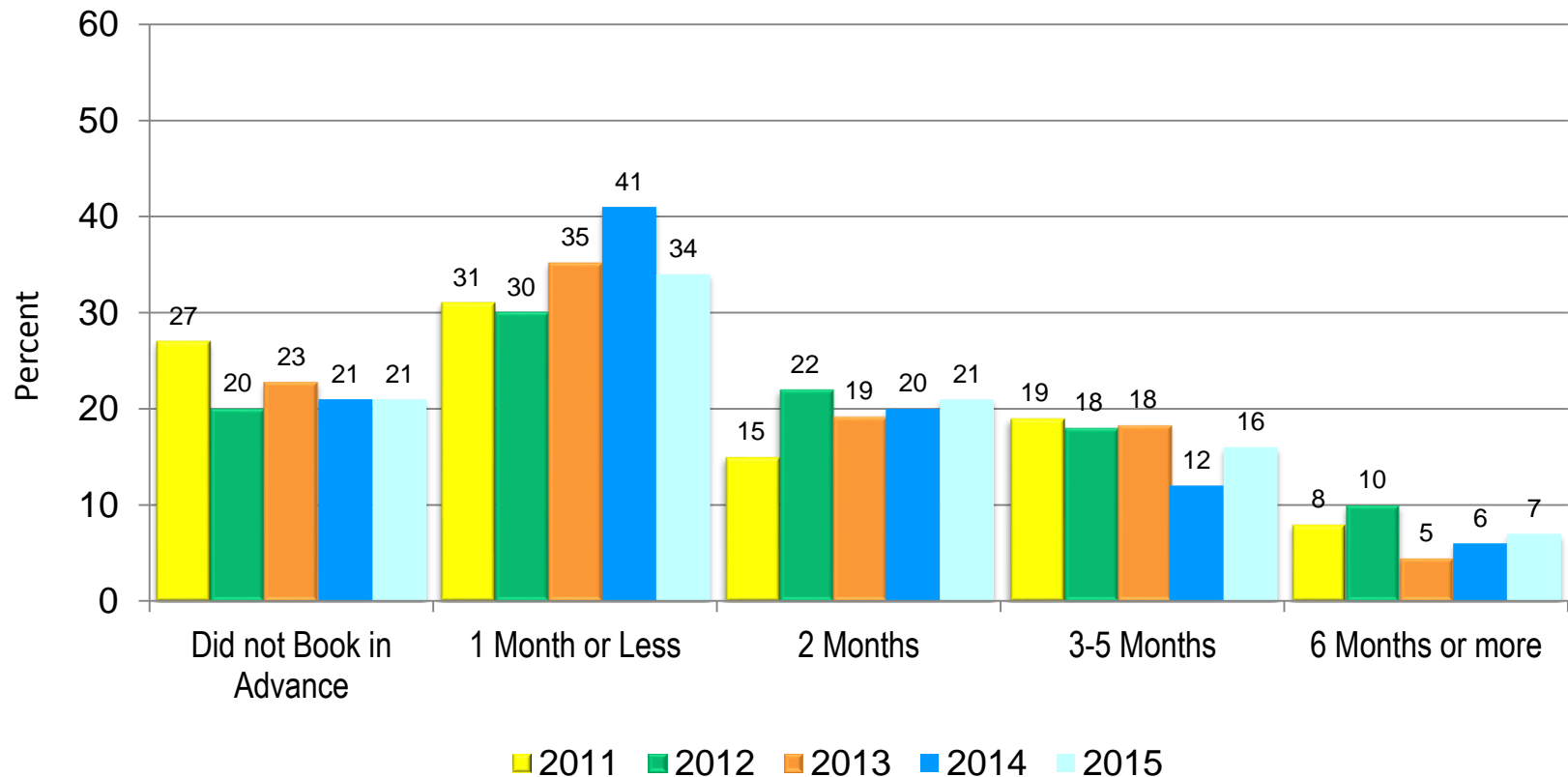
Reason for Visiting Websites -- Leisure



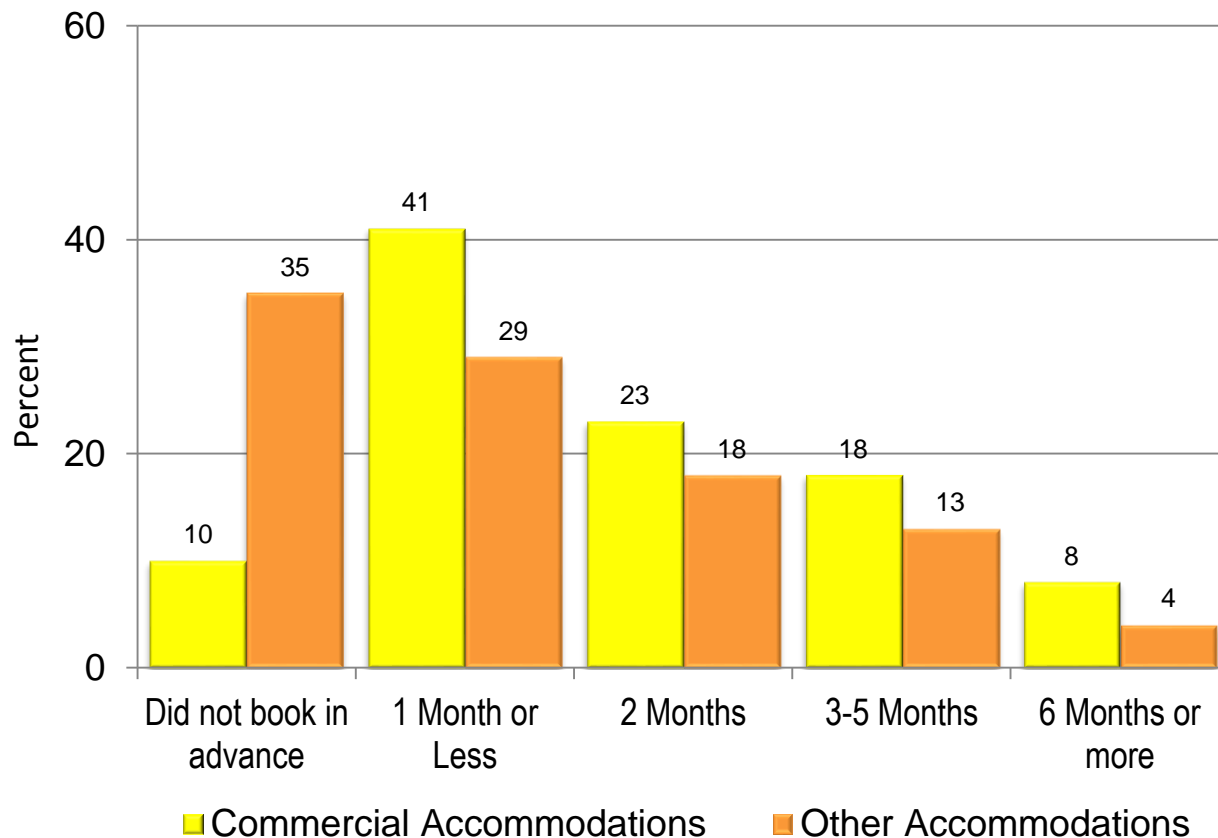
How Websites Were Discovered — Leisure



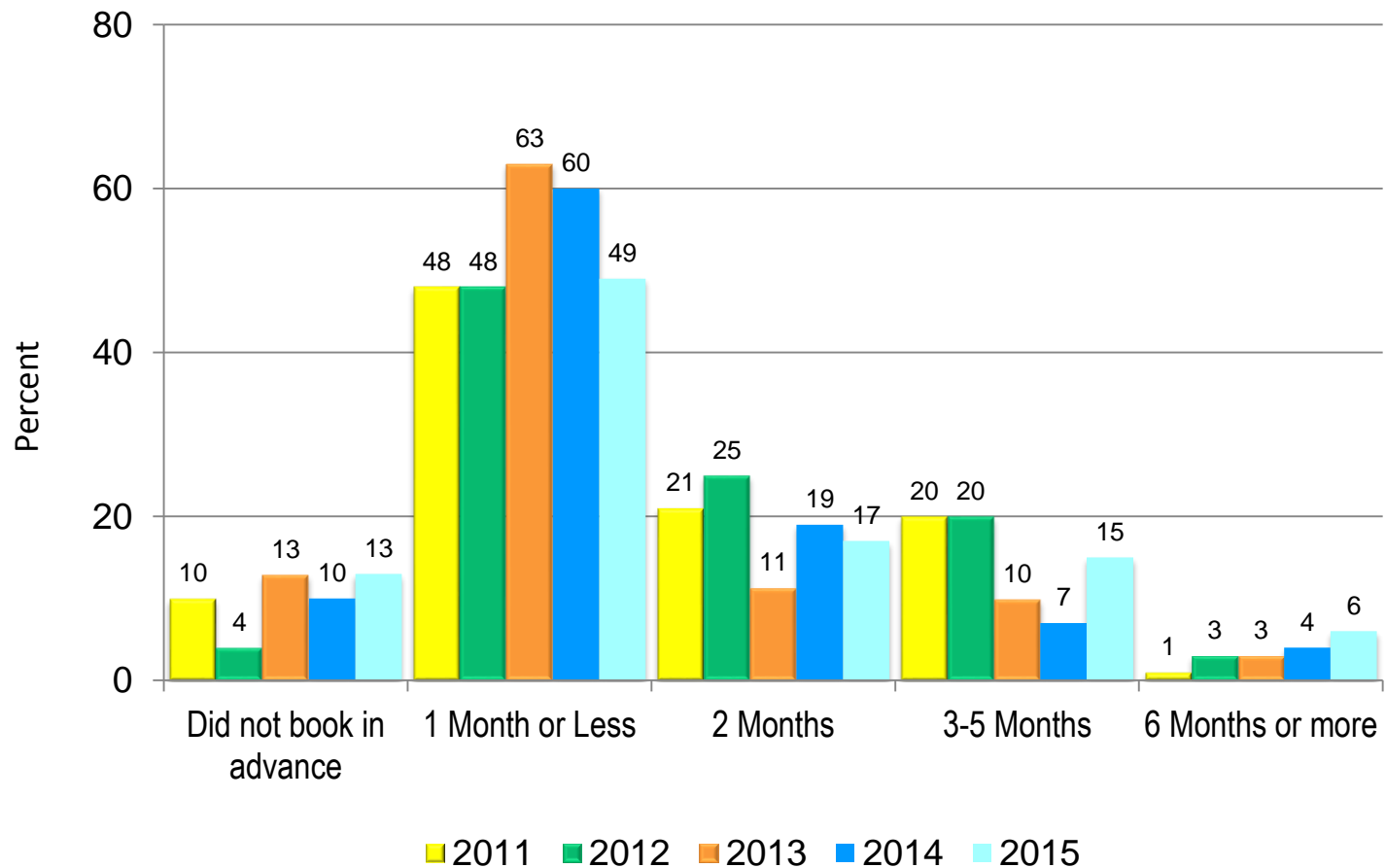
Booking Cycle — Leisure



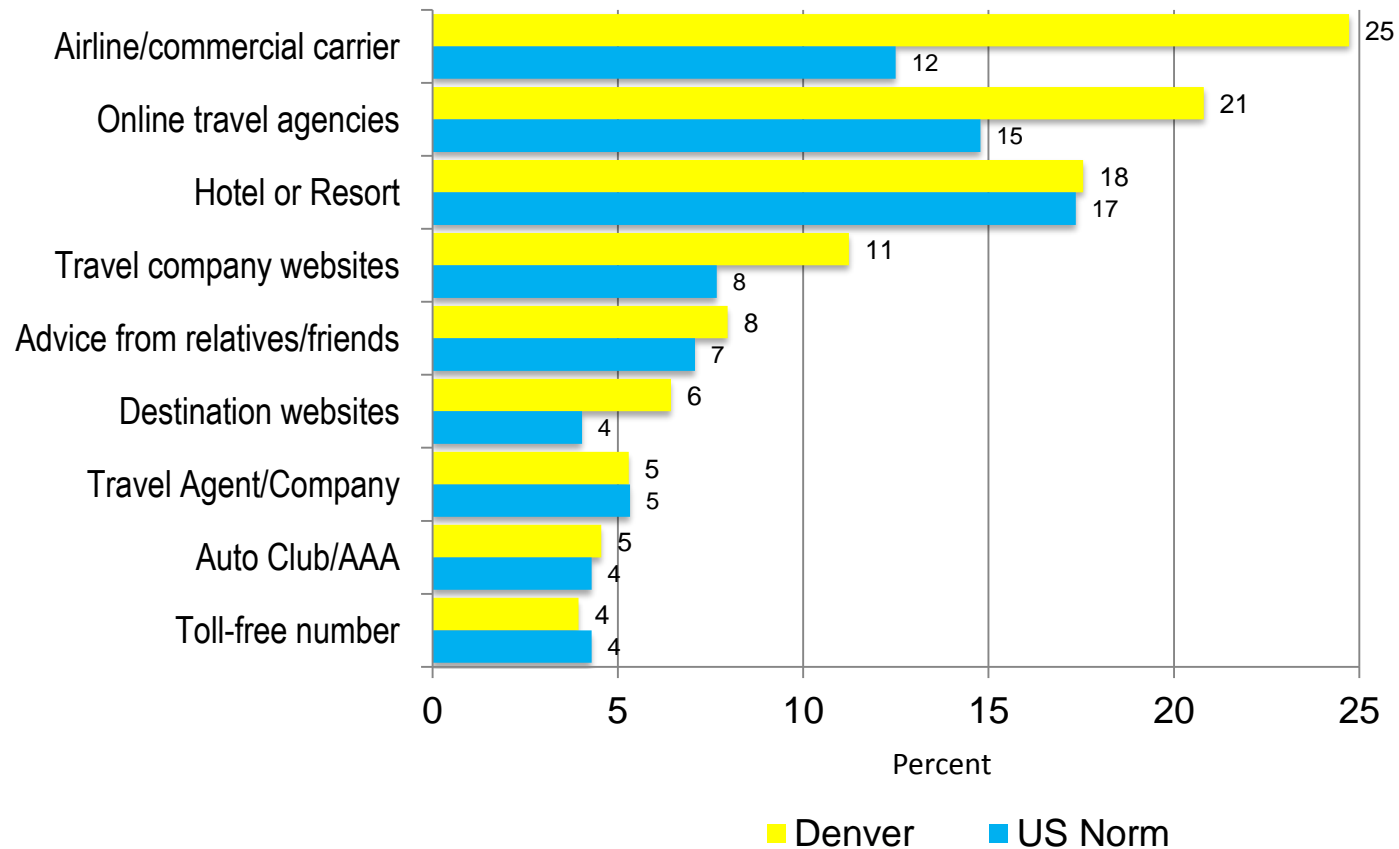
Booking Cycle — By Type of Accommodations



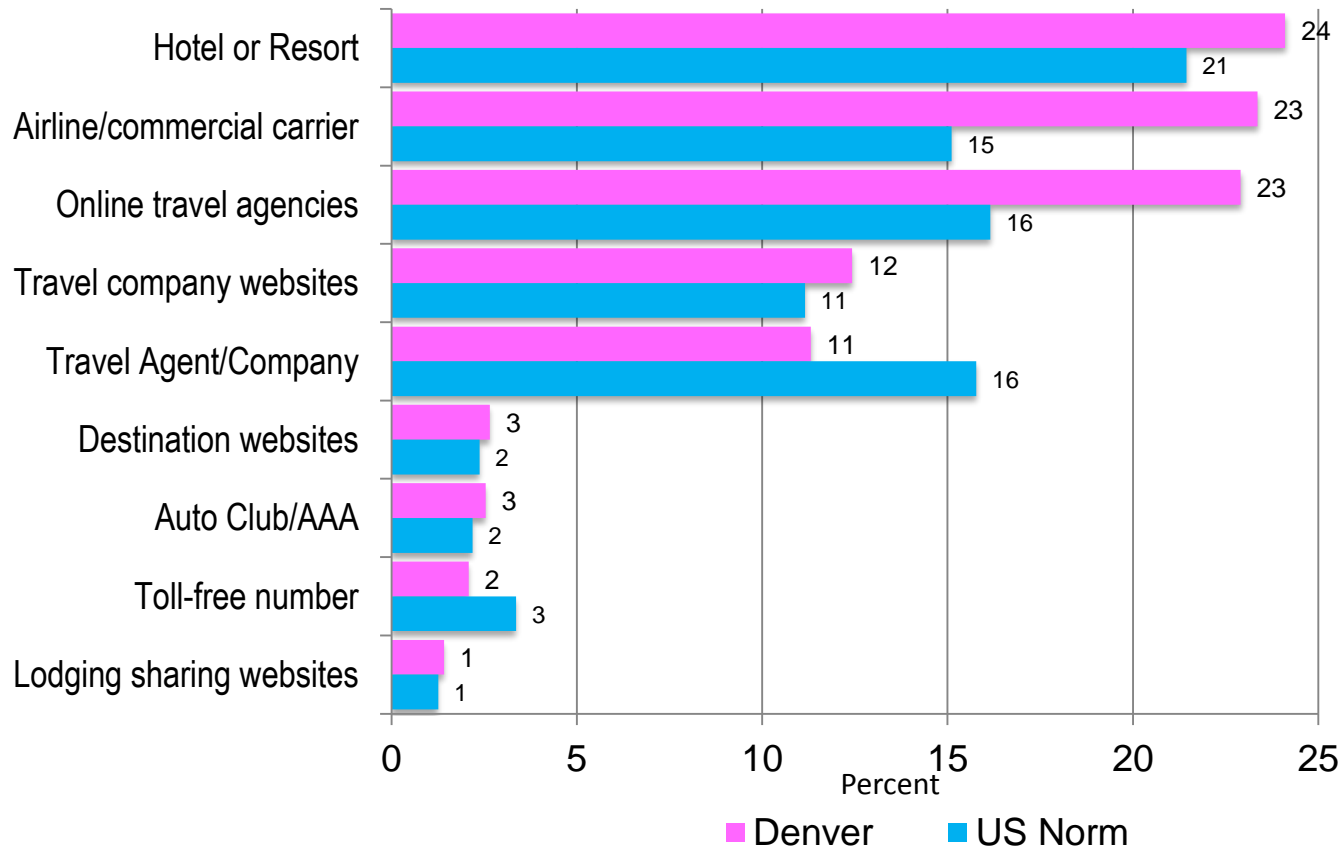
Booking Cycle — Business



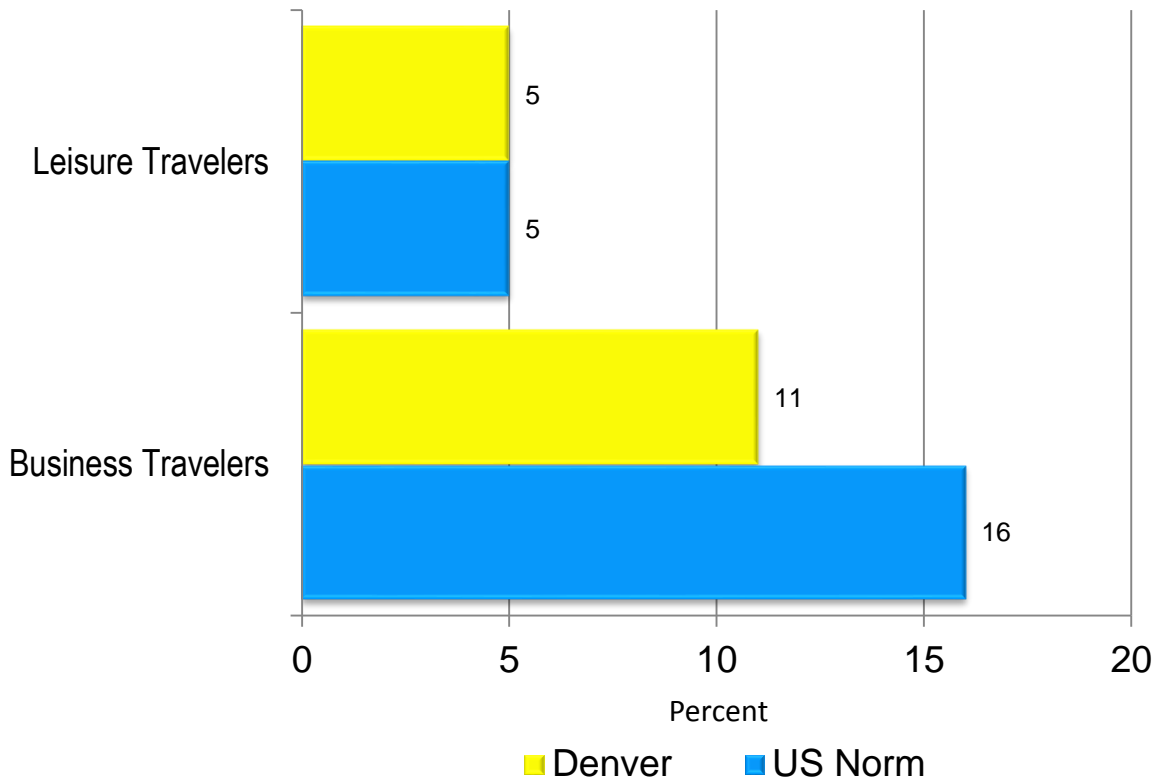
Used For Booking - Leisure



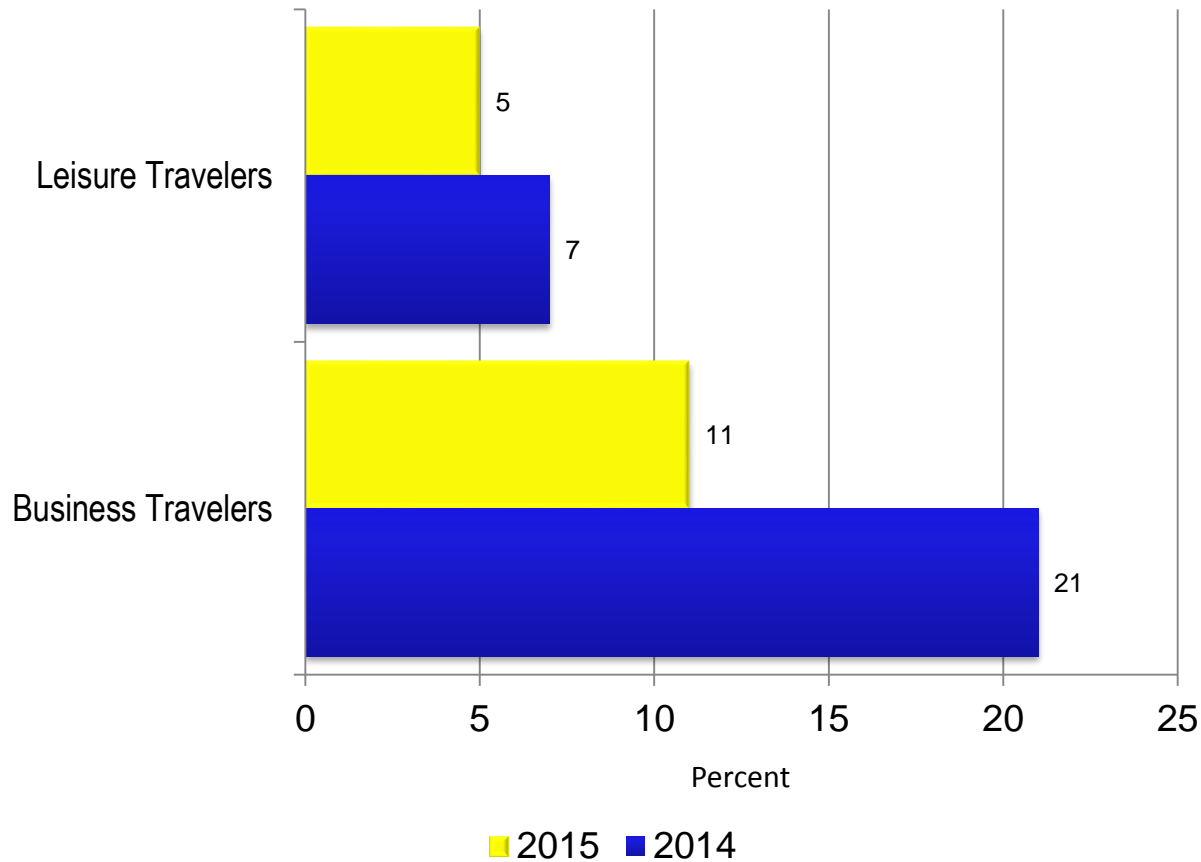
Used for Booking – Business



Travel Agent Booked All/Part of Trip



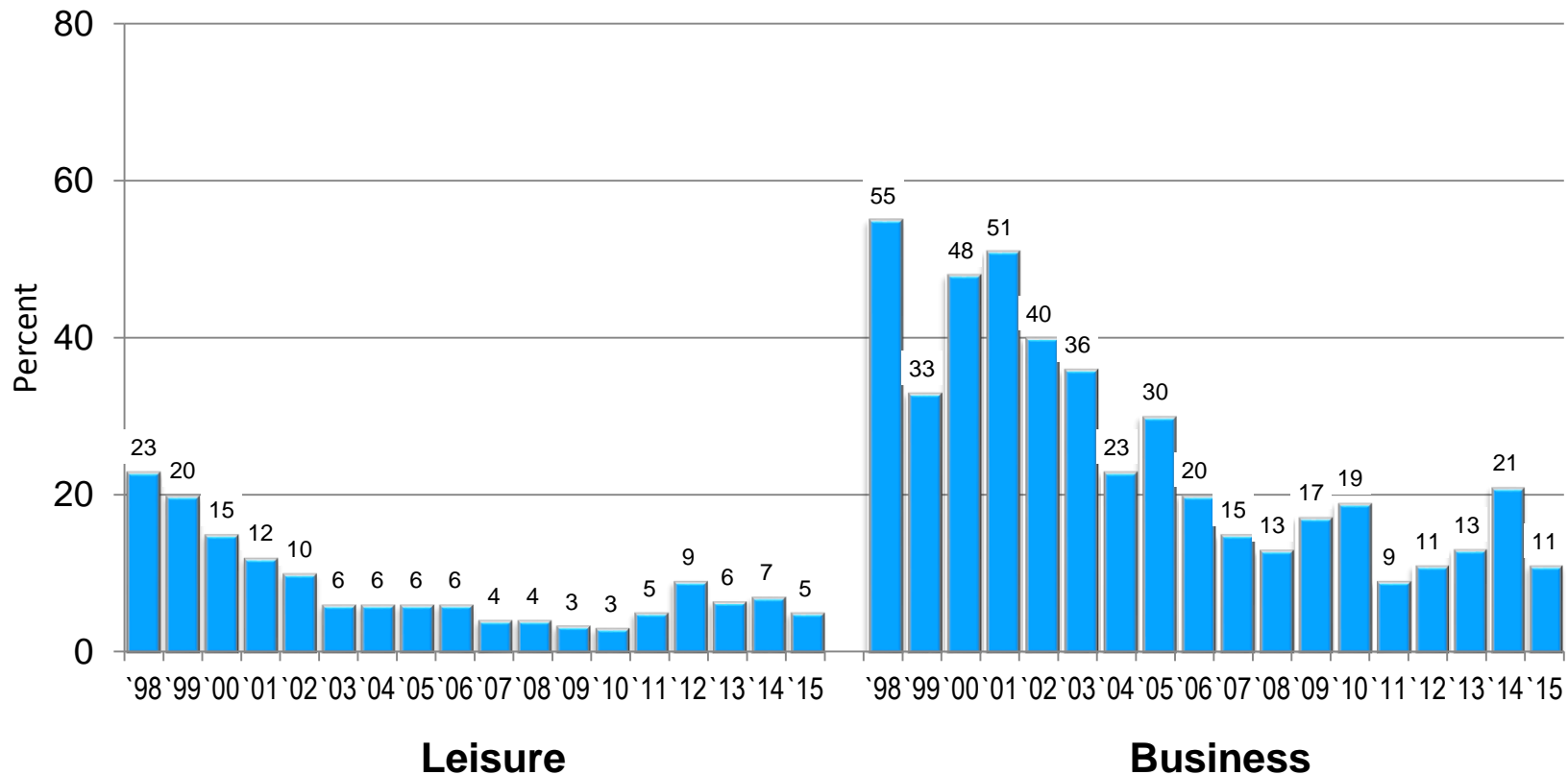
Travel Agent Booked All/Part of Denver Trip



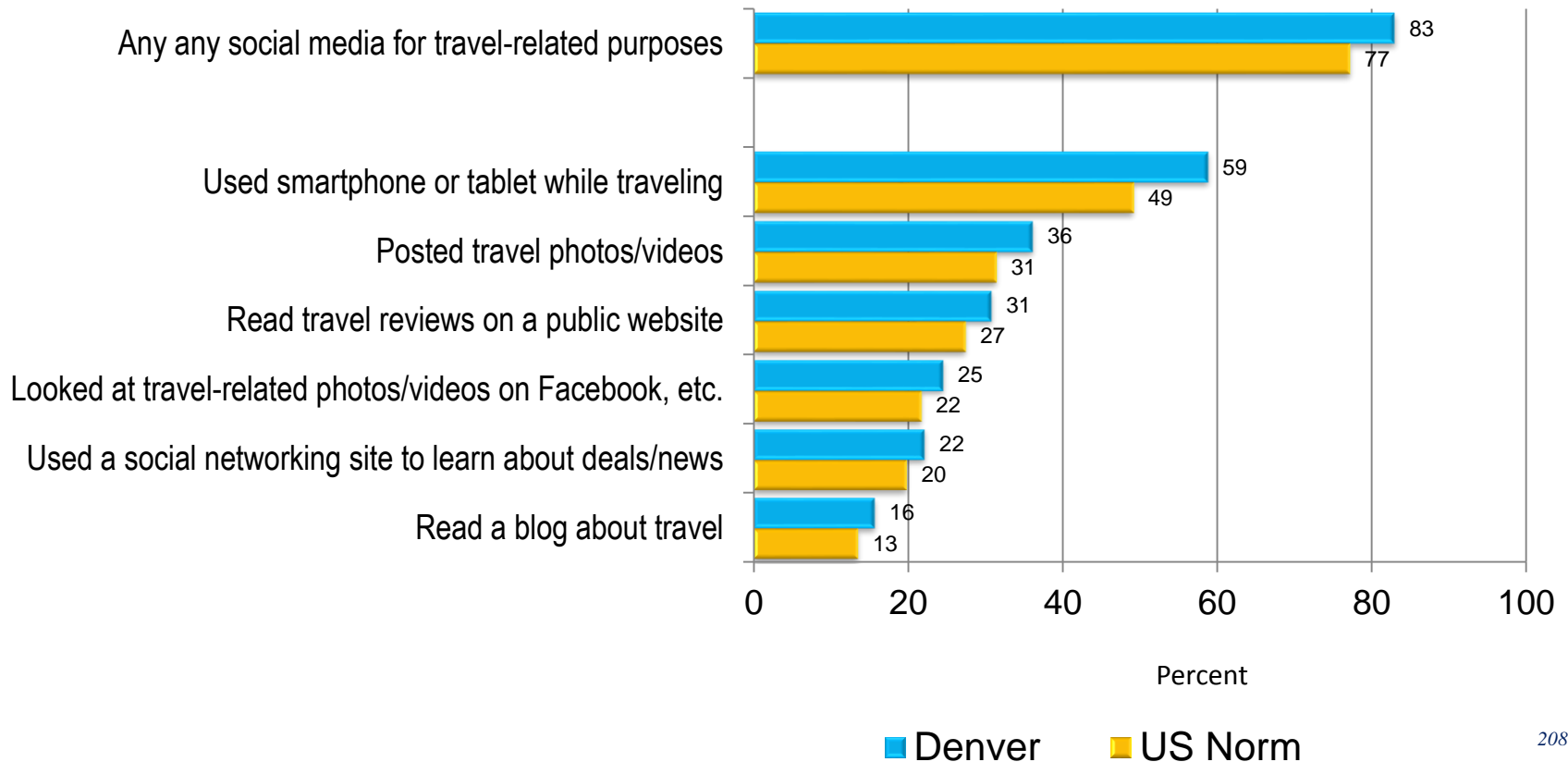
Travel Agent Booked All/Part of Denver Trip



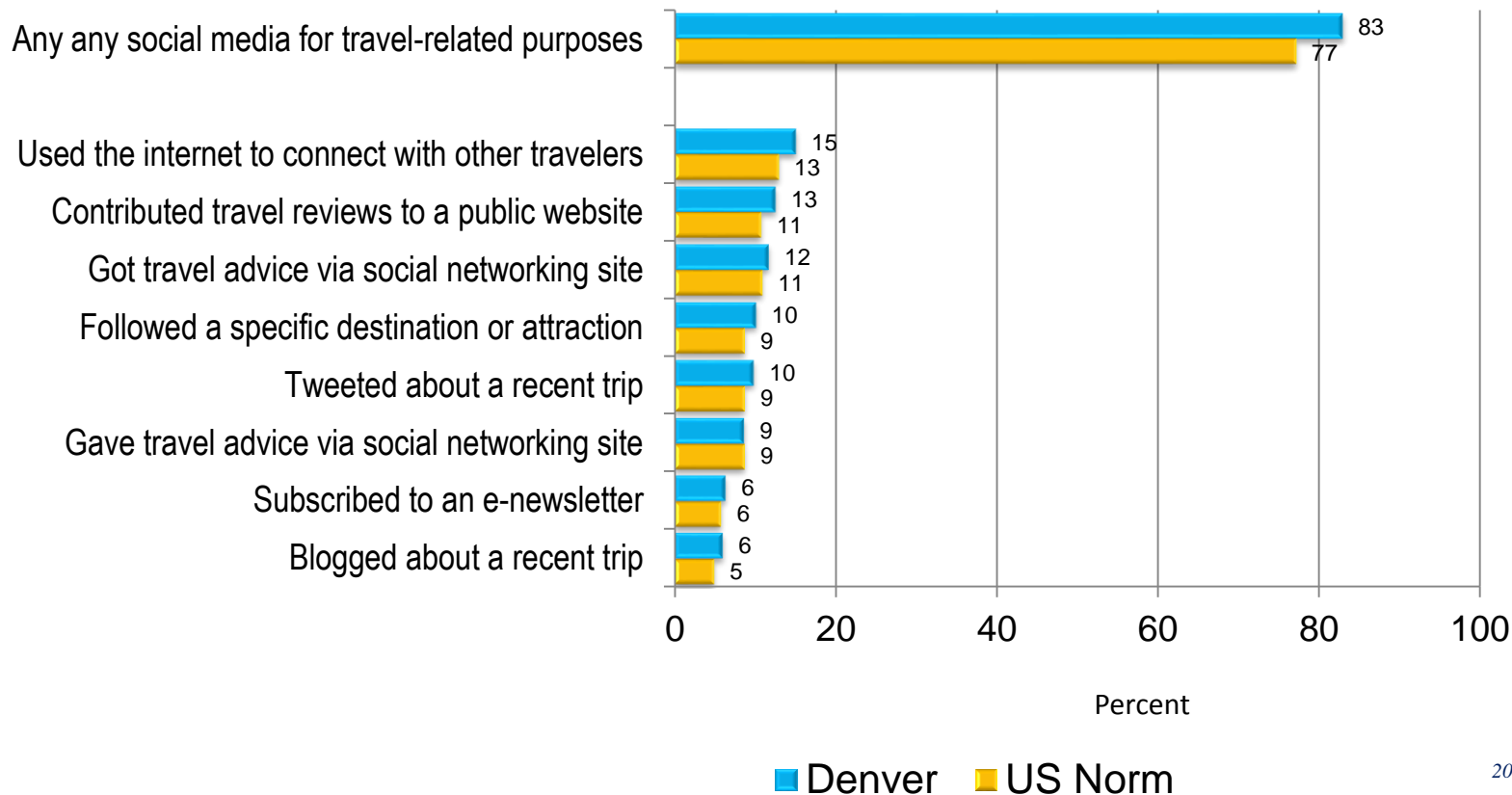
Base: Overnight Trips



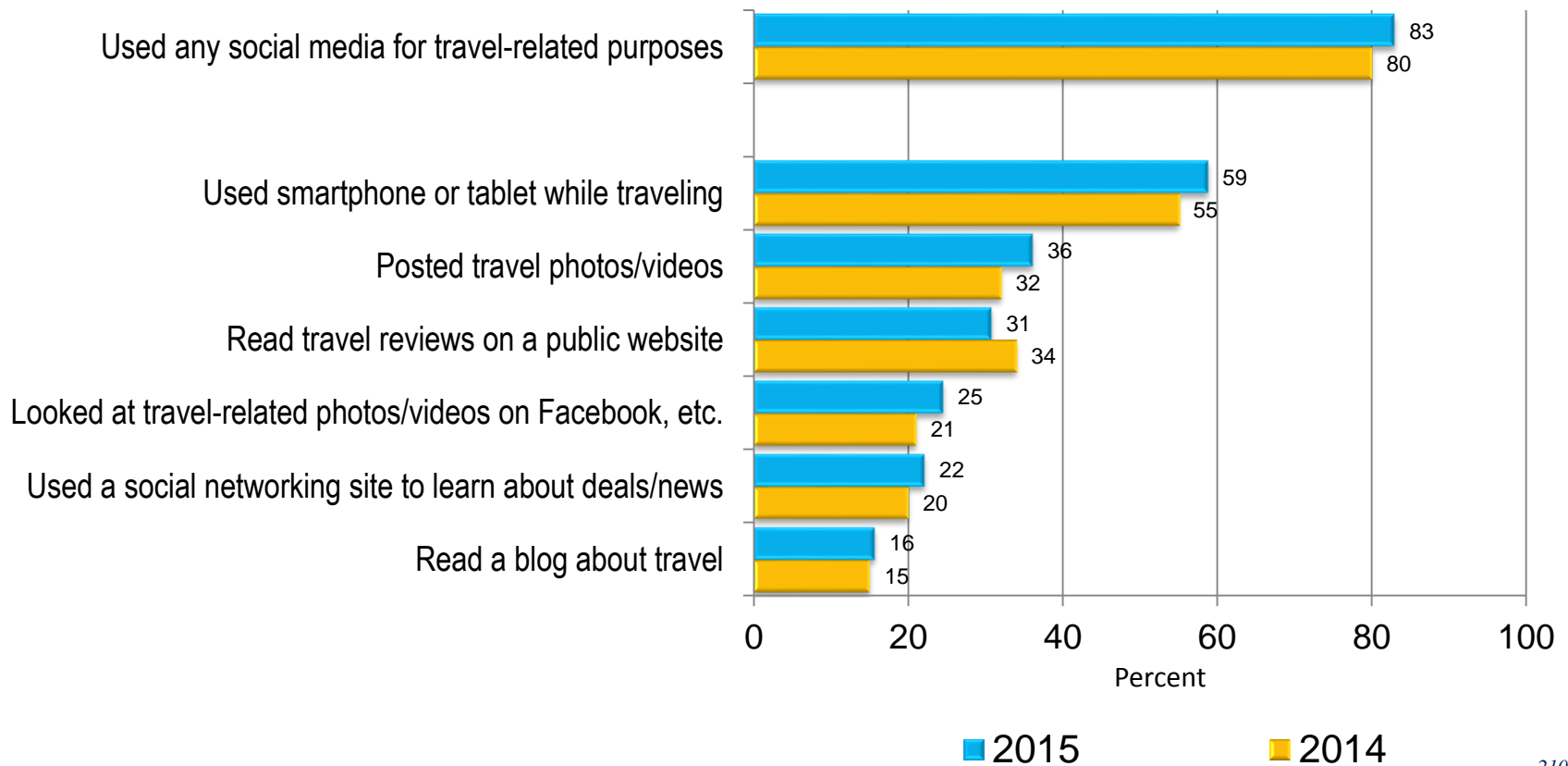
Social Media Use in the Past 3 Months by Overnight Leisure Travelers



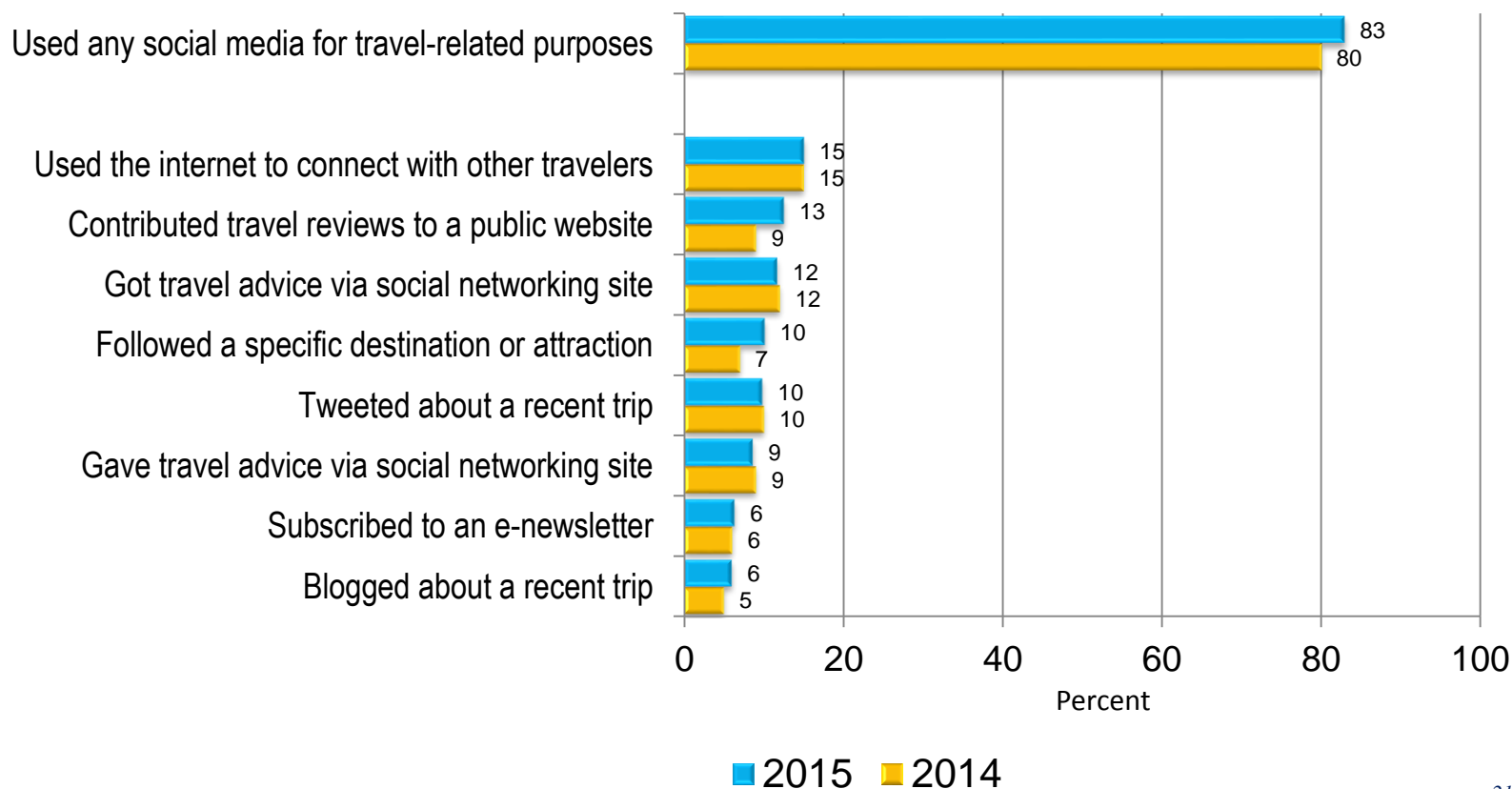
Social Media Use in the Past 3 Months by Overnight Leisure Travelers (Cont'd)



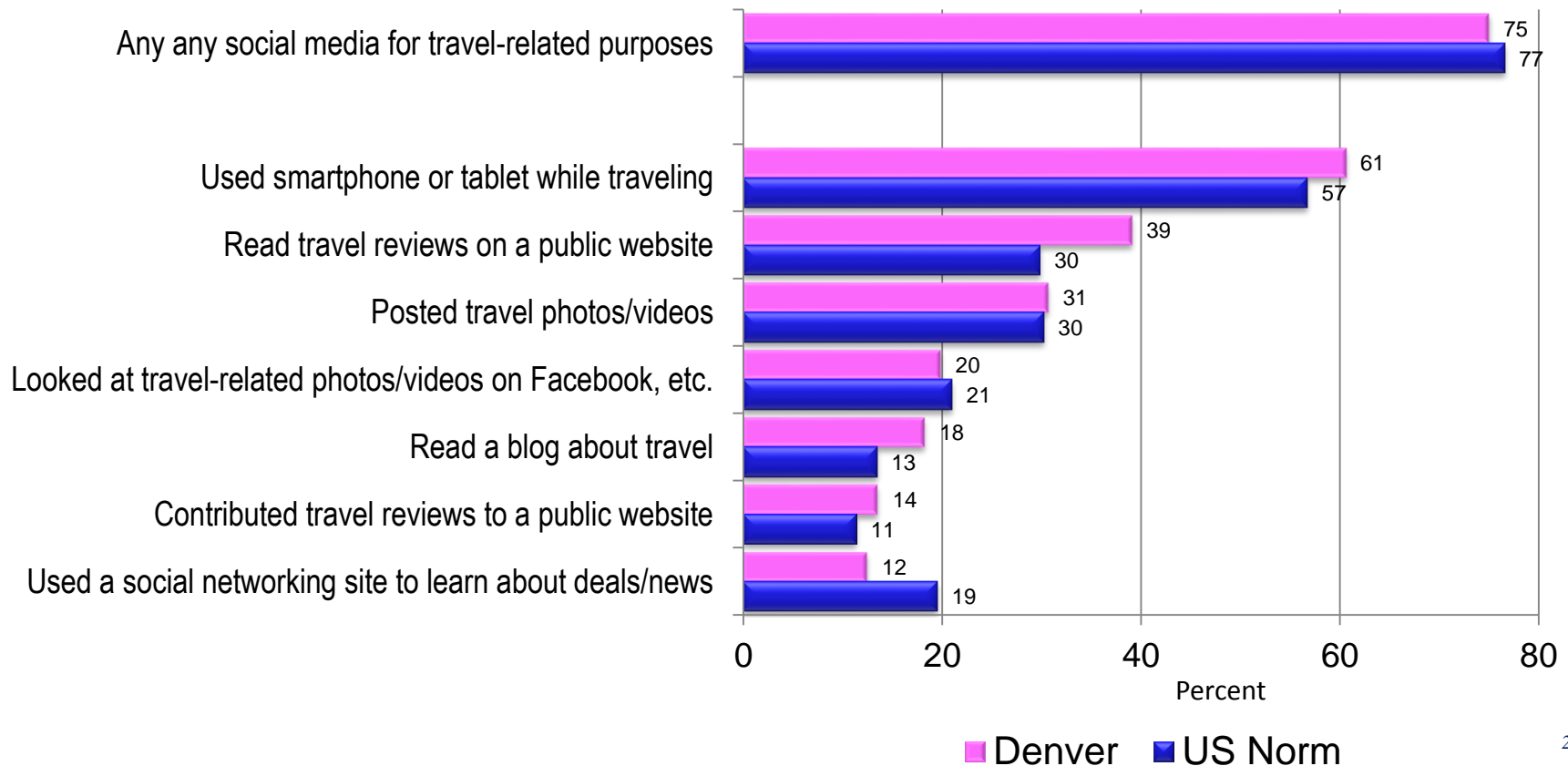
Social Media Use in the Past 3 Months by Overnight Leisure Travelers



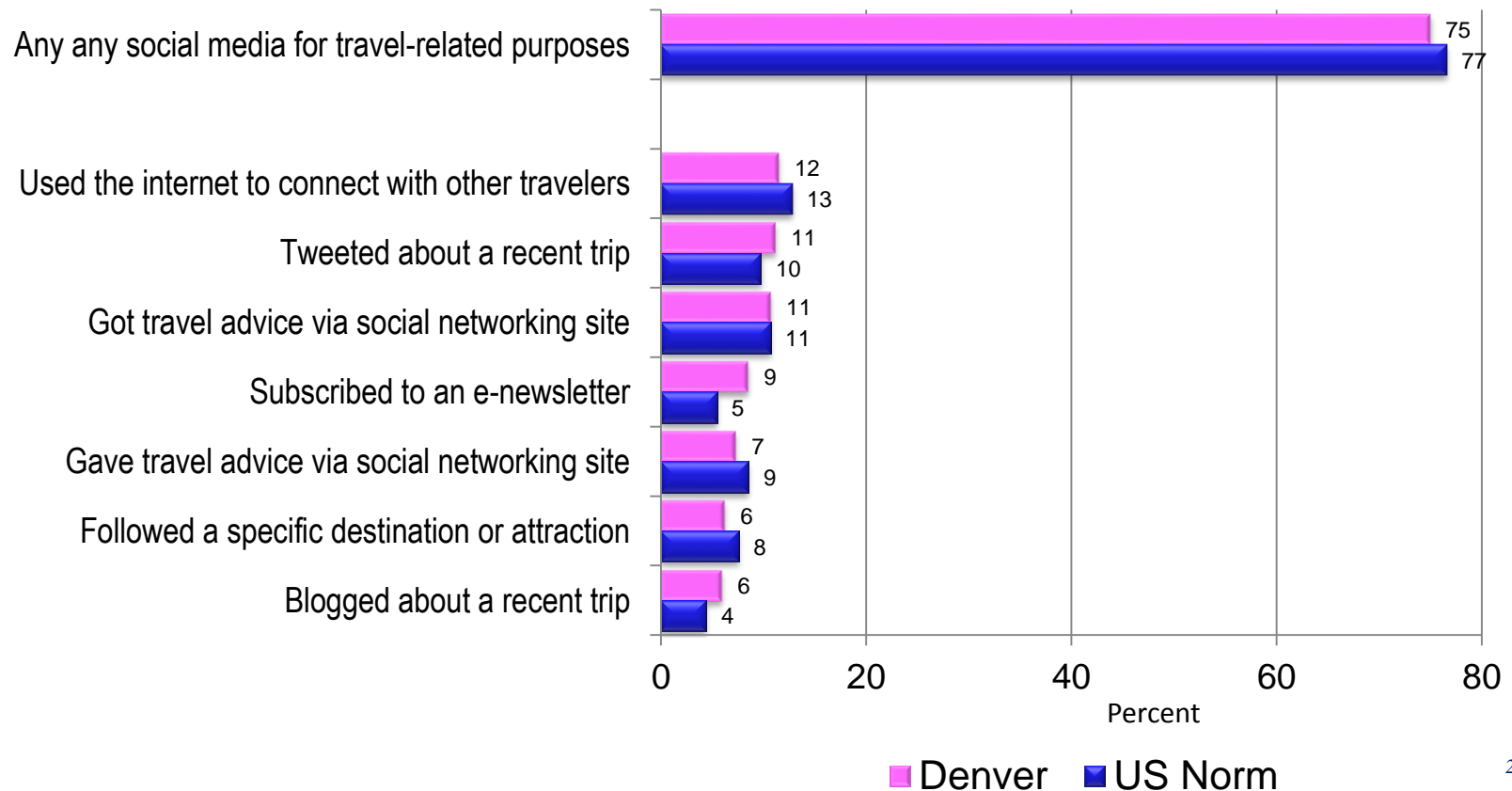
Social Media Use in the Past 3 Months by Overnight Leisure Travelers (Cont'd)



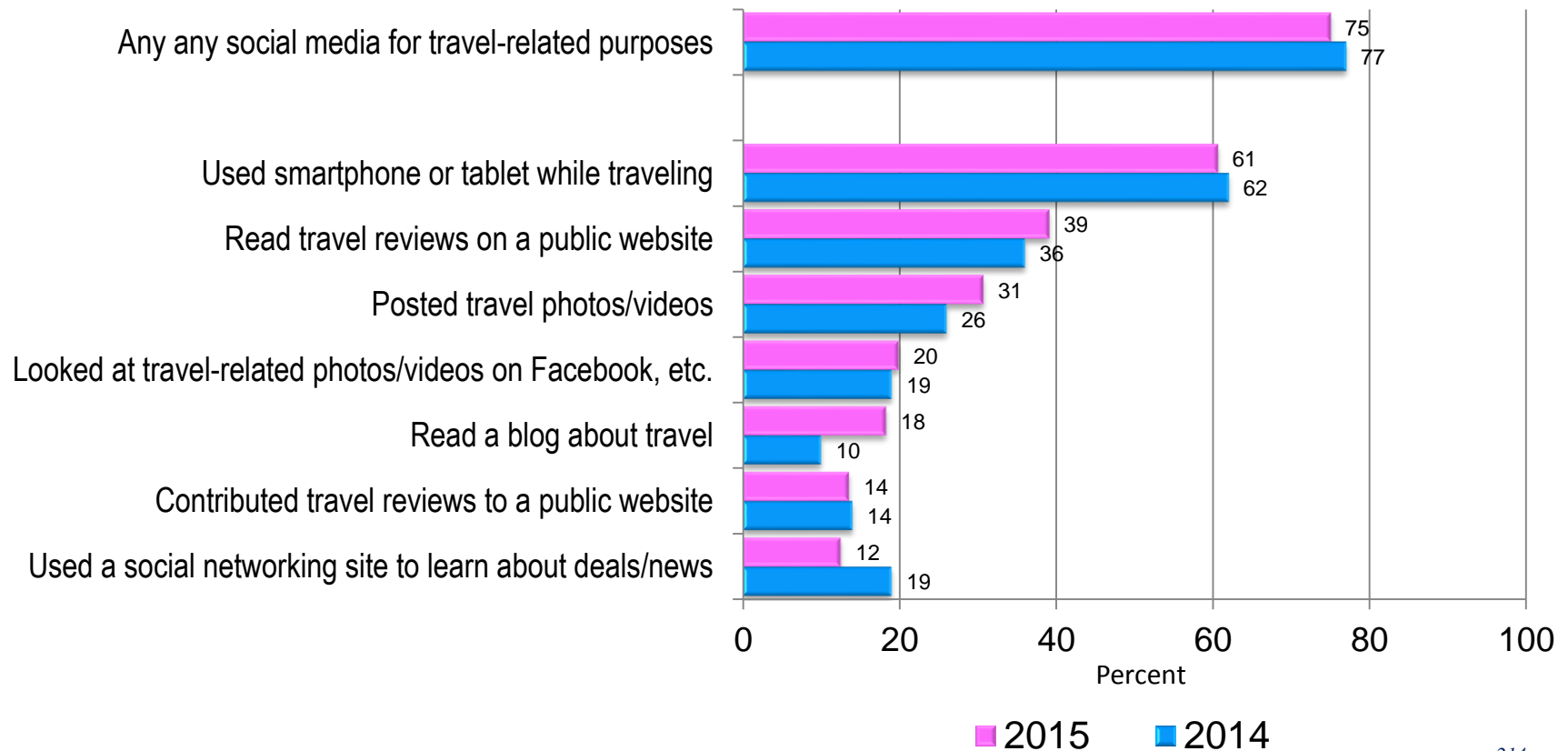
Social Media Use in the Past 3 Months by Overnight Business Travelers



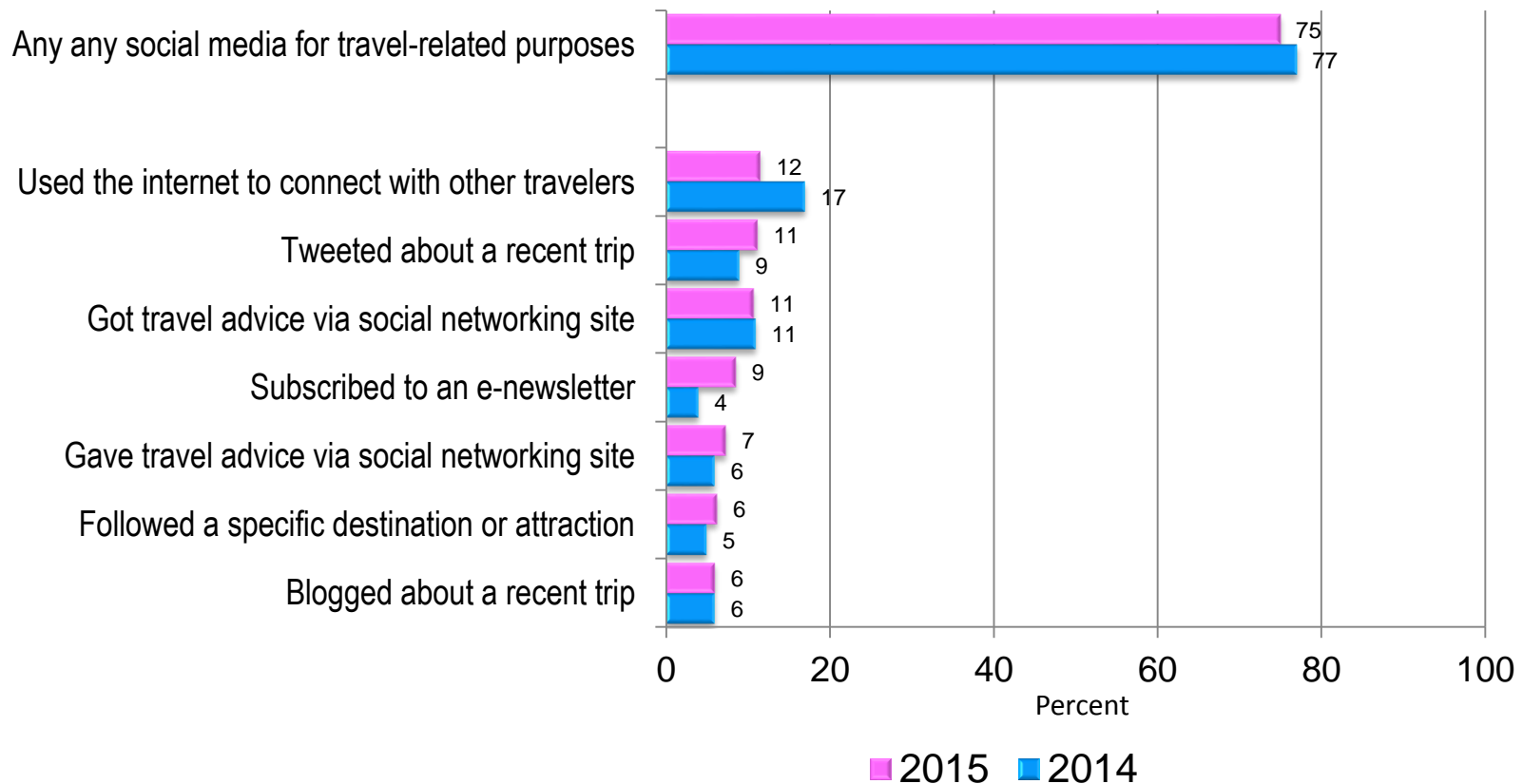
Social Media Use in the Past 3 Months by Overnight Business Travelers (Cont'd)



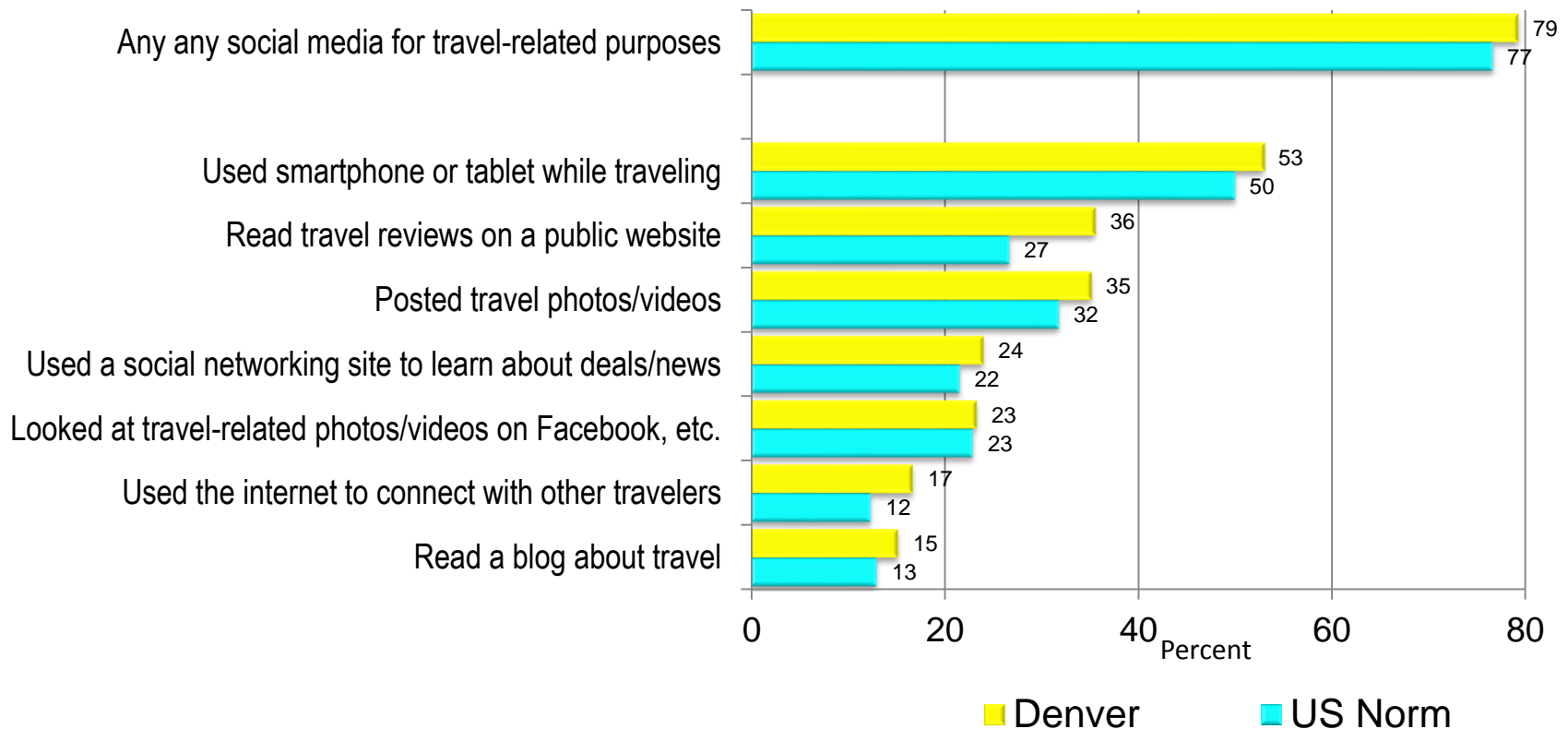
Social Media Use in the Past 3 Months by Overnight Business Travelers



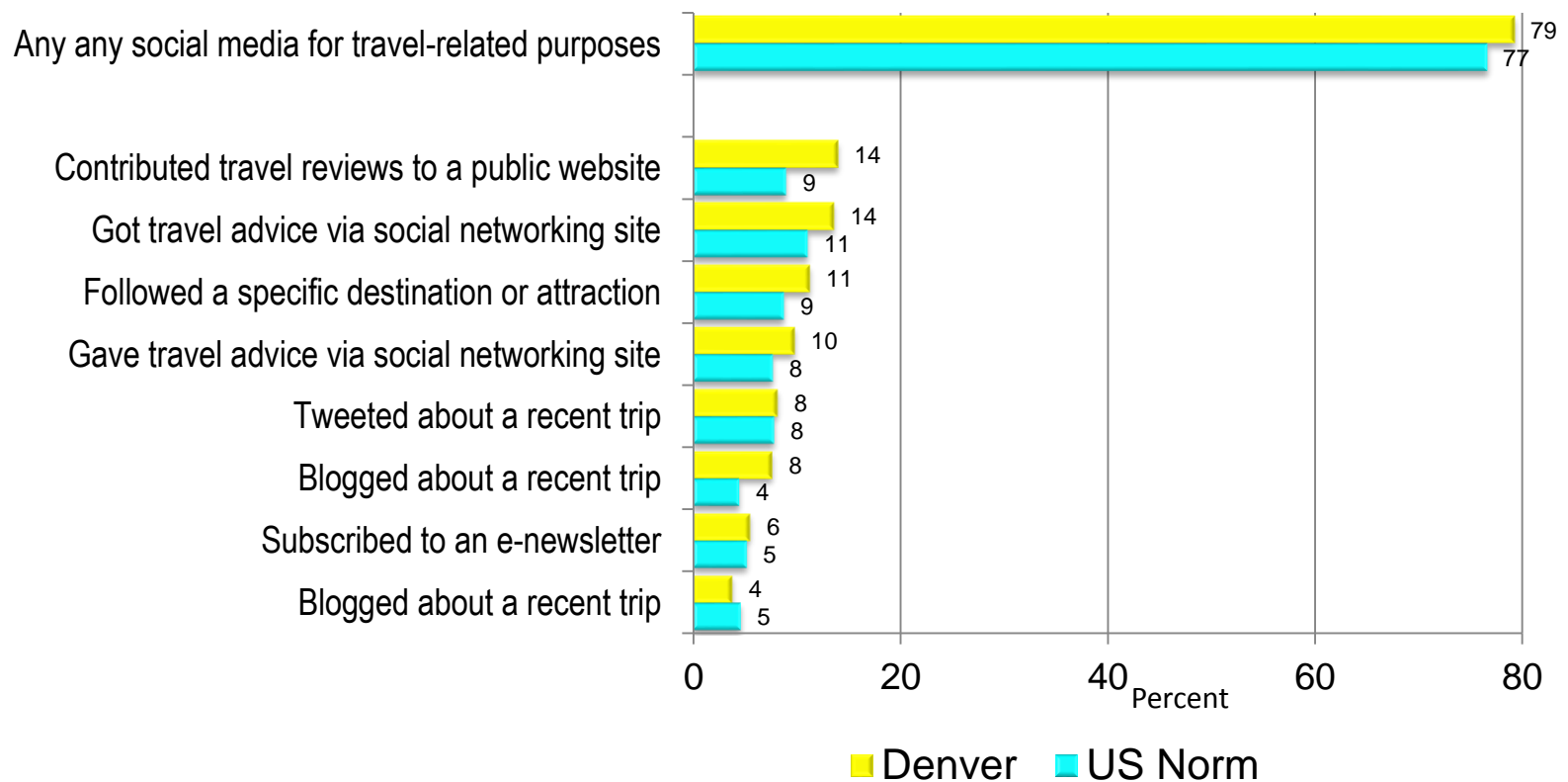
Social Media Use in the Past 3 Months by Overnight Business Travelers



Social Media Use in the Past 3 Months by Day Travelers



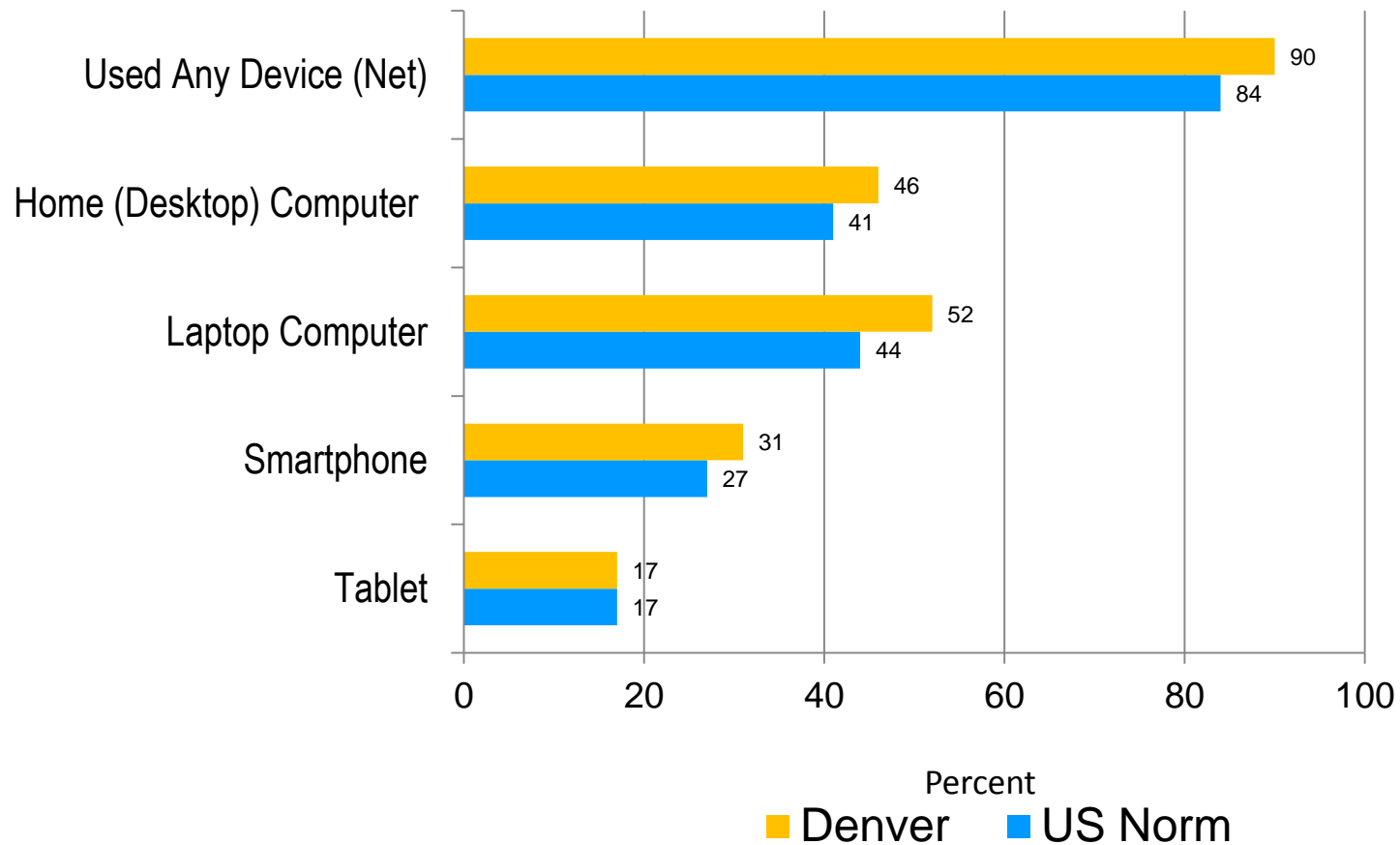
Social Media Use in the Past 3 Months by Day Travelers



Devices Used for Trip Planning by Overnight Leisure Travelers



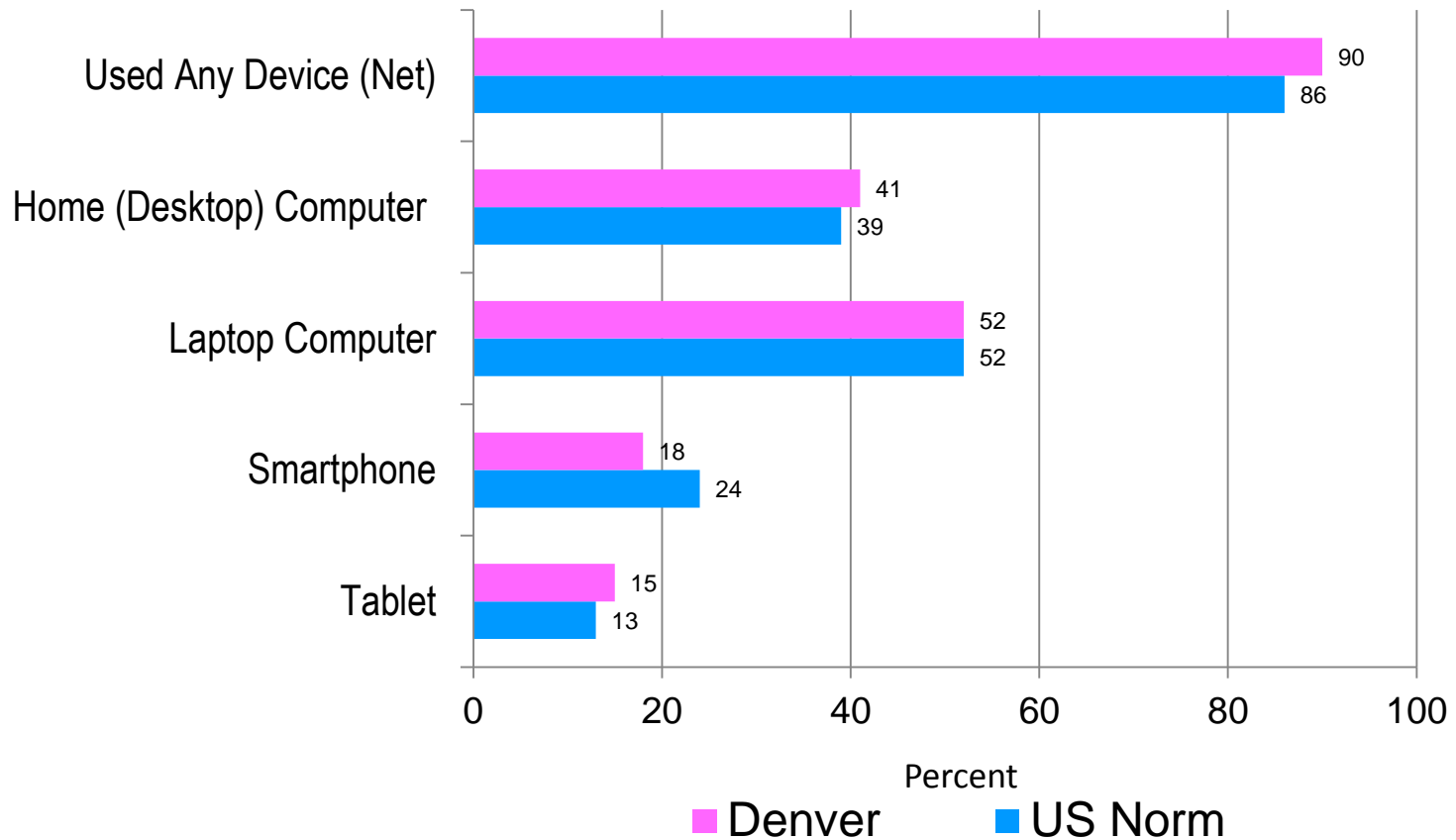
Base: Overnight Leisure Trips



Devices Used for Trip Planning by Overnight Business Travelers



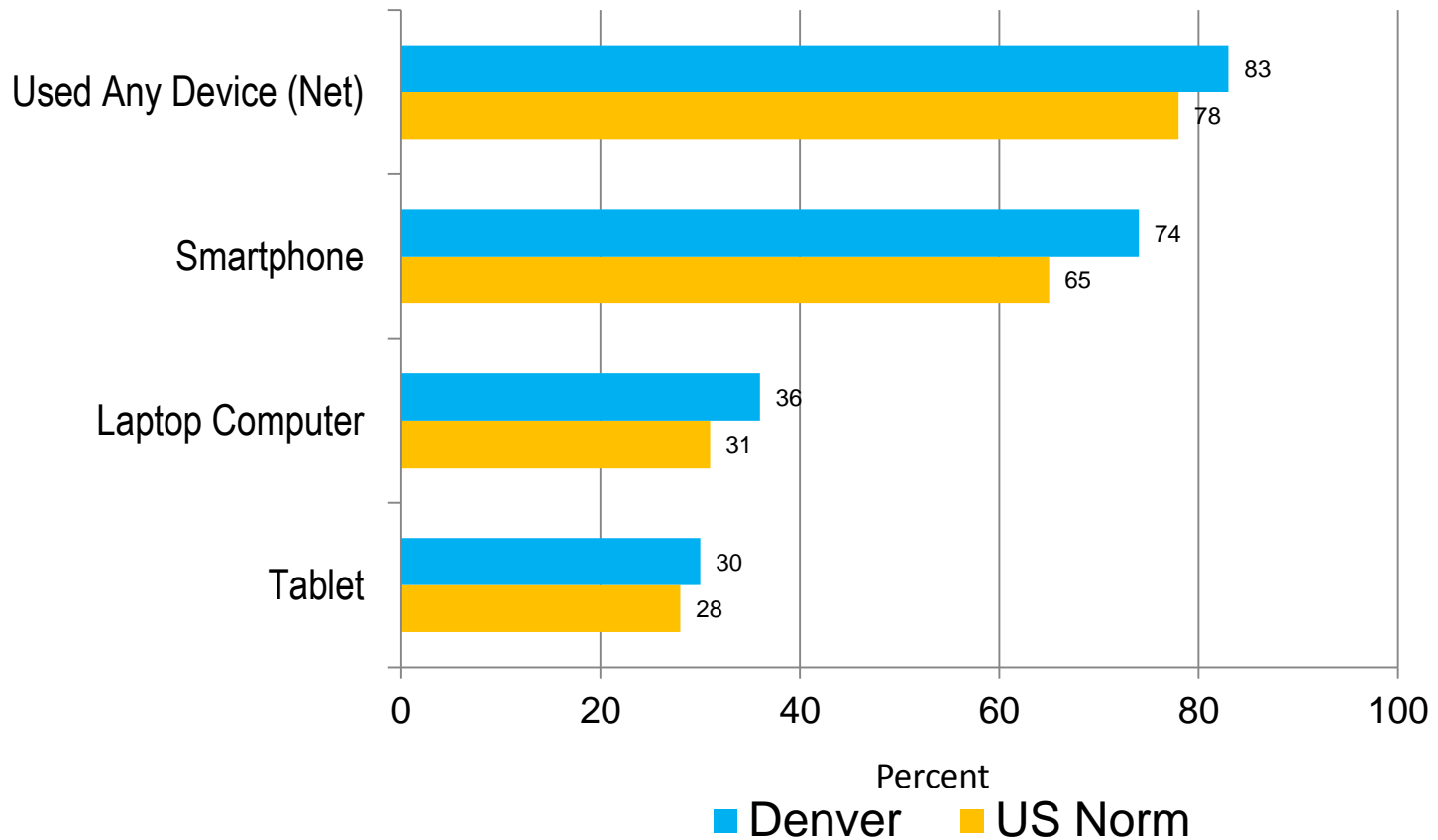
Base: Overnight Business Trips



Devices Used During Trip by Overnight Leisure Travelers



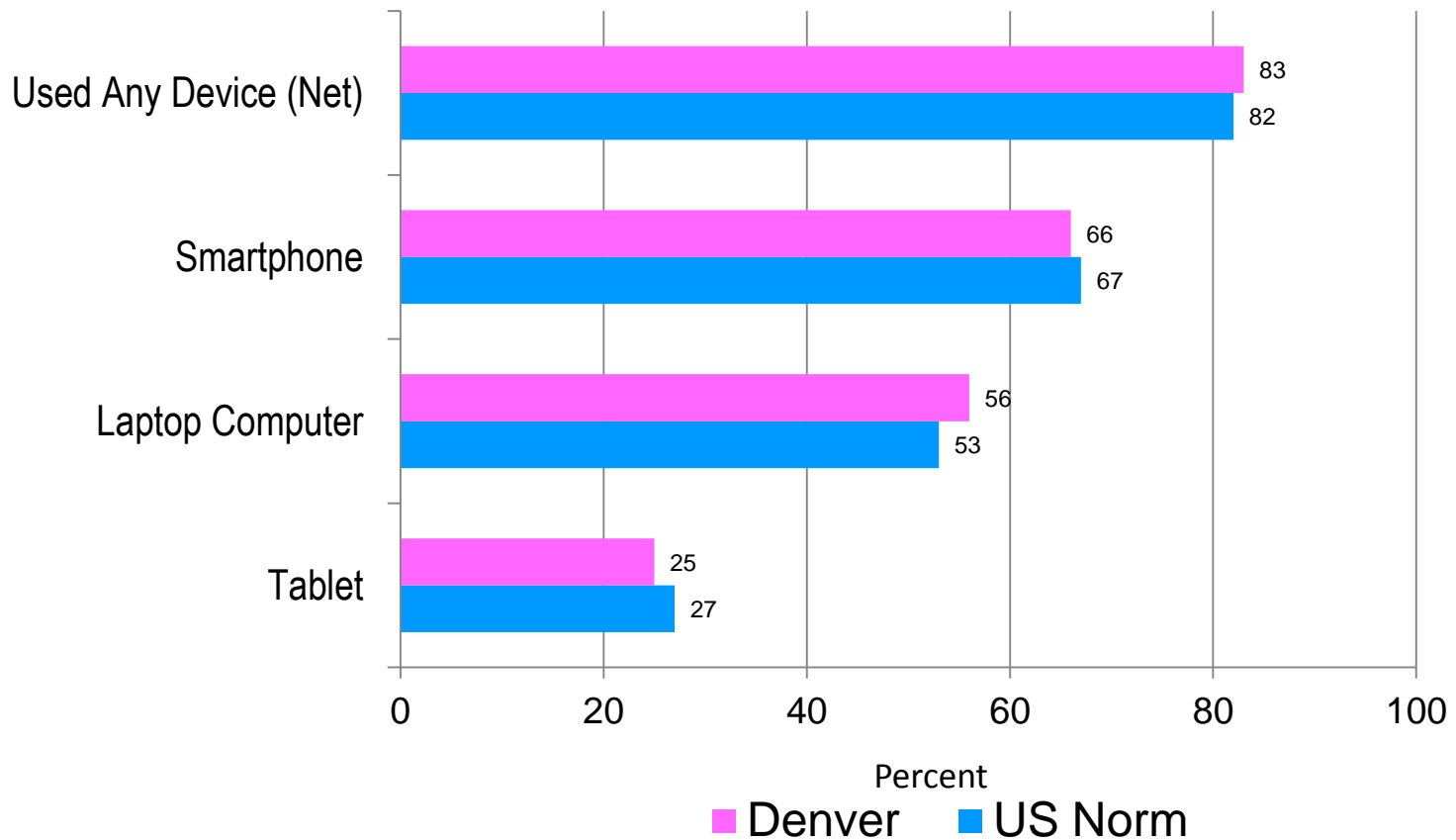
Base: Overnight Leisure Trips



Devices Used During Trip by Overnight Business Travelers



Base: Overnight Business Trips

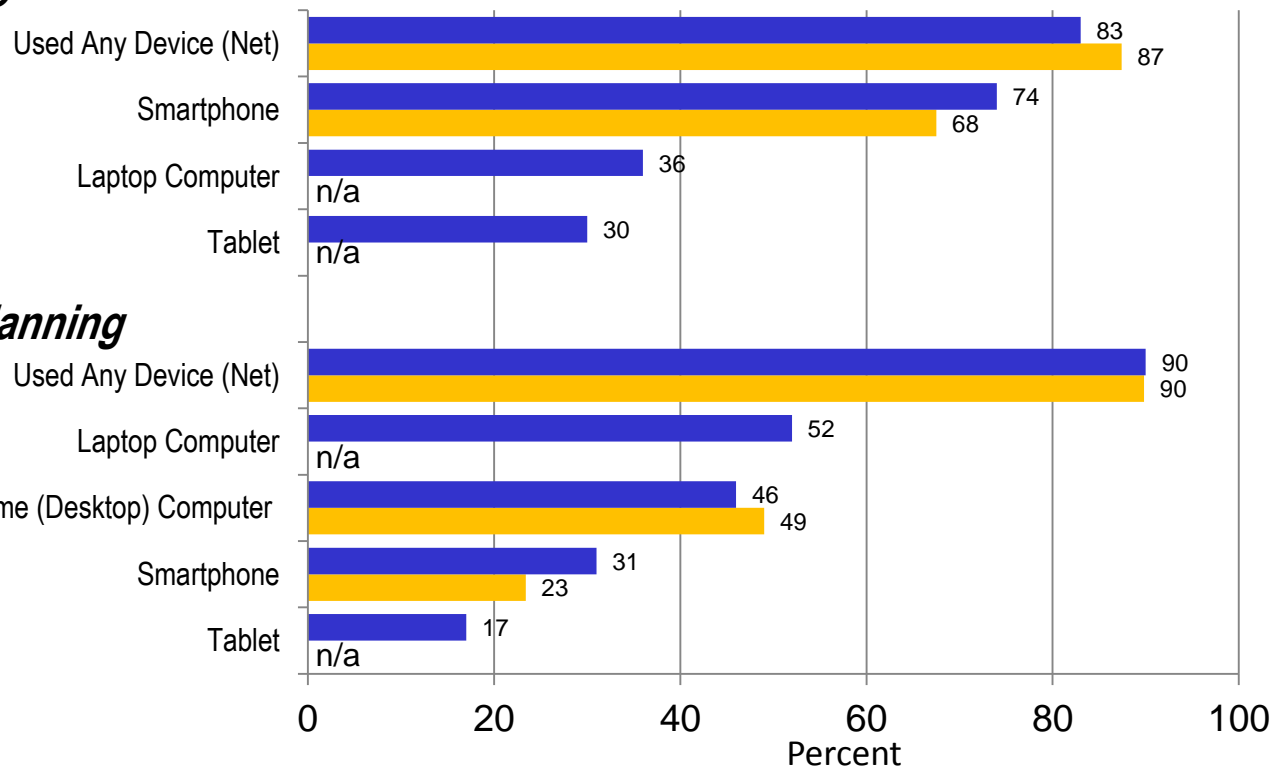


Devices Used for Trip Planning and During Trip by Overnight Leisure Travelers

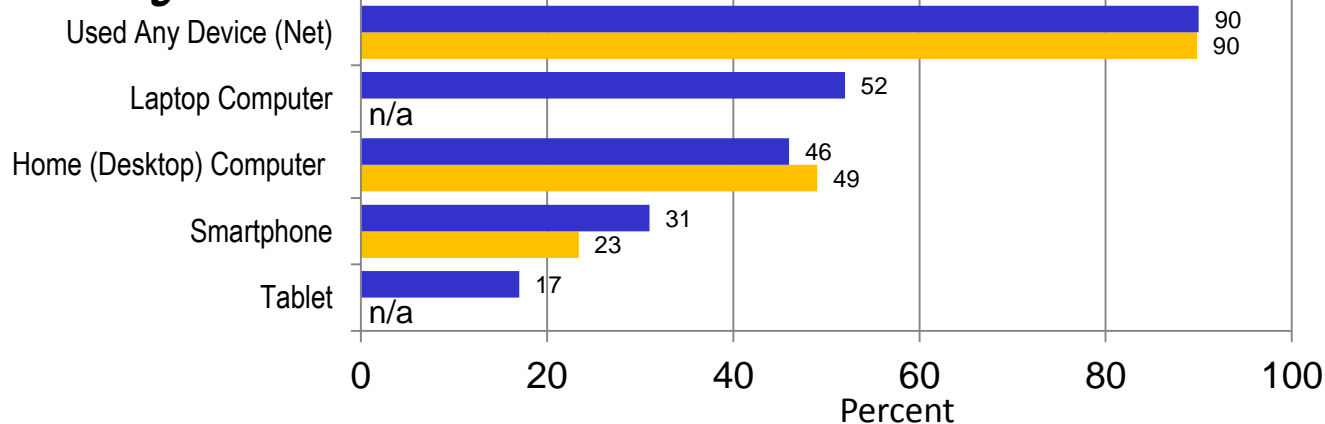


Base: Overnight Leisure Trips

Used During Trip



Used For Trip Planning



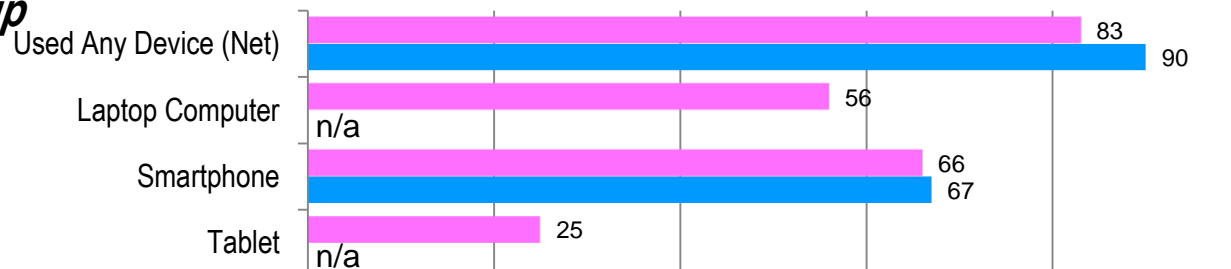
■ 2015 ■ 2014

Devices Used for Trip Planning and During Trip by Overnight Business Travelers

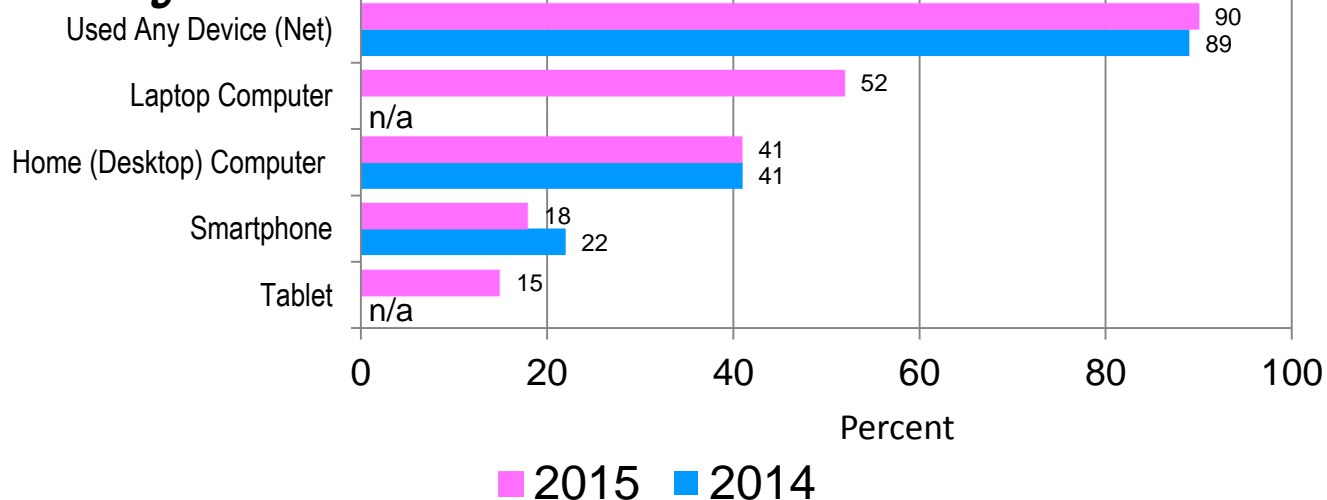


Base: Overnight Business Trips

Used During Trip

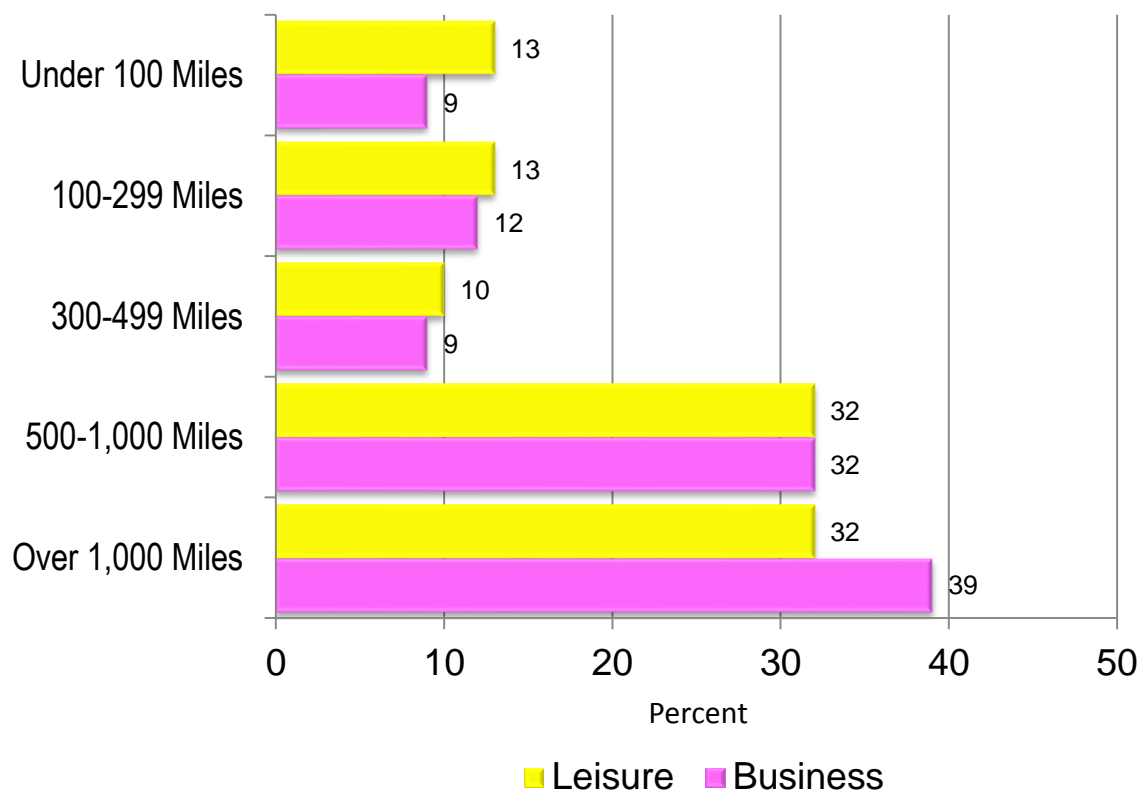


Used For Trip Planning



Tripographics

Distance Traveled — Leisure vs. Business



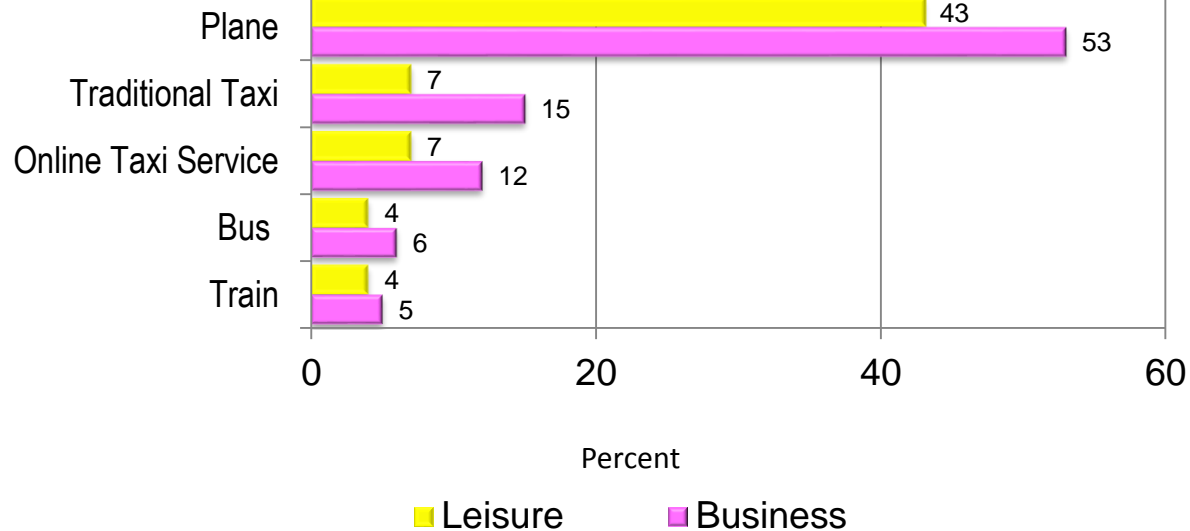
Transportation Used on Trip to Denver



Personal



Commercial

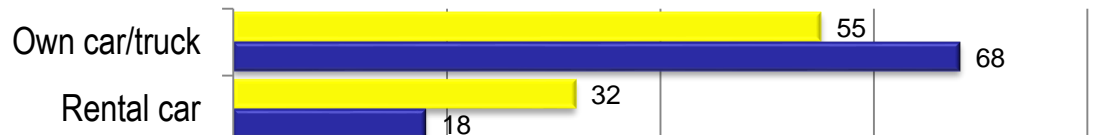


Note: Some respondents used more than 1 type of transportation on their way to their destination

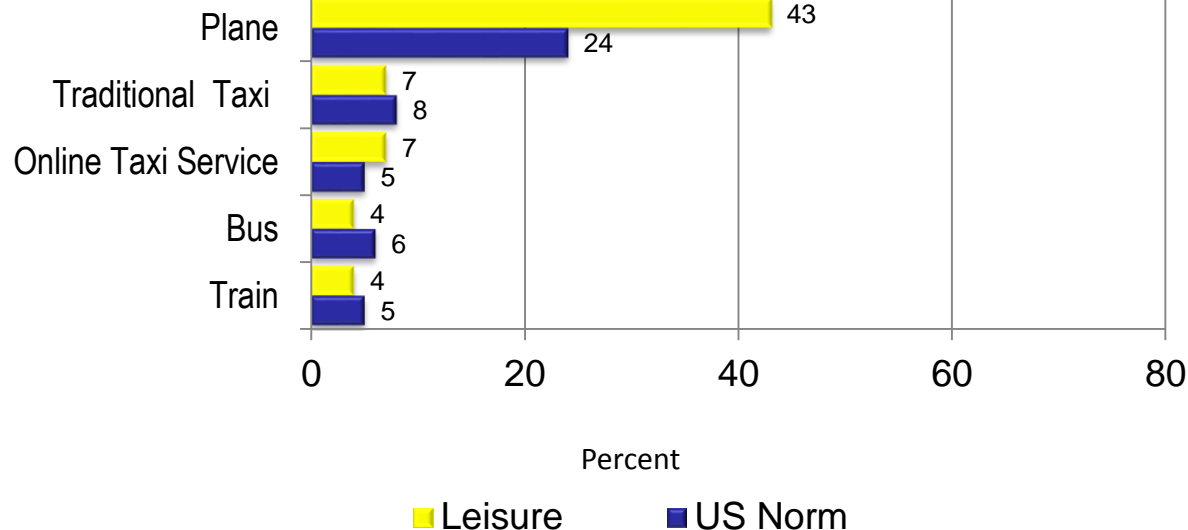
Transportation Used on Trip to Denver — Leisure



Personal



Commercial

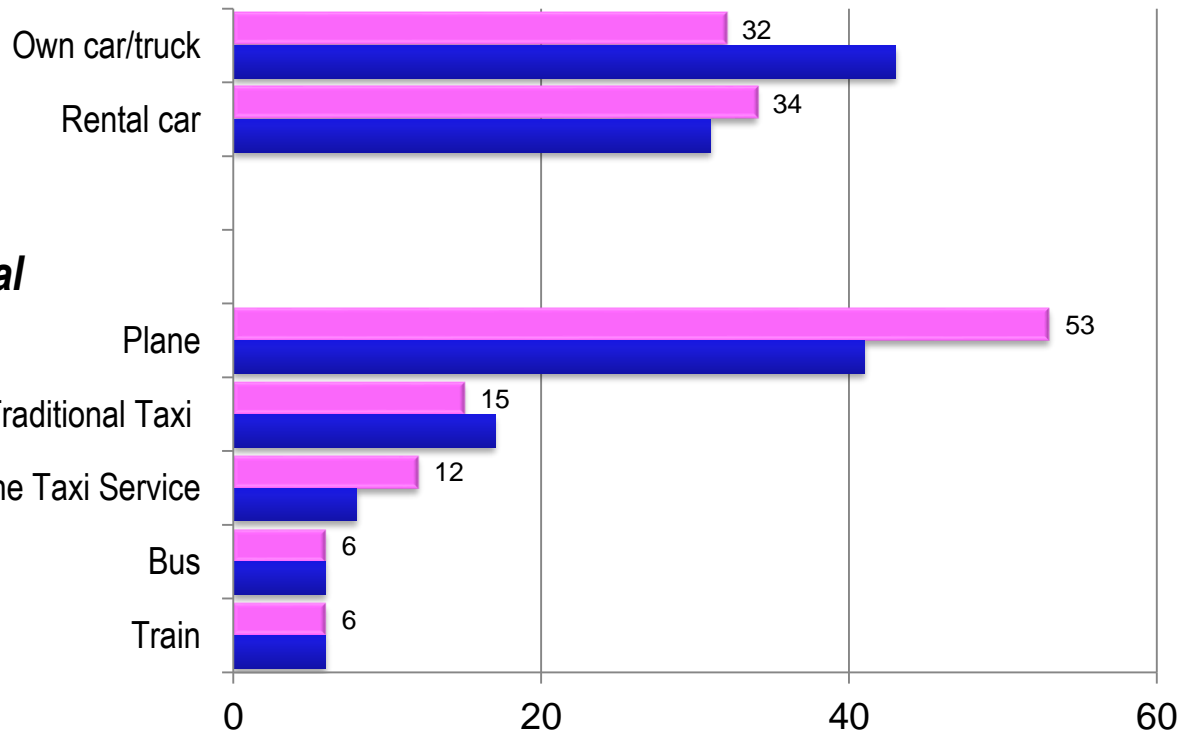


Note: Some respondents used more than 1 type of transportation on their way to their destination

Transportation Used on Trip to Denver — Business



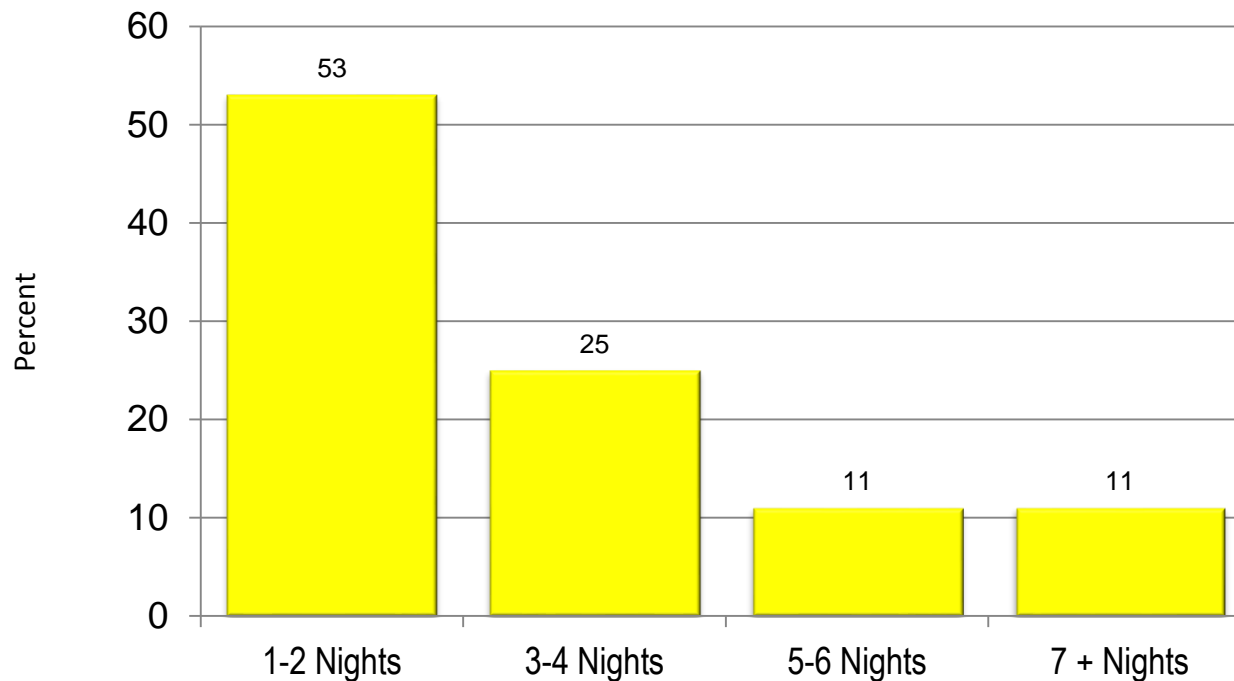
Personal



■ Business ■ US Norm

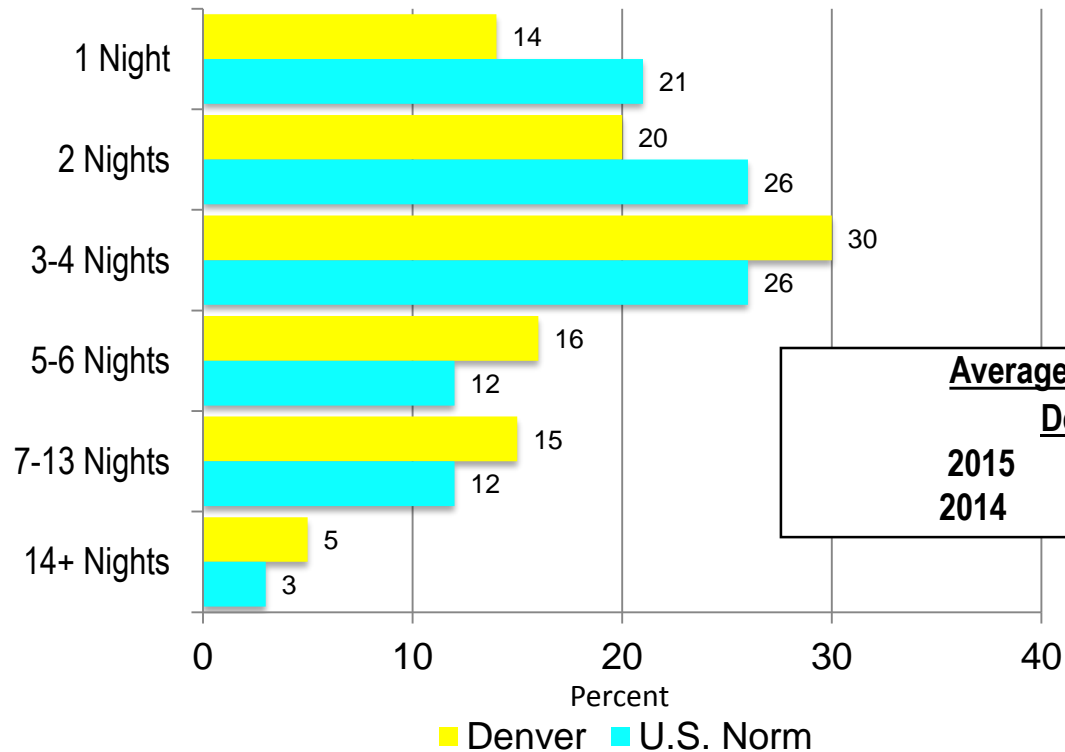
Note: Some respondents used more than 1 type of transportation on their way to their destination

Number of Nights Spent in Denver — Leisure



	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
Average Number of Nights Spent in Denver	3.4	3.2	3.2	3.3
Percent of Total Time in Colorado Spent in Denver	71%	81%	75%	77%
Percent of Entire Trip Spent in Denver	59%	74%	67%	69%

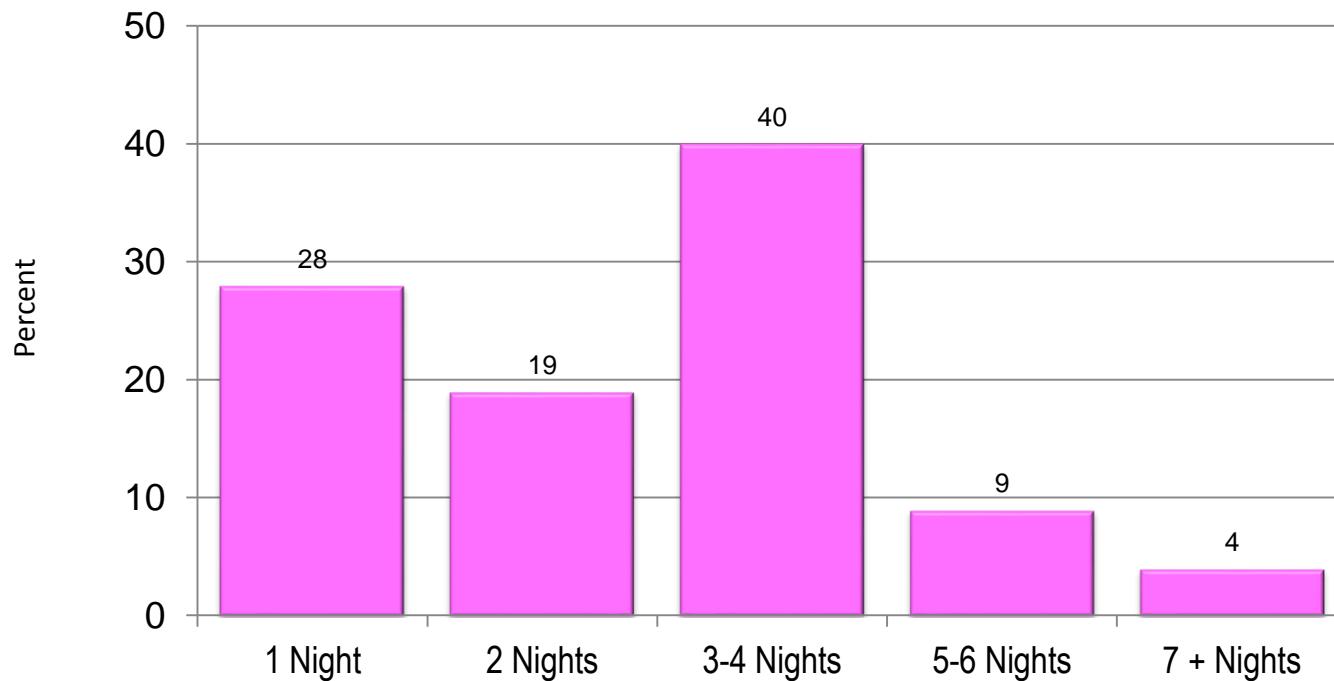
Overall Length of Trip* — Leisure



Average Number of Nights Away		
	Denver Trip	U.S. Norm
2015	4.8	4.0
2014	4.8	3.7

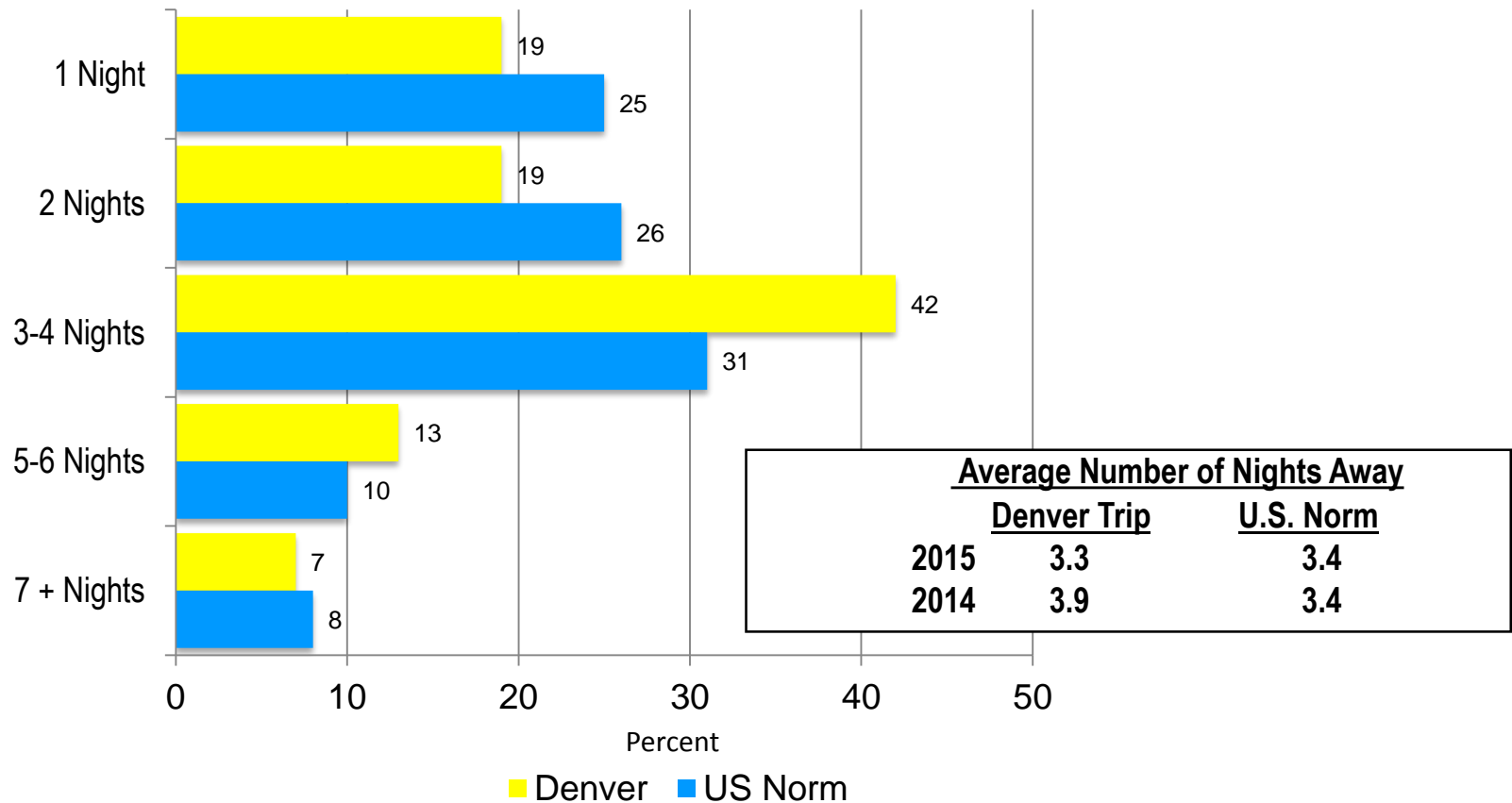
*Includes travel to/from Denver/destination and time spent elsewhere

Number of Nights Spent in Denver – Business



	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>
Average Number of Nights Spent in Denver	3.0	3.1	3.2	2.9
Percent of Total Time in Colorado Spent in Denver	91%	89%	88%	91%
Percent of Entire Trip Spent in Denver	81%	82%	83%	87%

Overall Length of Trip* – Business

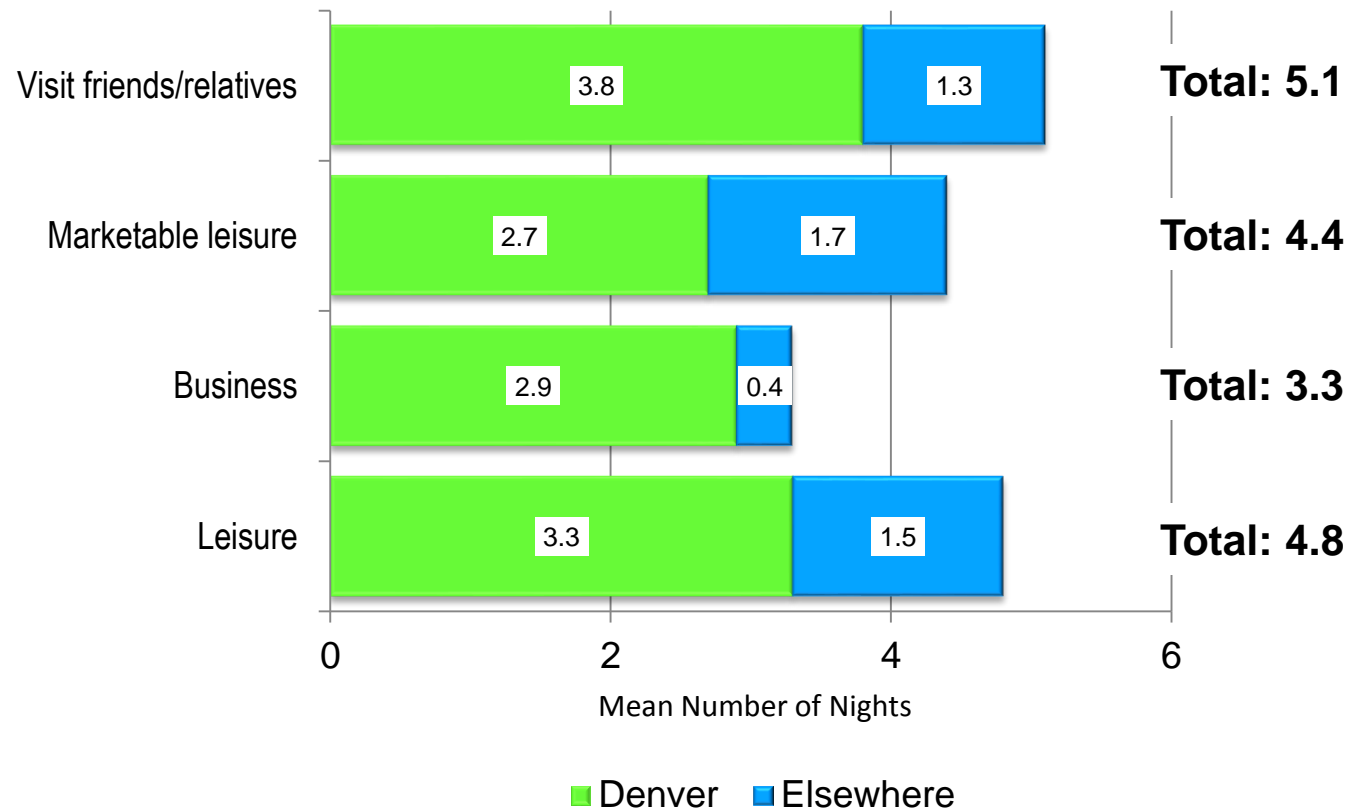


*Includes travel to/from Denver/destination and time spent elsewhere

Where Denver Visitors Stayed on Their Overall Trip



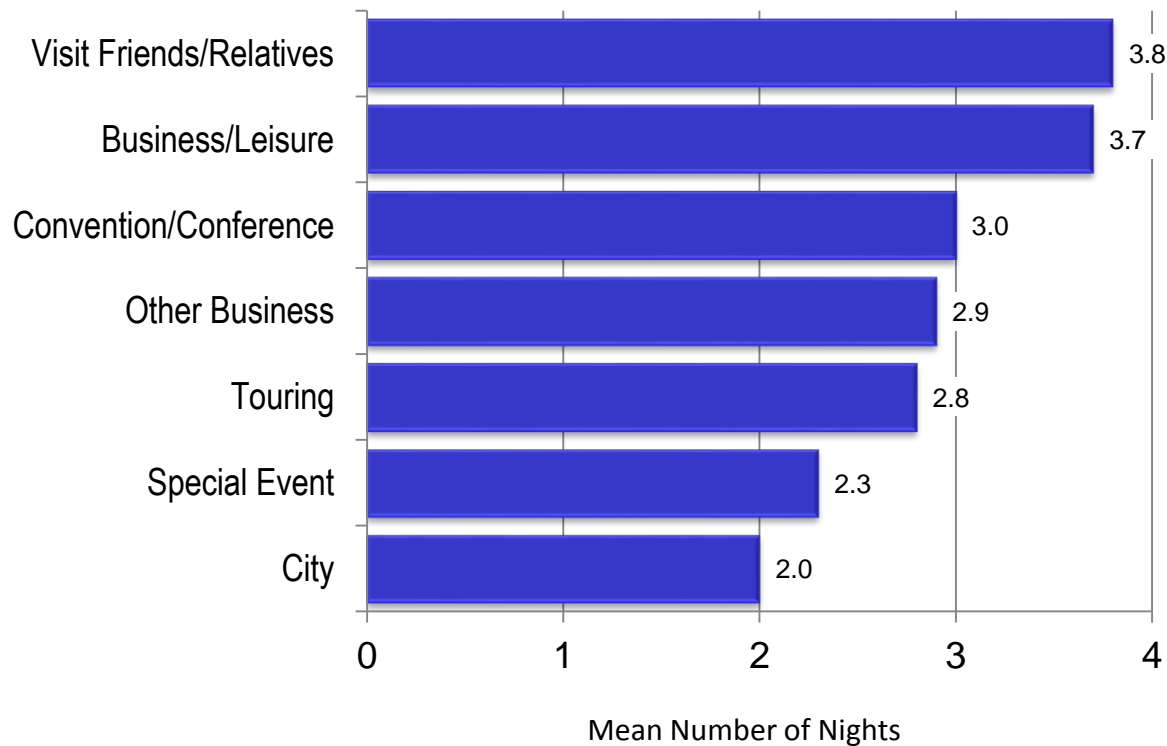
Base: Those Who Stayed at least 1 night



Average Number of Nights Spent in Denver — By Trip Type



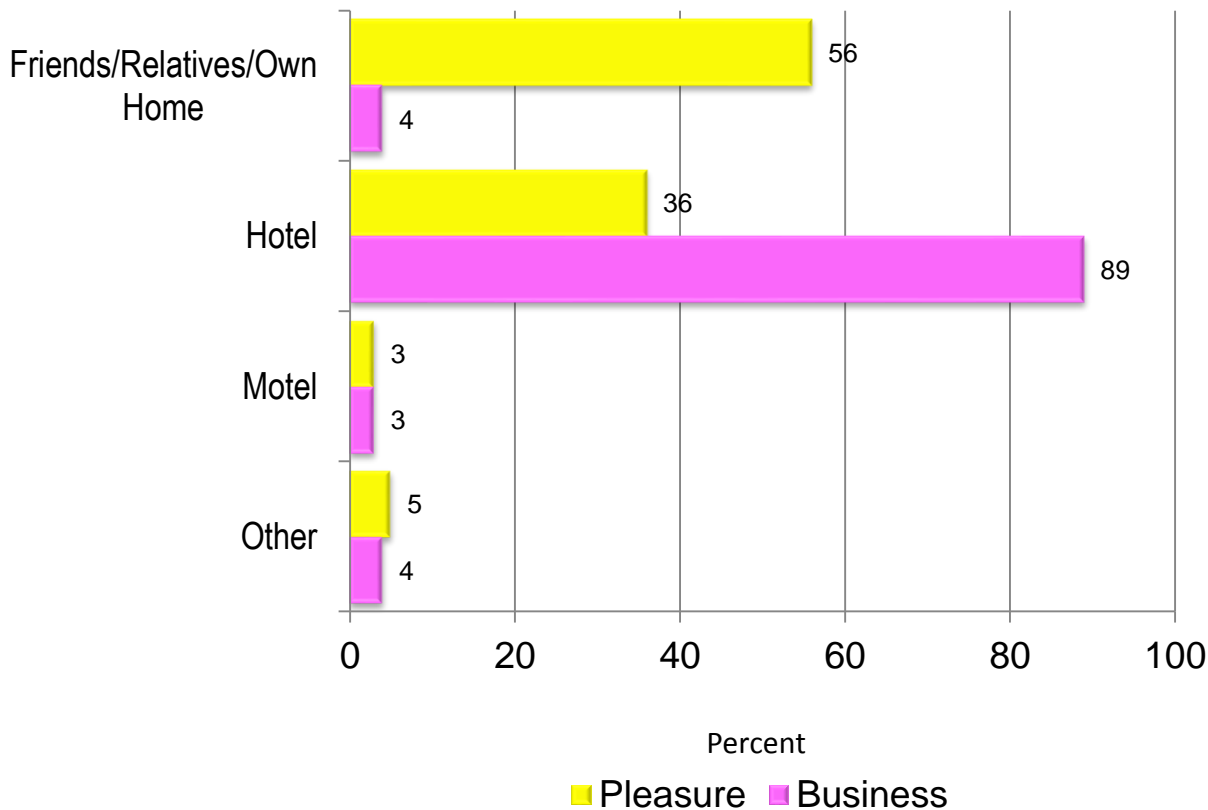
Base: Those Who Stayed at least 1 night



Percent of Denver Trip-Nights Spent in Each Type of Accommodation



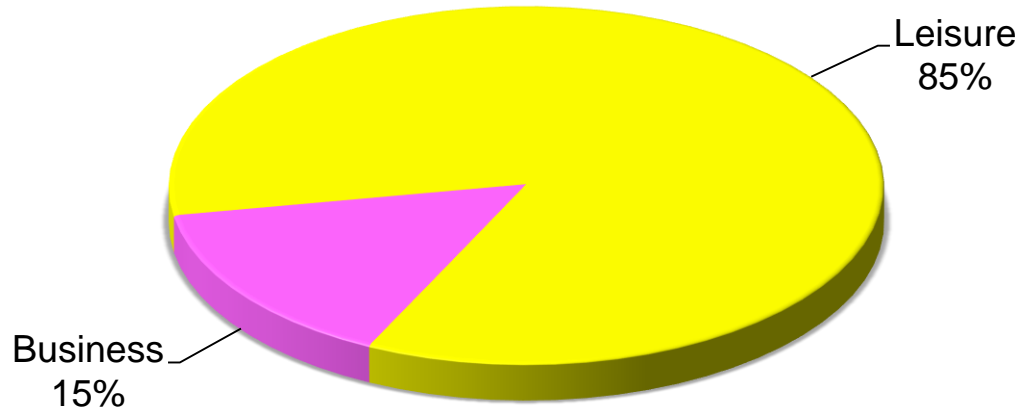
Base: Those Who Stayed at least 1 night



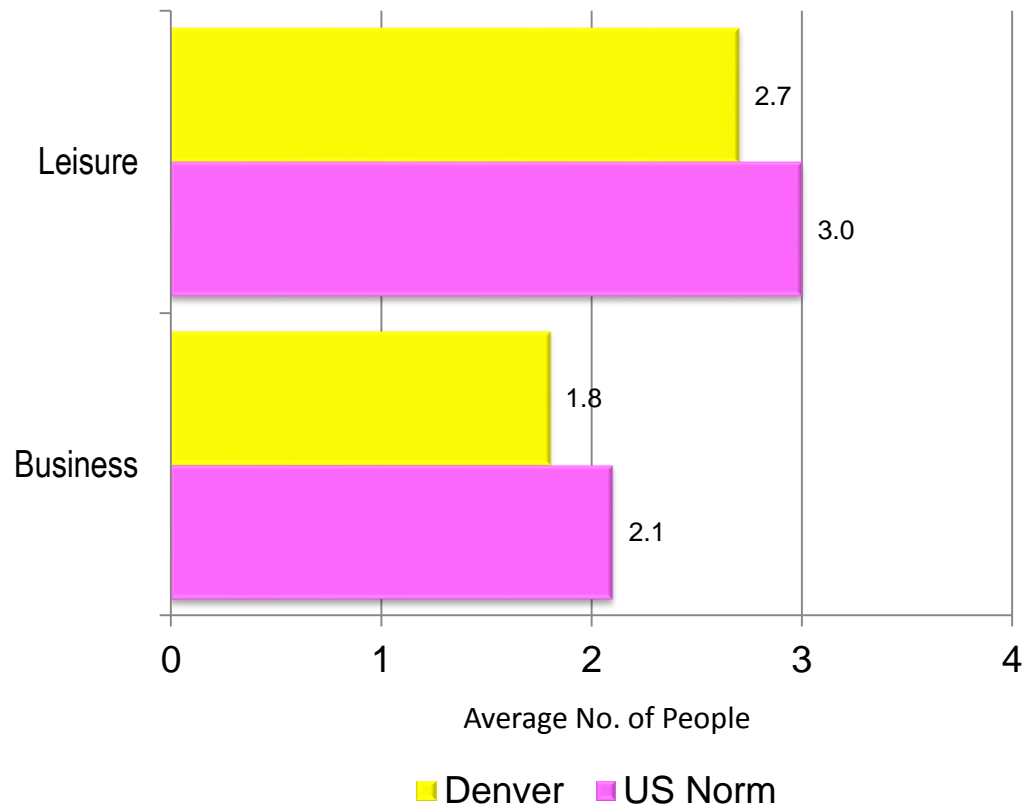
Use of Commercial Accommodations In Denver



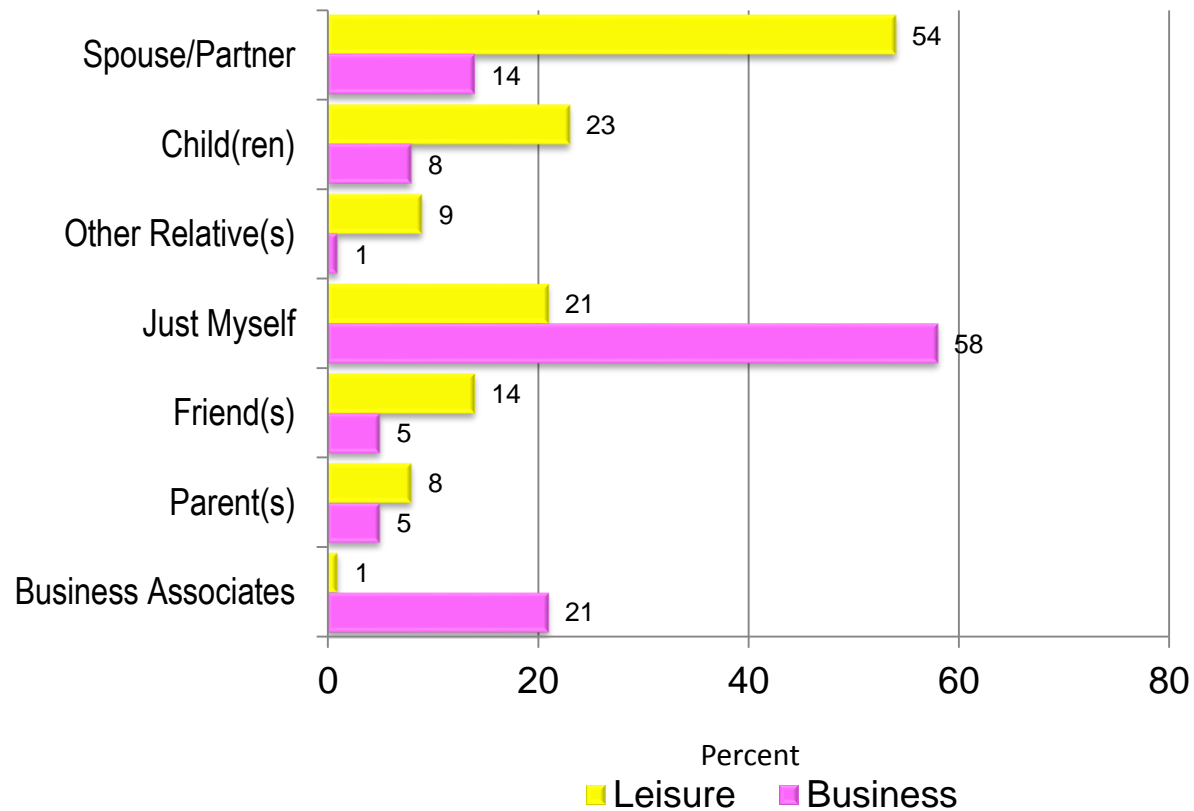
Percent of Accommodation Nights



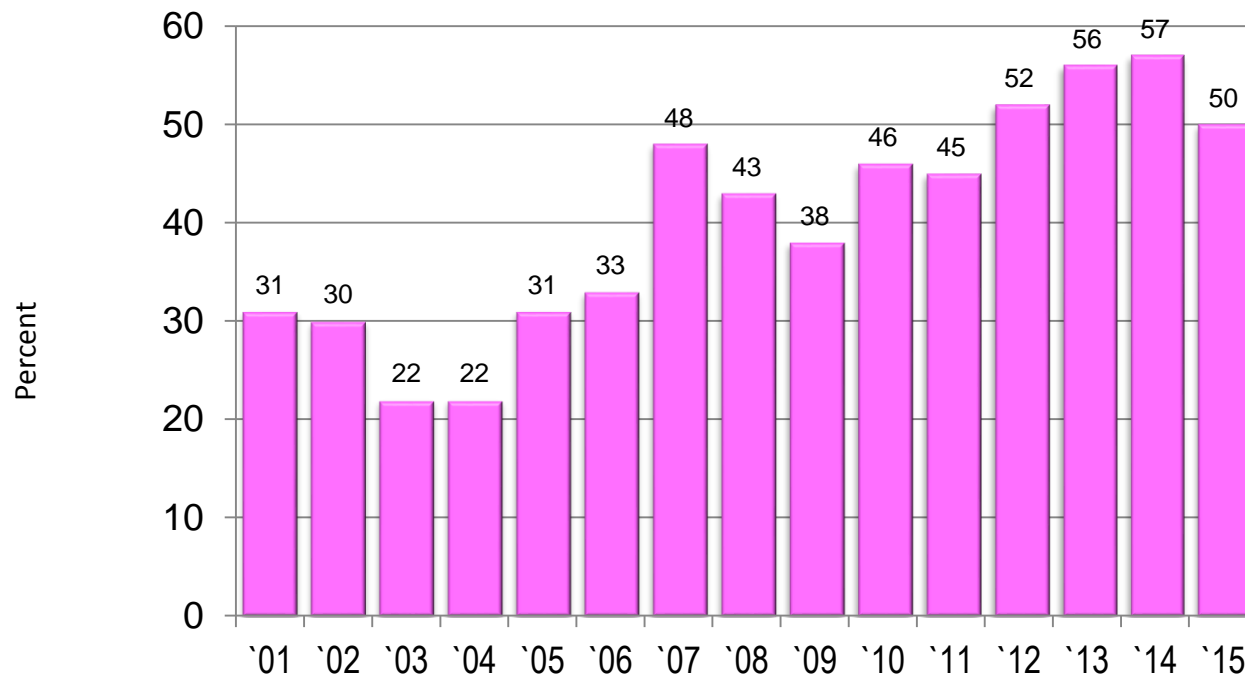
Size of Travel Party



Composition of Travel Party



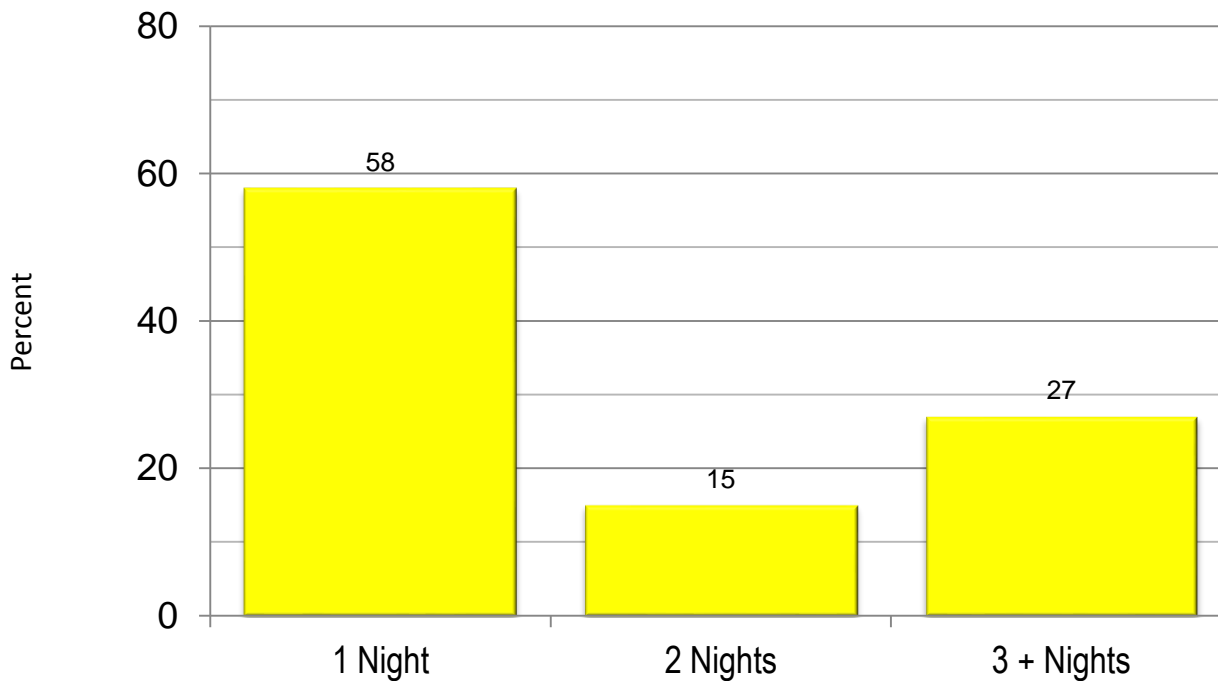
Share of Denver Business Trips that are Combined Business/Leisure Trips



Business/Leisure Trips – Number of Extra Nights Spent in Denver



Base: Overnight Business/Leisure Trips

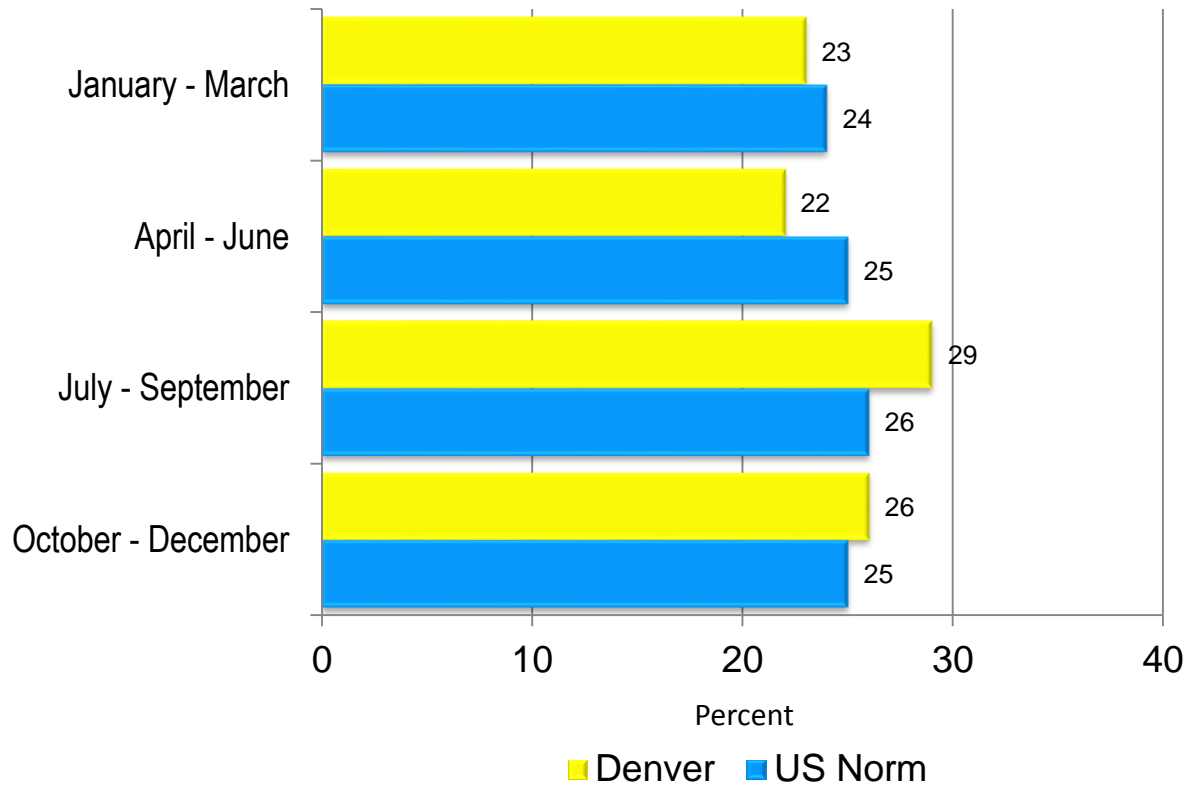


Percent of Extra Nights Spent in Denver	89%
Percent of Extra Nights Spent Elsewhere in Colorado	11%

Distribution of Trips By Quarter — Leisure



Base: Overnight Leisure Trips

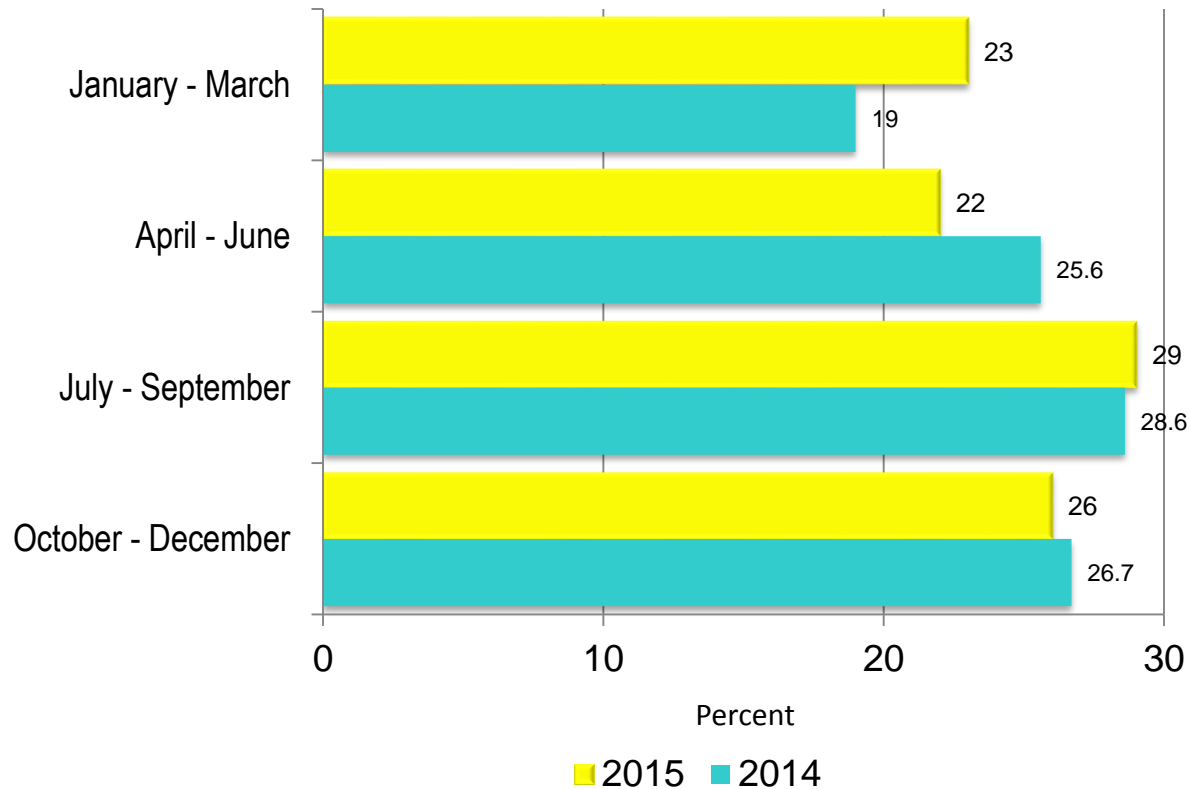


Distribution of Trips By Quarter

— Leisure



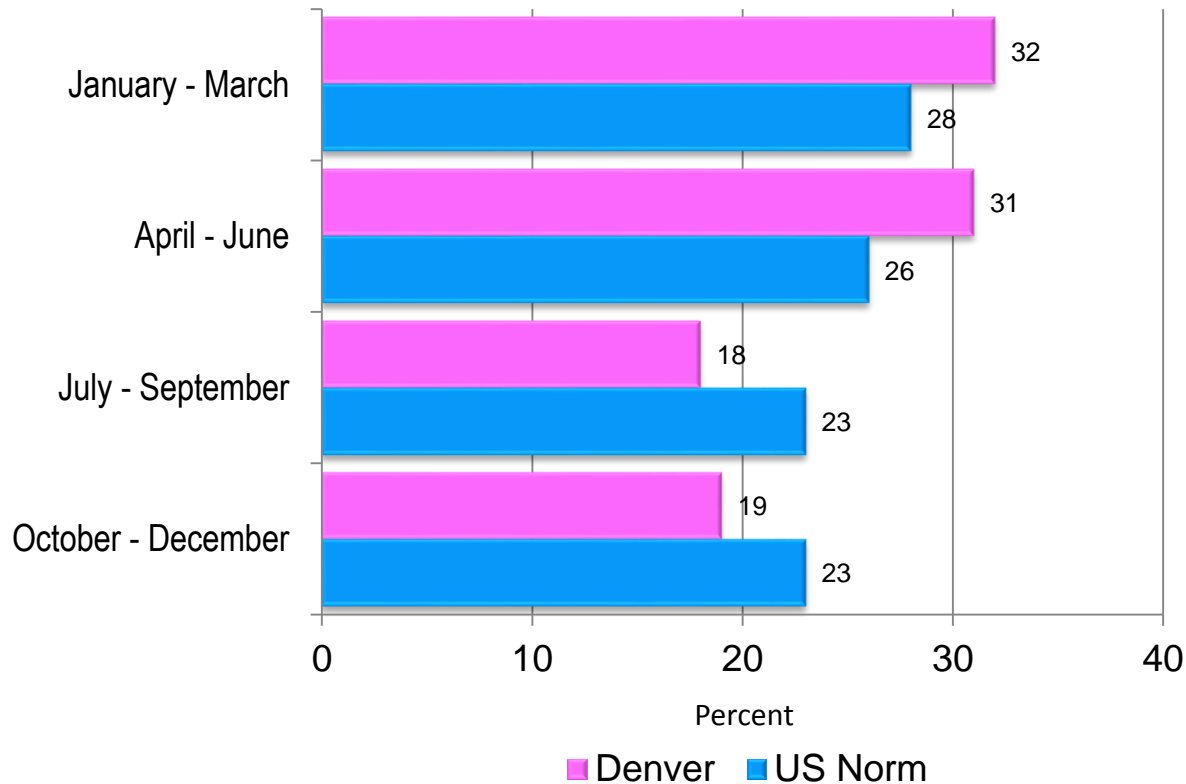
Base: Overnight Leisure Trips



Distribution of Trips By Quarter — Business



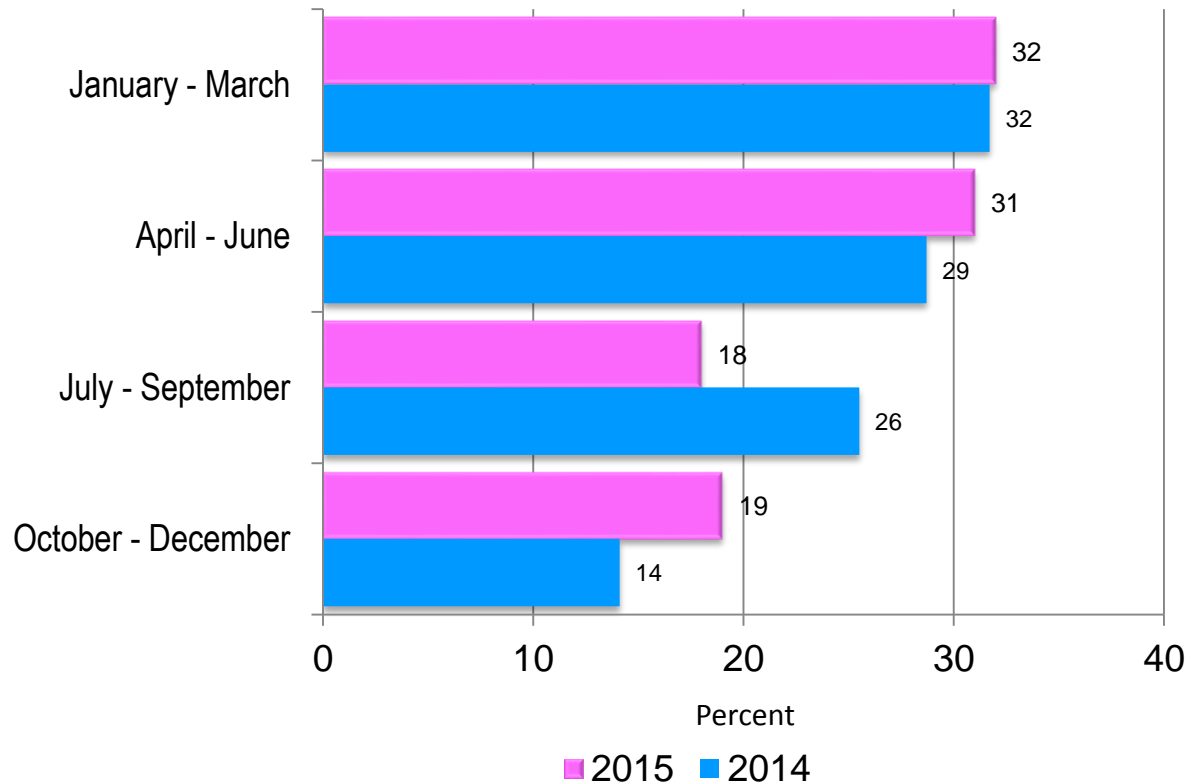
Base: Overnight Business Trips



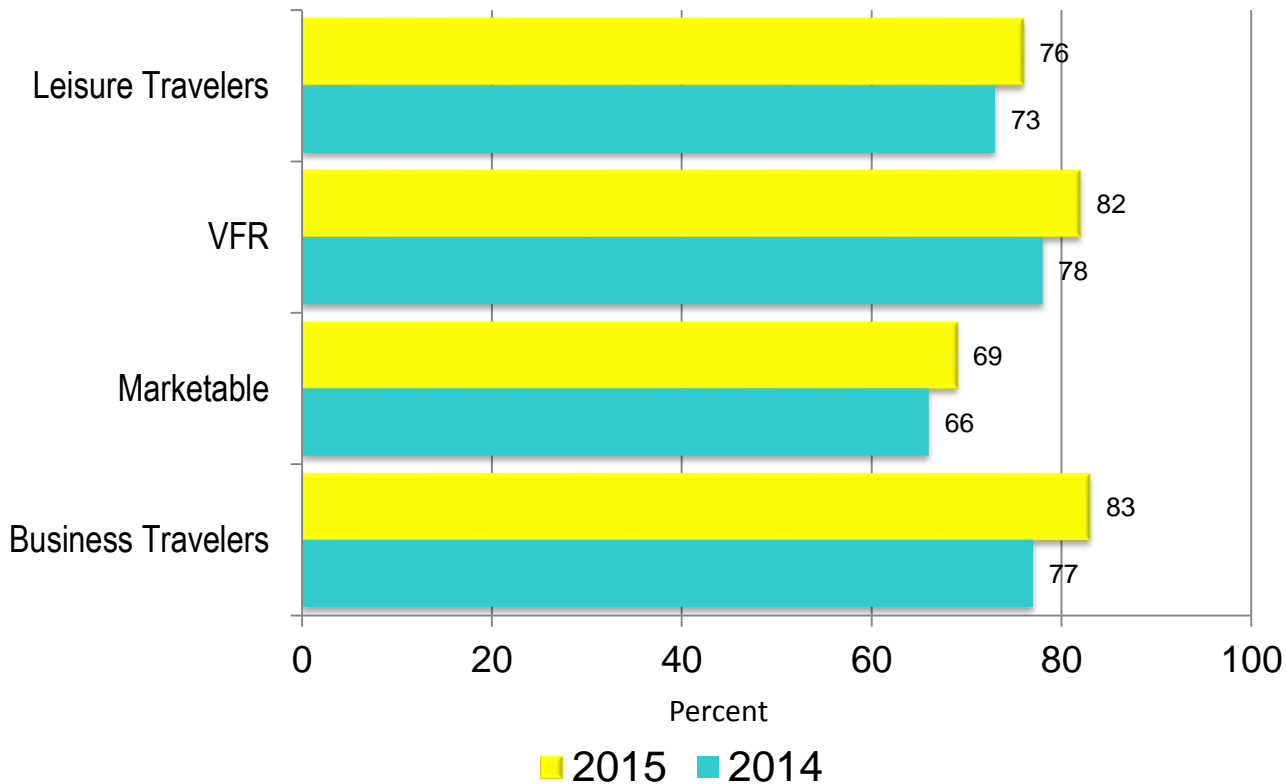
Distribution of Trips By Quarter — Business



Base: Overnight Business Trips



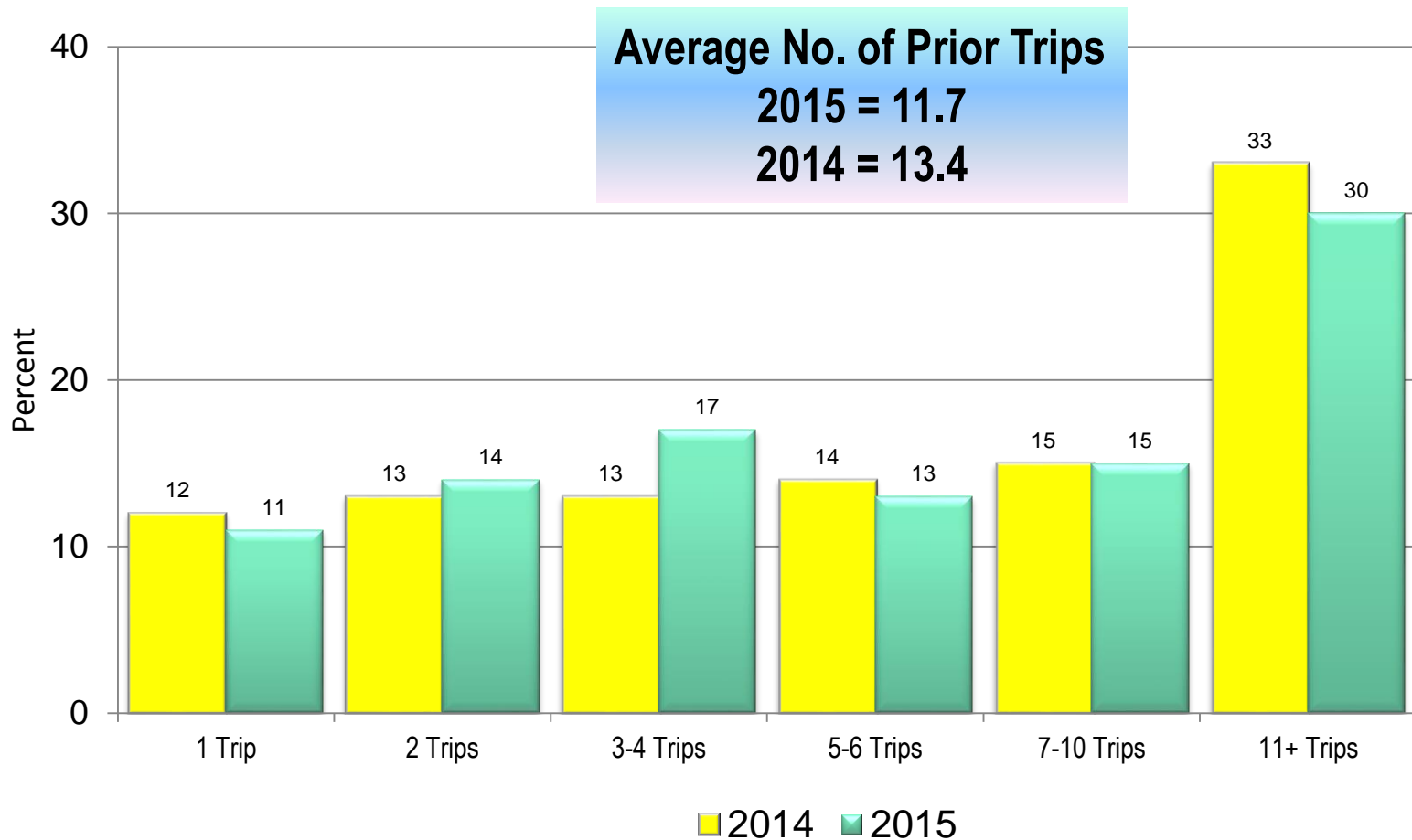
Incidence of Prior Travel to Denver



Number of Prior Overnight Leisure Trips to Denver — Leisure Visitors



Base: Prior Leisure Visitors

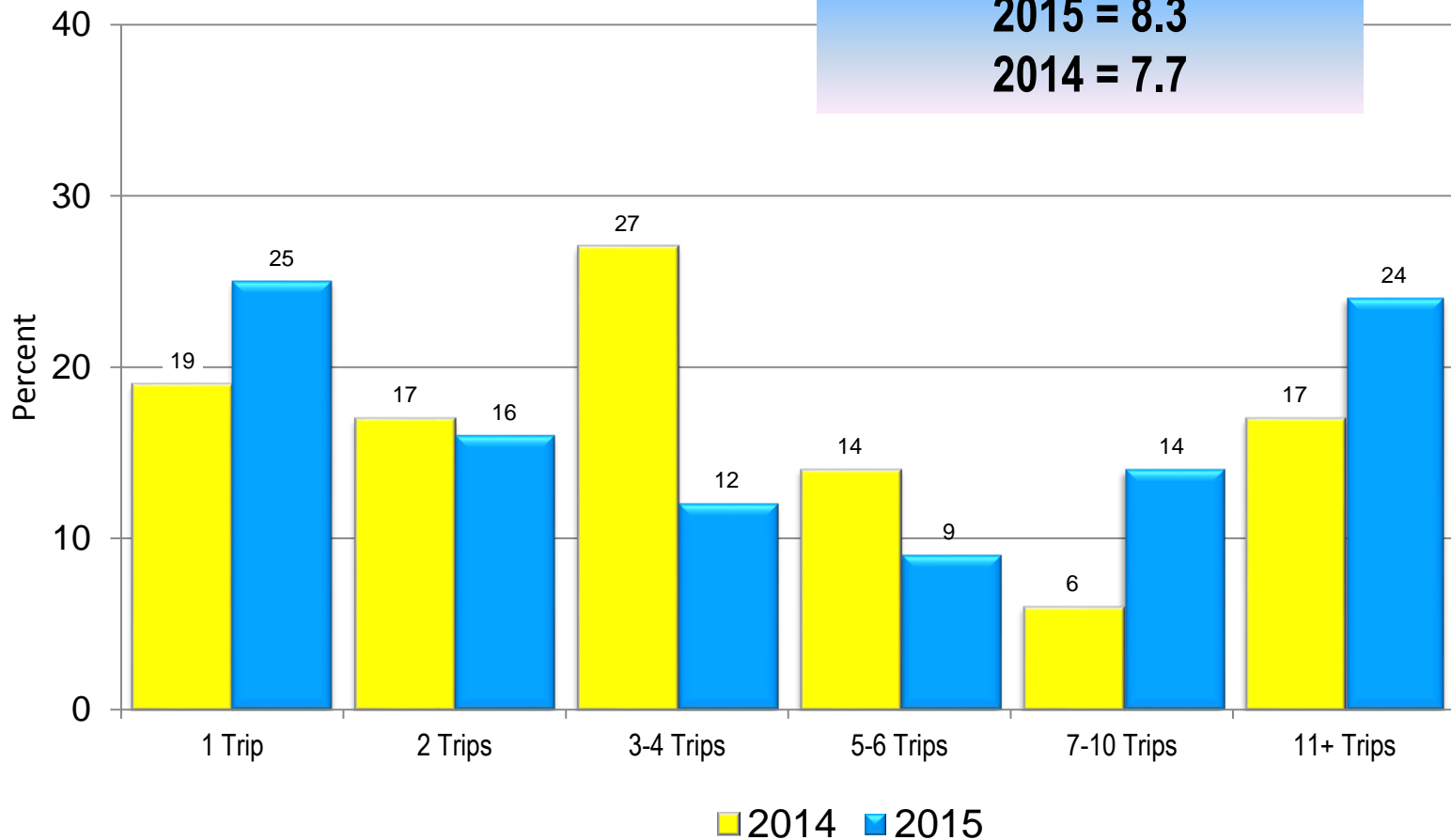


Number of Prior Overnight Leisure Trips to Denver — Business Visitors

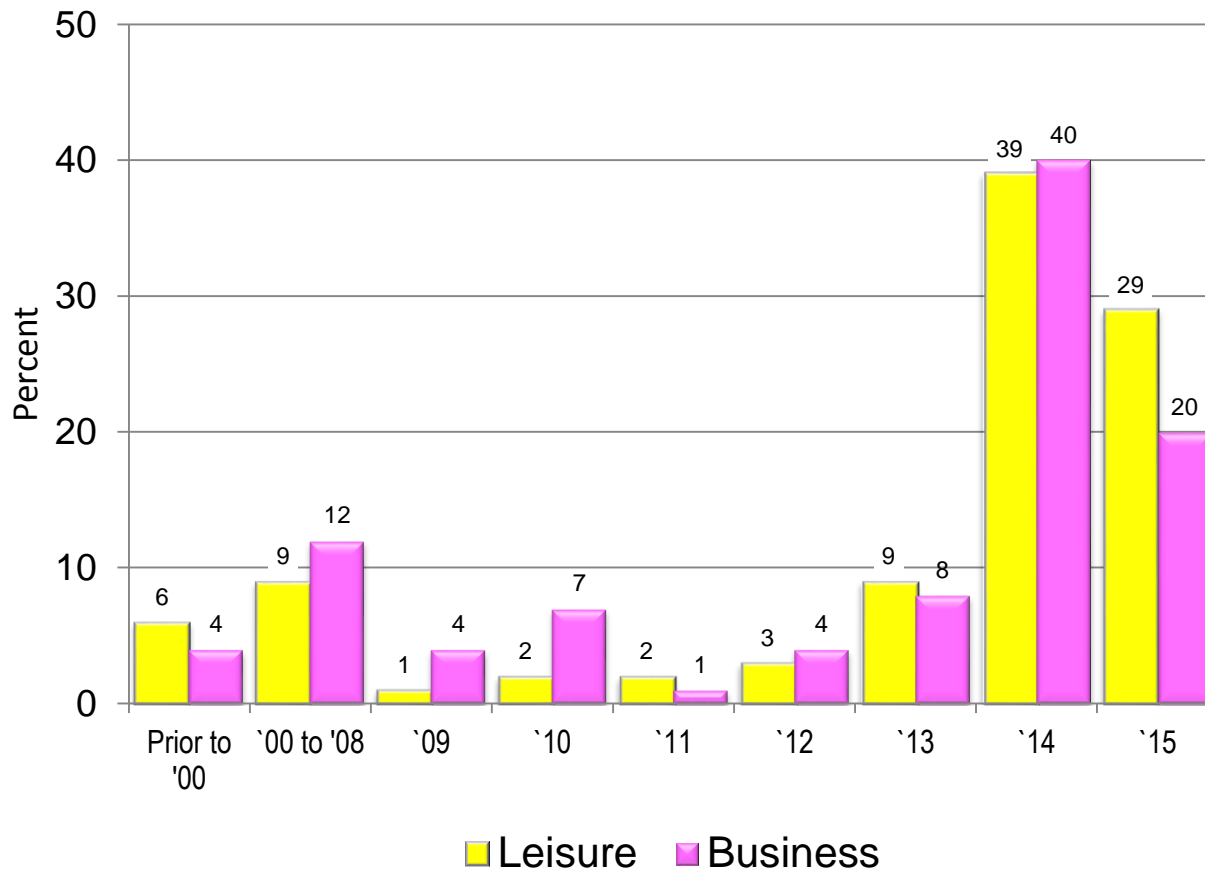


Base: Prior Business Visitors

Average No. of Prior Trips
2015 = 8.3
2014 = 7.7

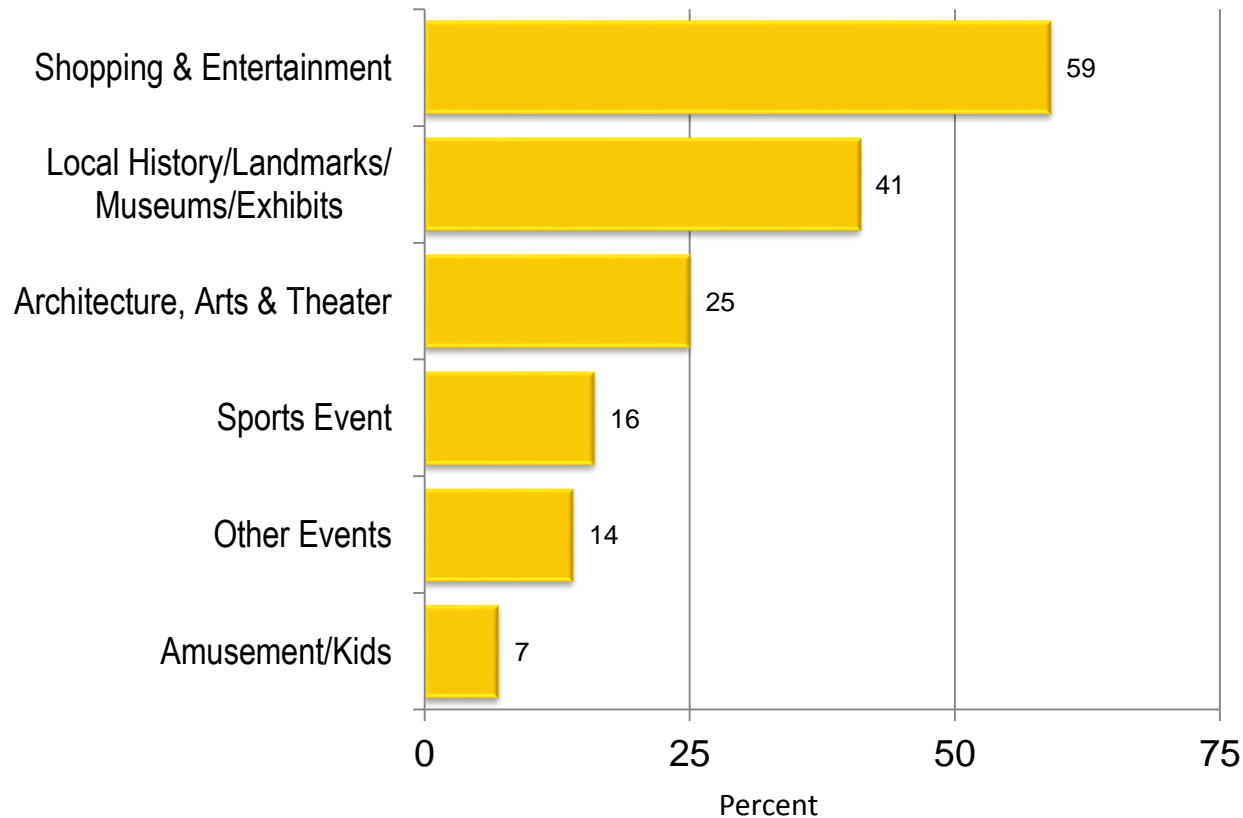


Year of Most Recent Denver Overnight Leisure Trip Among Prior Visitors

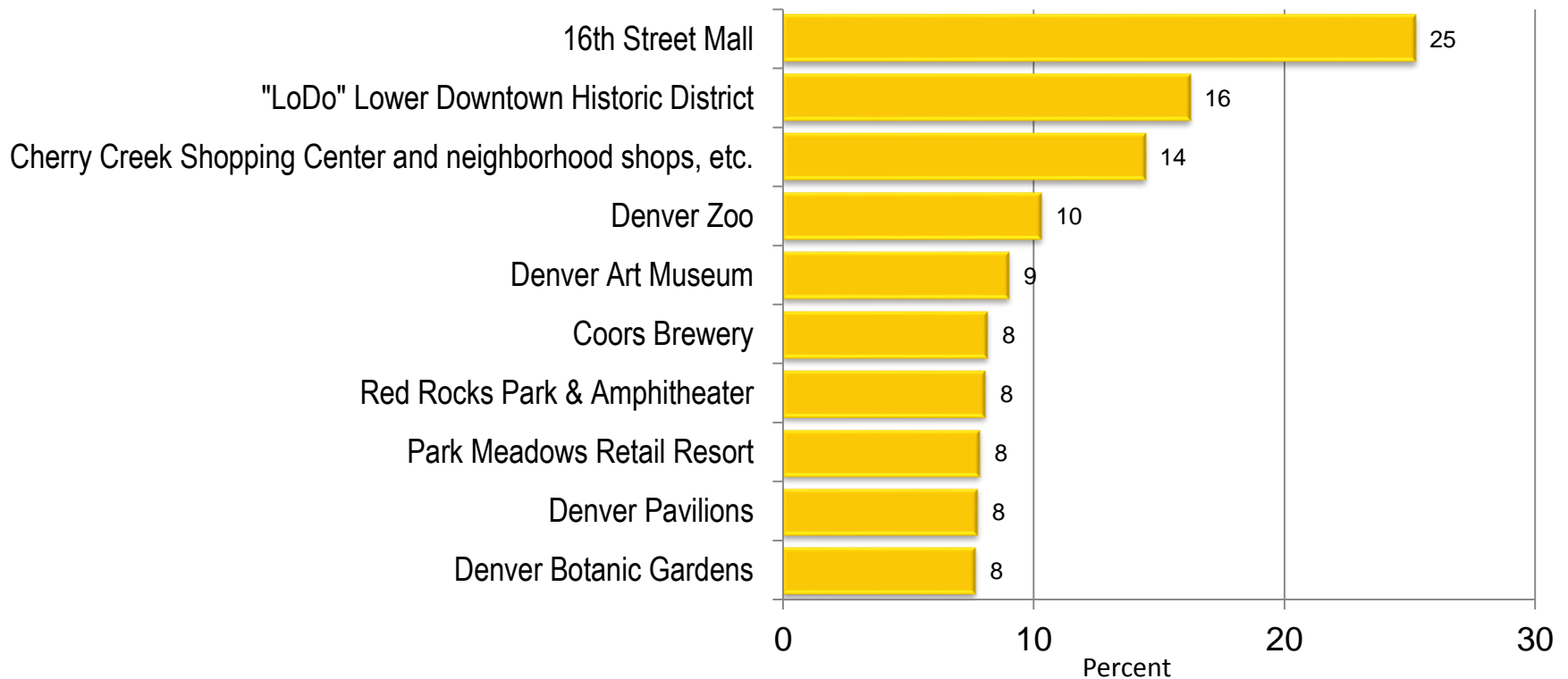


The Trip Experience

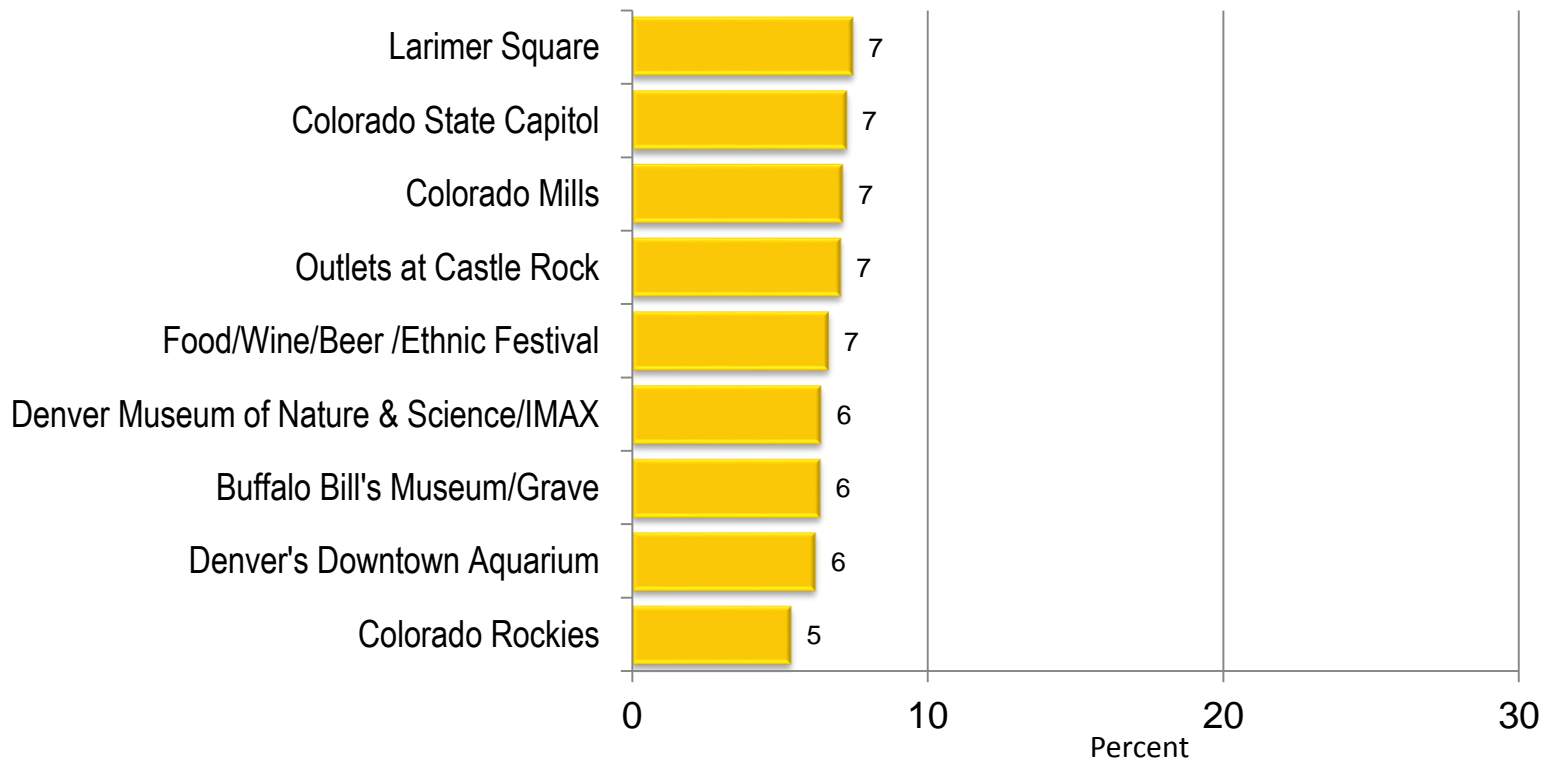
Types of Attractions Visited in Denver



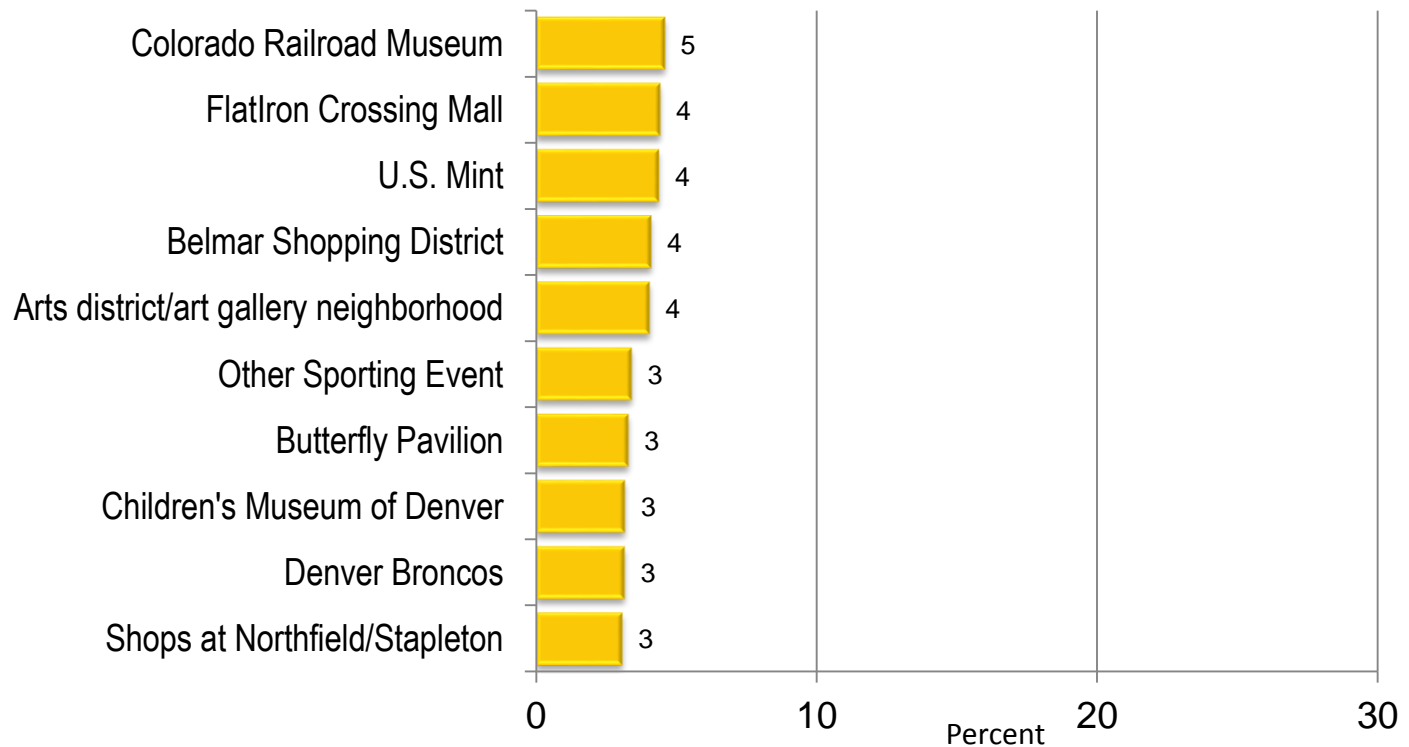
Attractions Visited in Denver



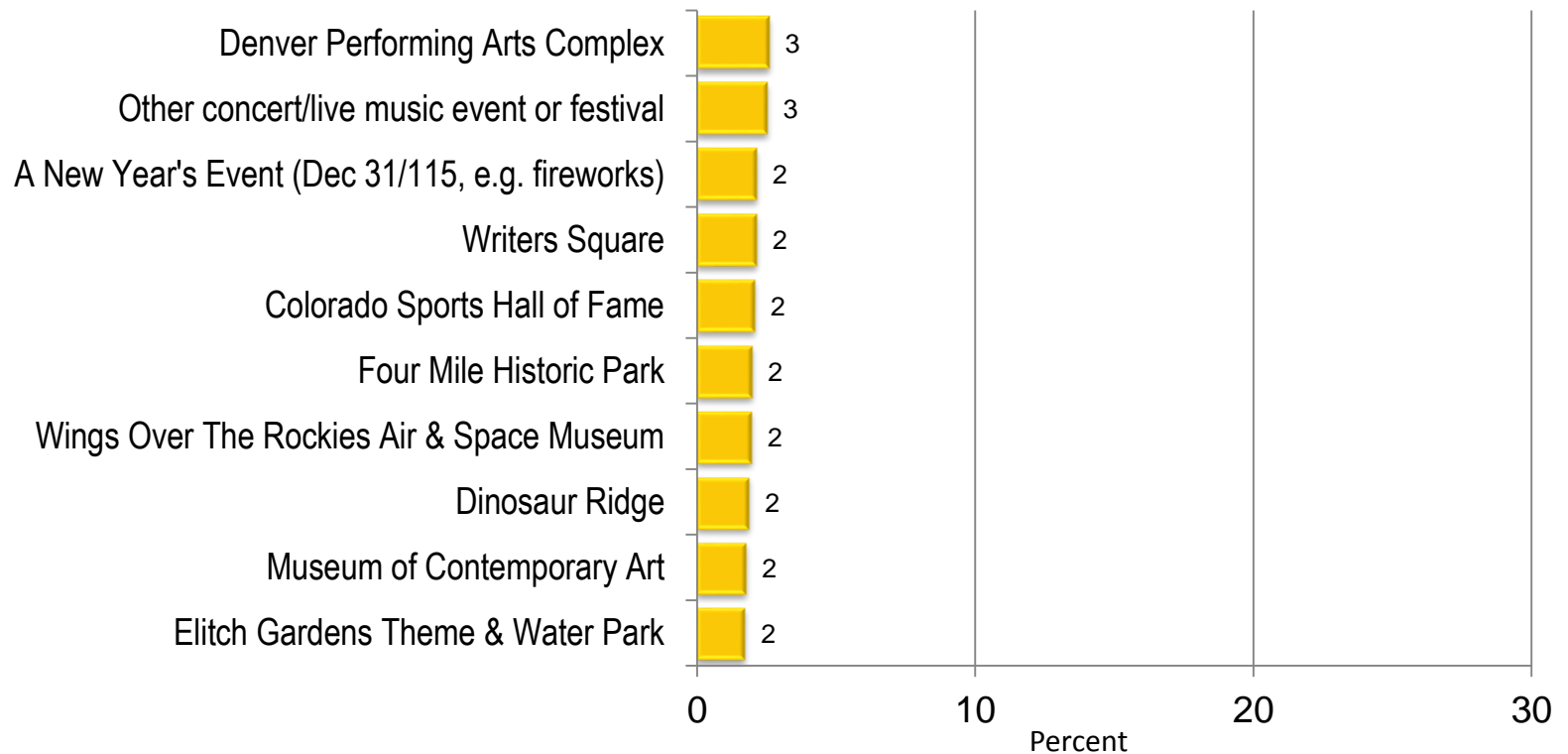
Attractions Visited in Denver (Cont'd)



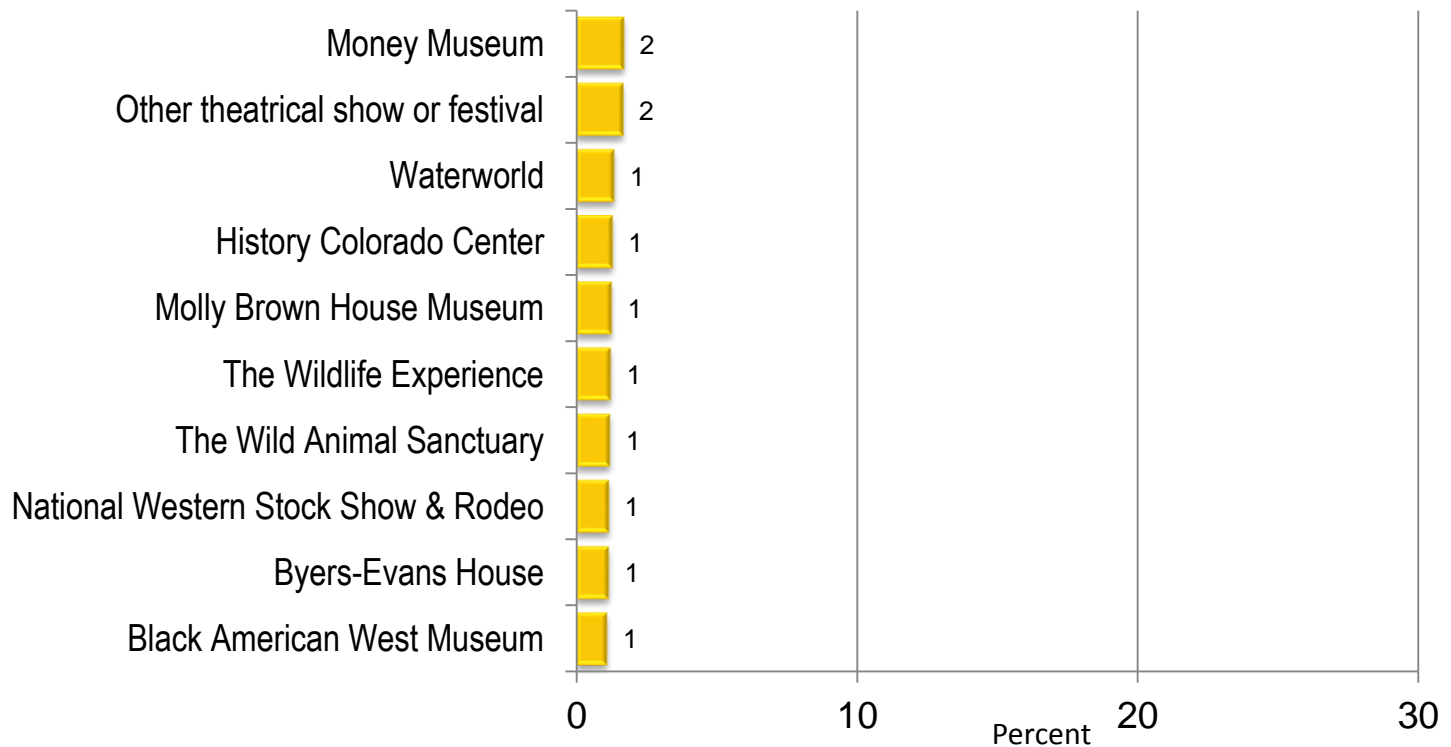
Attractions Visited in Denver (Cont'd)



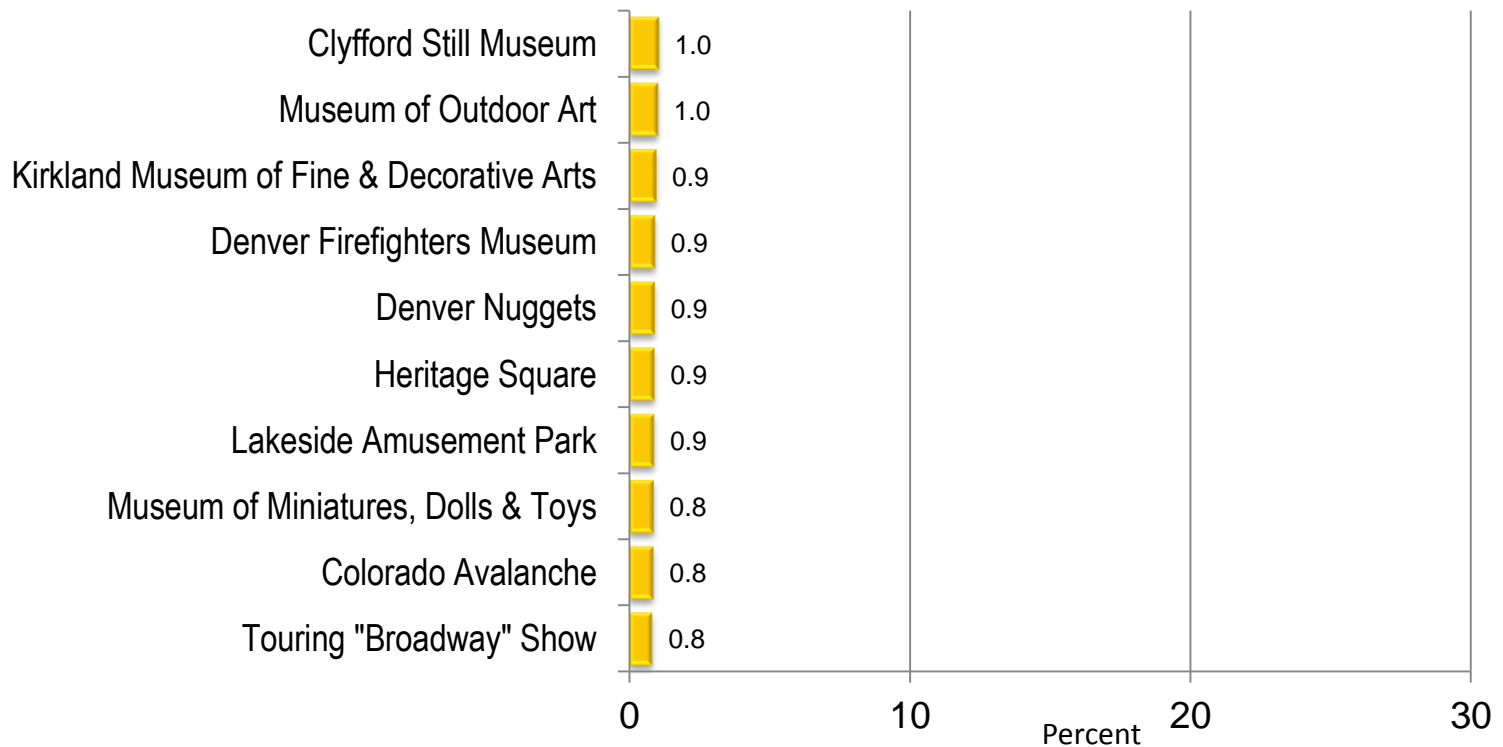
Attractions Visited in Denver (Cont'd)



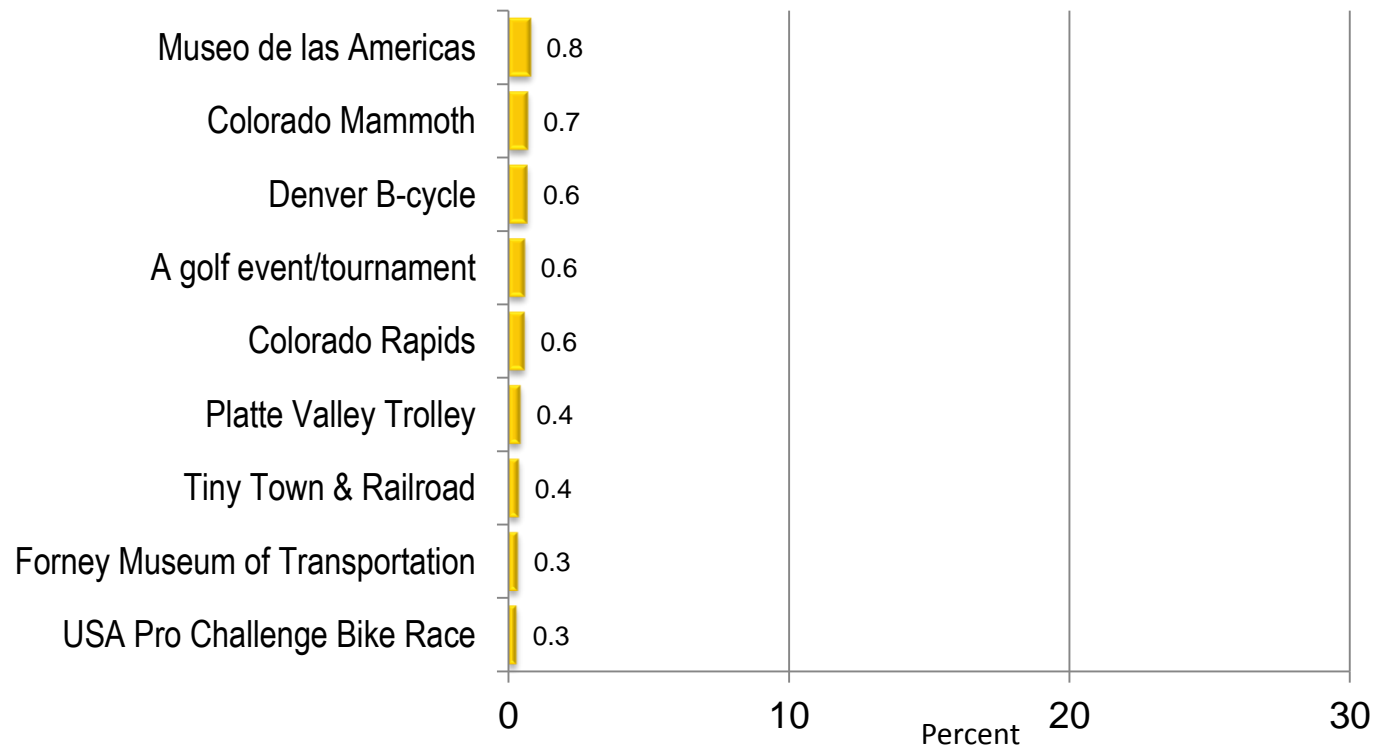
Attractions Visited in Denver (Cont'd)



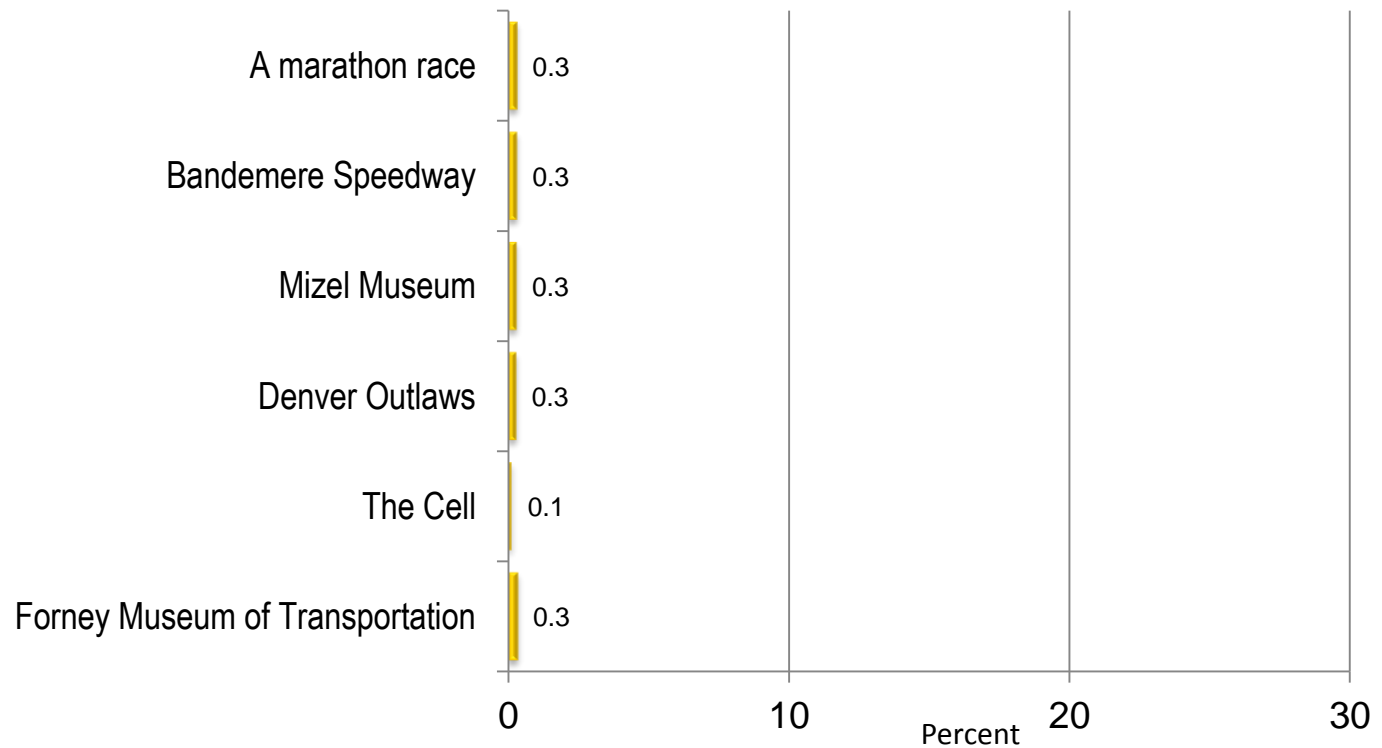
Attractions Visited in Denver (Cont'd)



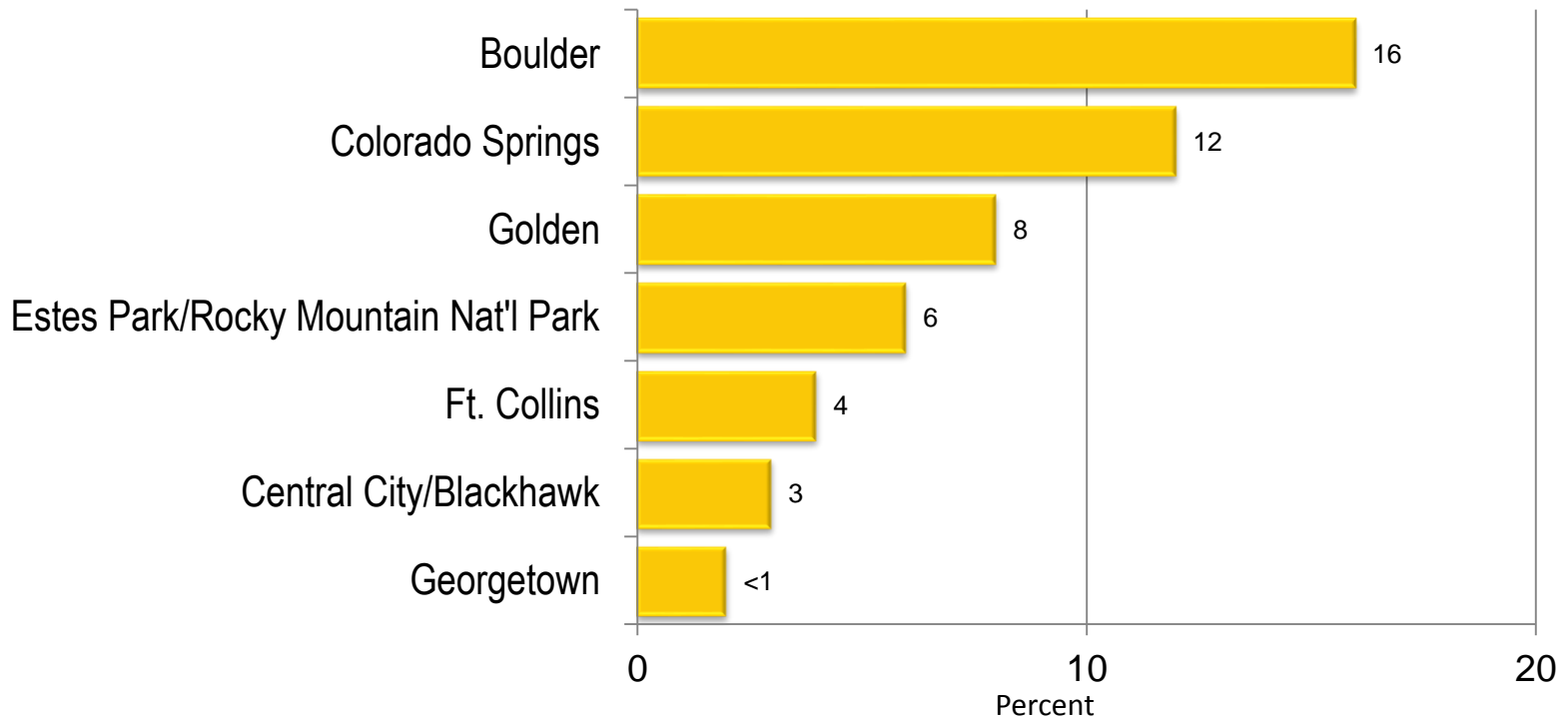
Attractions Visited in Denver (Cont'd)



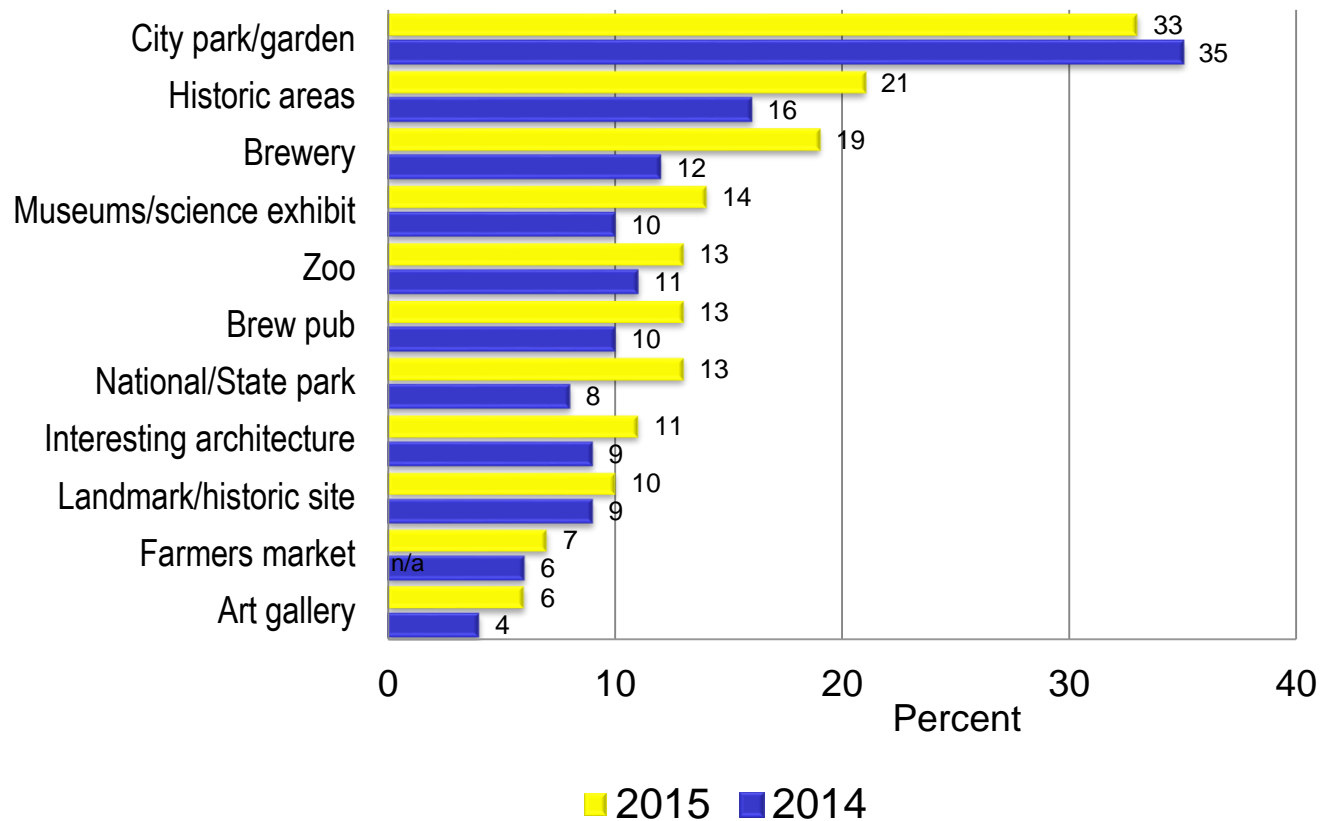
Attractions Visited in Denver (Cont'd)



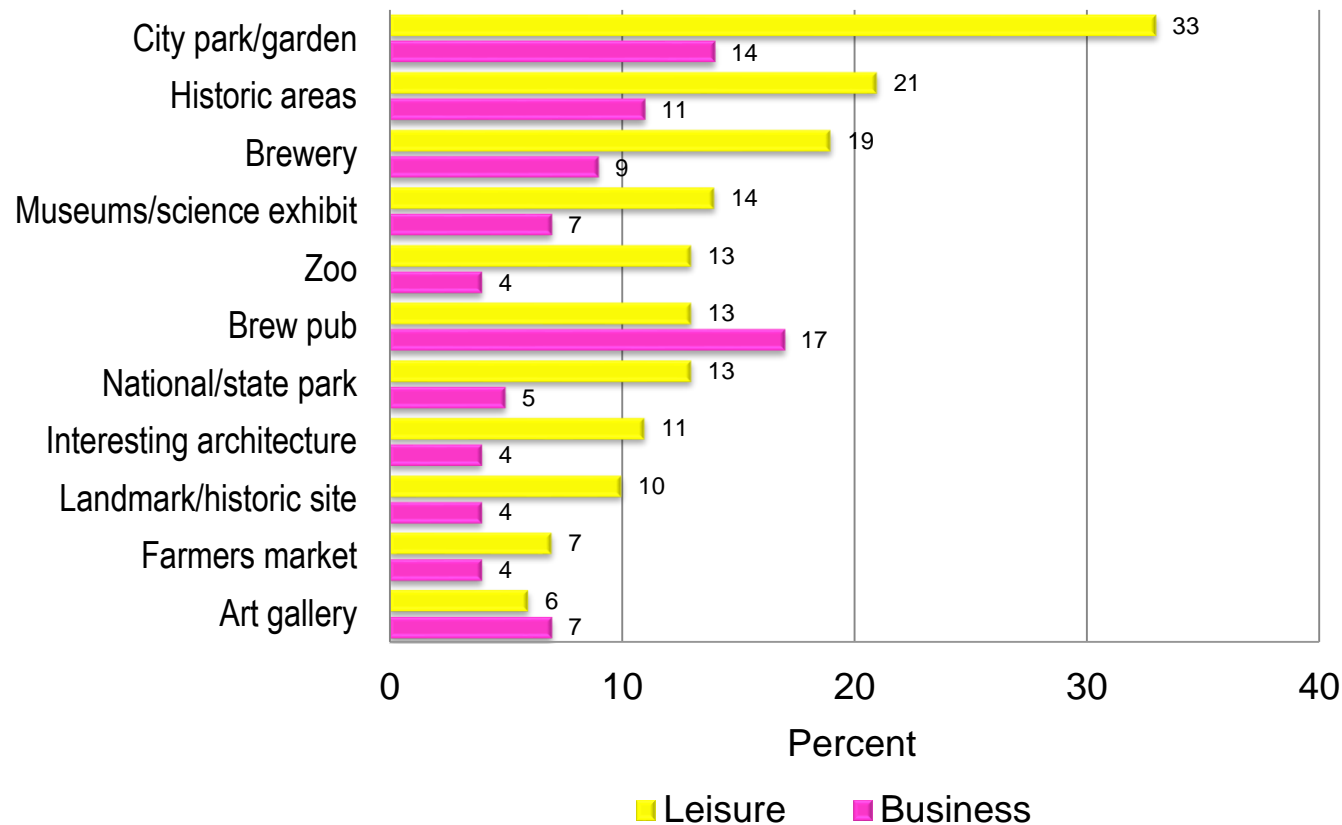
Out of Town Attractions Visited



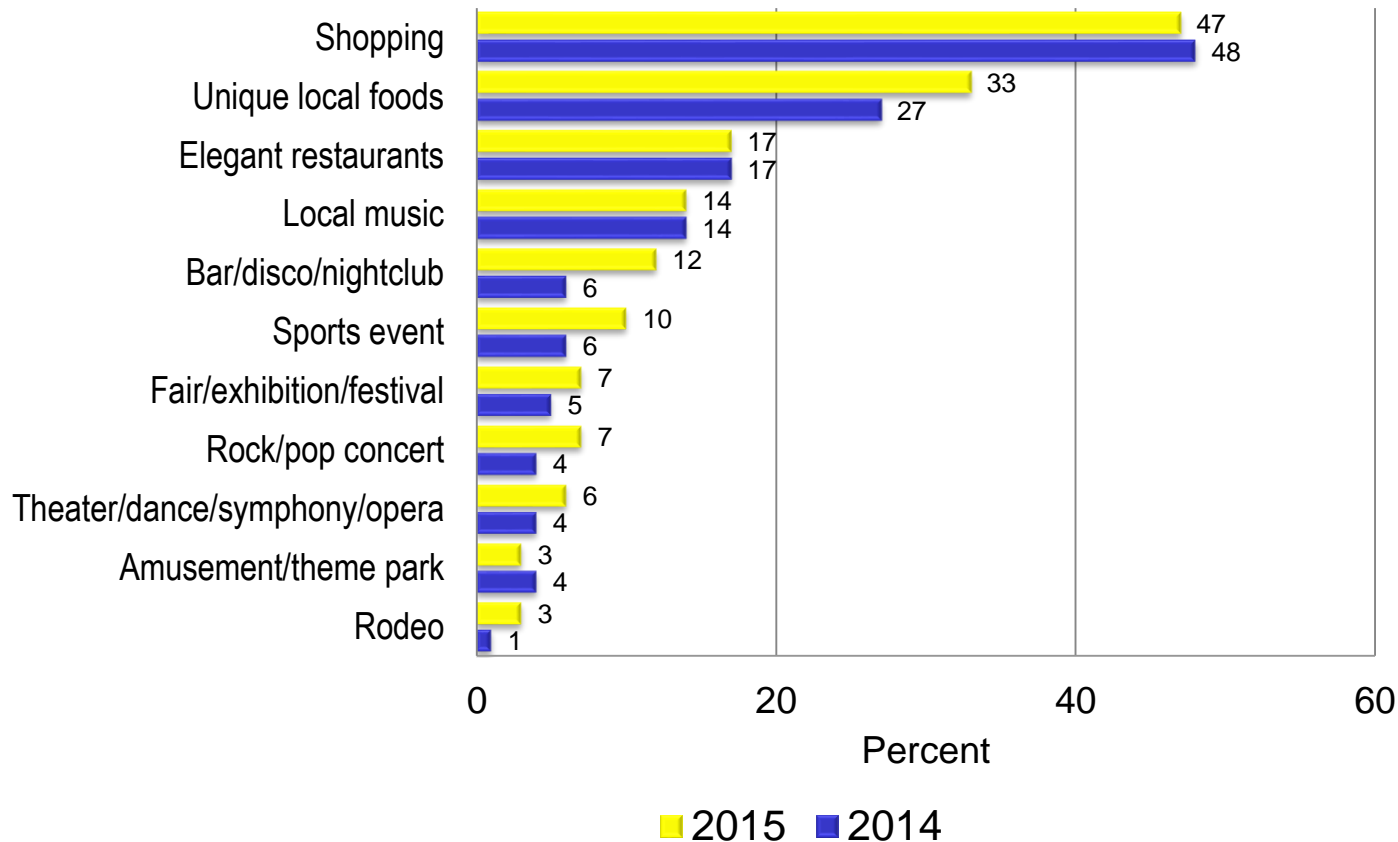
Sightseeing on Overnight Leisure Trip



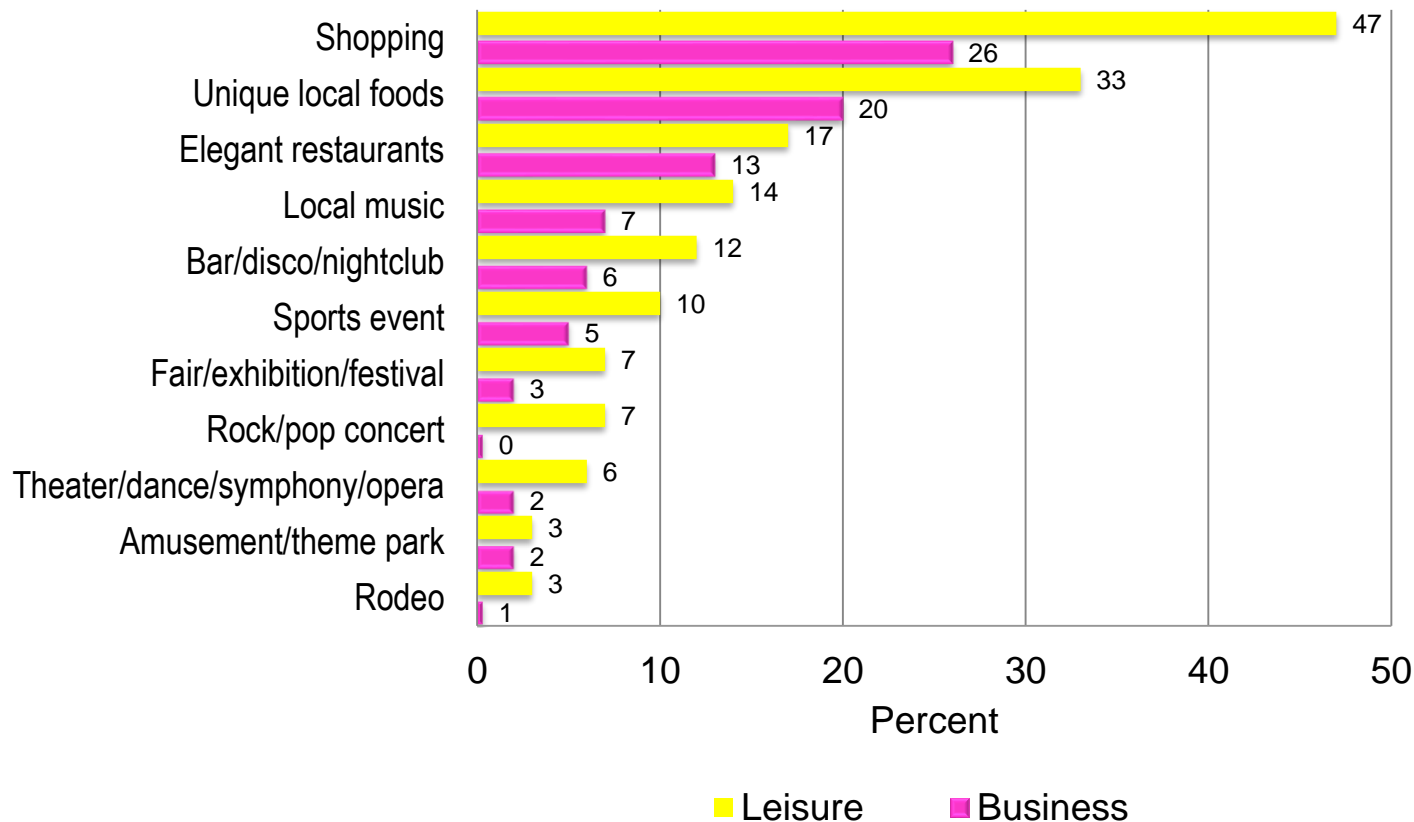
Sightseeing on Overnight Leisure vs. Business Trip



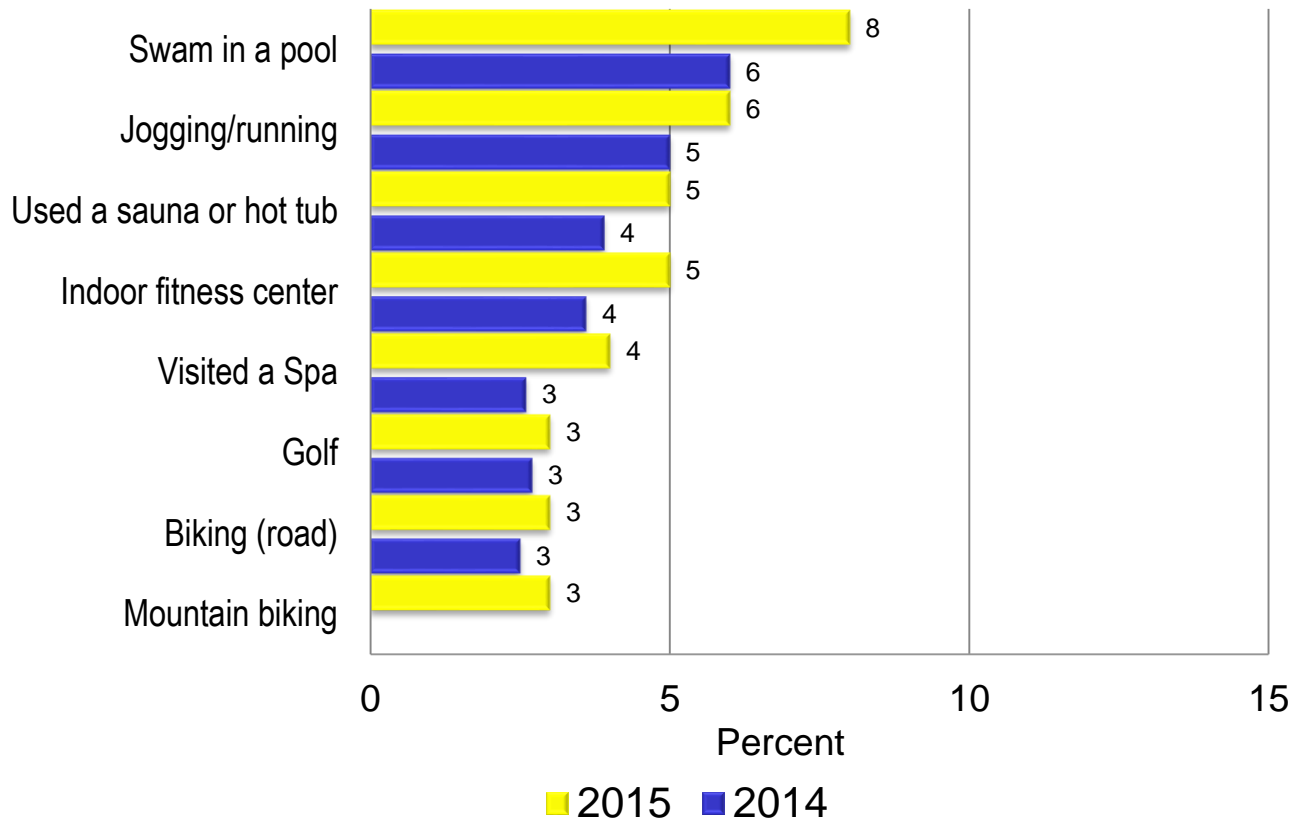
Entertainment on Overnight Leisure Trip



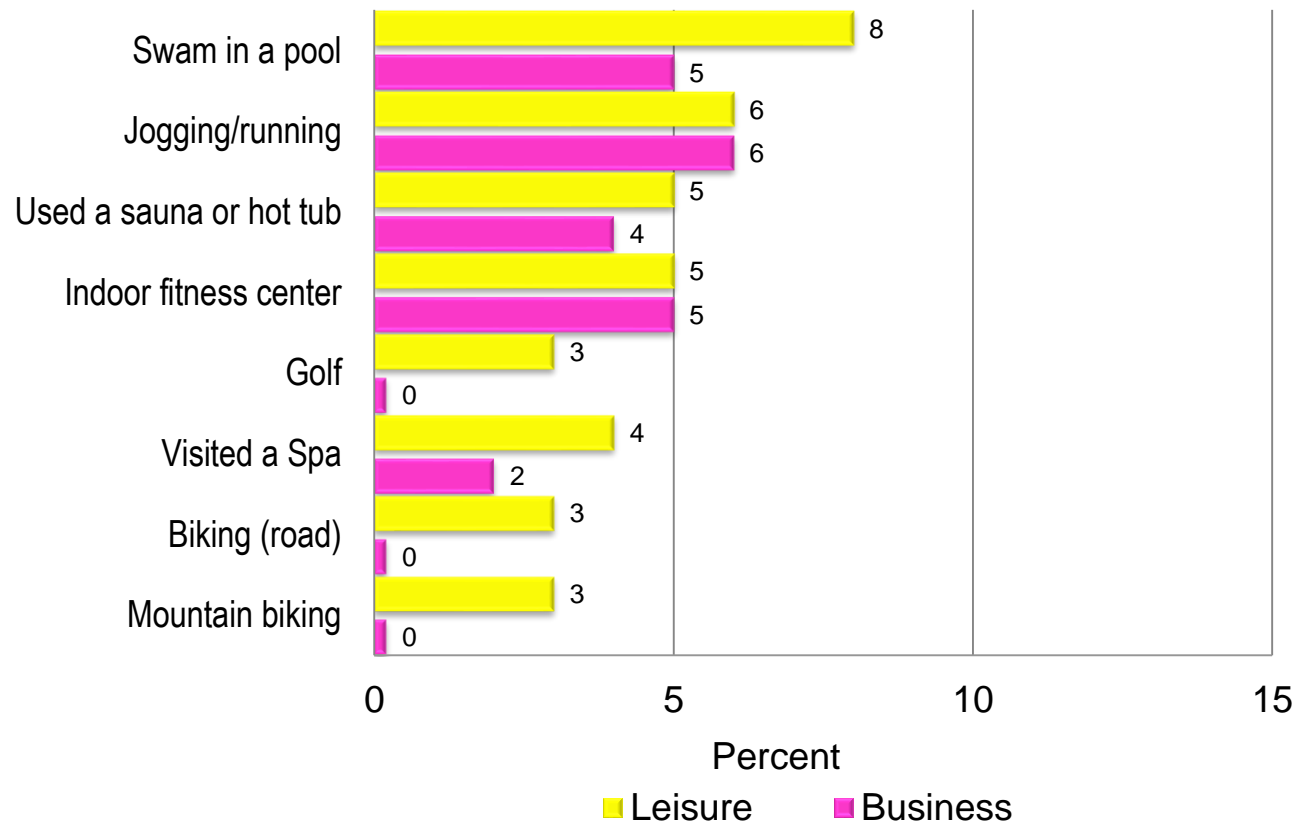
Entertainment on Overnight Leisure vs. Business Trip



Sports & Recreation on Overnight Leisure Trip

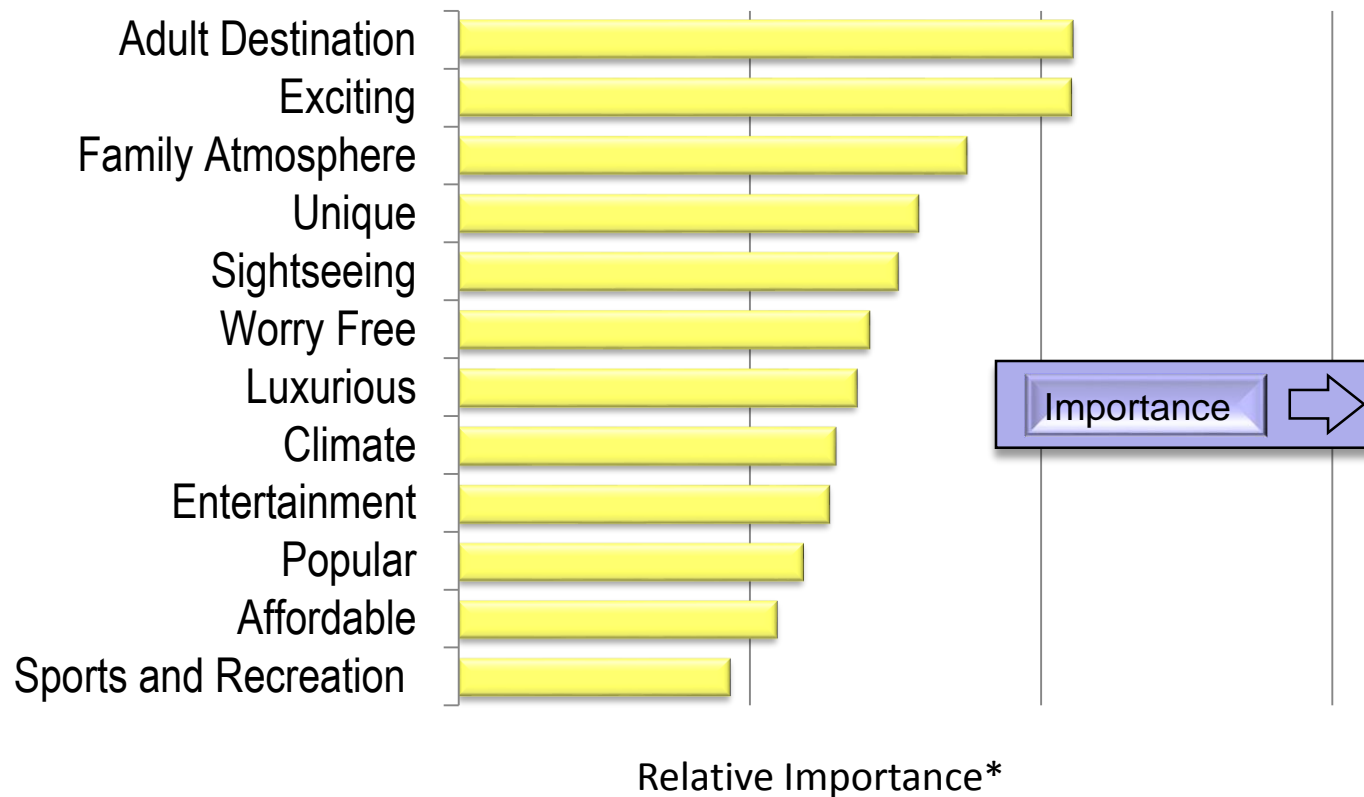


Sports & Recreation on Overnight Trip



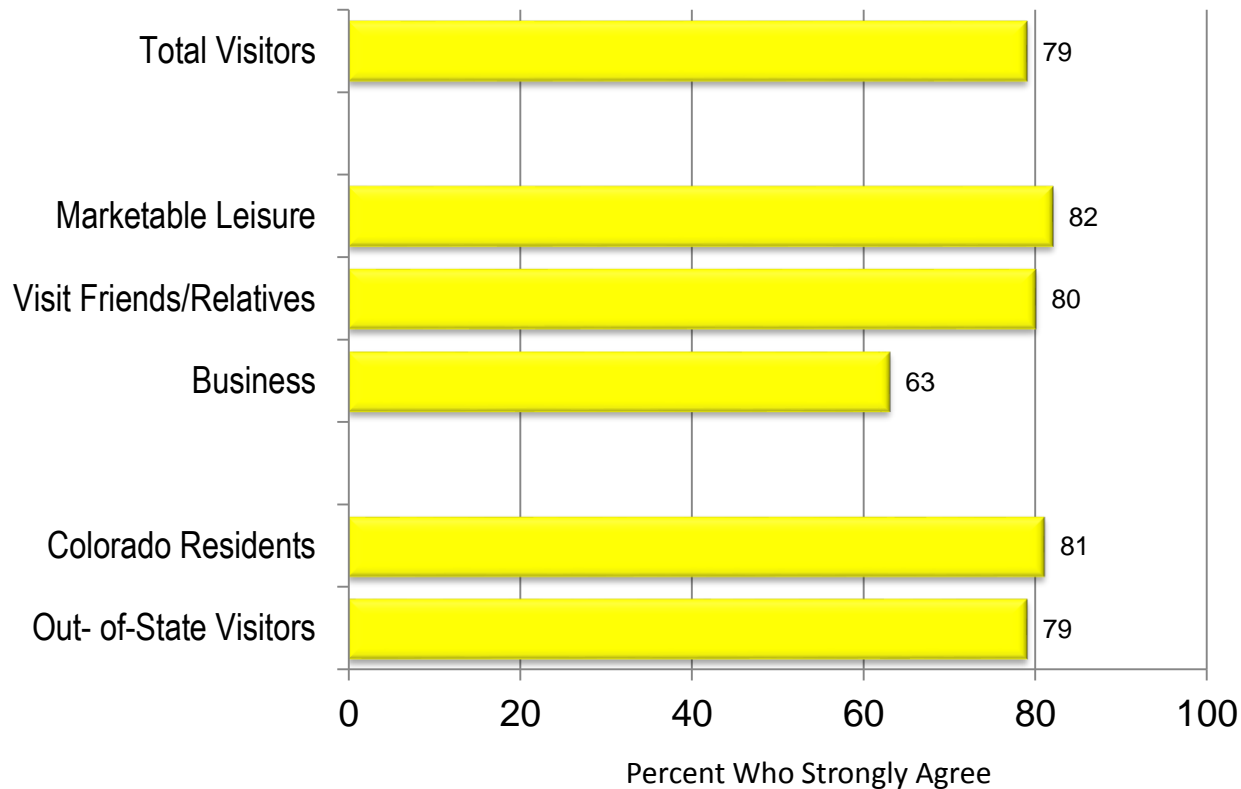
Denver's Product Delivery

Travel Motivators

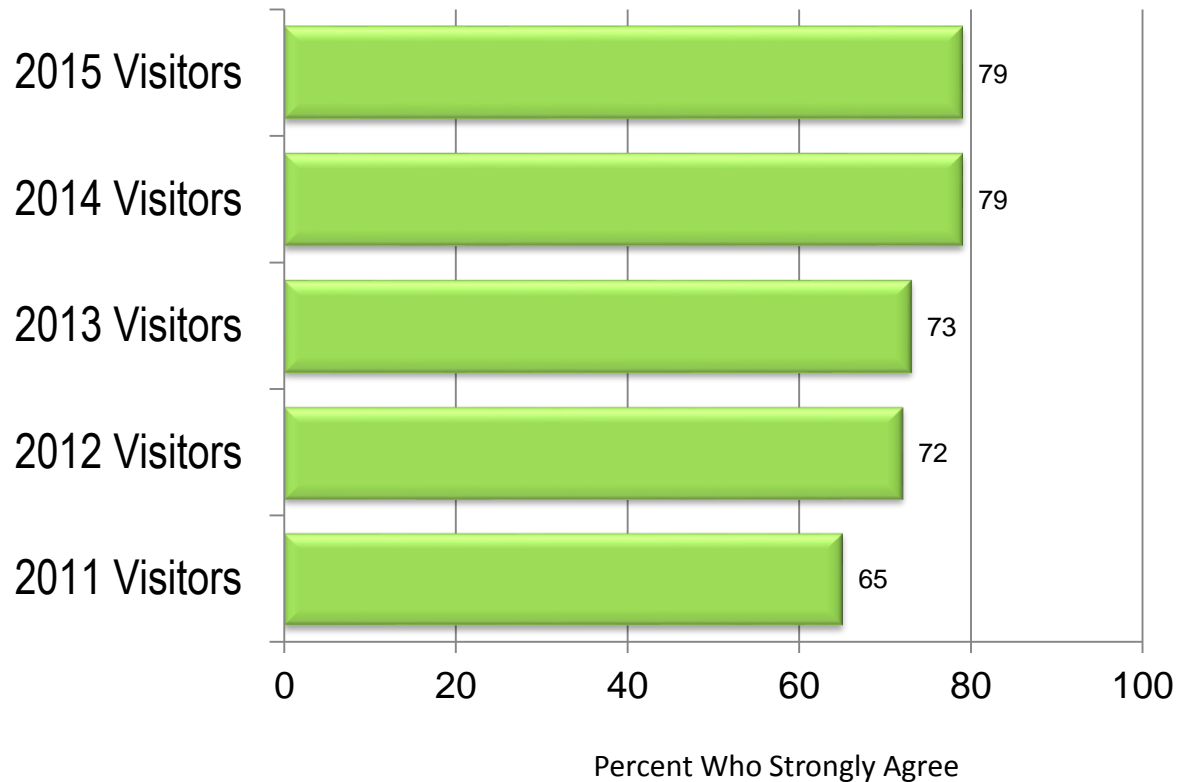


*A measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

Denver's Product — “Would Really Enjoy Visiting Again”



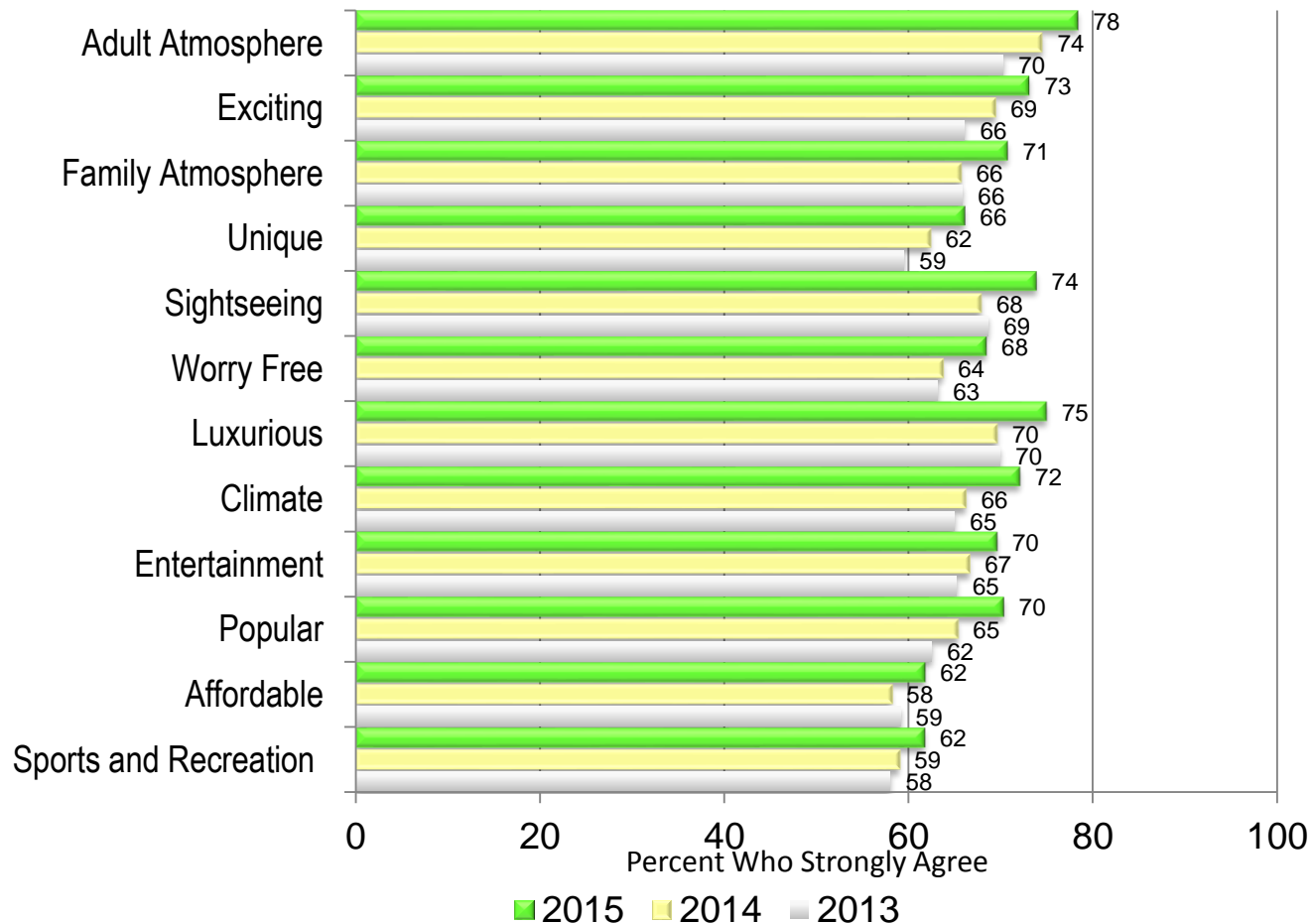
Denver's Product— “Would Really Enjoy Visiting Again”



Denver's Product Delivery — Image Among Visitors



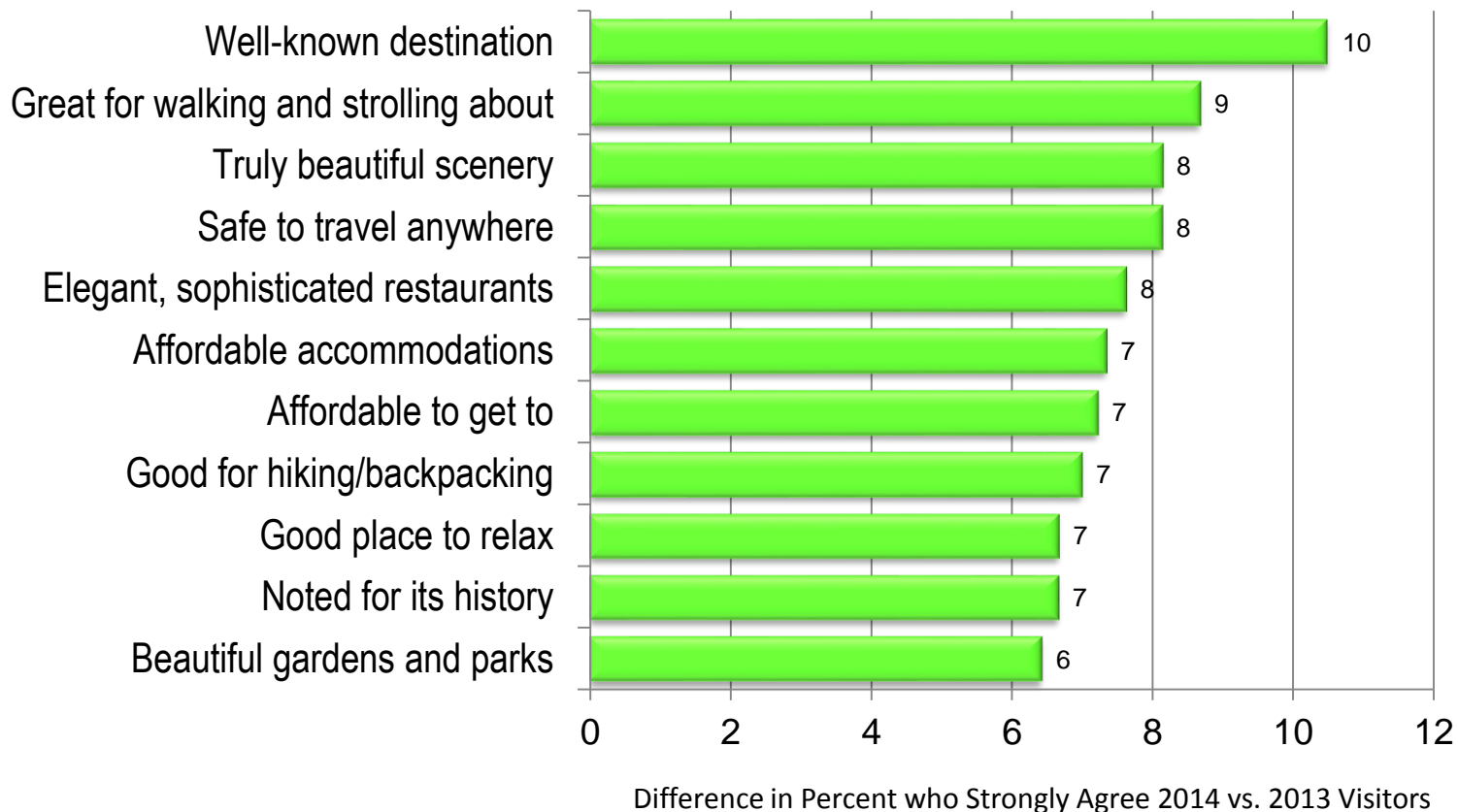
Base: Overnight Leisure Trips



Denver's Top Product Gains vs. 2014



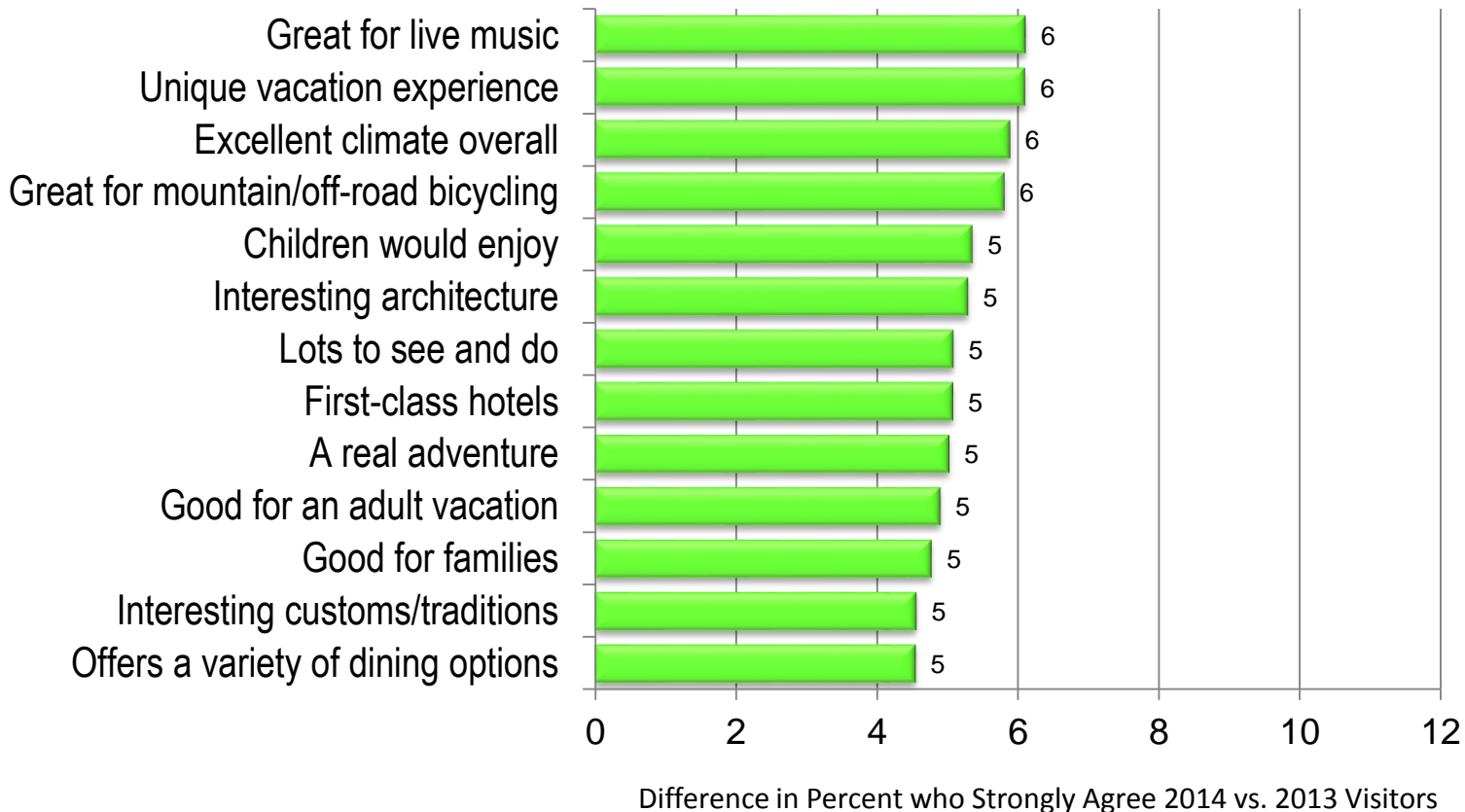
Base: Overnight Leisure Trips



Denver's Top Product Gains vs. 2014 (Cont'd)



Base: Overnight Leisure Trips



Denver's Top Product Losses vs. 2014

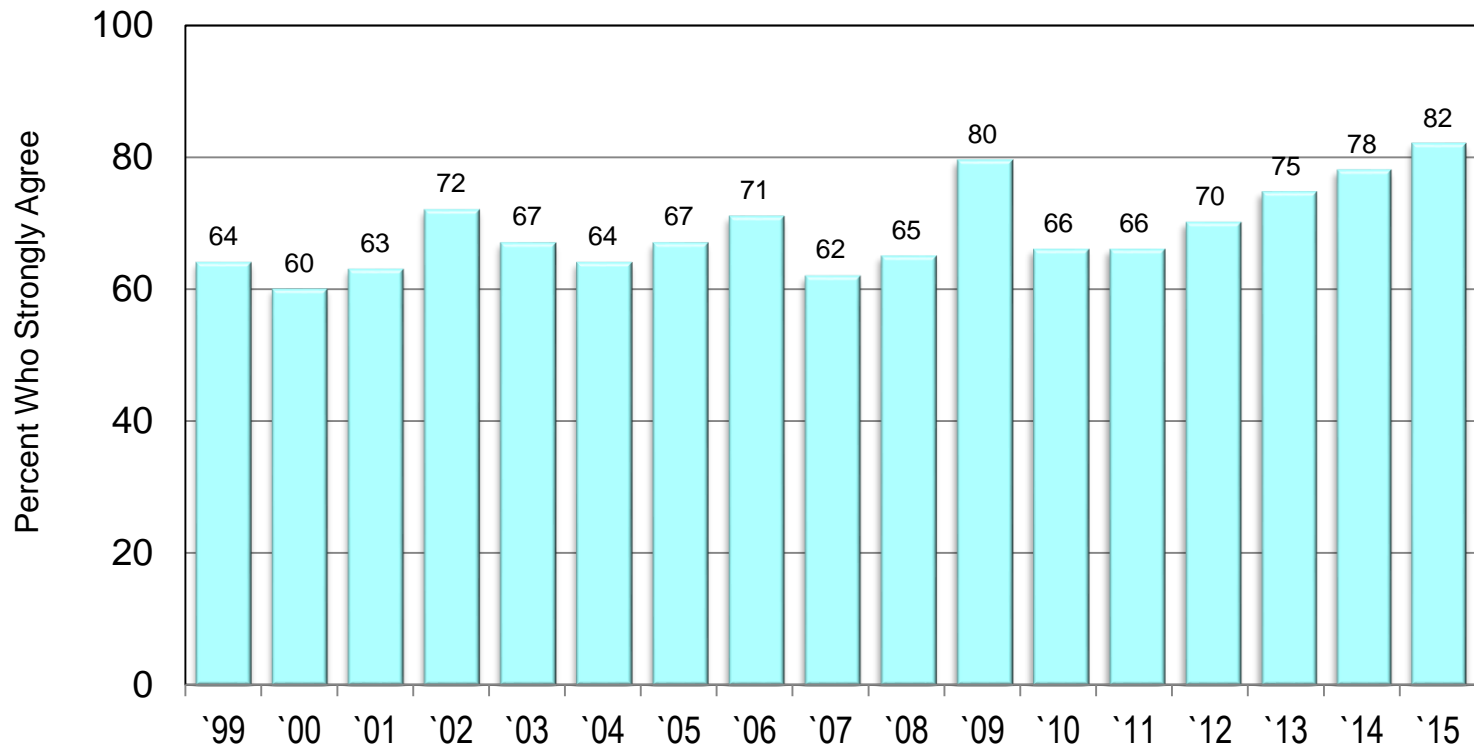


THERE WERE NO SIGNIFICANT PRODUCT LOSSES VS. 2014

“Would Really Enjoy Visiting Again” — 1999 to 2015



Base: Overnight Marketable Trips

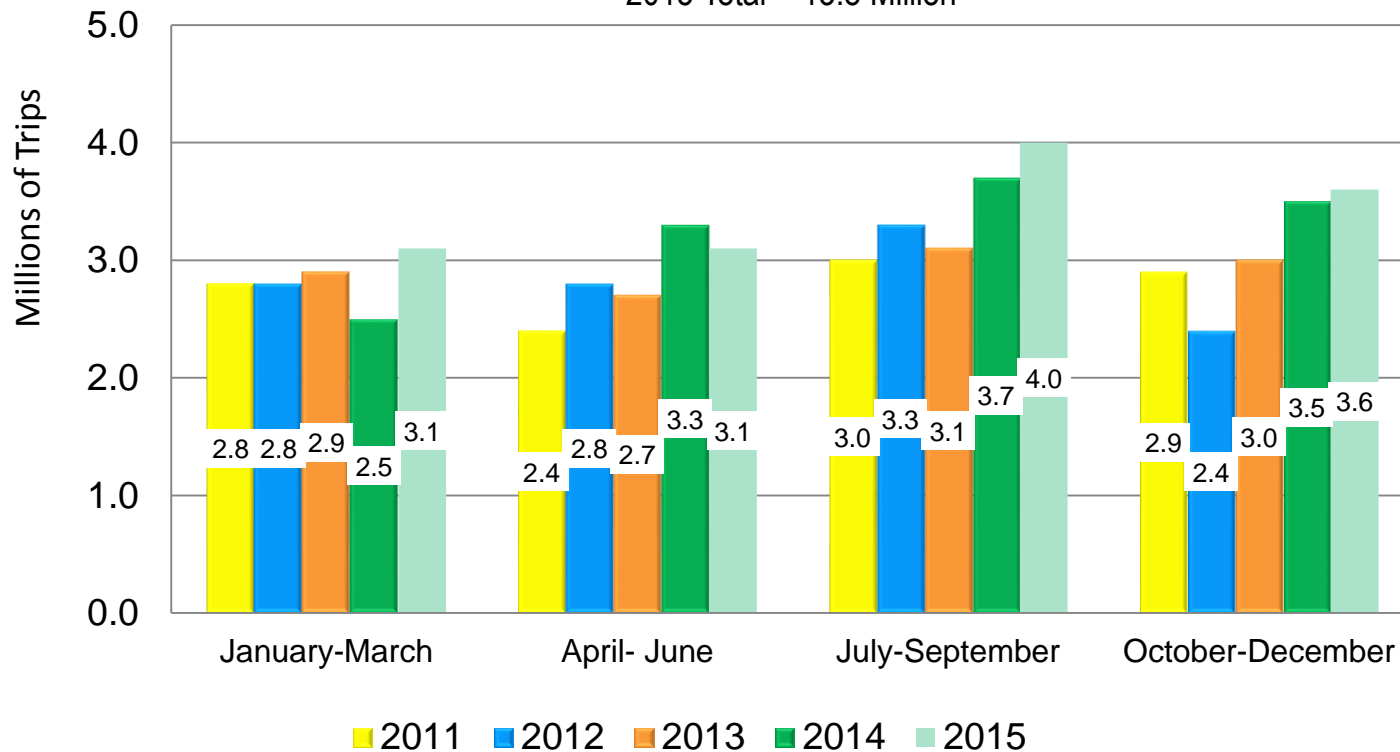


Appendix A: Trend Data

Seasonality — Leisure Travelers



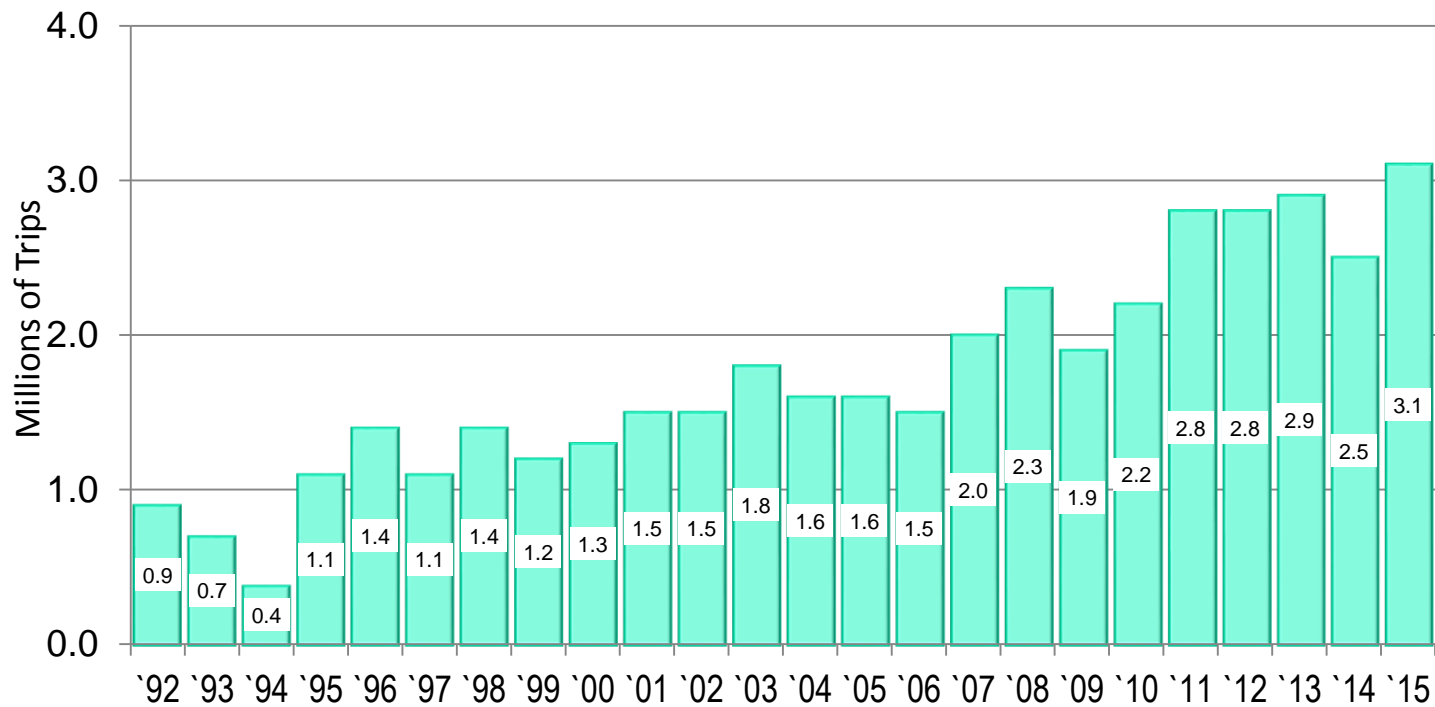
2011 Total = 11.0 Million
2012 Total = 11.3 Million
2013 Total = 11.7 Million
2014 Total = 13.0 Million
2015 Total = 13.8 Million



Seasonality — Leisure Travelers



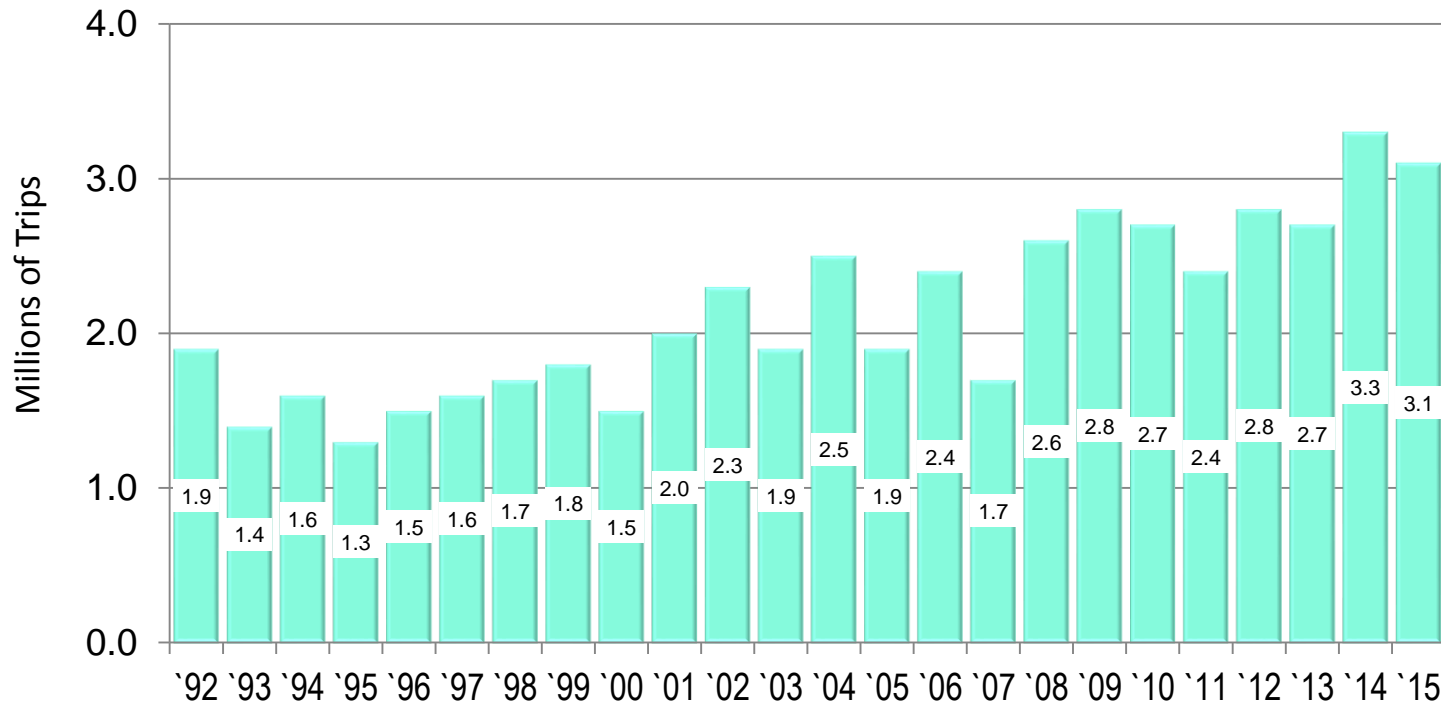
January to March



Seasonality — Leisure Travelers



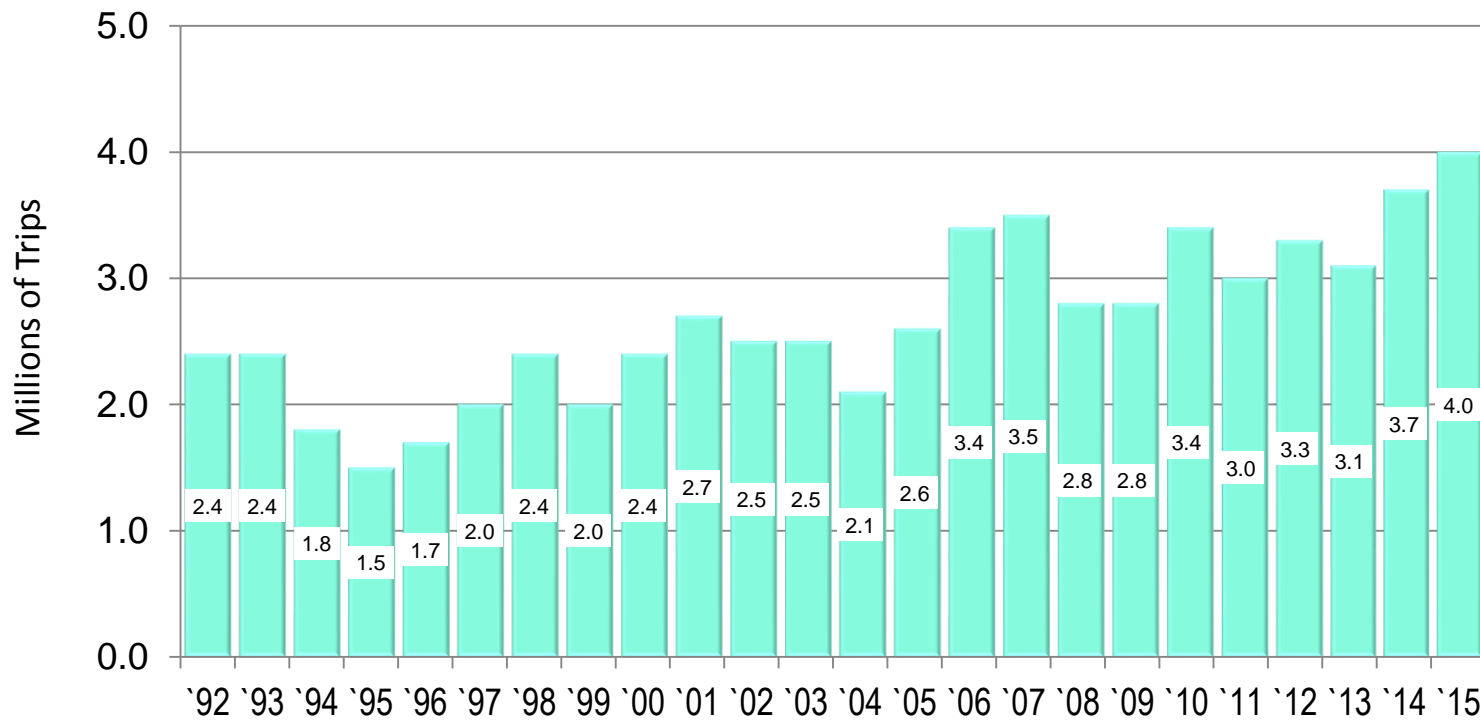
April to June



Seasonality — Leisure Travelers



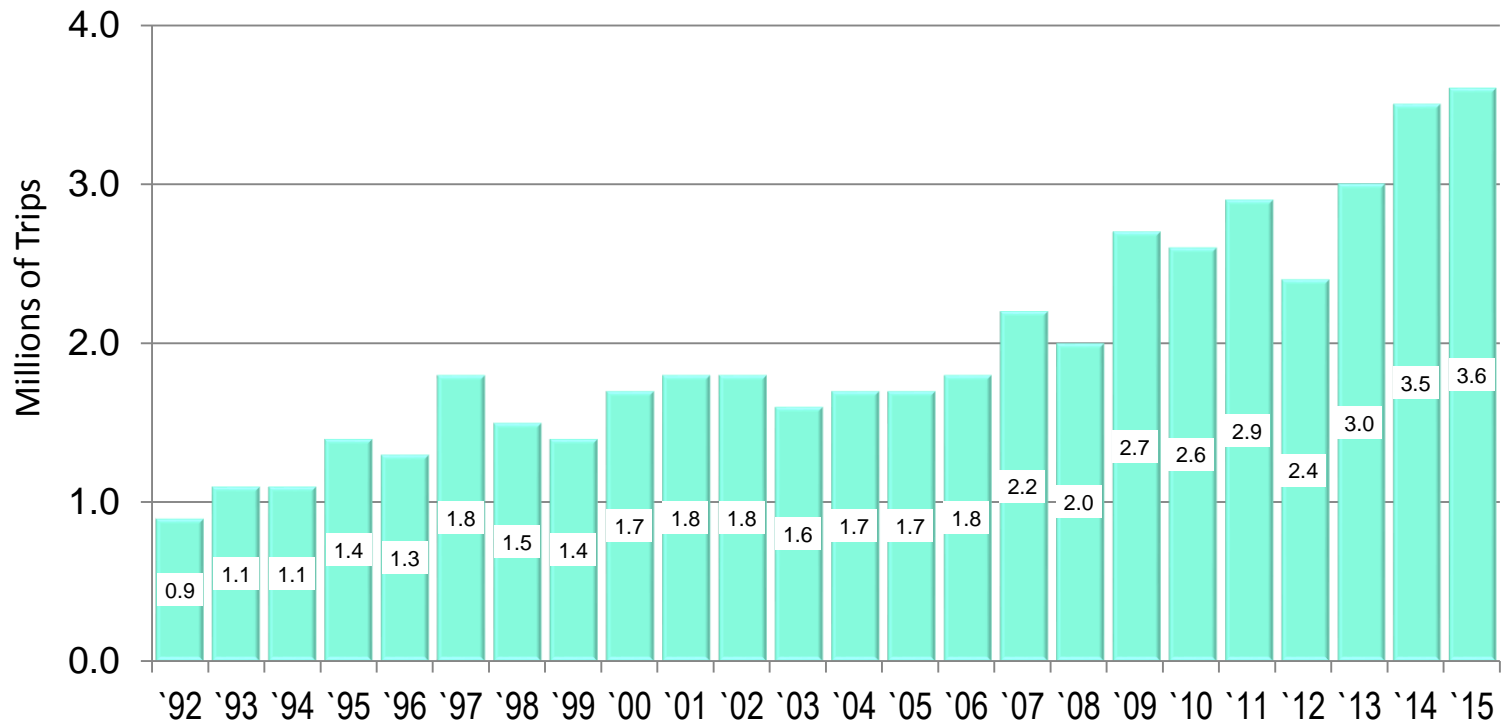
July to September



Seasonality — Leisure Travelers



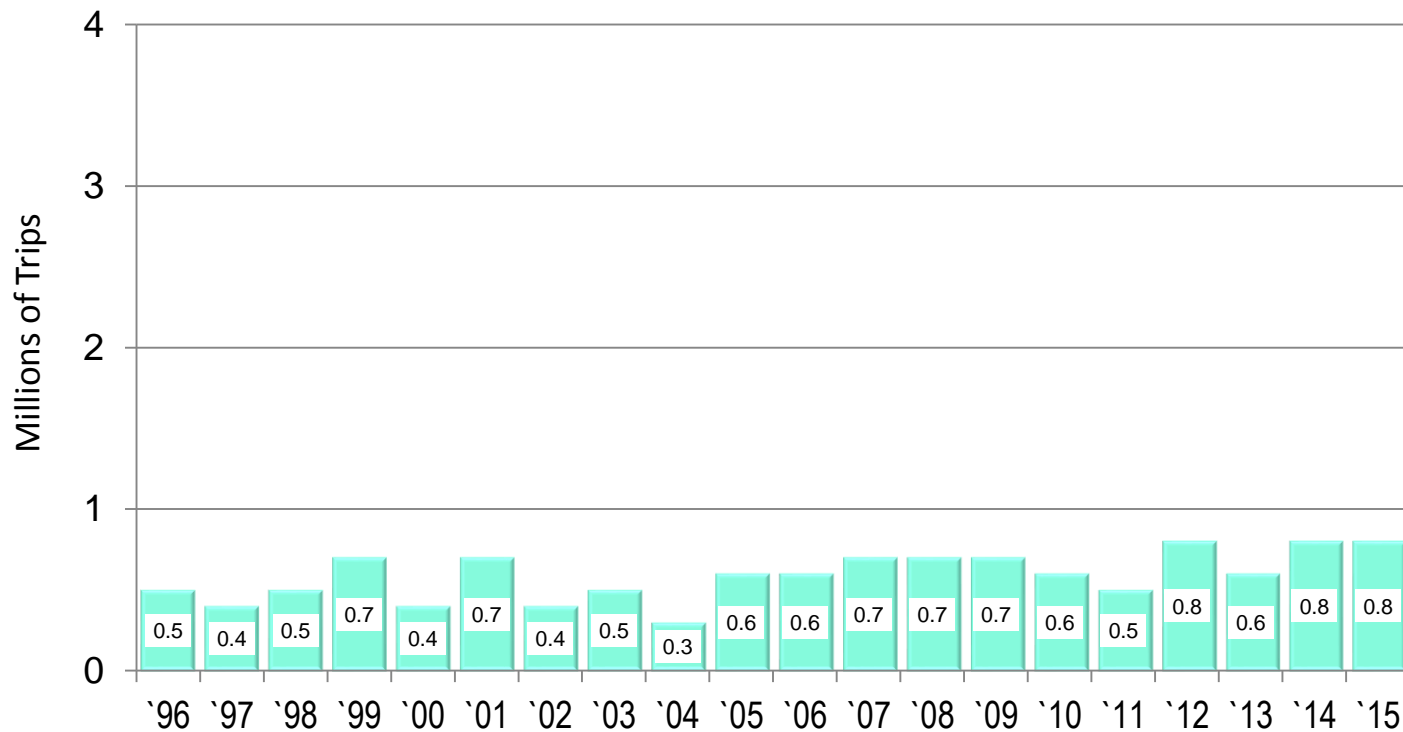
October to December



Seasonality – Business Travelers



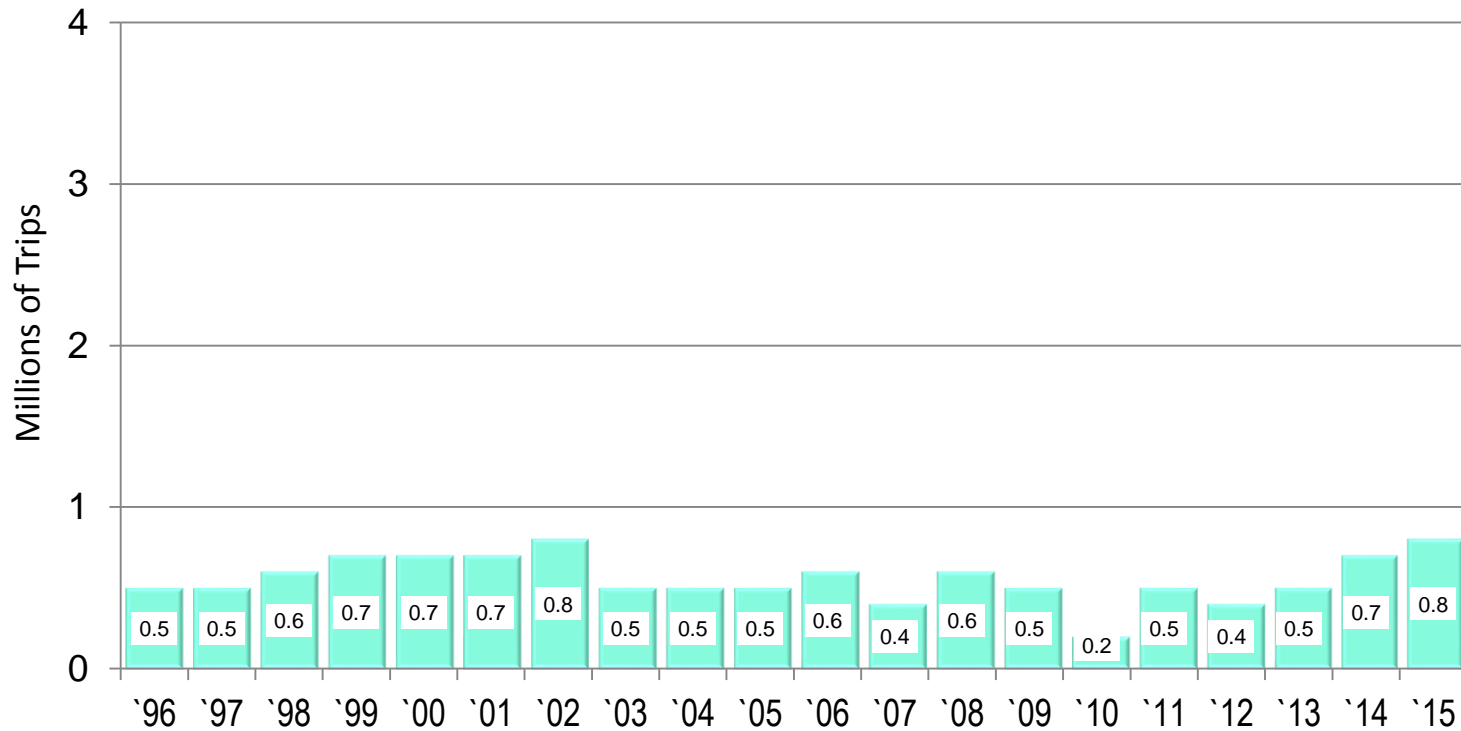
January to March



Seasonality – Business Travelers



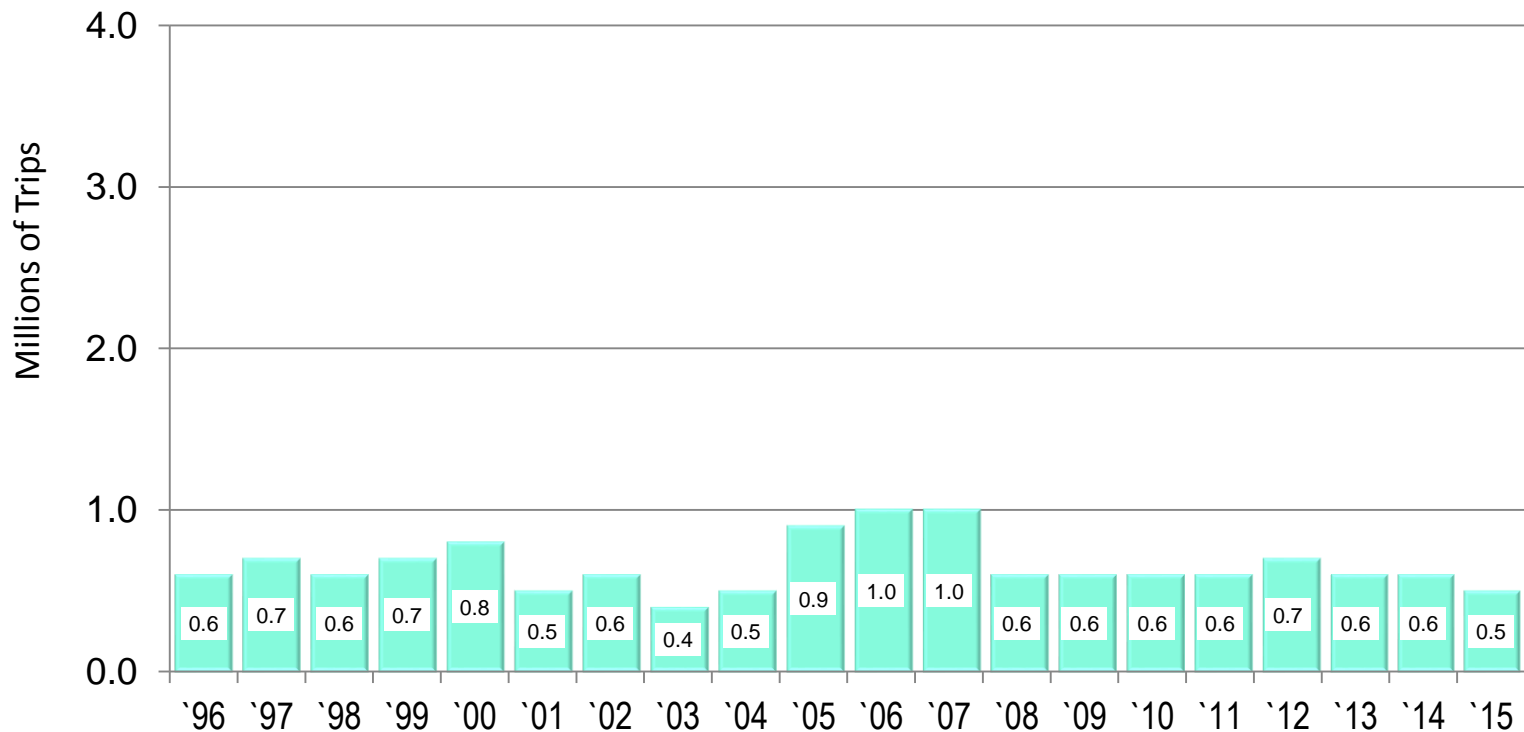
April to June



Seasonality – Business Travelers



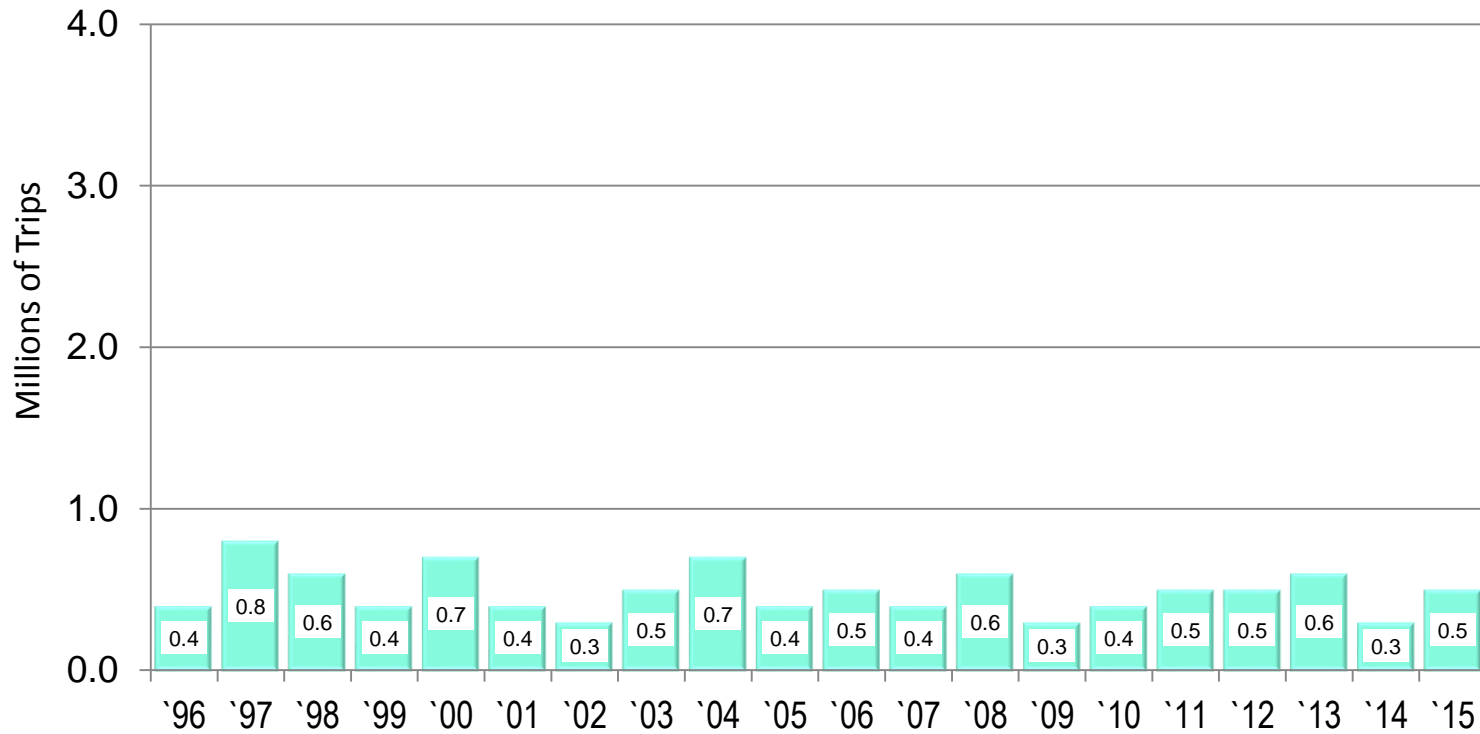
July to September



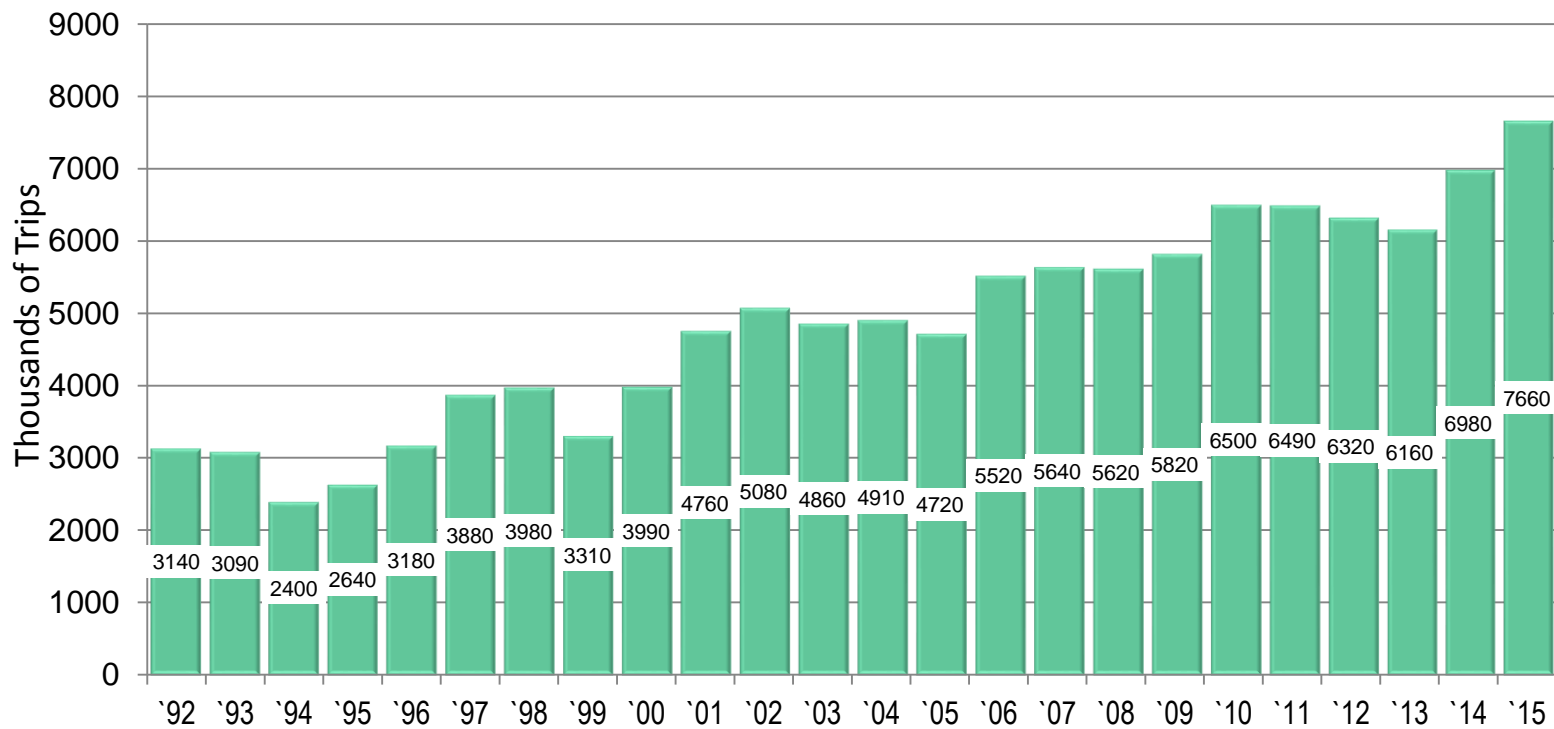
Seasonality – Business Travelers



October to December

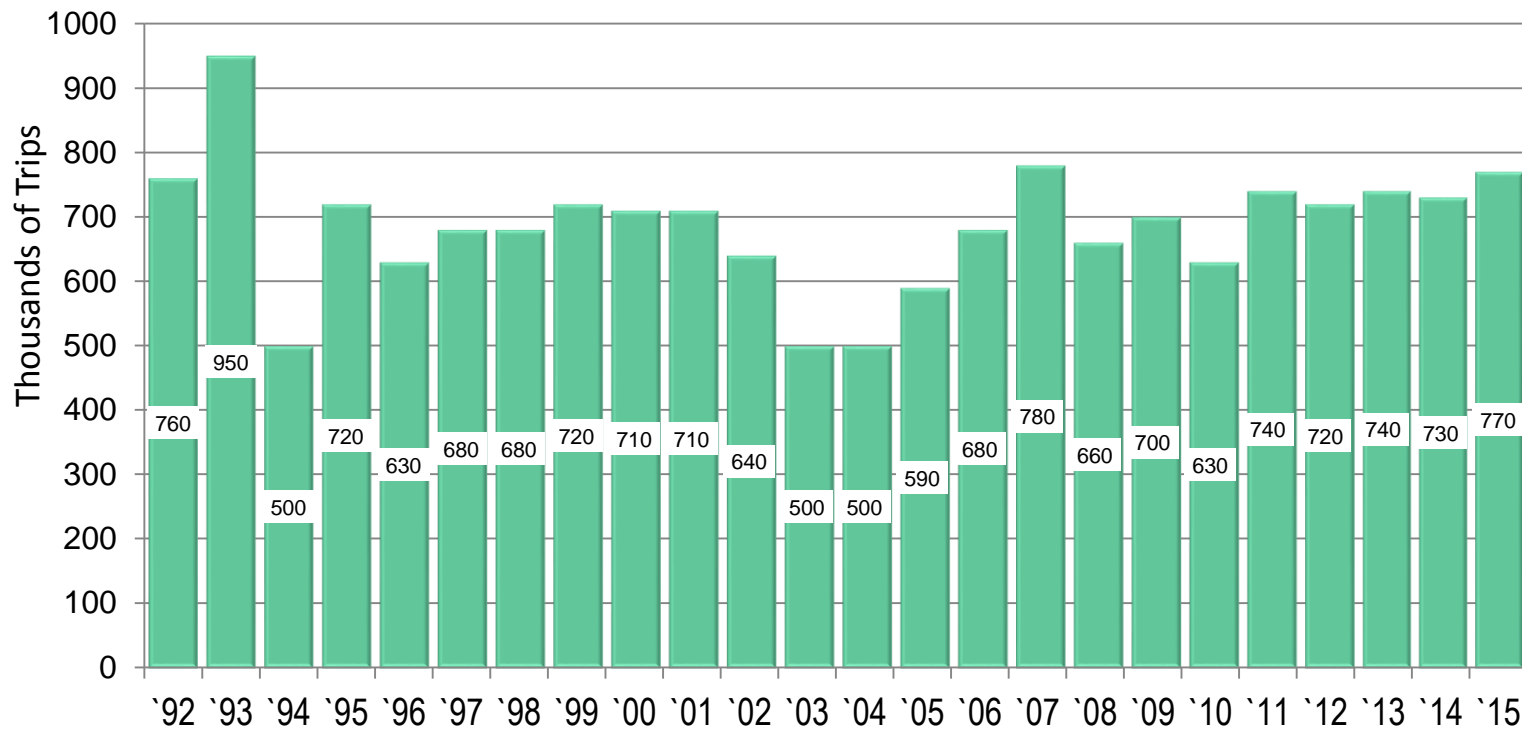


Denver's Overnight Visitors By Trip Type



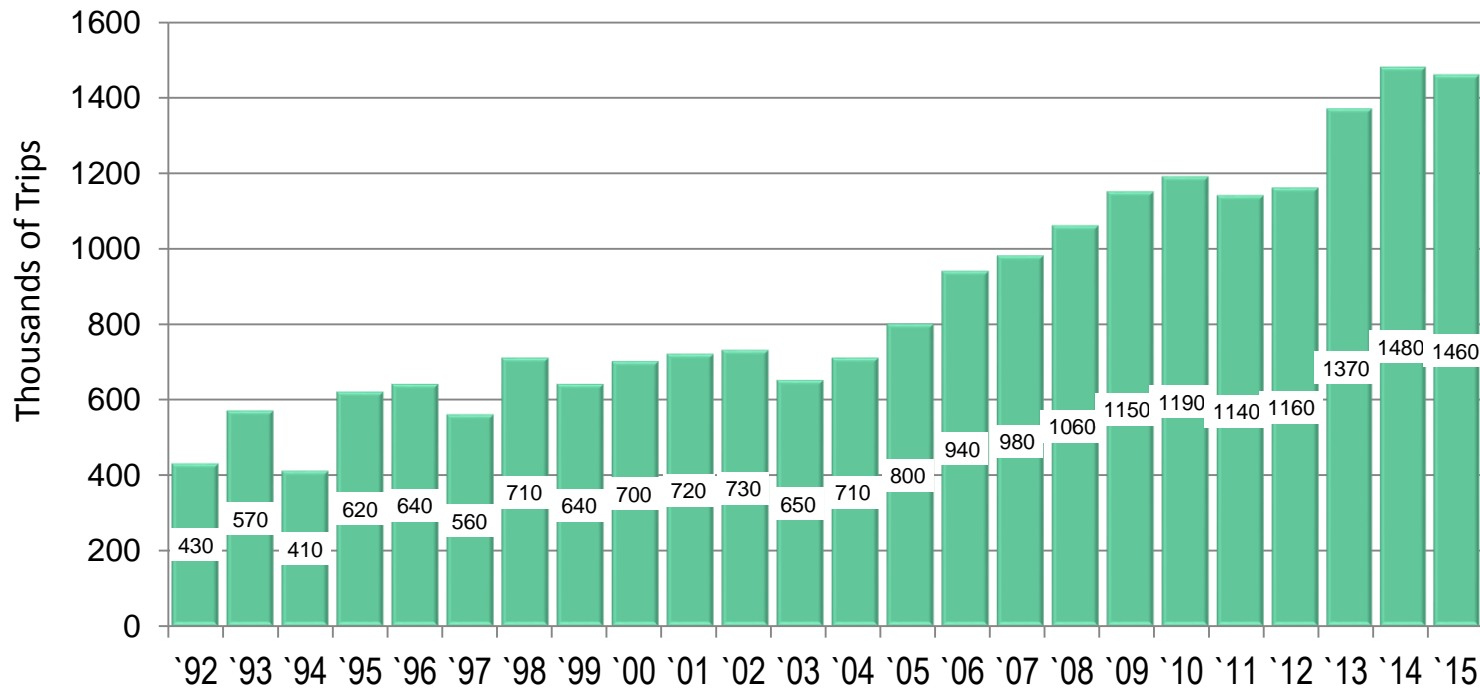
Visits to Friends/Relatives

Denver's Overnight Visitors By Trip Type



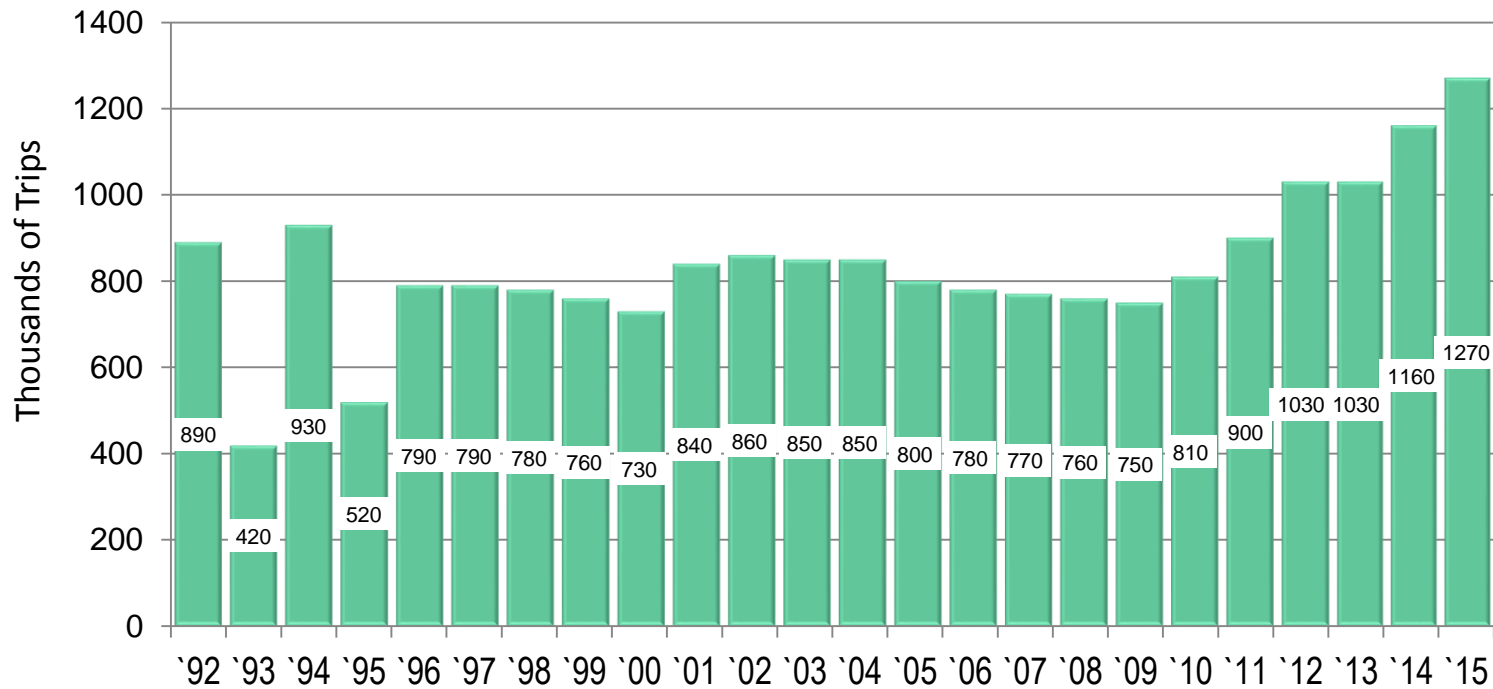
Combined Business/Leisure

Denver's Overnight Visitors By Trip Type



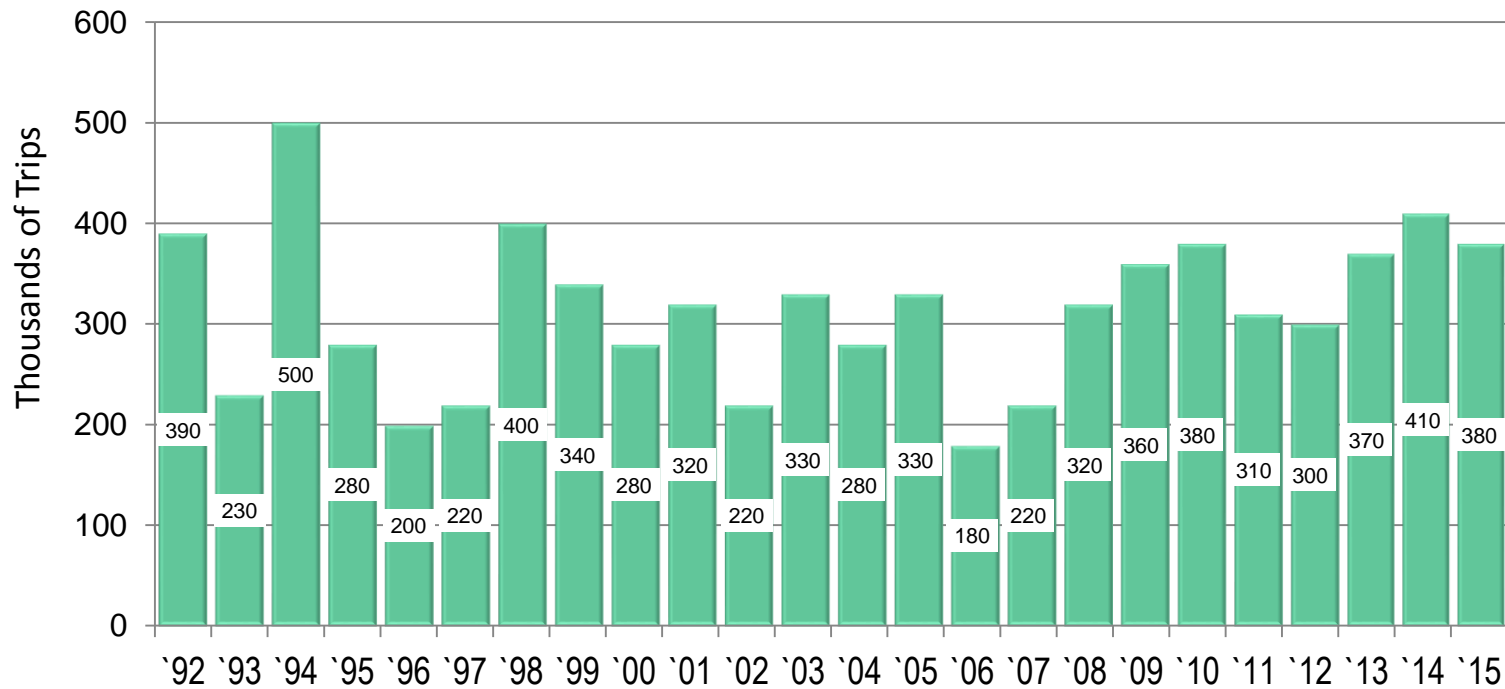
Special Event

Denver's Overnight Visitors By Trip Type



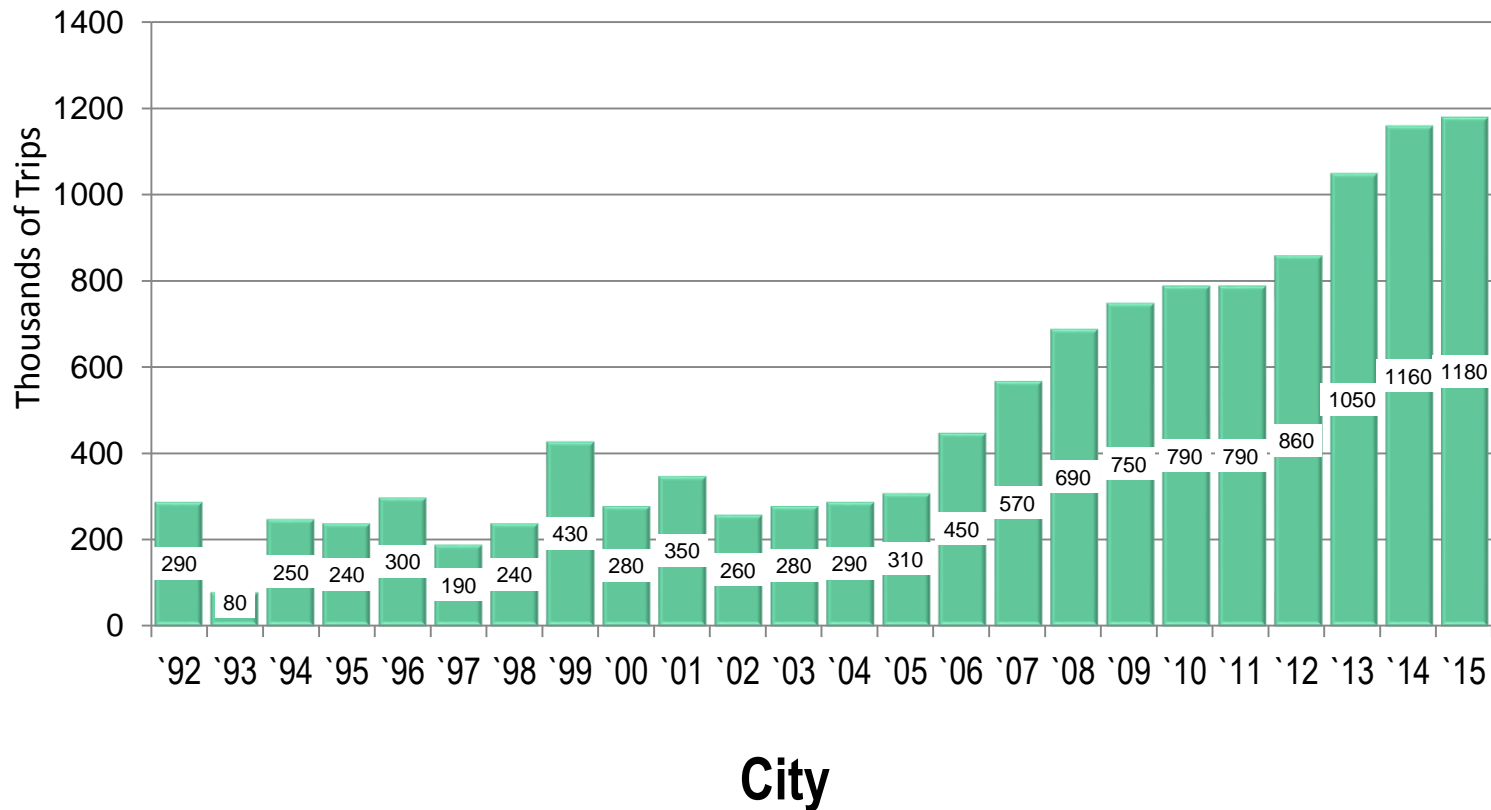
Touring

Denver's Overnight Visitors By Trip Type

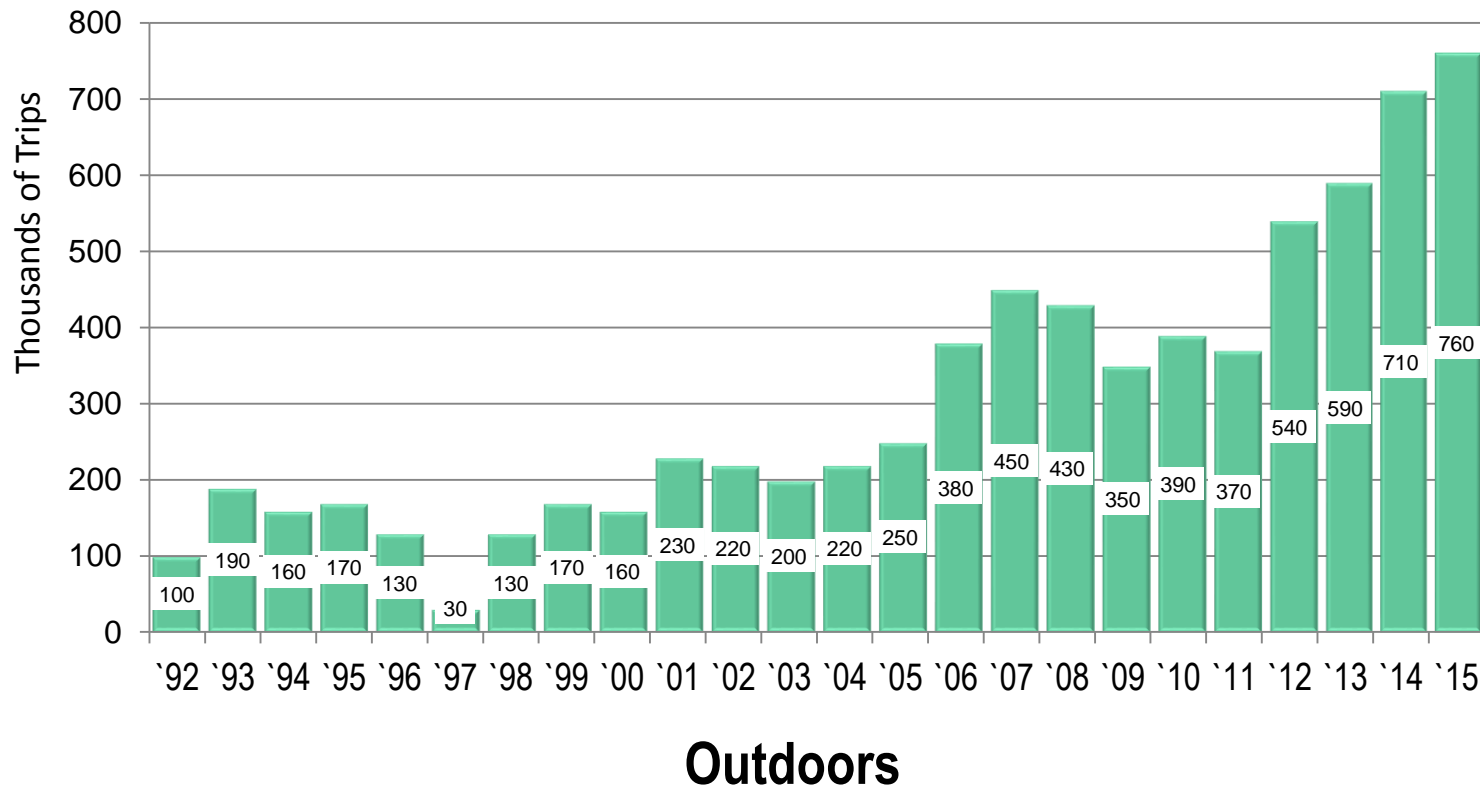


Ski

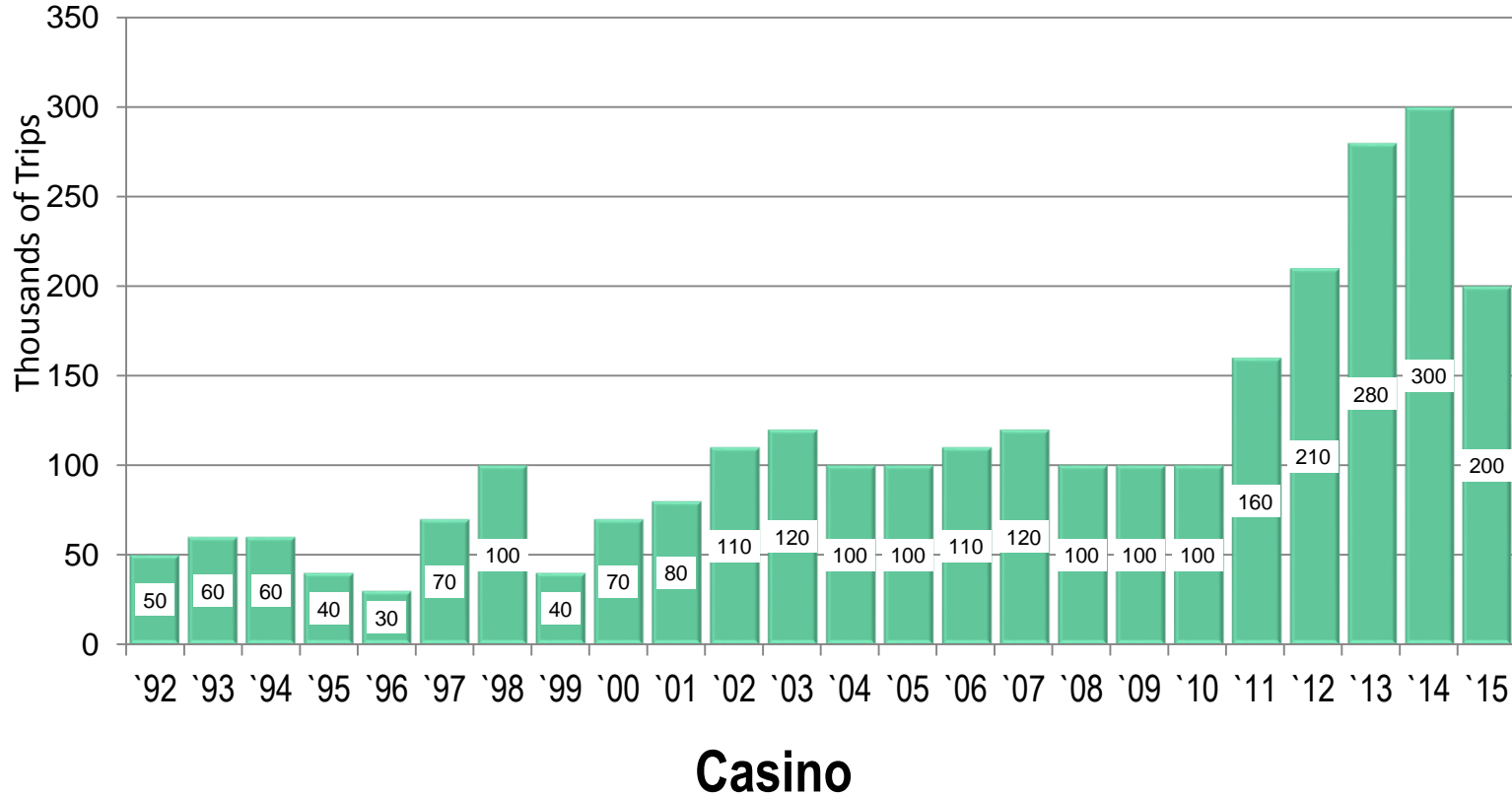
Denver's Overnight Visitors By Trip Type



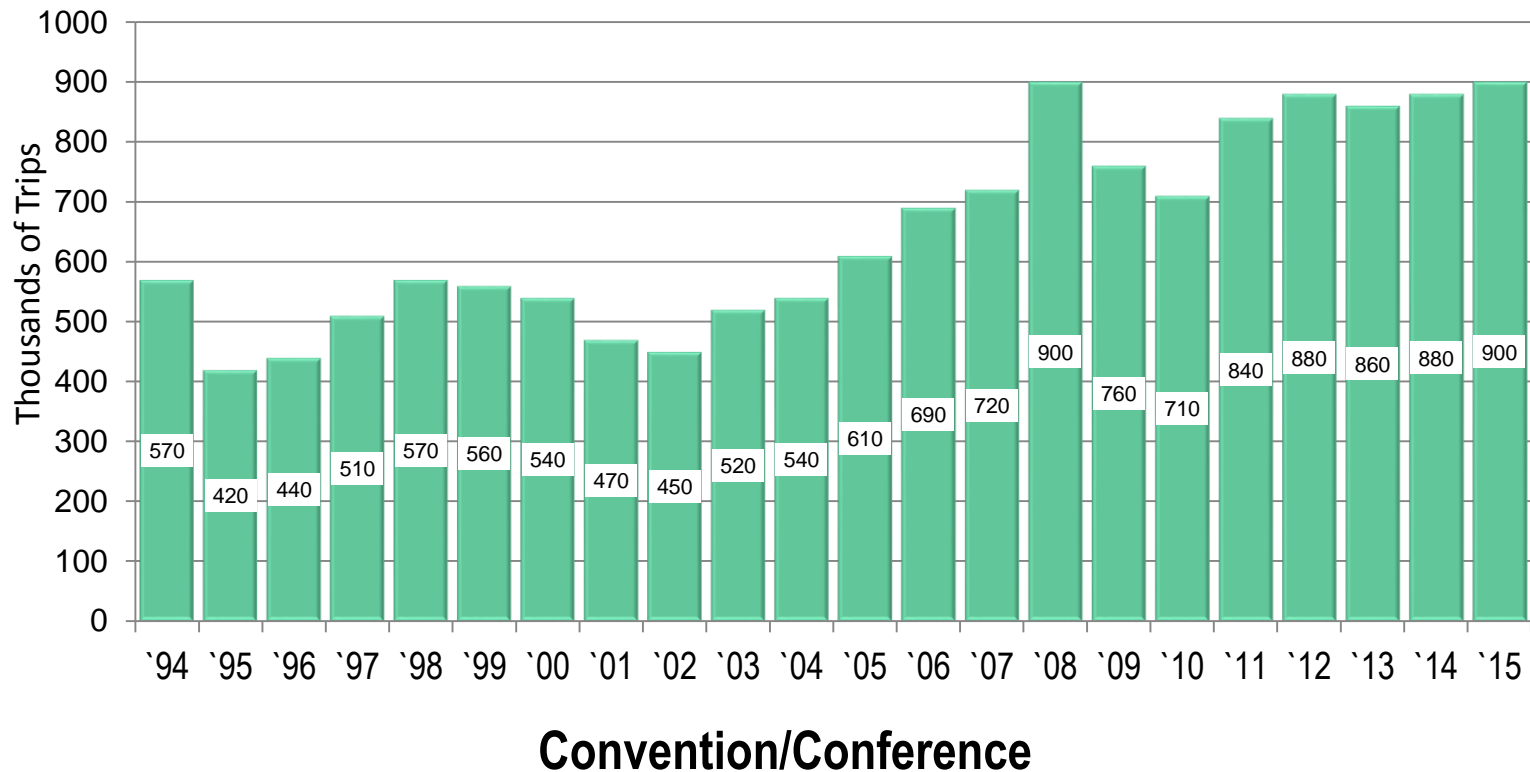
Denver's Overnight Visitors By Trip Type



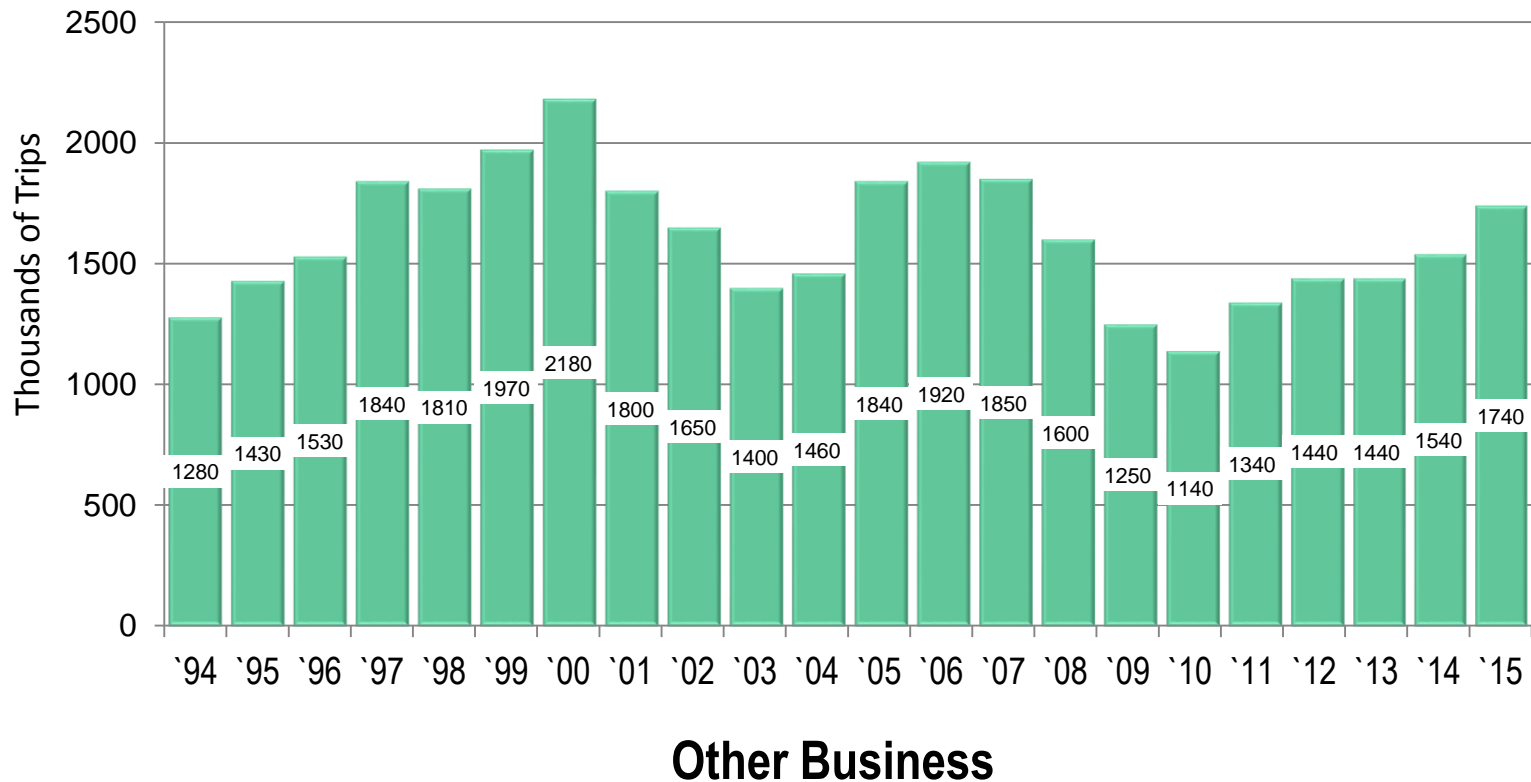
Denver's Overnight Visitors By Trip Type



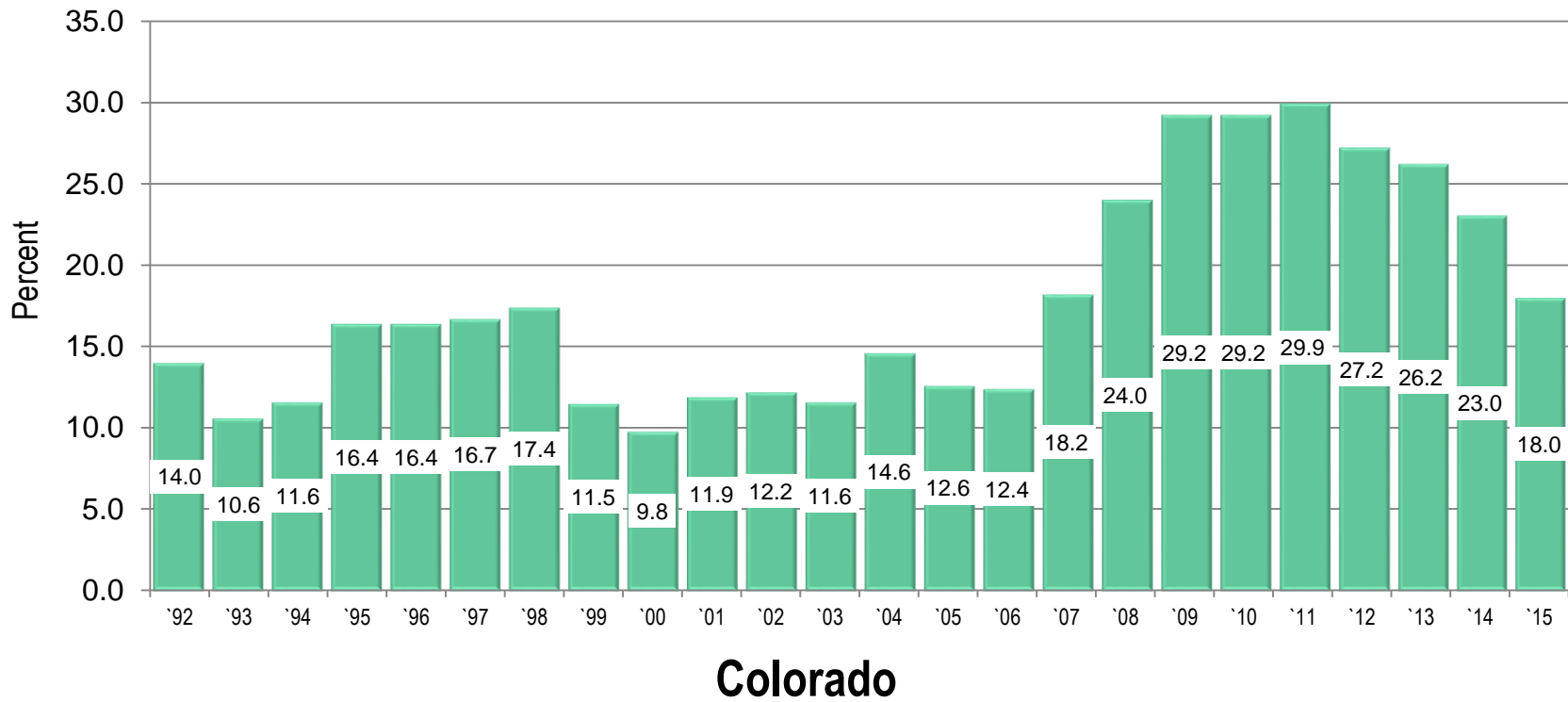
Denver's Overnight Visitors By Trip Type



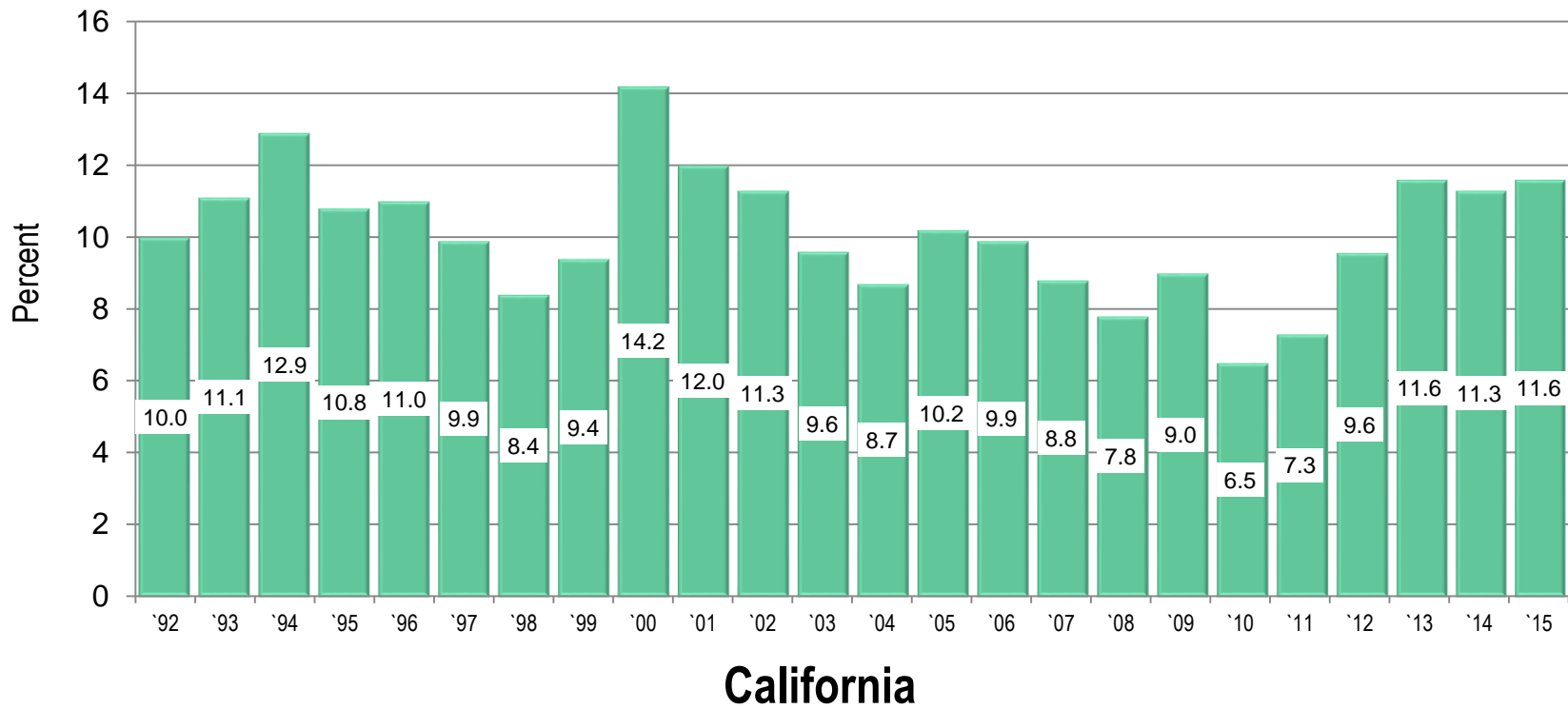
Denver's Overnight Visitors By Trip Type (Cont'd)



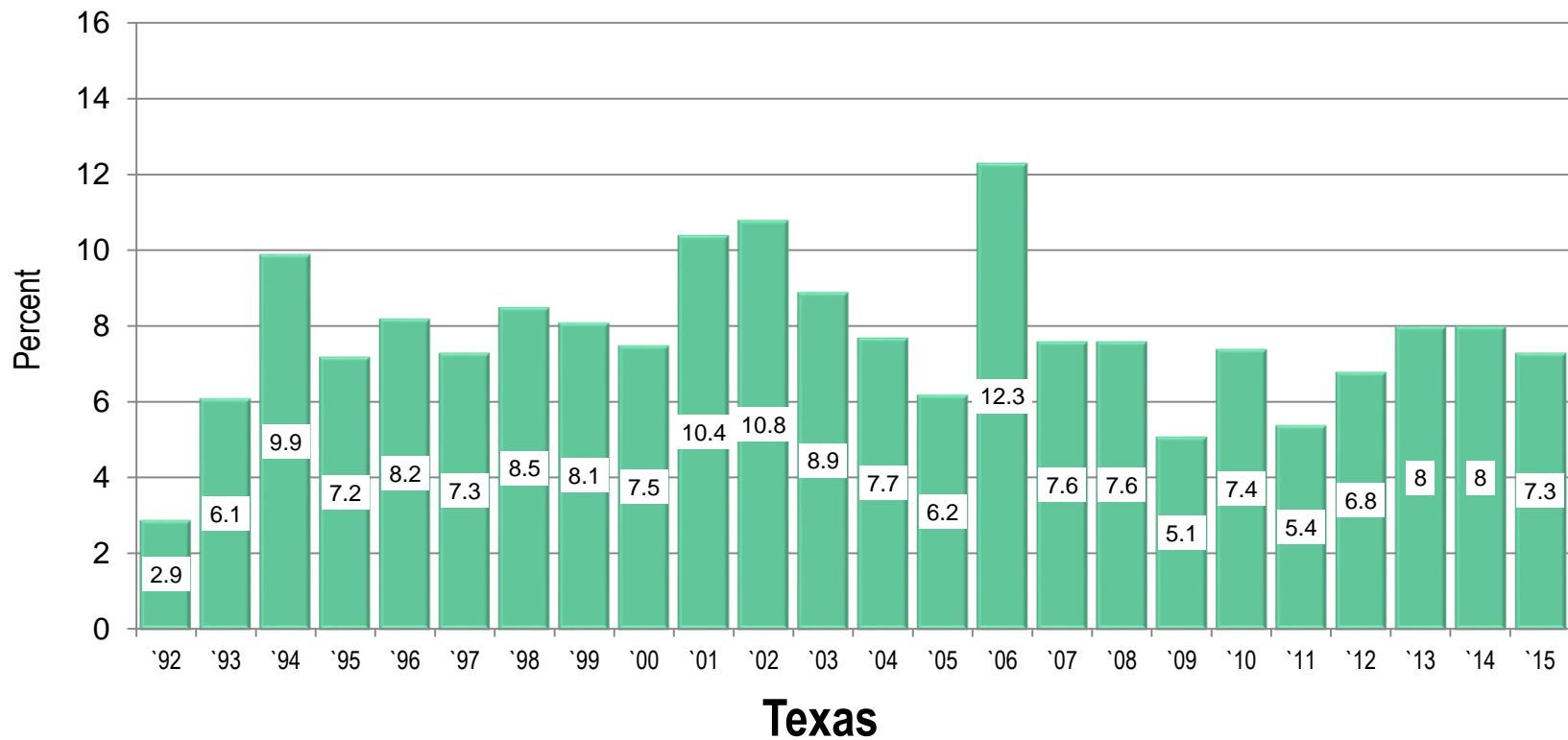
State Sources of Overnight Leisure Visitors



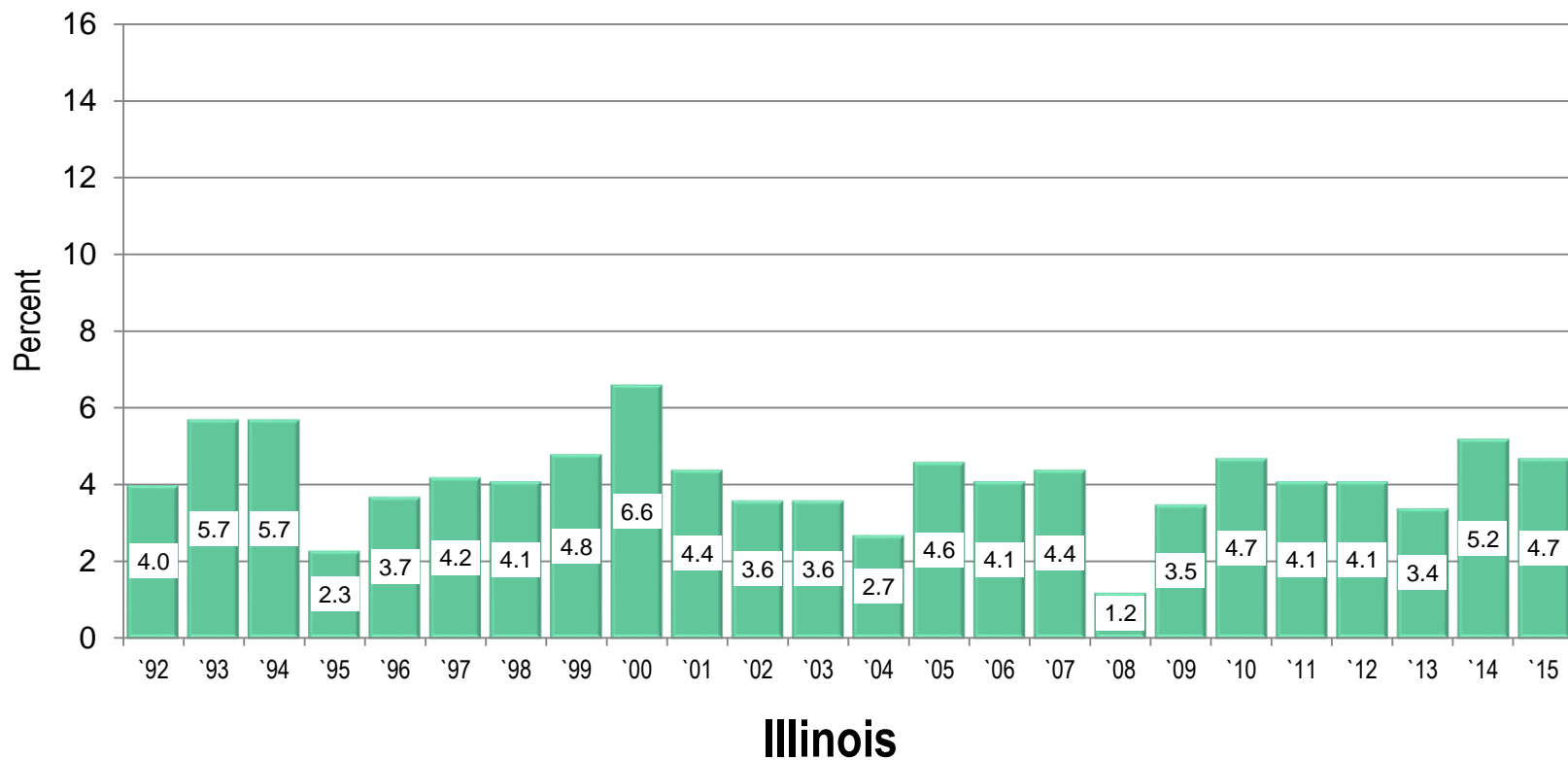
State Sources of Overnight Leisure Visitors



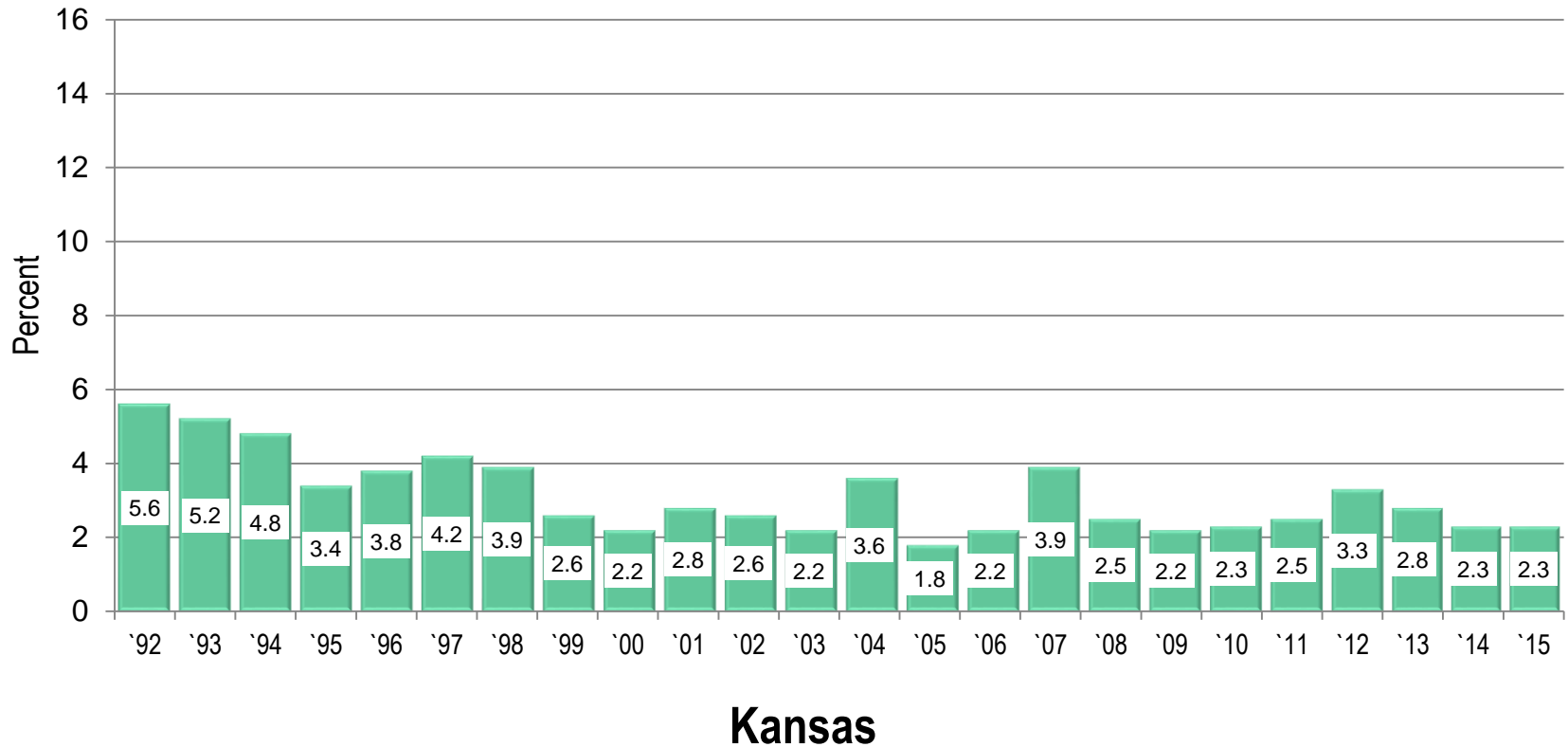
State Sources of Overnight Leisure Visitors



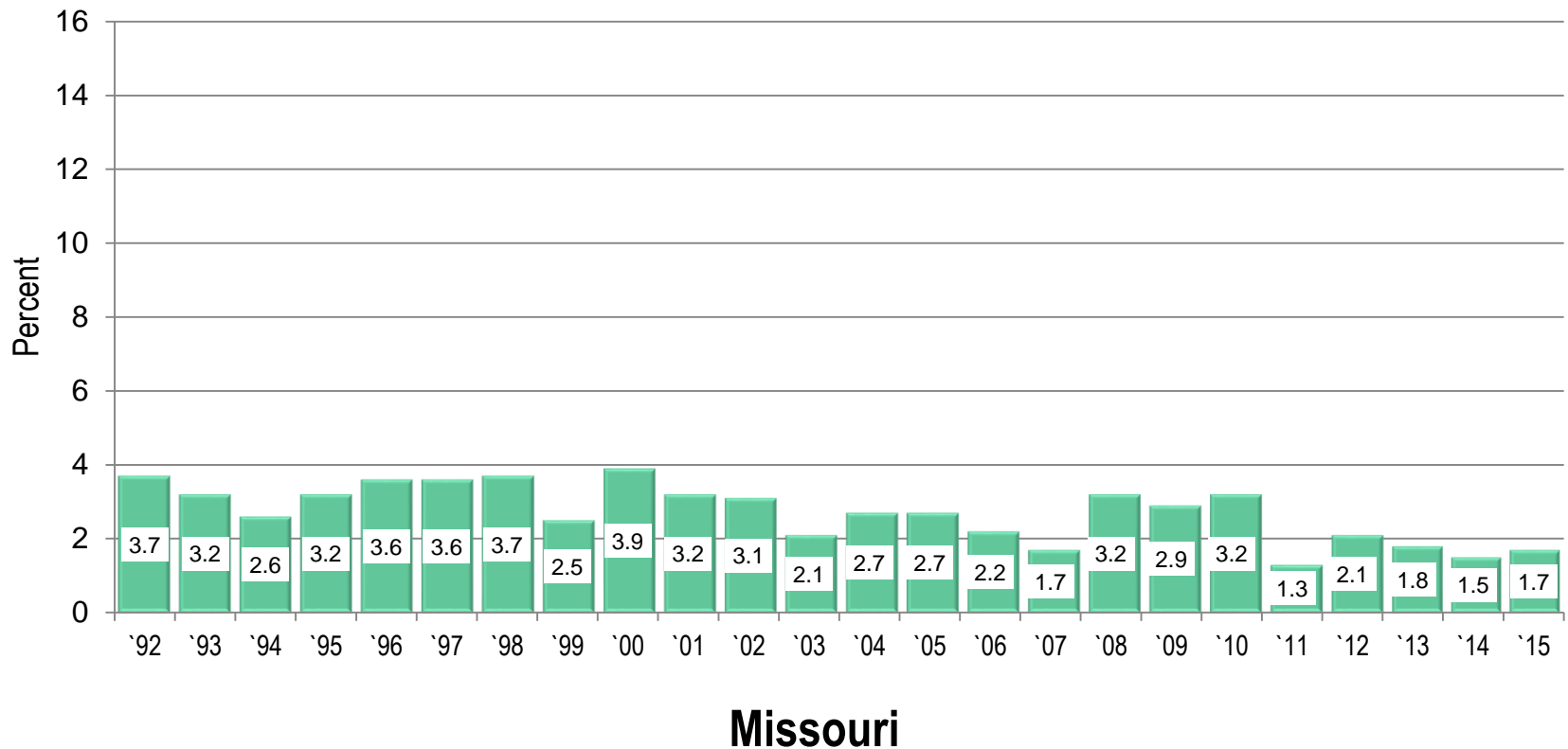
State Sources of Overnight Leisure Visitors



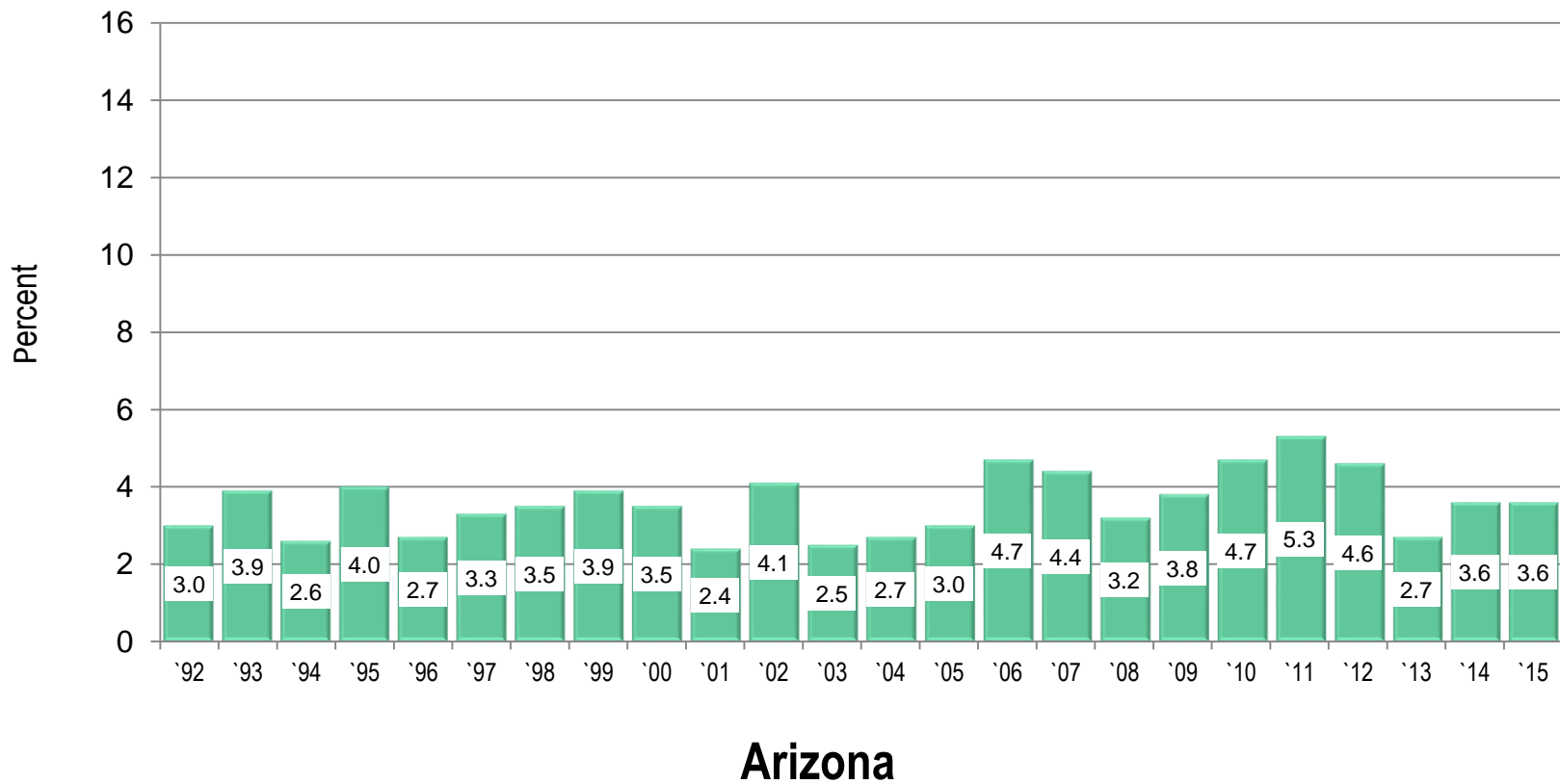
State Sources of Overnight Leisure Visitors



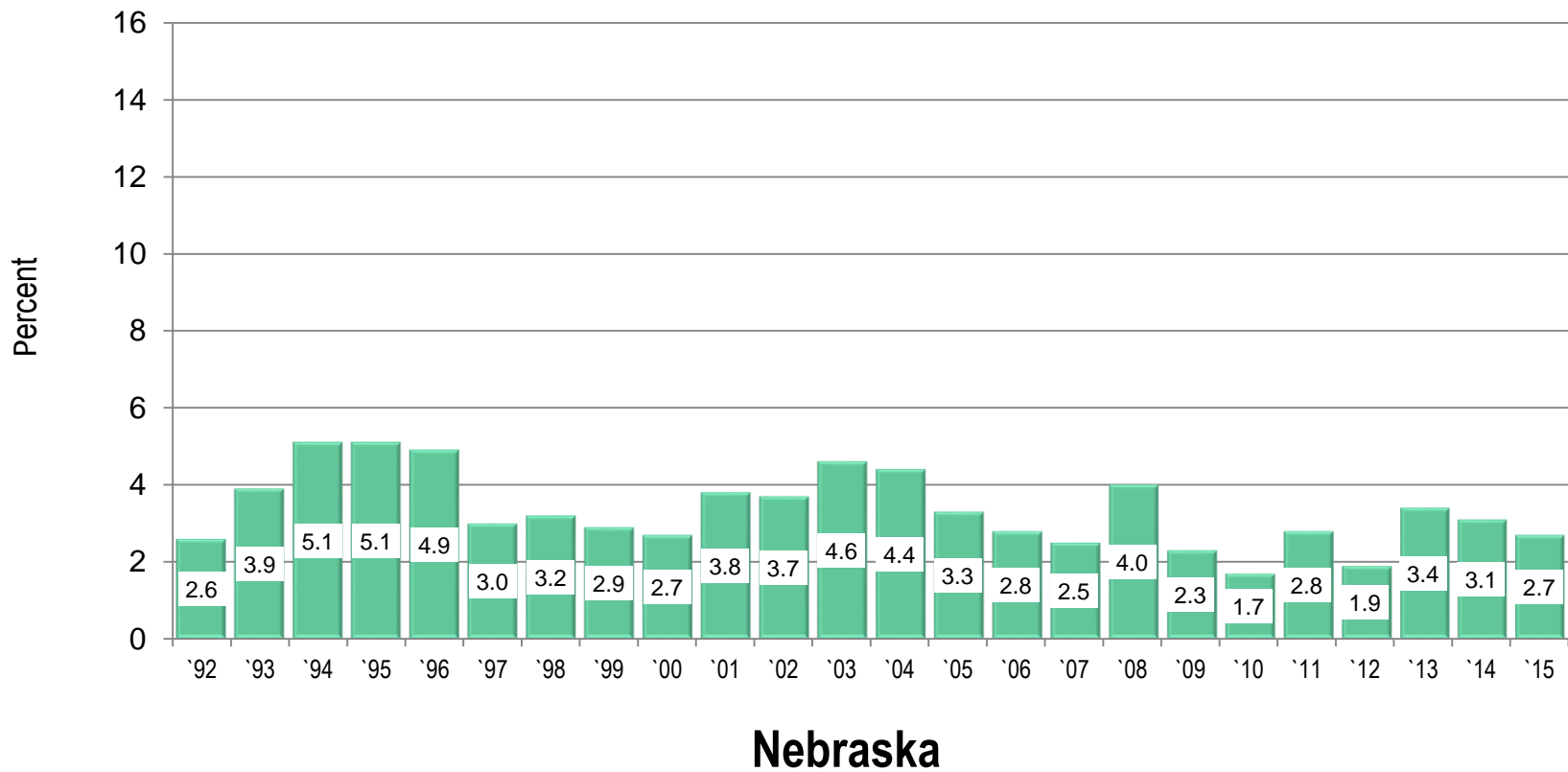
State Sources of Overnight Leisure Visitors



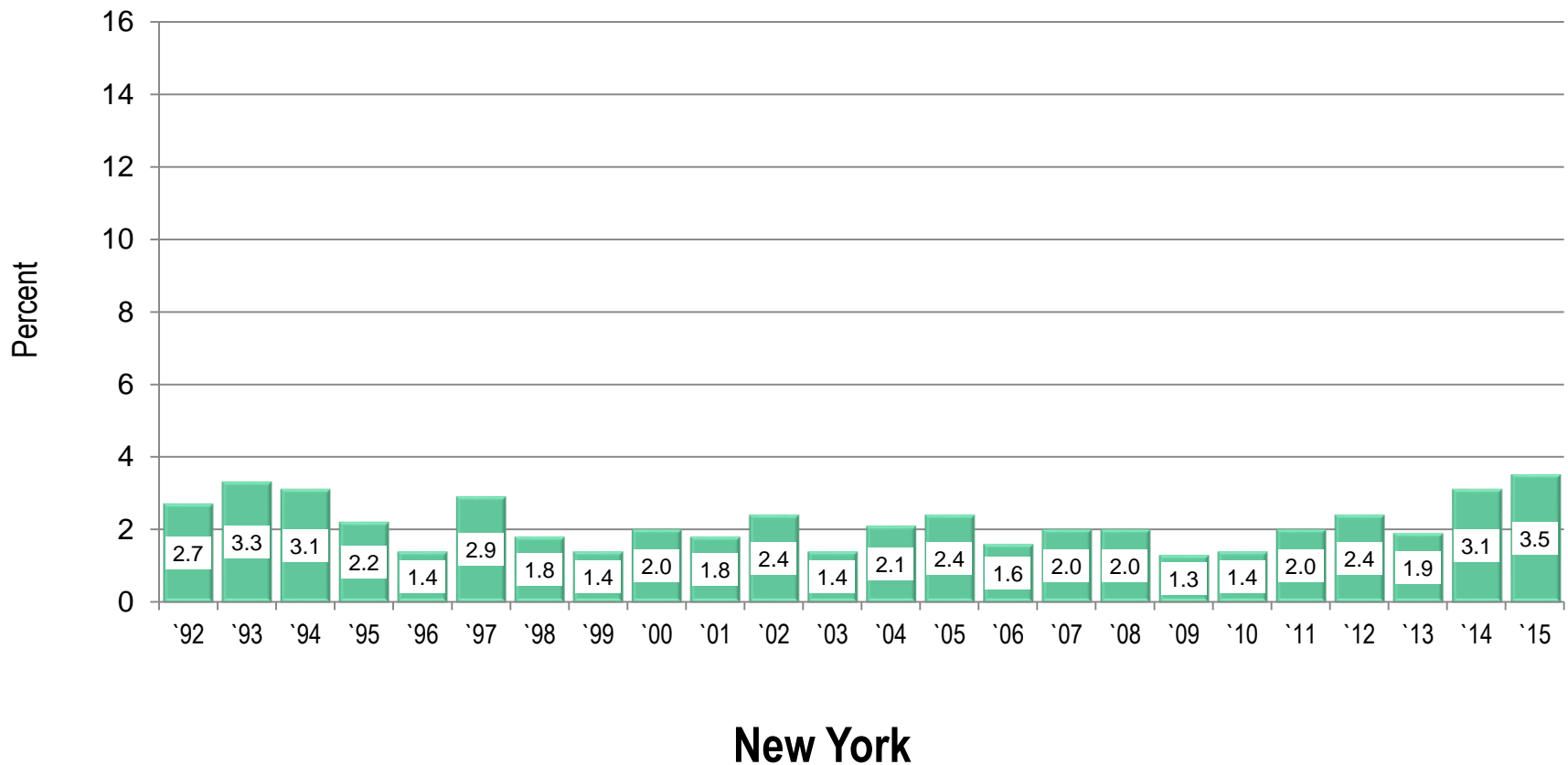
State Sources of Overnight Leisure Visitors



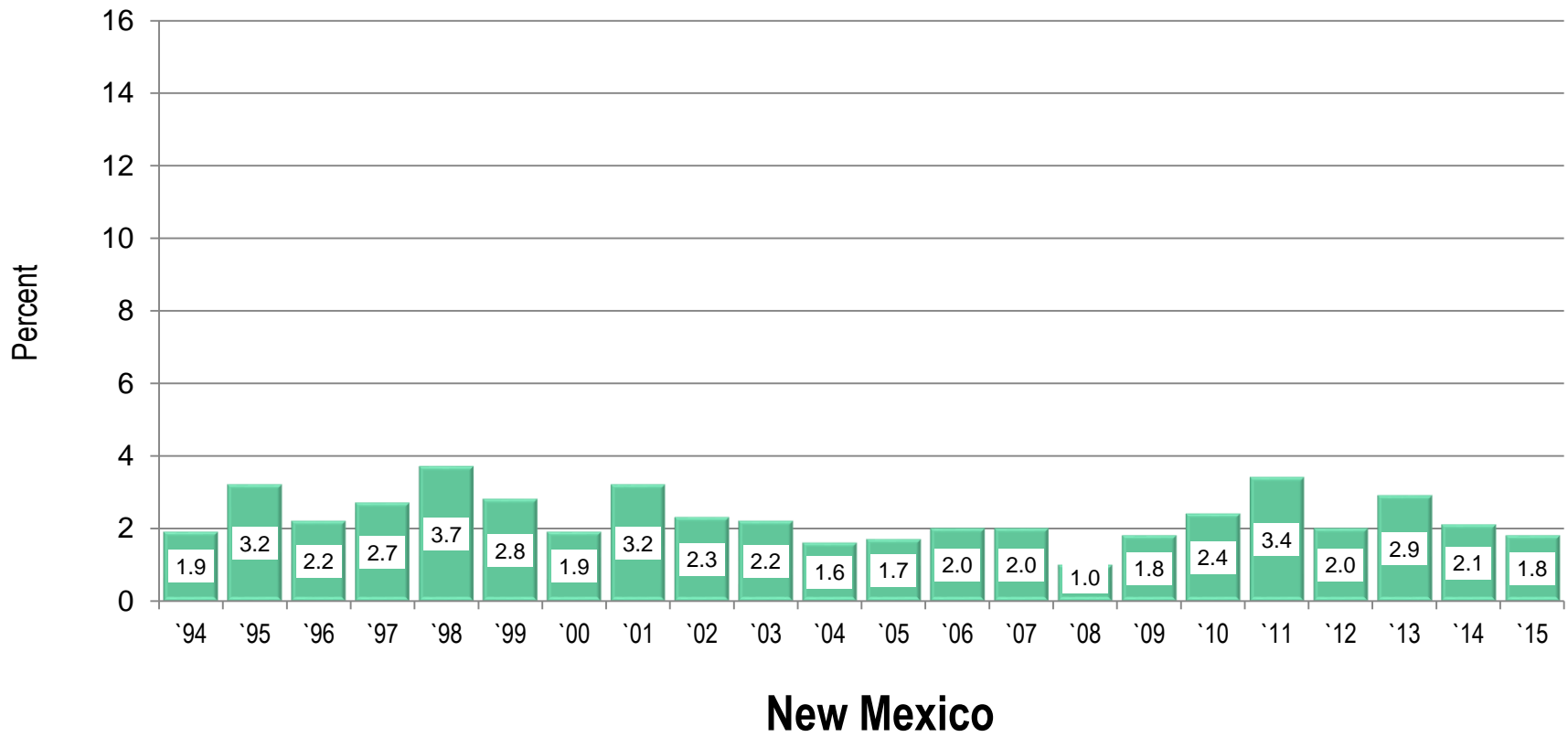
State Sources of Overnight Leisure Visitors



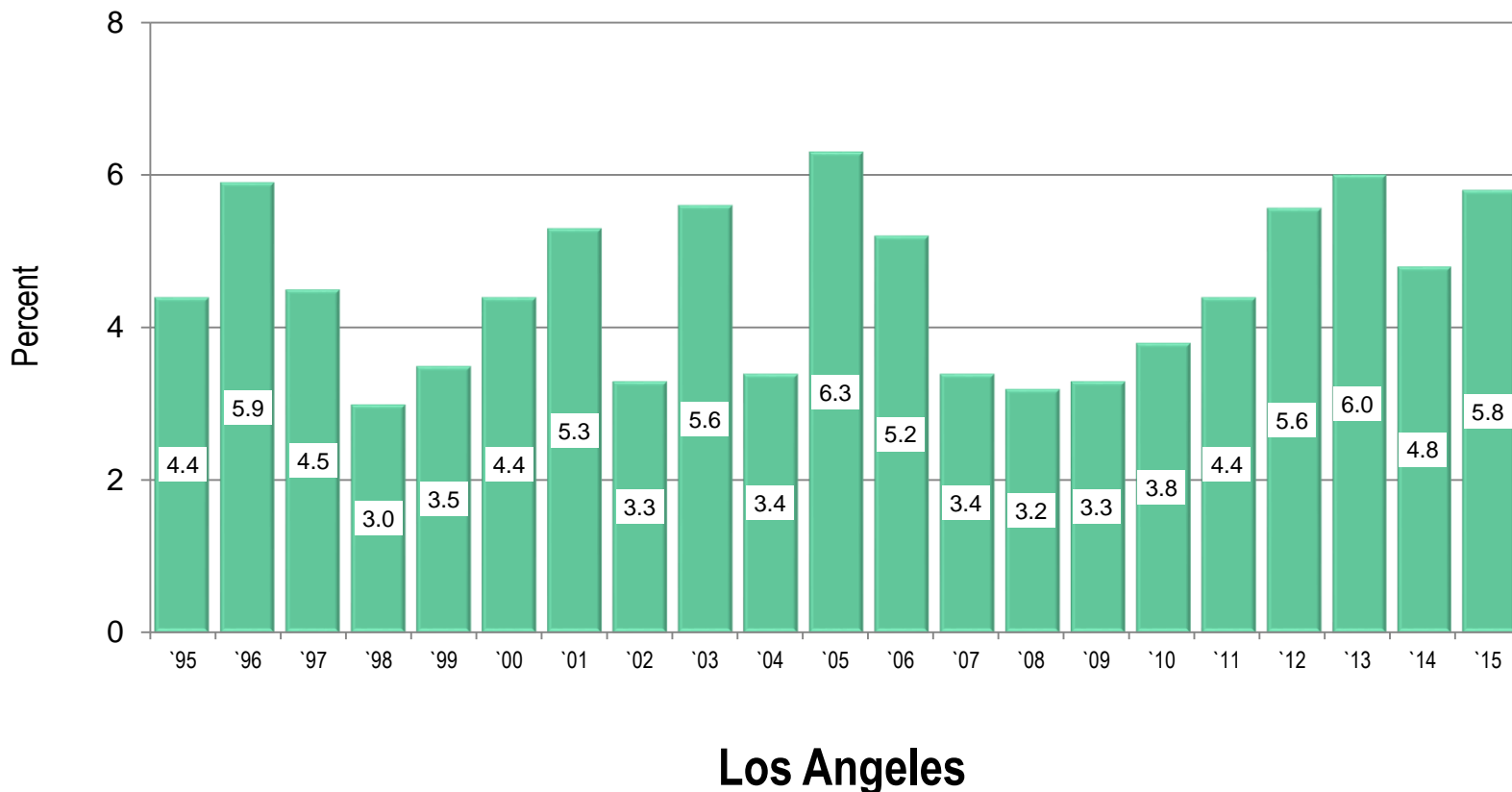
State Sources of Overnight Leisure Visitors



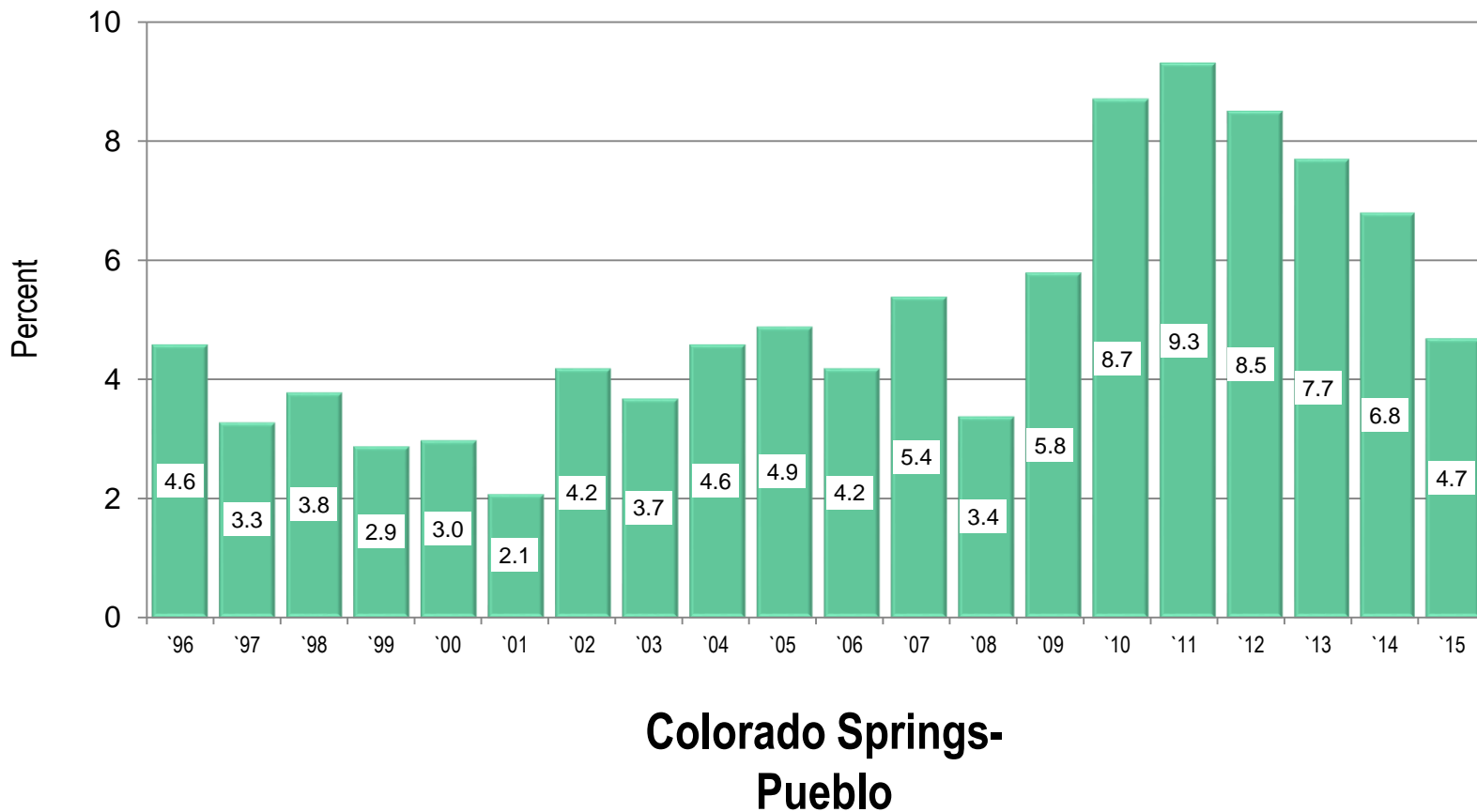
State Sources of Overnight Leisure Visitors



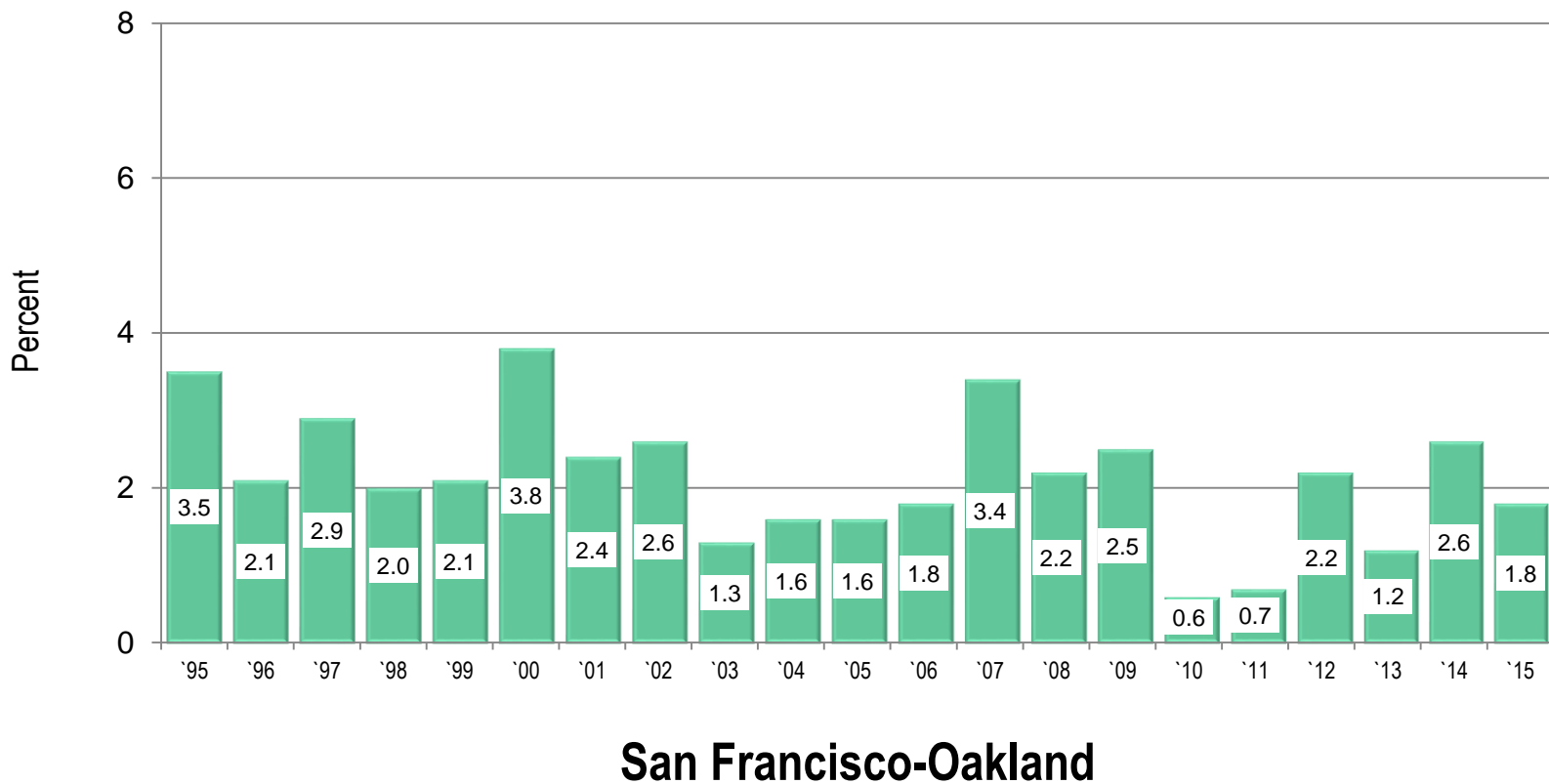
Top Urban Sources of Overnight Leisure Visitors



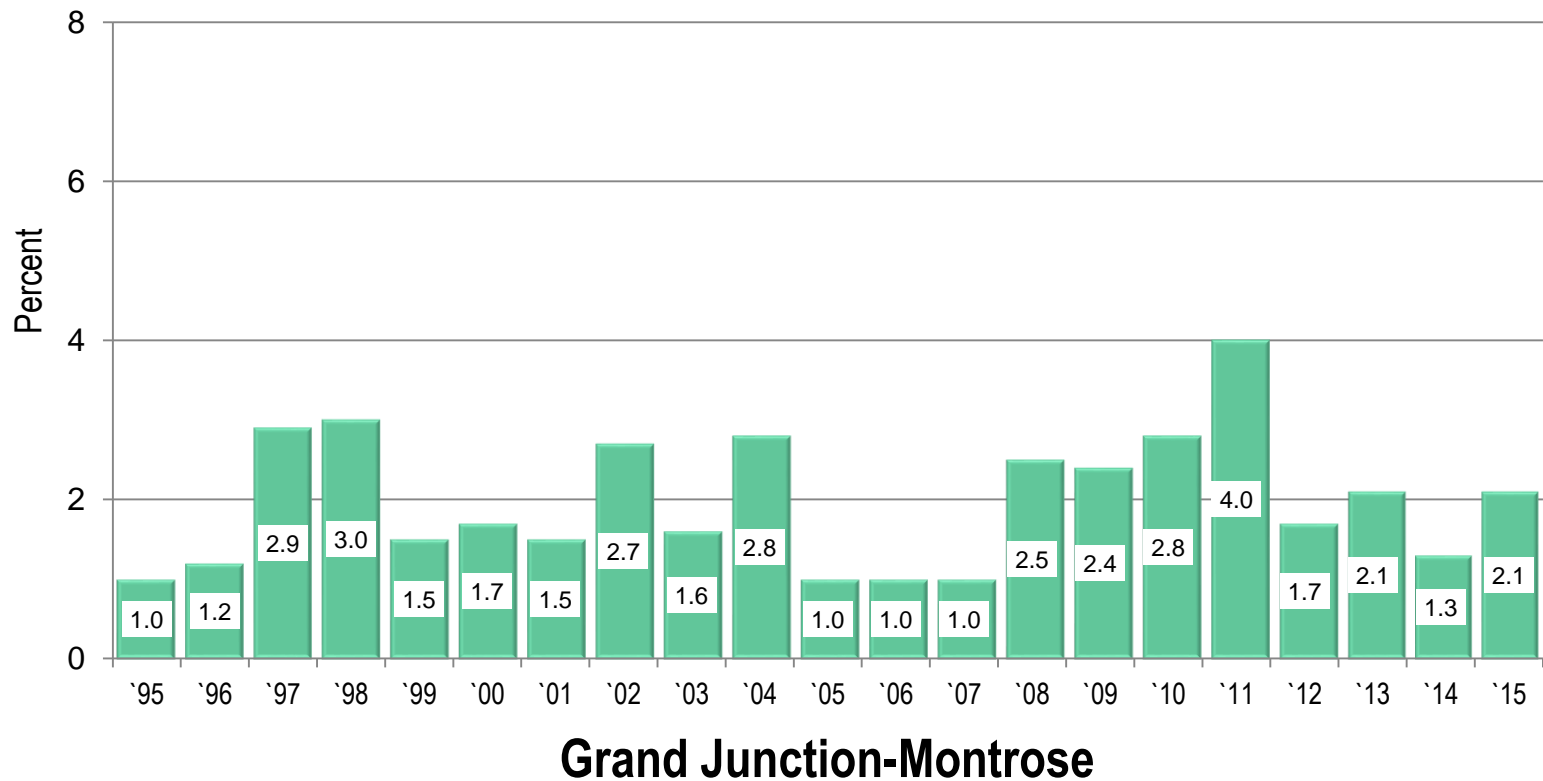
Top Urban Sources of Overnight Leisure Visitors



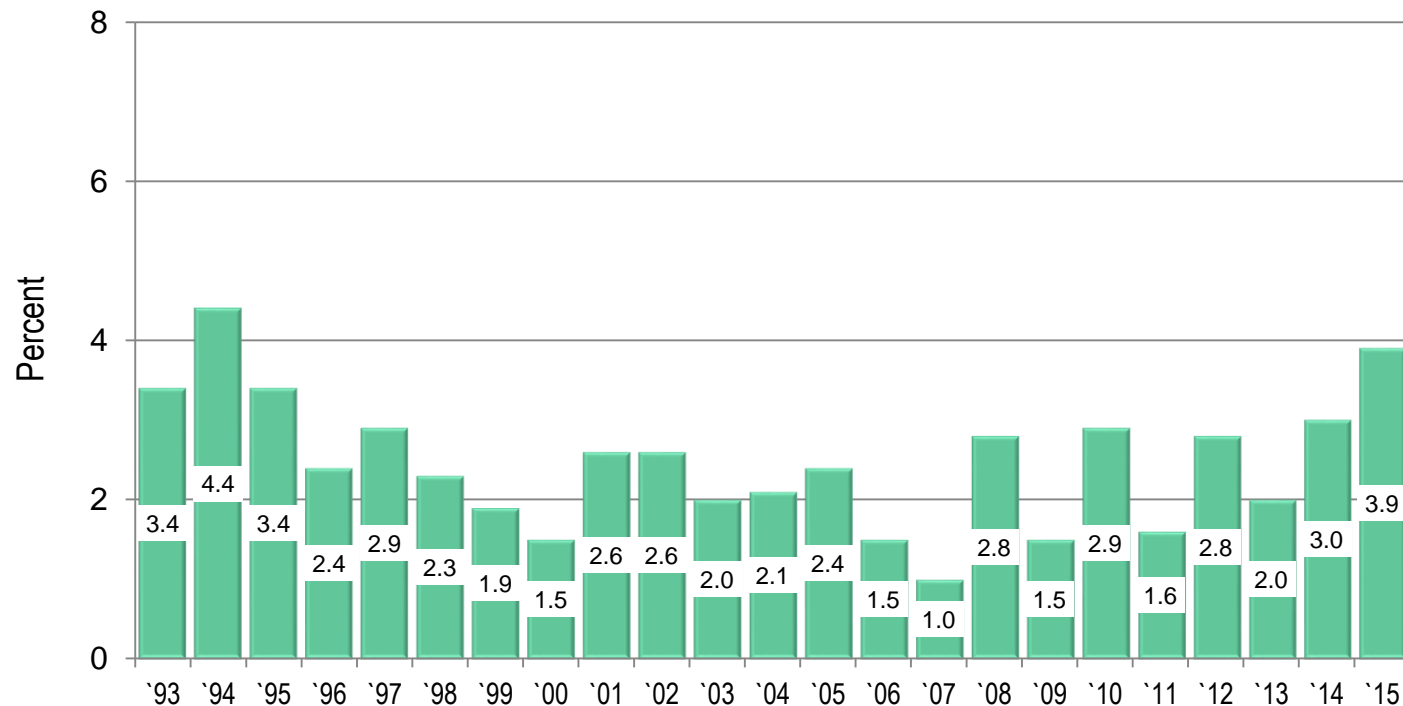
Top Urban Sources of Overnight Leisure Visitors



Top Urban Sources of Overnight Leisure Visitors

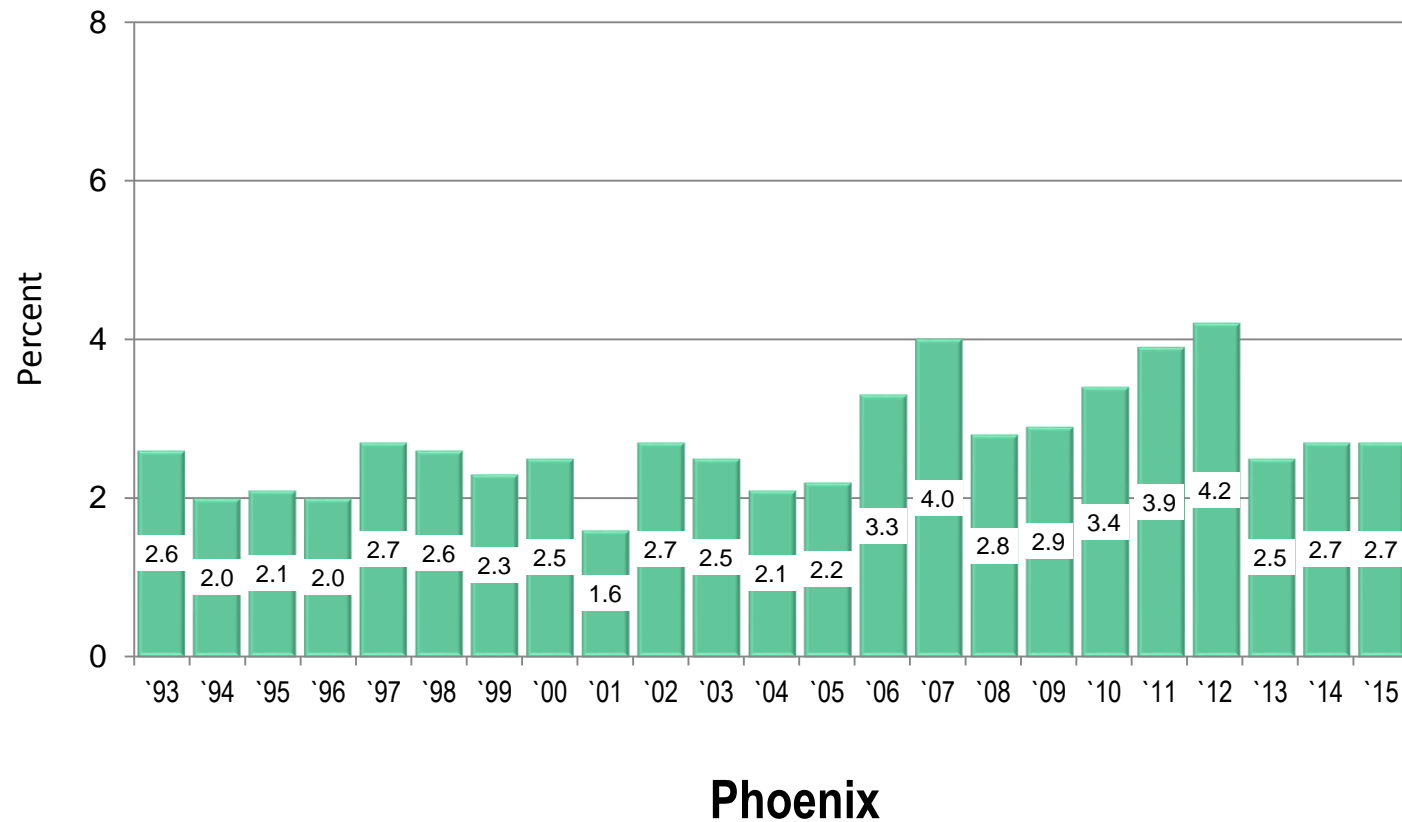


Top Urban Sources of Overnight Leisure Visitors

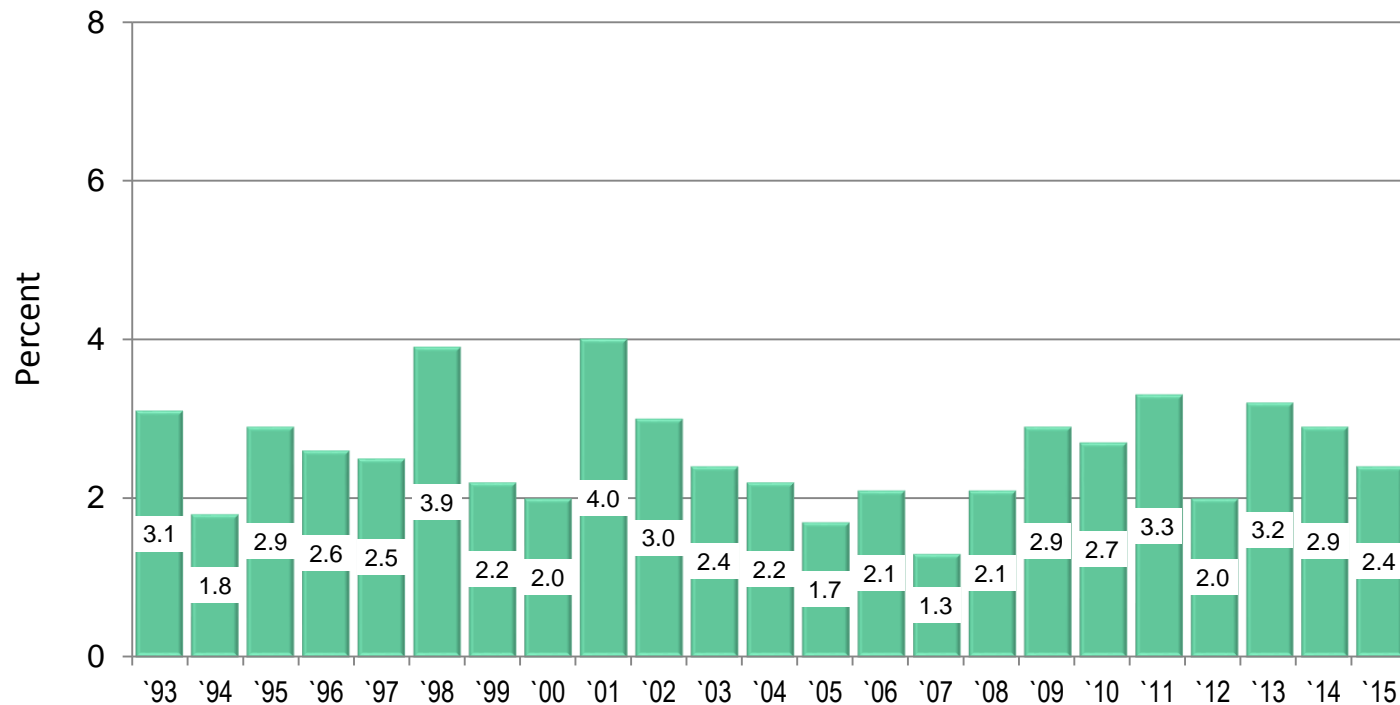


New York

Top Urban Sources of Overnight Leisure Visitors

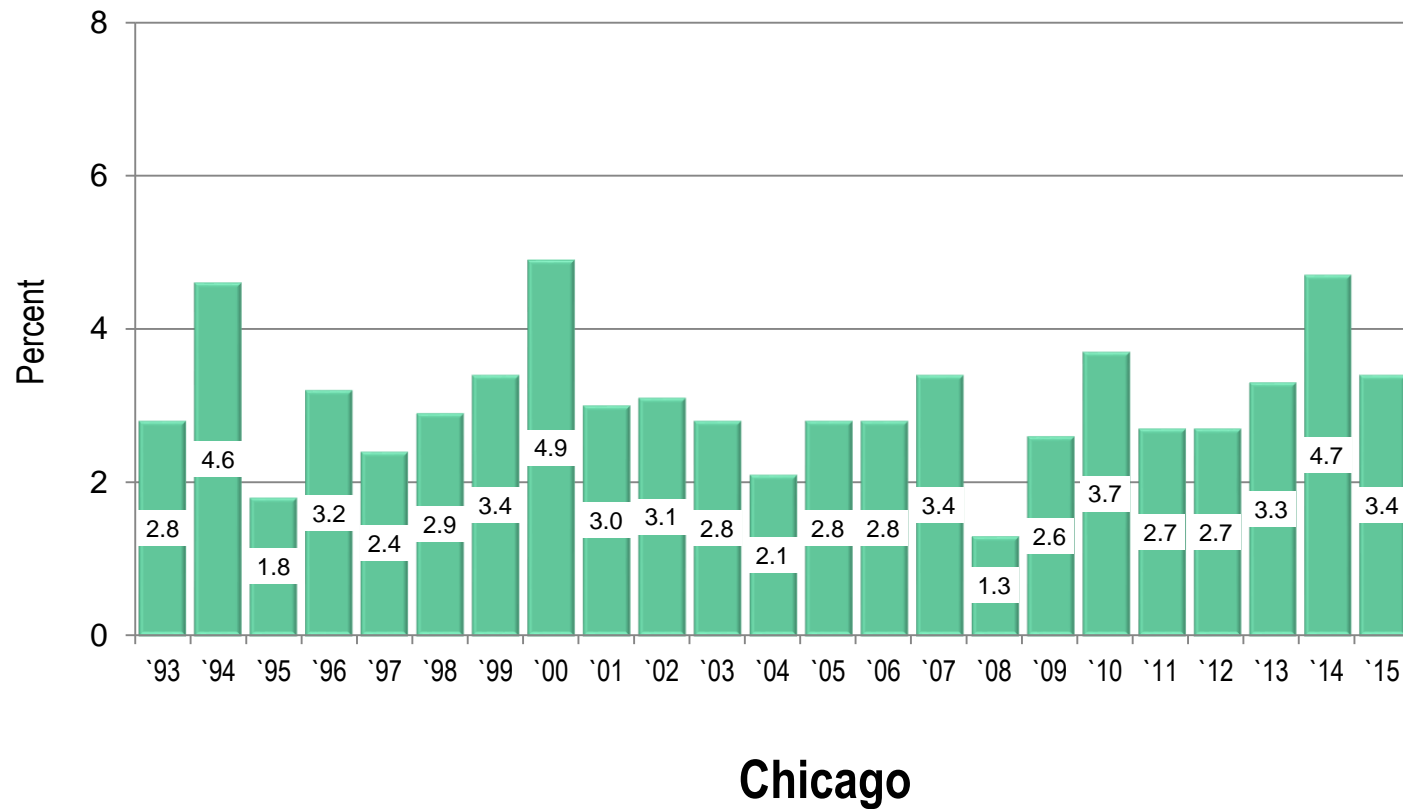


Top Urban Sources of Overnight Leisure Visitors

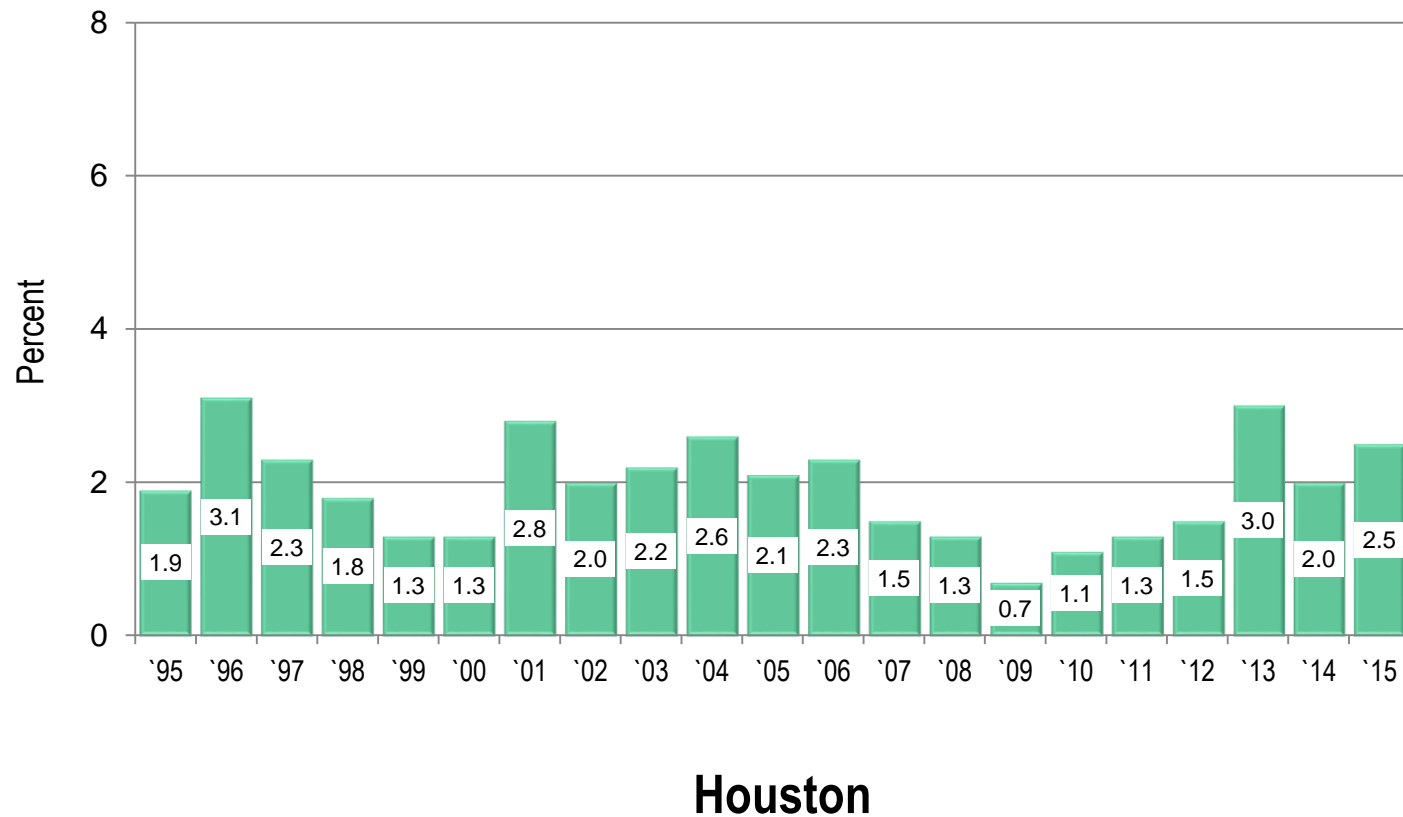


Albuquerque-Santa Fe

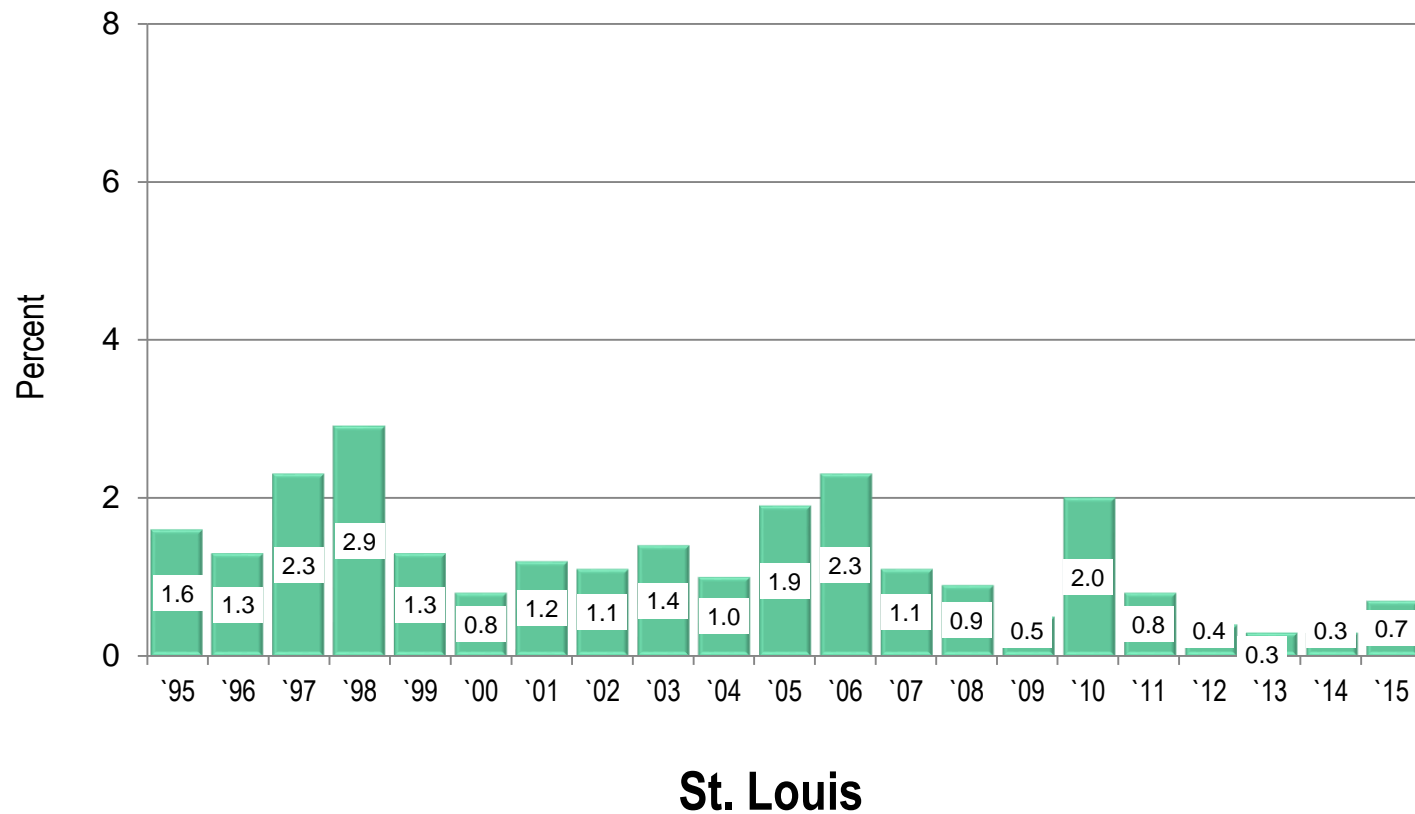
Top Urban Sources of Overnight Leisure Visitors



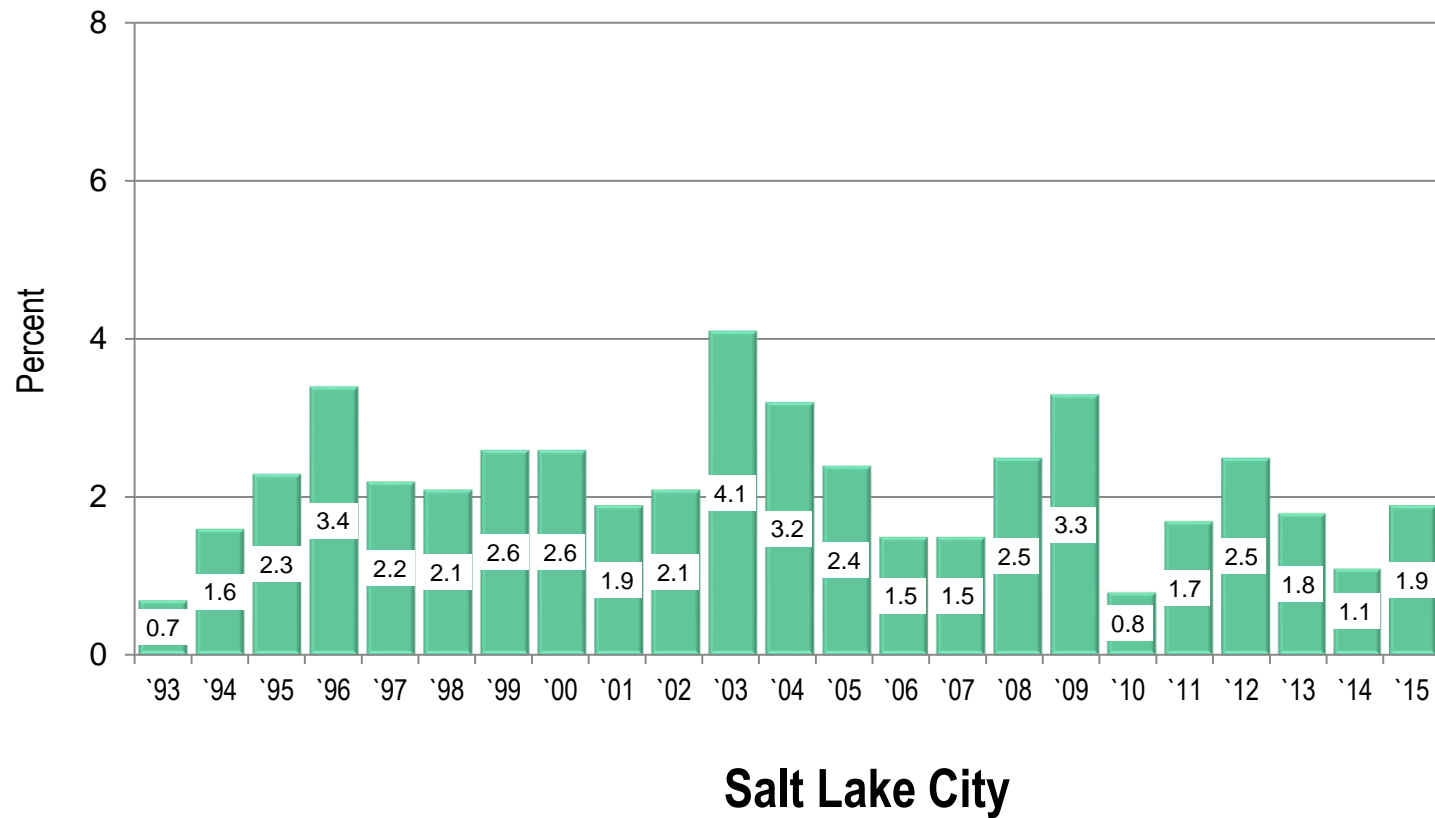
Top Urban Sources of Overnight Leisure Visitors



Top Urban Sources of Overnight Leisure Visitors



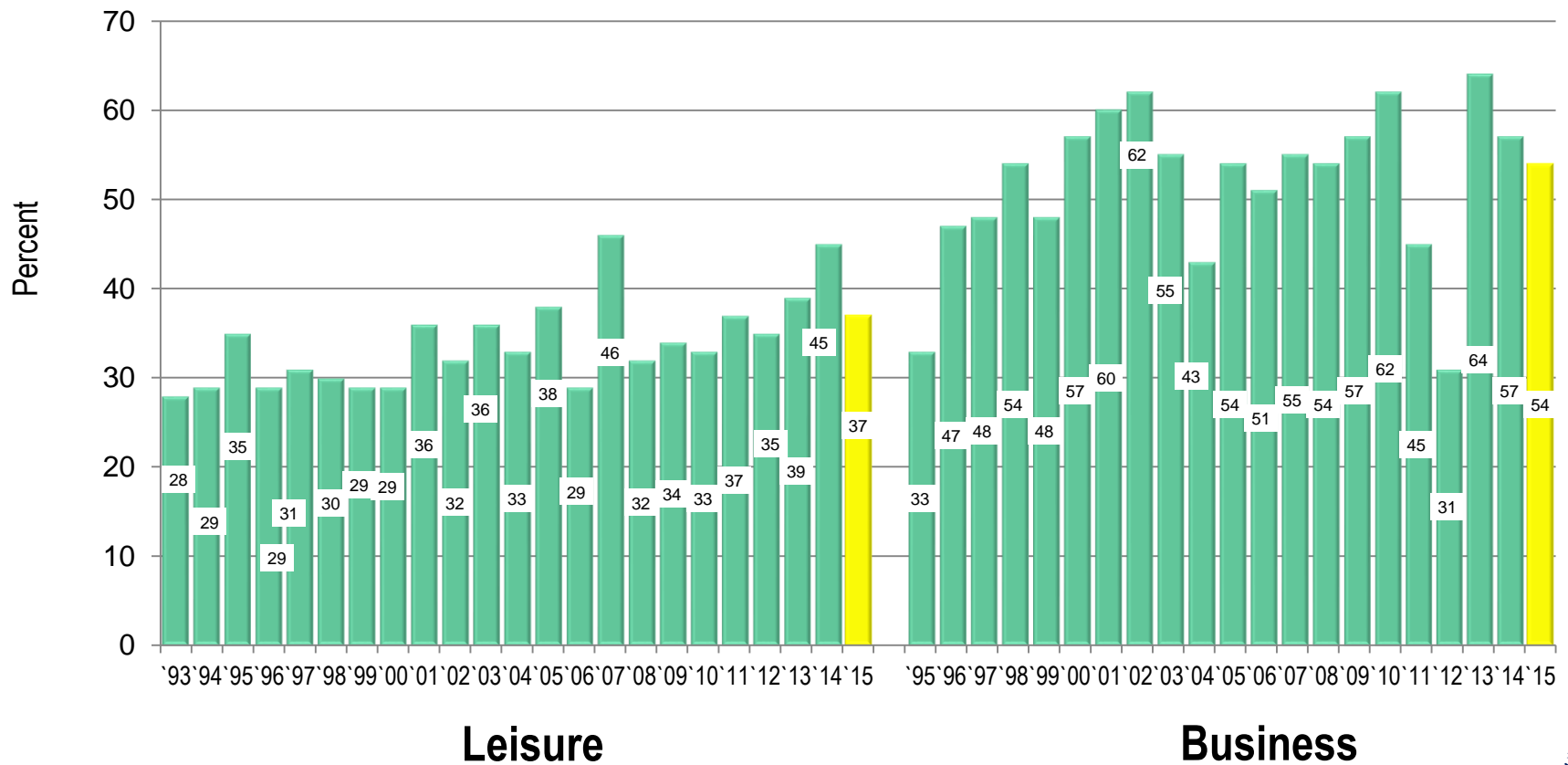
Top Urban Sources of Overnight Leisure Visitors



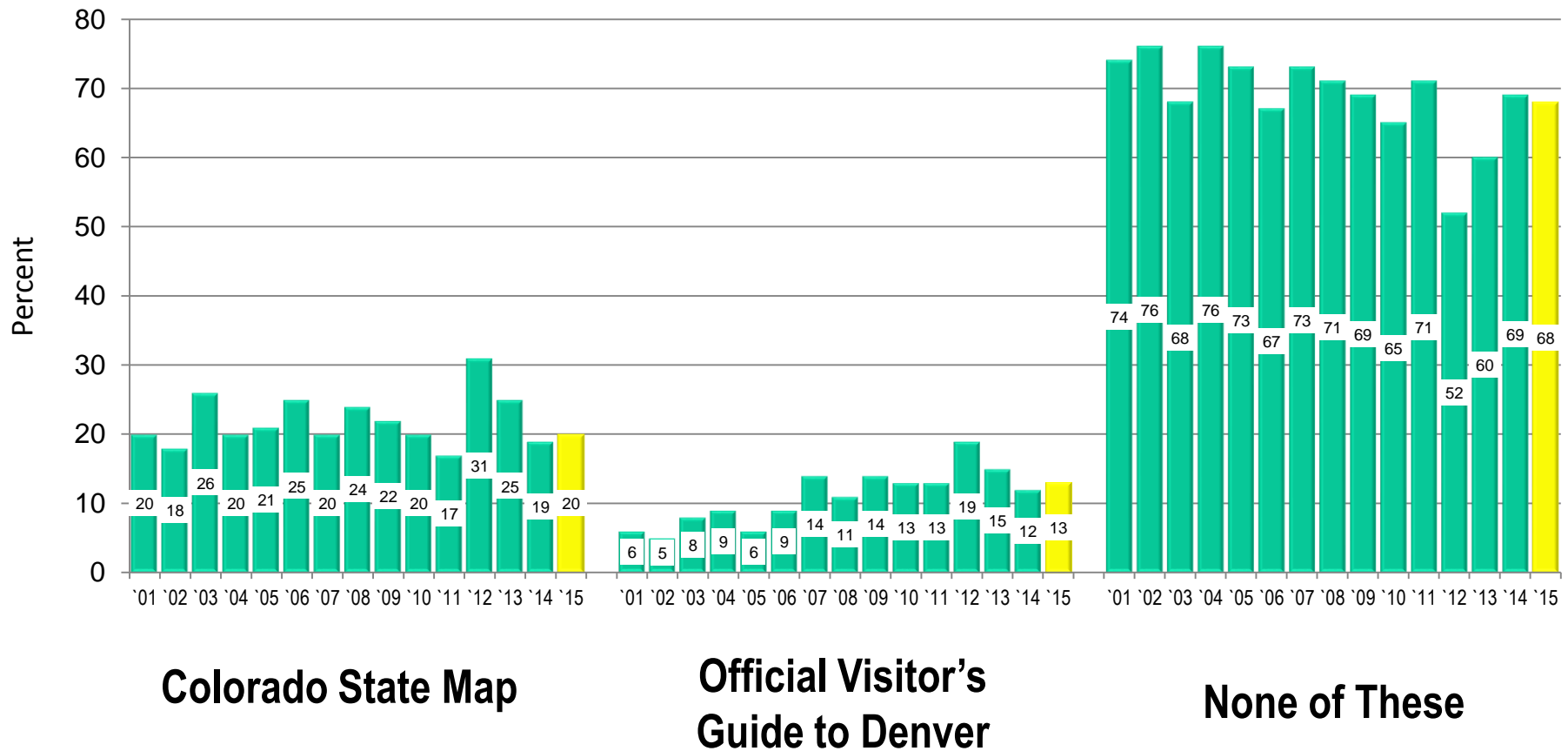
Planning Cycle



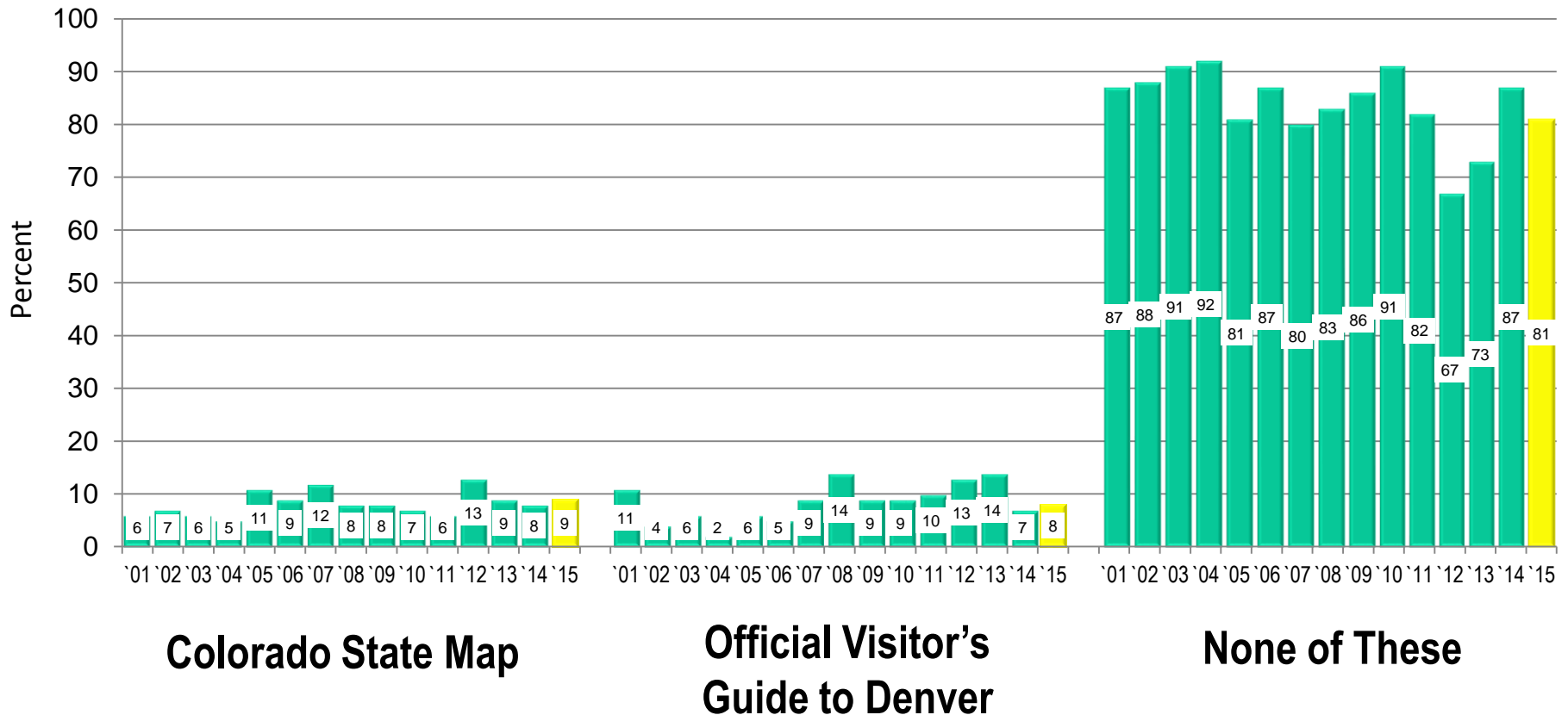
Percent Planning Trip One Month or Less in Advance



Publications Used for Planning Trip — Leisure



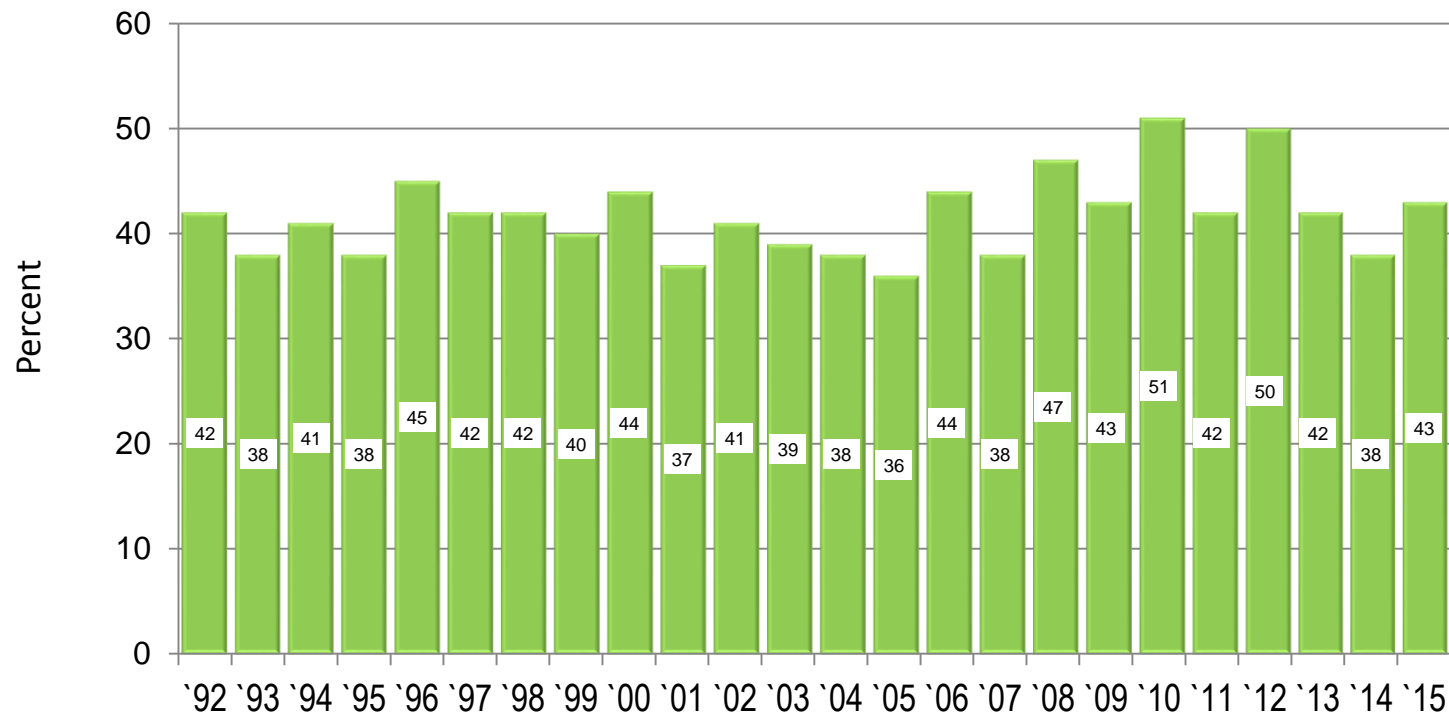
Publications Used for Planning Trip — Business



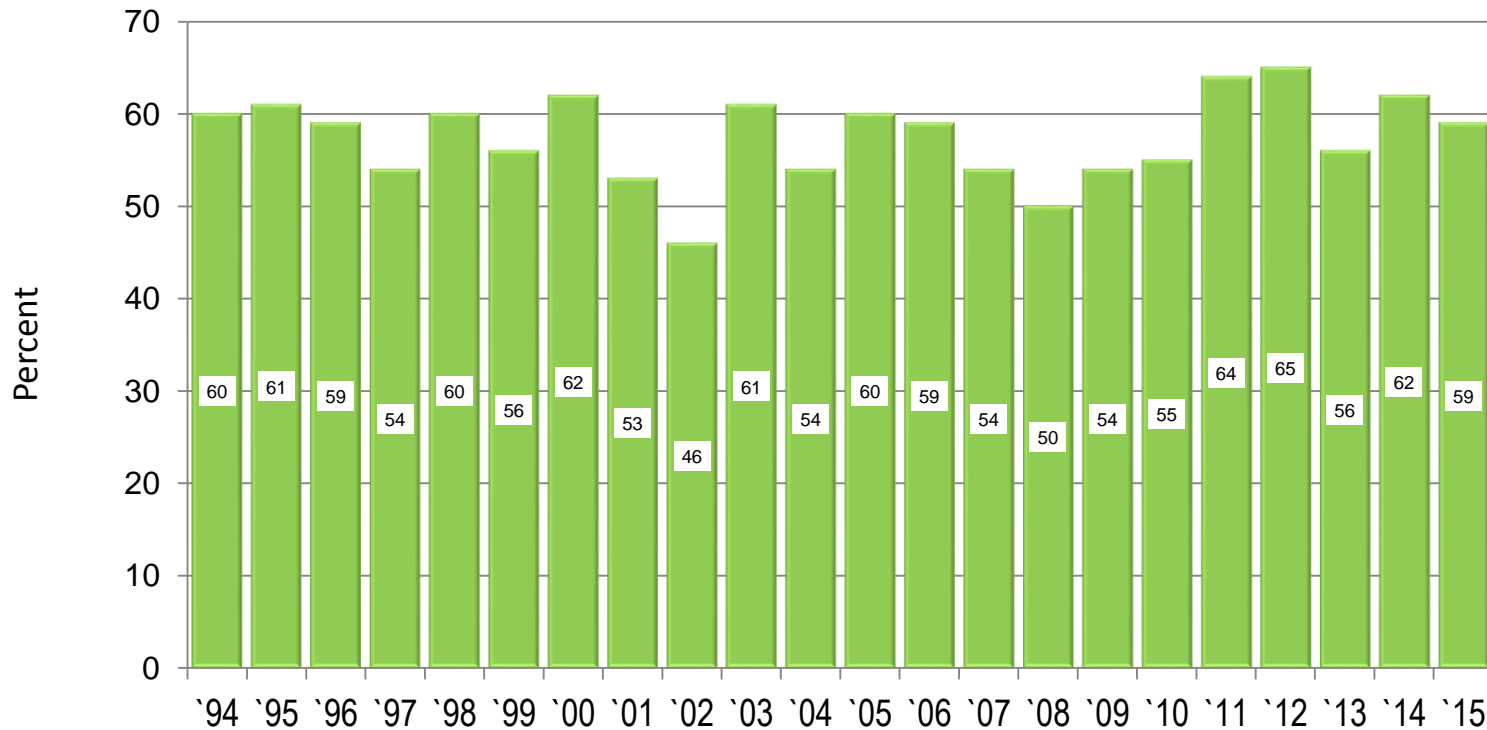
Booking Cycle — Leisure



Percent Booking 2 or More Months in Advance

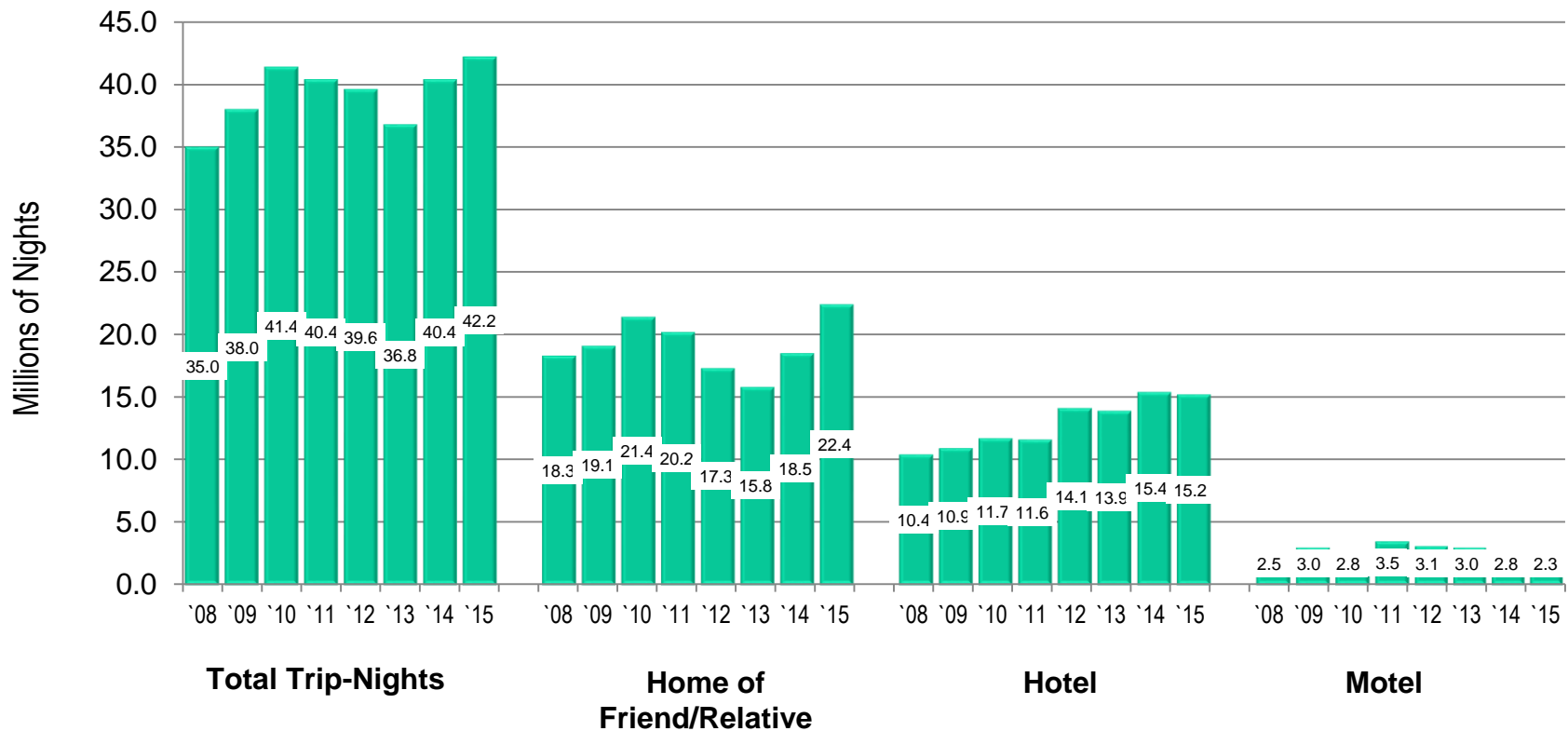


Stayed in Commercial Accommodations*

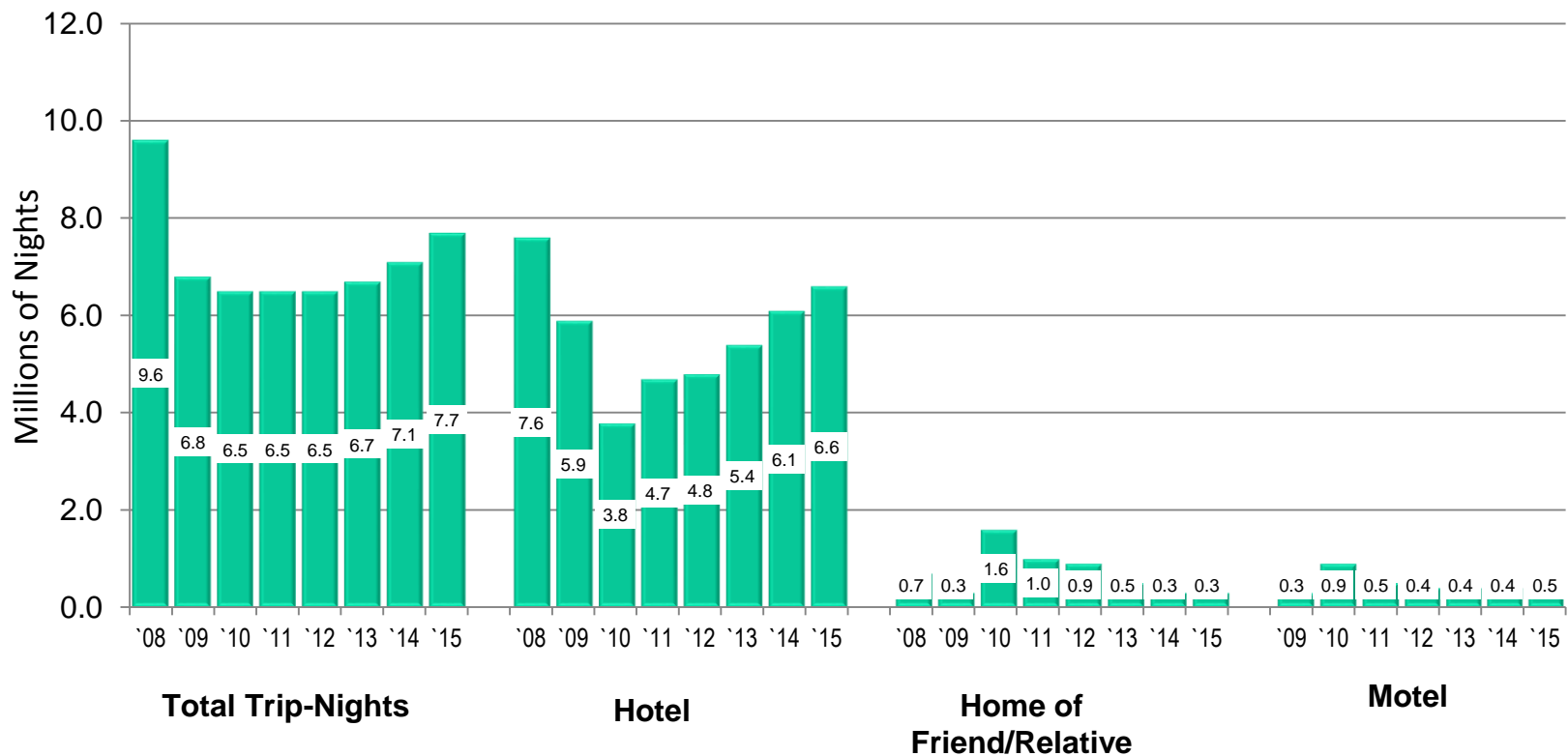


*Percent who spent at least one night in a Denver hotel, motel, inn, or bed & breakfast

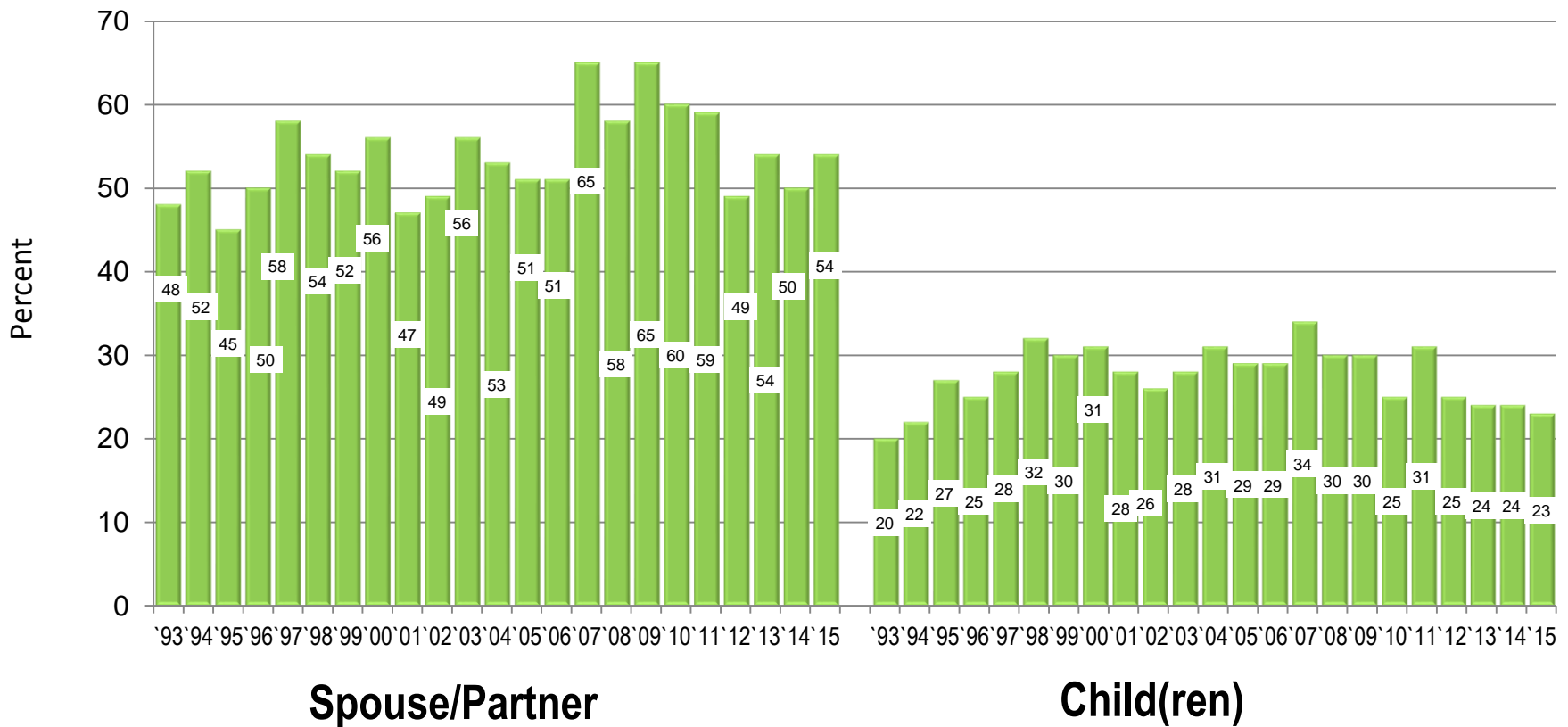
Leisure Trip-Nights Spent in Each Type of Accommodation



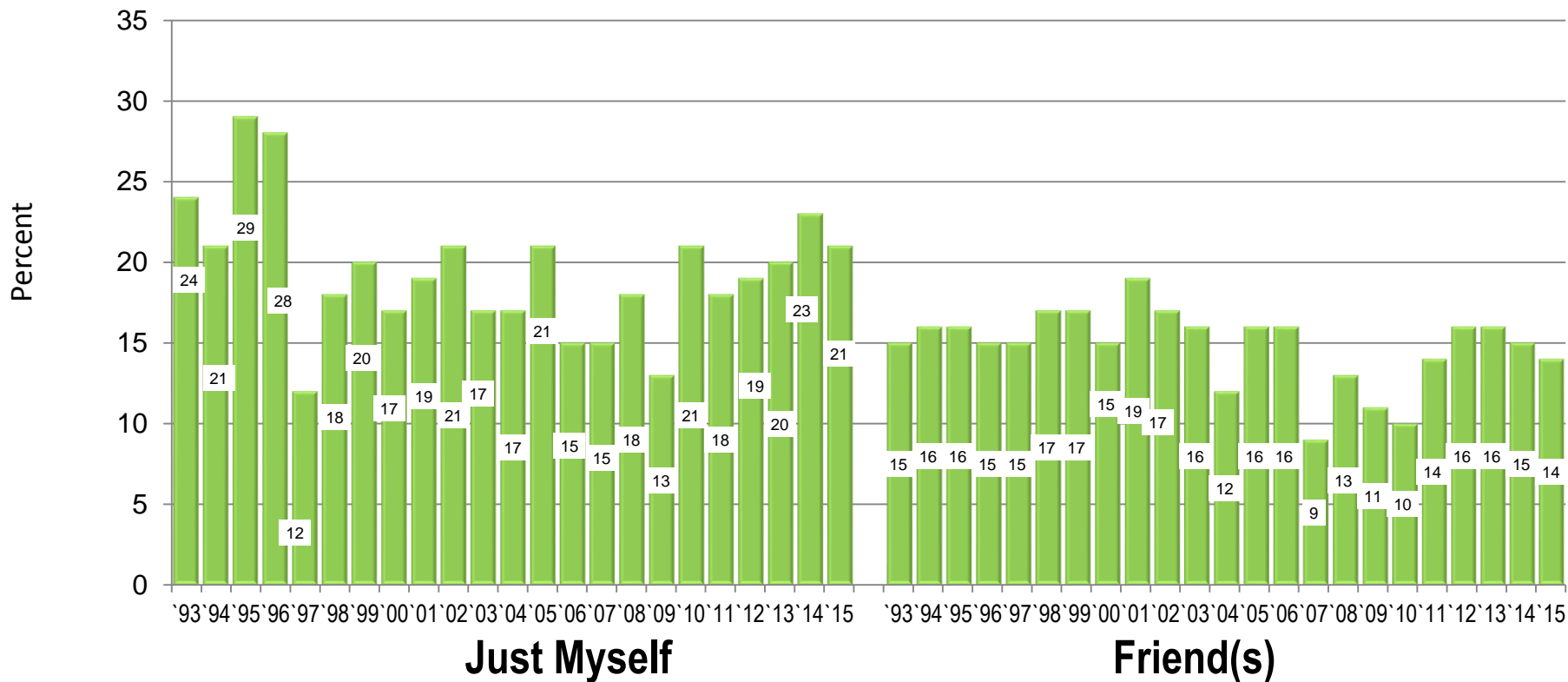
Business Trip-Nights Spent in Each Type of Accommodation



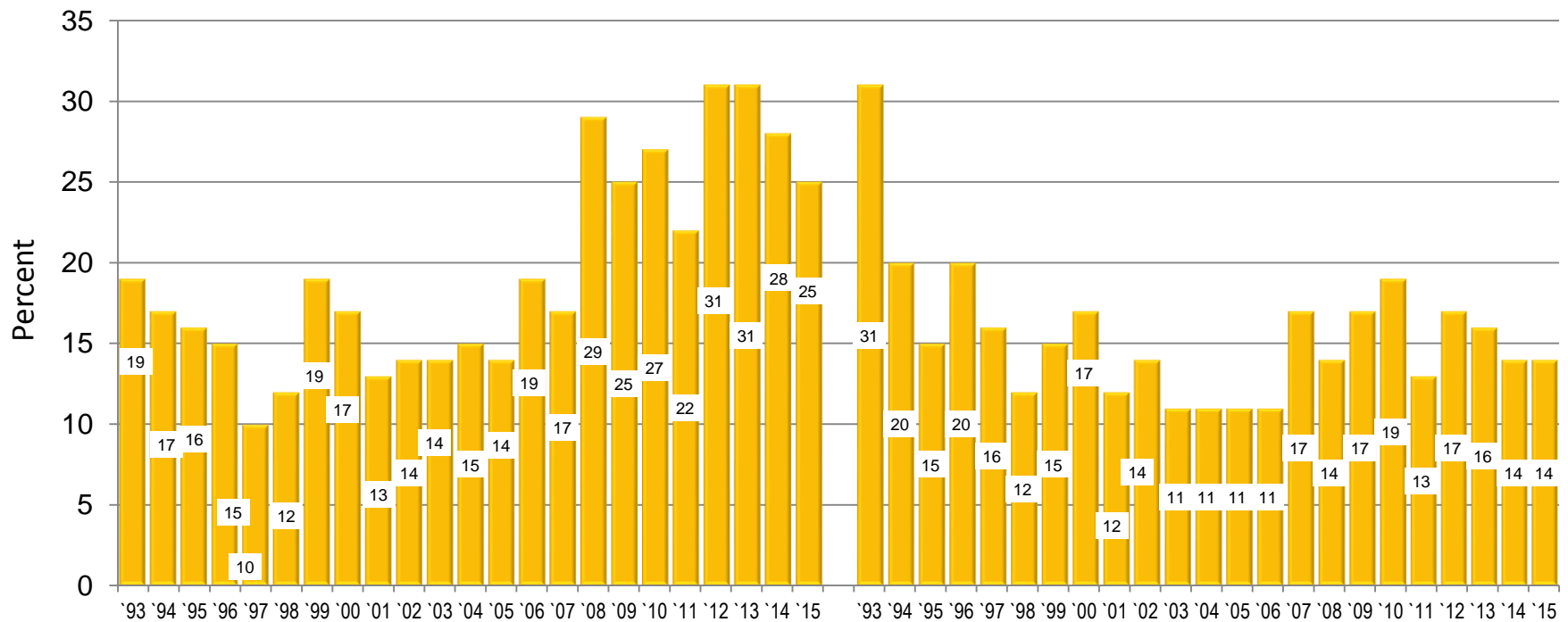
Composition of Travel Party — Leisure



Composition of Travel Party — Leisure



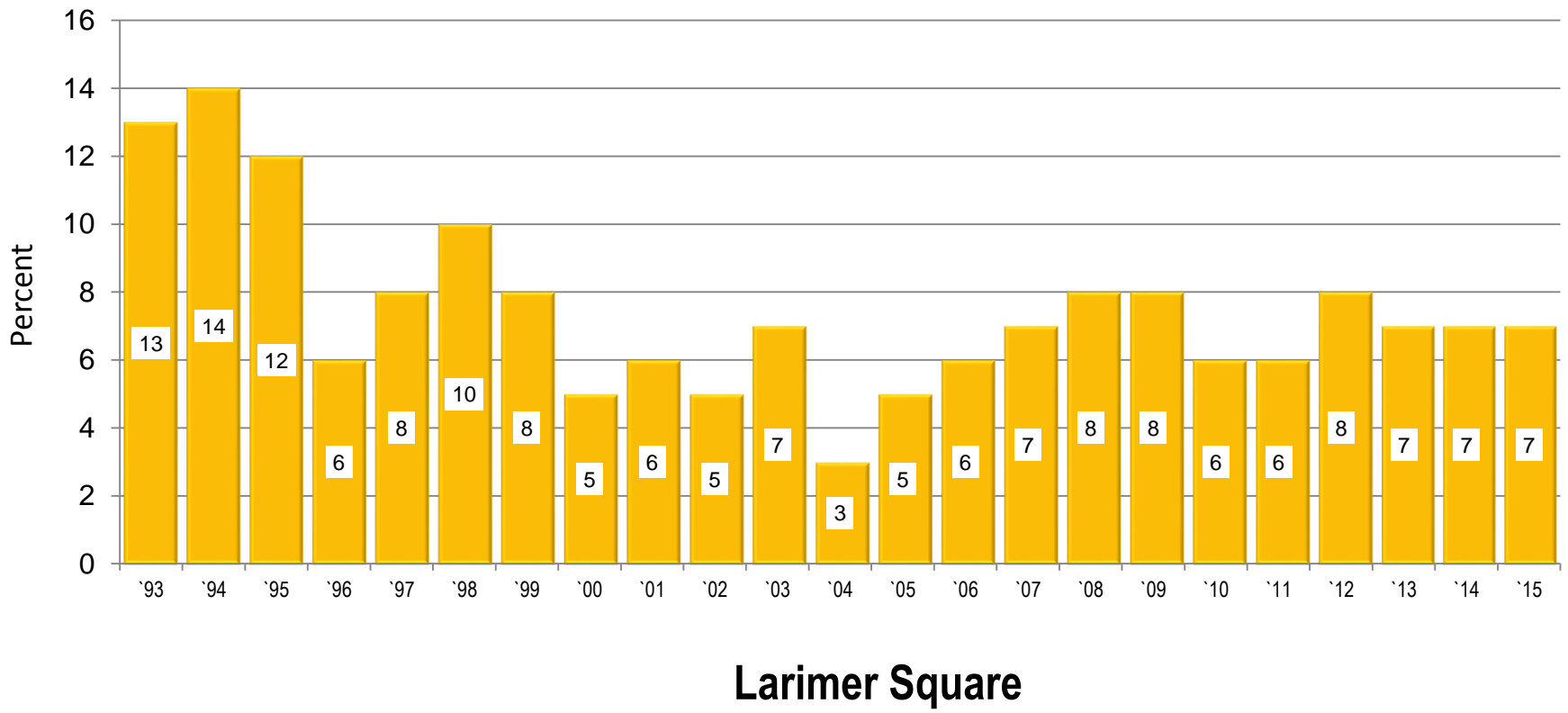
Attractions Visited or Seen



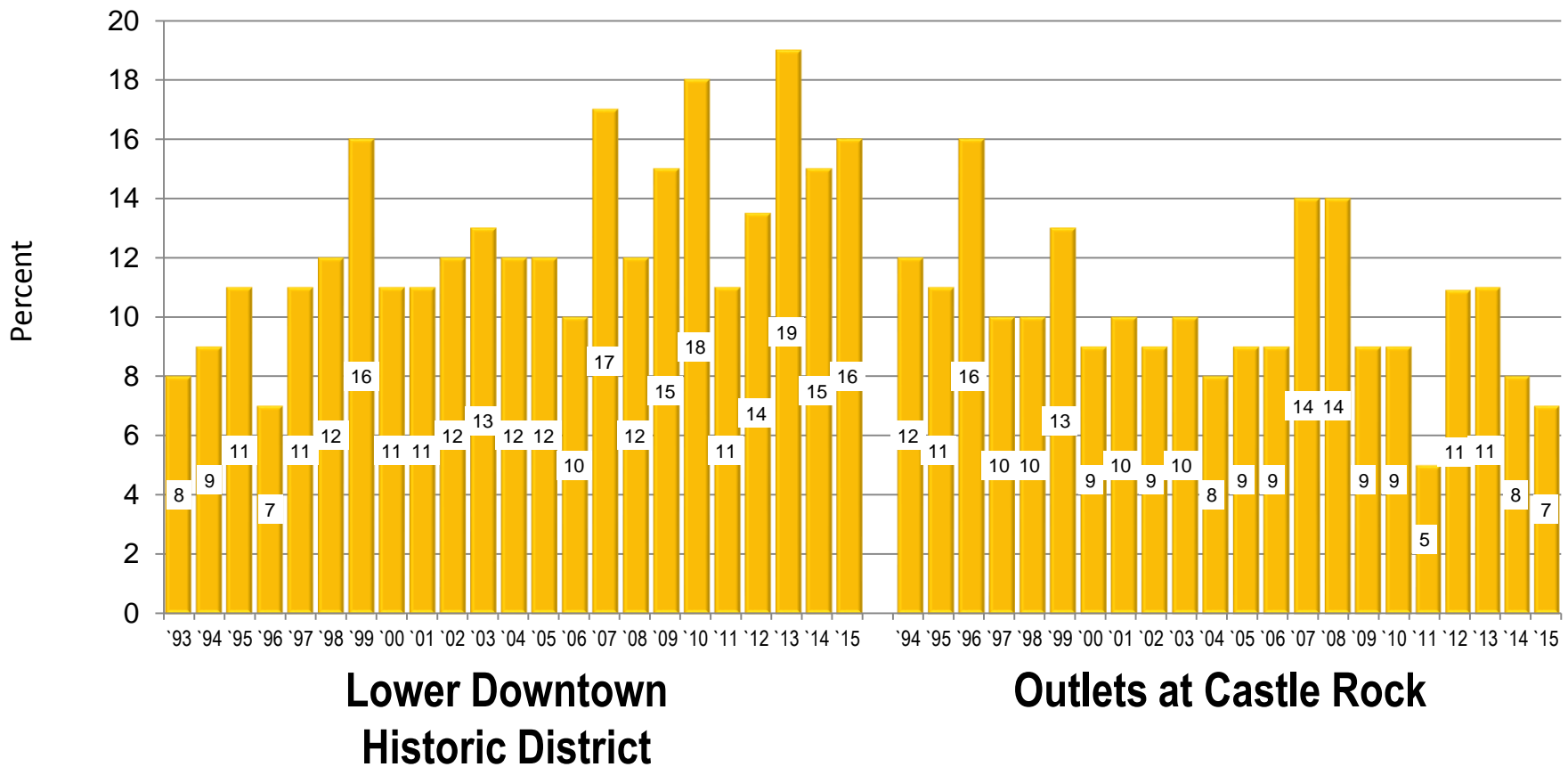
16th Street Mall

**Cherry Creek Shopping
Center/Neighborhood
Shops**

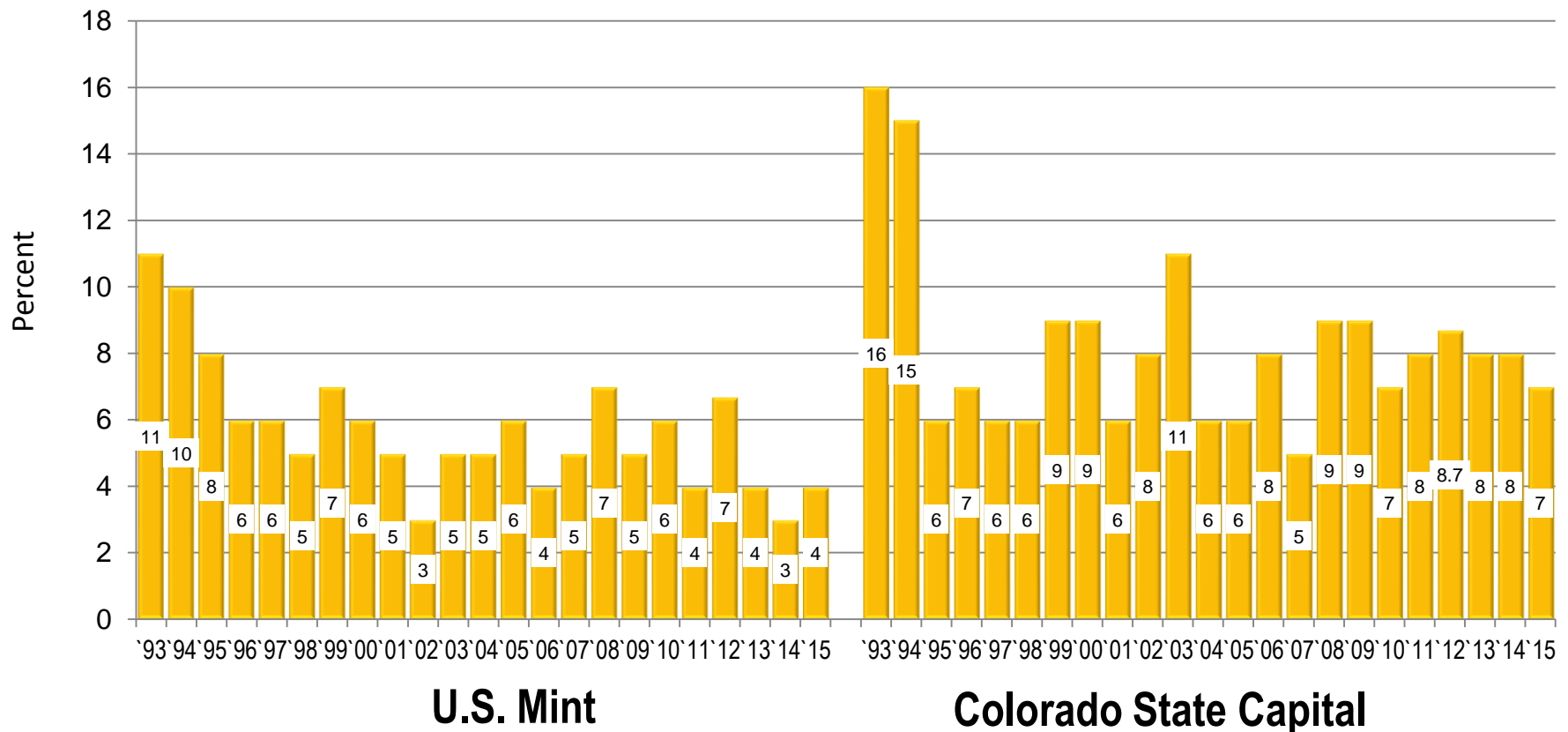
Attractions Visited or Seen



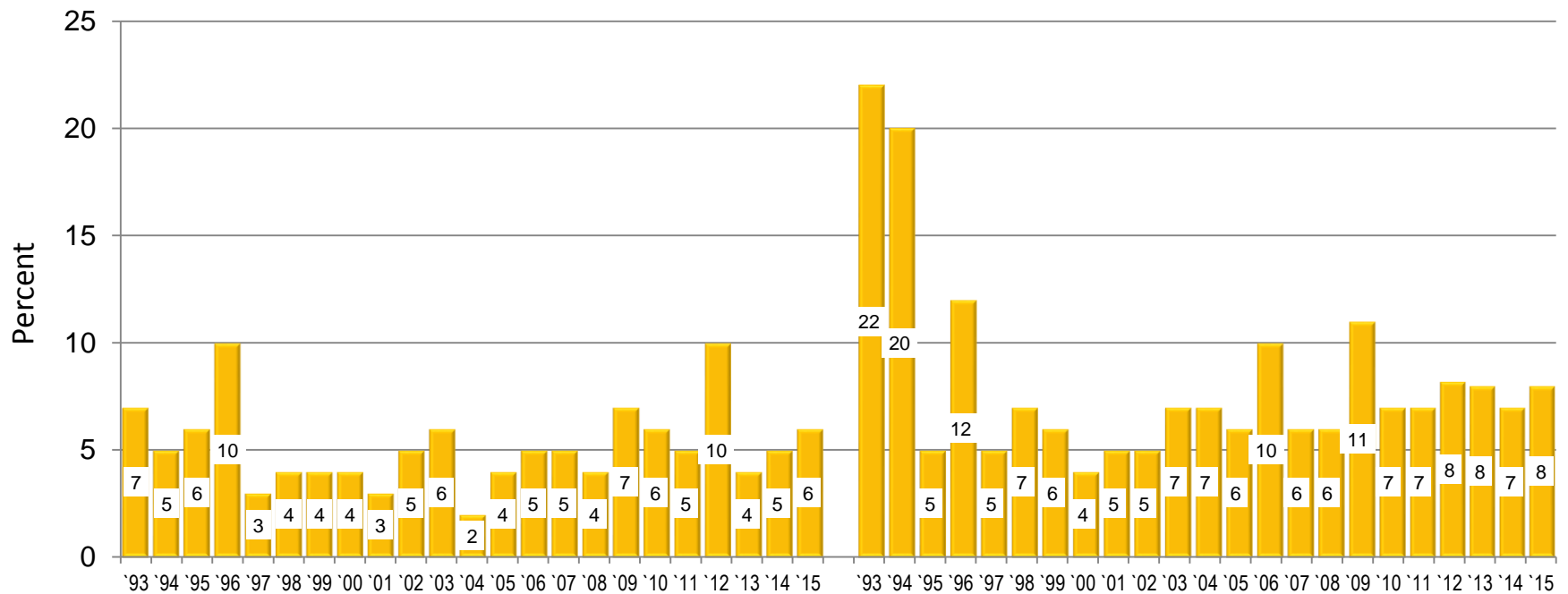
Attractions Visited or Seen



Attractions Visited or Seen



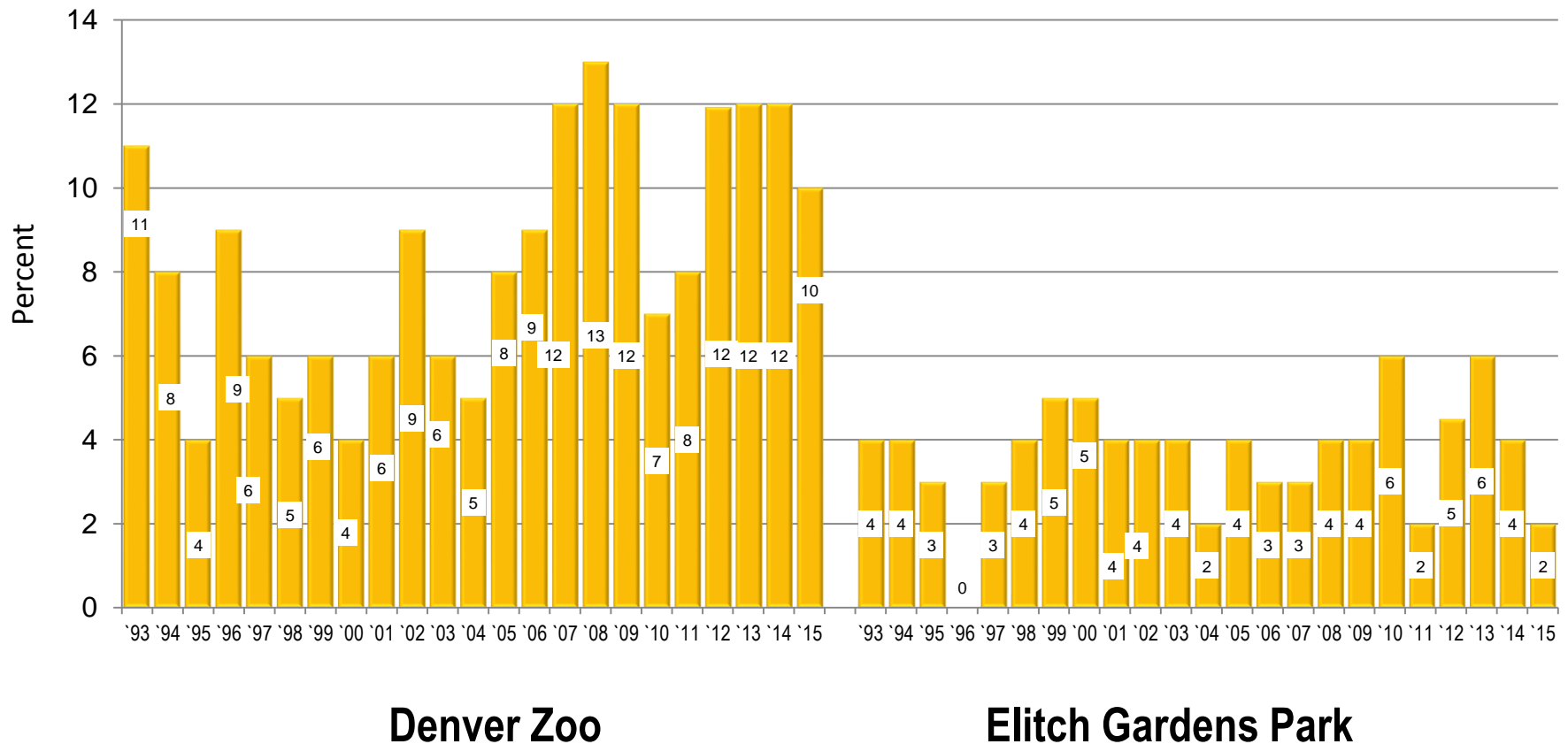
Attractions Visited or Seen



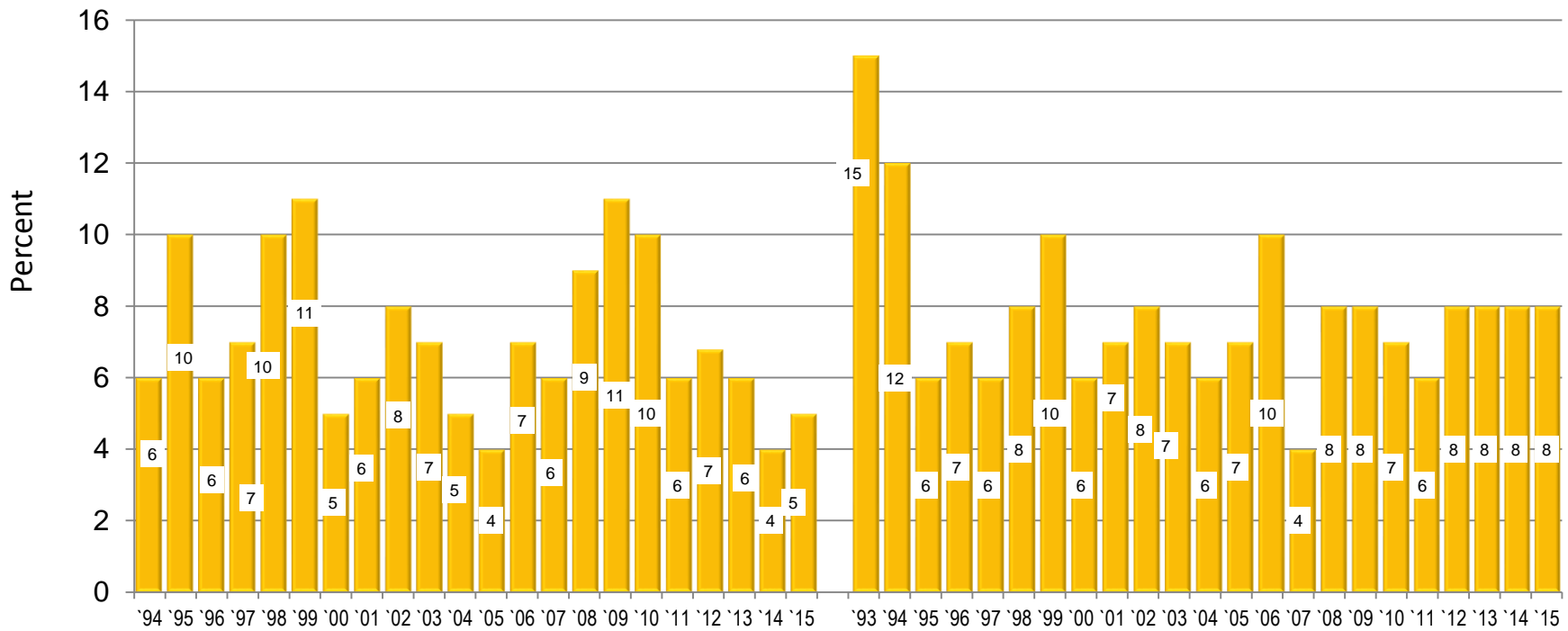
**Buffalo Bill's
Museum & Grave**

**Red Rocks Park &
Amphitheatre**

Attractions Visited or Seen



Attractions Visited or Seen



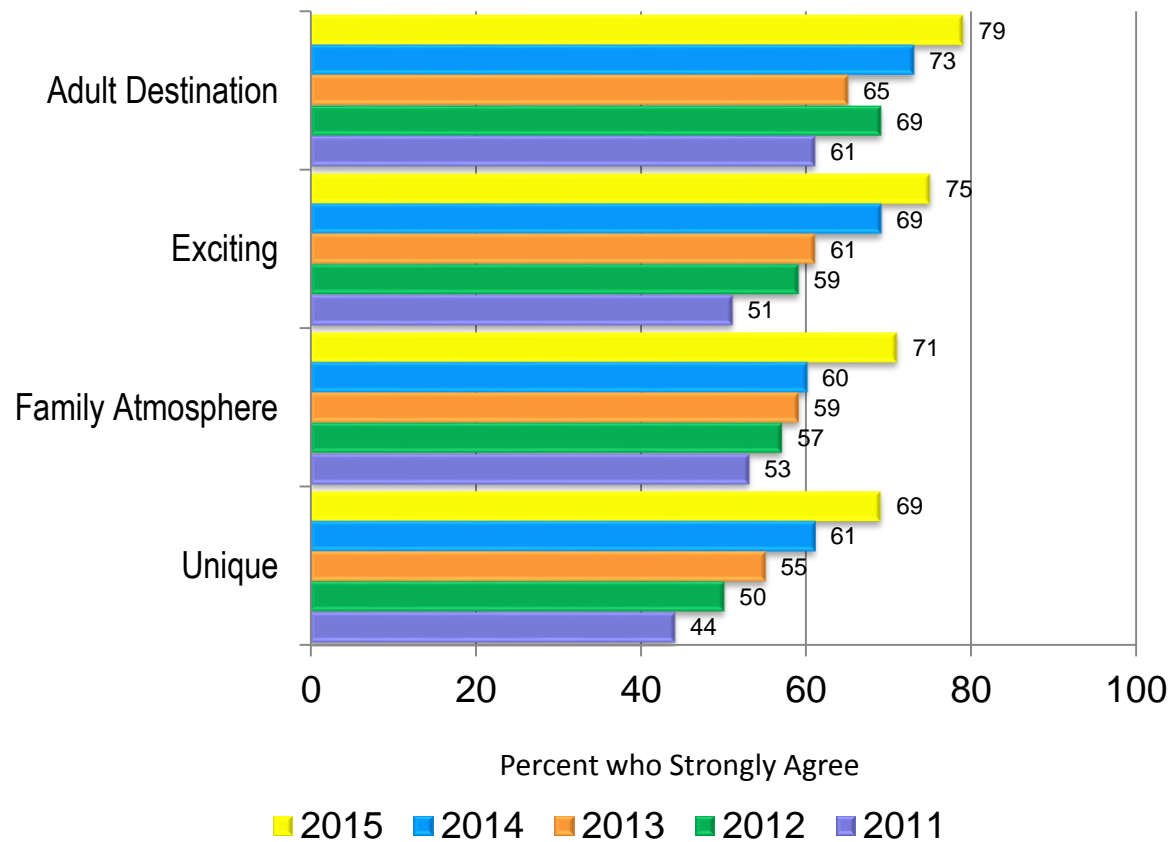
Colorado Rockies Baseball

Coors Brewery

Denver's Product Delivery



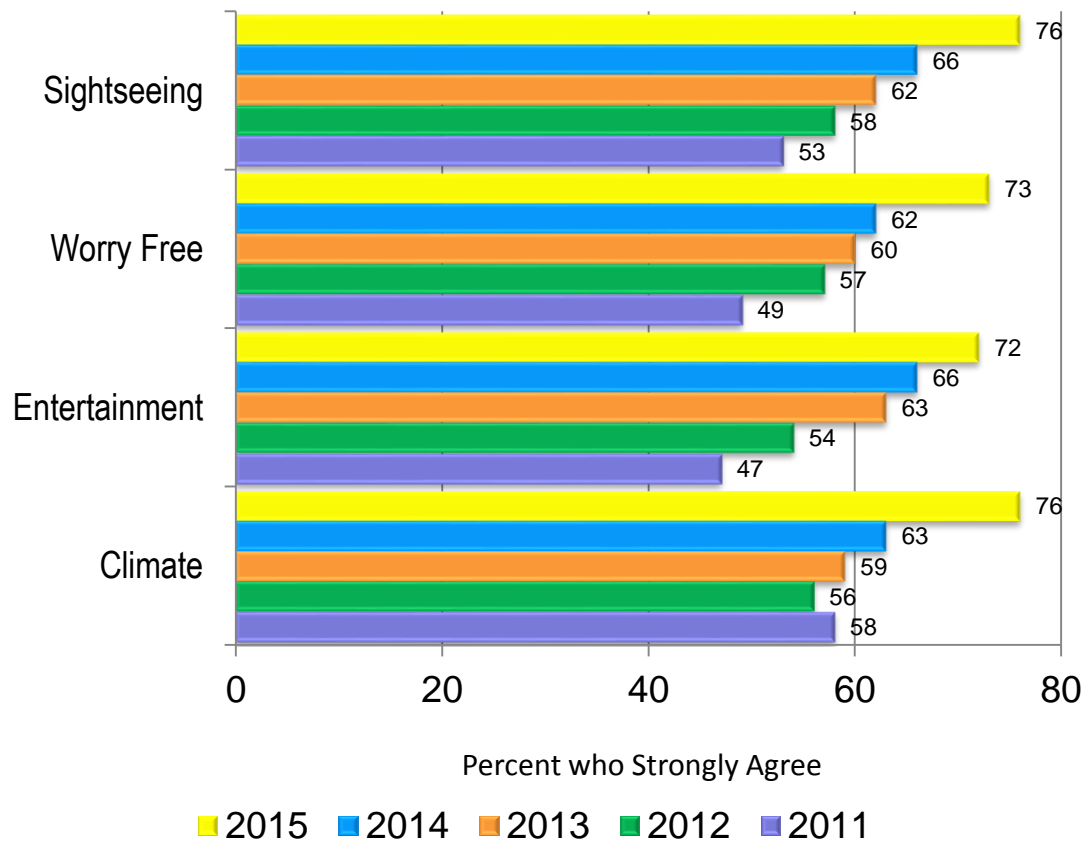
Base: Overnight Marketable Trips



Denver's Product Delivery (Cont'd)



Base: Overnight Marketable Trips



Denver's Product Delivery (Cont'd)



Base: Overnight Marketable Trips

