

# Colorado's Heritage Tourism Travel Year 2003

Prepared on behalf of the Colorado Tourism Office

*This project was paid for in part by a State Historical Fund grant from the  
Colorado Historical Society*

**Final Report**

*March 2005*

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# Background and Purpose



- ⦿ Longwoods International was engaged by the Colorado Tourism Office to conduct a re-analysis of research recently conducted for the state, including:
  - ⦿ *The 2003 Colorado Visitor Study*
  - ⦿ *Longwoods' syndicated 2003 National Visitor Study*
- ⦿ This re-analysis was undertaken to provide input into the development of a program by the Colorado Historical Society that would promote heritage tourism throughout Colorado.

# Method



- The analysis involved profiling recent Colorado overnight visitors, and overnight travelers to US destinations in general, who participated in heritage-related activities while on their trip, specifically in terms of:
  - *Size of market, i.e. estimated number of trips including a heritage-related activity*
  - *Demographic profile, including age; gender; income; education; region of residence (including in-state trips); travel party composition and characteristics*
  - *Behavioral characteristics, including: trip planning and booking; use of escorted tours and packages; length of trips and nights spent in Colorado; trip expenditures; regions visited; attractions visited; repeat visitation; segmentation by trip purpose*
  - *Attitudes on heritage product*

# Method



- ⊙ Throughout this report a “Heritage Visitor” is defined as someone who visited an historic area, an historic museum and/or a landmark/historic site in Colorado.
- ⊙ The 2003 Colorado Visitor Study, based on a total sample of 1,061 respondents, consisted of a quarterly survey of overnight visitors to the state.
- ⊙ The 2003 Longwoods National Visitor Study, with a total sample of 1,124, was conducted to provide Colorado and other clients with normative data based on overnight travelers to a random selection of destinations across the US.
- ⊙ In addition to visitor profiling, we have analyzed image data drawn from the 2003 Advertising ROI and Image Benchmark Study, which had a total sample of 1536 completed surveys.
- ⊙ For these samples sizes, the error range within the sample at the 95% confidence level is  $+ / - 2.5\%$ , based on statistical probability.

# Highlights and Conclusions

# The U.S. Heritage Tourism Market



- ⊙ In 2003, almost a third of all domestic overnight trips to US destinations involved some heritage-related activity:
  - ⊙ *totaling over 445 million trips*
  - ⊙ *about 85% were pleasure trips; 15% were business trips*
  - ⊙ *of the 376 million pleasure trips most (57%) were “marketable” trips, as opposed to trips simply to visit friends or relatives (VFR)*
- ⊙ Over the past 8 years, the volume of US pleasure trips involving heritage activities has steadily increased:
  - ⊙ *Up 45% since 1996*

# The U.S. Heritage Tourism Market



- ⦿ People can engage in heritage-related activities on any type of trip.
- ⦿ However, the trip purpose most often associated with heritage tourism nationally is the touring trip:
  - ⦿ *A “touring trip” is defined as “a trip by car, bus, or train through areas of scenic beauty, cultural or general interest”.*
  - ⦿ *Touring trips account for a third (34%) of marketable heritage trips, well above the national norm of 18%.*
  - ⦿ *Other trip types that often include heritage activities are Special Event, City and Outdoor trips*



# Colorado's Heritage Travel Market



- ⊙ Compared to the national norm, Colorado's heritage tourism market is similarly extensive:
  - ⊙ *Involving 38% of total pleasure trips to the state, and 39% of marketable trips*
  - ⊙ *Accounting for about 8 million trips in 2003*
- ⊙ However, although this current volume represents a recovery from its weakest level in 2001 (presumably "9/11"-related), it still reflects a notable decline versus pre-2000:
  - ⊙ *About 10 million heritage trips annually prior to 2000*
  - ⊙ *Bottomed out at 7 million in 2001*
  - ⊙ *The reverse of the national growth trend*

# Colorado's Heritage Travel Market



- Similar to the national pattern, touring is the most common “marketable” trip type among heritage visitors to Colorado, followed by Outdoors, Combined Business/Pleasure and Special Events trips. In 2003, the estimated volume of heritage visitors in these segments were:
  - *Touring trips* 1.8 million
  - *Outdoors trips* 0.8 million
  - *Combined business/pleasure trips* 0.4 million
  - *Special events trips* 0.3 million
  - *Ski trips* 0.2 million
  - *City trips* 0.2 million
  - *Other marketable trips* 0.4 million

# Heritage Tourism Spending In Colorado



- ⊙ Colorado's economy benefits substantially from heritage visitors:
  - ⊙ *Of the \$5.85 billion in total expenditures by overnight leisure visitors to the state in 2003, 45% (\$2.6 Billion) was spent by heritage travelers*
- ⊙ Heritage visitors contributed more than their fair share of expenditures since they accounted for only 38% of total overnight pleasure trips.
- ⊙ Each heritage visitor spent an average of \$322 per stay in Colorado, well above the \$274 norm for overnight pleasure visitors to the state.
- ⊙ The sectors where heritage visitors spent money generally paralleled the expenditure patterns of Colorado visitors as a whole.

# Sources of Heritage Travel



- As with overnight leisure travel in general, most of Colorado's heritage trips in 2003 originated in the region:
  - *The primary source of heritage visits to the state was the Western region of the US; but at 56%, the West contributed somewhat fewer visitors than the total pleasure travel level (63%).*
- Colorado residents accounted for a substantial number of the visits, however they were the main reason for the regional shortfall:
  - *They accounted for 25% of all leisure trips in 2003, but only 18% of heritage trips:*
    - *The Denver DMA was the major source of in-state heritage travel*
  - *Conversely, heritage visitors were slightly more likely to come from the Mid-West and Northeast, relative to all Colorado vacationers*
  - *The top out-of-state sources of heritage travelers to Colorado were:*
    - ❖ *STATES: California and Texas*
    - ❖ *URBAN CENTERS: Los Angeles, Phoenix, Chicago, Salt Lake City and Dallas*

# Colorado's Heritage Visitor Profile



- Demographically, Colorado heritage visitors tend to be older, living with family and more upscale compared to the general state visitor and even the national heritage traveler:
  - *heritage visitors are somewhat older (average age of 46 vs. national and Colorado norms of 44).*
  - *more of them are married (68%) and have children at home (47%).*
  - *more of them belong to the related categories of:*
    - *higher income (59% earning \$50,000 or more per annum)*
    - *higher education (53% college graduate)*
    - *working in white collar jobs (76%)*
  - *more of them reside in larger population centers (55% in communities with 1.0 million + residents)*

# Trip Planning and Booking



- Compared to the Colorado trip norm, planning for Colorado heritage trips is different in several ways:
  - *Most (53%) of the heritage trips in 2003 were planned at least 3 months in advance, vs. only 2 months ahead for most overnight trips to the state in general*
  - *When planning their trip, heritage travelers were much more likely to seek word-of-mouth recommendations and made much greater use of formal information sources such as:*
    - ❖ *The internet*
    - ❖ *Books*
    - ❖ *Visitors' bureaus*
    - ❖ *An auto club*
    - ❖ *Magazines*

# Trip Planning and Booking



- ⊙ Among those using online sources for trip planning:
  - ⊙ *Reported visits to the **colorado.com** website (25%) were well above the norm (15%) in 2003. Similarly, use of the **denver.com** website (9%) tended to be more common among heritage visitors.*
  - ⊙ *When visiting online sites, Colorado heritage travelers were more likely to look for information on local activities and attractions (57%) than the average visitor (38%).*
- ⊙ Among the state tourism publications available, both the *Colorado Summer Vacation Guide* (11%) and the *Visitor's Guide To Denver* (7%) were used more often by Colorado heritage visitors than by the average traveler.
- ⊙ Despite their inclination to plan the trips well in advance, most Colorado heritage visitors only book their travel shortly before embarking (34% within a month, 62% within 2 months), not unlike the general state visitor.

# Trip Profile



- The use of travel packages and escorted group tours is clearly underdeveloped among heritage visitors to Colorado:
  - *Only 6% of heritage visitors to the state reported using a prepaid package for their Colorado vacation in 2003, well below the national heritage traveler norm of 17%.*
  - *Similarly, only 5% of them reported traveling with an escorted group tour*
- The Colorado heritage travel party is virtually identical to that of the overnight state visitor in general:
  - *In 2003, it was comprised of about 3 people, in most cases consisting of spouses/partners (68%) plus a child, a friend or another relative.*



# Trip Profile



- ⊙ Although the West is the main source of the state's heritage travel business, Colorado is still a relatively long-haul destination for most heritage tourists:
  - ⊙ *In 2003, most (45%) traveled over 1,000 miles to reach their destination. In comparison, fewer traveled such a long distance among general overnight visitors to the state (34%) as well as national heritage visitors (35%).*
  - ⊙ *Nevertheless, personal vehicles were, by and large, the most common means of transportation used by heritage travelers going to and within Colorado, generally paralleling state pleasure travel and national heritage norms.*

# Trip Profile



- Heritage visitors to Colorado take longer than average trips and stay longer in the state.
  - *The length of the average heritage trip to the state, at 7.5 nights in 2003, was well above both the general Colorado overnight (5.8 nights) and the national heritage visitor (6.8 nights) norms.*
  - *Actual time spent at their Colorado destination, at 5.5 nights, was also longer than the overall state and national heritage equivalents.*
- Heritage visitors are somewhat more likely to stay in paid accommodations than other Colorado visitors:
  - *Hotels/motels (29%) were the most popular commercial accommodations, followed by rented/time-share condos and campsites/campgrounds.*
- Heritage tourism in Colorado is notably skewed to the summer season:
  - *The greatest proportion of heritage trips (47%) in 2003 occurred between July – September, clearly exceeding the proportions reported for Colorado overnight visitors in general (37%) and especially the national traveler (29%).*

# The Trip Experience



- ◉ Colorado heritage visitors do a lot more in Colorado than the typical vacationer.
- ◉ They do not confine themselves to historical/heritage-related activities, and compared to the average visitor they are more likely to take in many of Colorado's regions and attractions.
- ◉ The Southern regions of the State were especially popular among heritage visitors in 2003.
- ◉ The list of "top attractions" and towns that Heritage visitors experience on their trip is largely the same as for Colorado vacationers in general, but they come in proportionately much higher numbers.
- ◉ The most popular attractions/towns for this segment in 2003 were:
  - 1) Colorado Springs
  - 2) Garden of the Gods
  - 3) Durango
  - 4) Pikes Peak
  - 5) Estes Park
  - 6) Colorado State Capitol
  - 7) Manitou Springs
  - 8) Denver's 16<sup>th</sup> Street Mall
  - 9) Denver's LoDo Historic District
  - 10) Rocky Mt. National Park

# The Trip Experience



- The general experience of heritage tourists was much broader than that of the average vacationer too, with greater exposure to experiences such as:
  - *The natural surroundings including mountains, wilderness and National/State parks*
  - *Colorado's unique Indian and Hispanic cultures*
  - *Colorado's villages, towns and cities, taking in local parks/gardens and zoos, interesting architecture, museums and galleries*
  - *Shopping, seeking out unique local cuisine and attending fairs and festivals*
  - *Engaging in most sporting activities, especially hiking*
- This is a pattern we also see with heritage tourists nationally. The main difference is that most destinations are not offering the mountains

# Colorado's Heritage Image



- ◉ Colorado has a strong overall image in the marketplace, but this is not particularly based on its heritage or historic associations.
- ◉ Generally, people feel that Colorado lags behind its competition on some key heritage-related dimensions:
  - ◉ *At a large disadvantage for general “culture”, i.e., offering unique cultures/ways of life and having interesting customs and traditions*
  - ◉ *And well behind for the heritage specifics such as being noted for history, having well-known landmarks and great museums/galleries*
- ◉ Much of this appears to be an awareness problem, because recent Colorado heritage visitors give Colorado substantially higher marks in each of these areas based on their actual experience, and they rate Colorado better than the average tourist for:
  - ◉ *Landmarks*
  - ◉ *Being noted for history*
  - ◉ *Offering exposure to different cultures/ways of life*
- ◉ Certainly, Colorado heritage visitors appear to be more satisfied with their overall trip experience than the average vacationer to Colorado and heritage vacationers nationally, with particular satisfaction related to the attractions and sightseeing opportunities offered in Colorado.

# Conclusions and Recommendations



- ⊙ Heritage tourism makes a major contribution to Colorado's tourism business.
  - ⊙ *“Heritage trips” not only account for a significant portion of all overnight trips to the state but, more importantly, they contribute a disproportionately larger share of total visitor spending than other tourists.*
  - ⊙ *Compared to the general overnight visitor, heritage visitors stay longer, visit more places and take in more of Colorado's paid attractions.*
  - ⊙ *Pre-dominantly skewed to the fair weather months, heritage tourism clearly plays a key role in maintaining a strong summer tourism business for the State.*

# Conclusions and Recommendations



- Nonetheless, opportunities to benefit from an even stronger heritage segment clearly exist:
  - *Colorado's heritage trip volume has yet to fully recover to pre-911 levels. In contrast, national heritage tourism has already rebounded and resumed its impressive growth over the past decade.*
    - *Much of this decline can be erased by rebuilding in-state overnight travel to heritage sites*
  - *Although its product delivery is strong, Colorado lags behind key competitors' on heritage imagery:*
    - *Part of the issue is lack of awareness of what Colorado has to offer in this area, because visitors like what they experience once they find it*
  - *There are abundant tactical opportunities to influence heritage trips and their various components, stemming from:*
    - *a longer planning cycle*
    - *a strong reliance on the internet and print media*
    - *more common usage of state tourism publications*
    - *underdeveloped usage of pre-packaged and escorted tours*

# Conclusions and Recommendations



- There are also many opportunities to align heritage tourism with the broader state tourism marketing campaign:
  - *There is a common goal – broadening visitors’ experience to more than just the state’s physical beauty/the mountains*
  - *The primary target should be the touring segment, which is consistent with the recommended targeting for the state in spring to fall marketing efforts*
  - *The heritage visitor has an upscale demographic profile, and is typically a big-city dweller:*
    - *which again would fit with the state’s regional targeted cities media strategy*
  - *In terms of media: print (magazines, auto club, state publications) and on-line are the top channels being used by the Heritage segment to guide trip planning, and both are key components of the state campaign.*



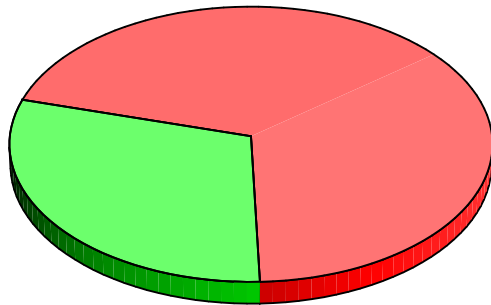
# Main Findings

# Size & Structure of the U.S. Heritage Tourism Market

# Size of the U.S. Heritage Tourism Market – Overnight Trips in 2003

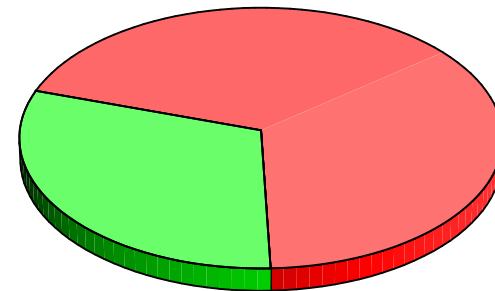


**Total Trips**  
(1.494 Billion)



**Heritage**  
446.7 Million  
(29.9%)

**Pleasure Trips**  
(1.228 Billion)



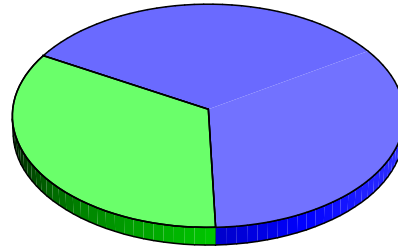
**Heritage**  
375.8 Million  
(30.6%)

# Size of the U.S. Heritage Tourism Market in 2003 – By Segment



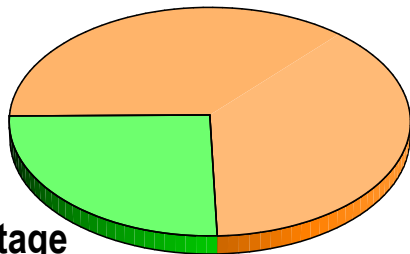
**Marketable Trips**  
(619.8 Million)

**Heritage**  
213.2 Million  
(34.4%)



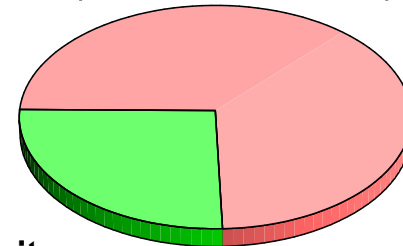
**VFR Trips**  
( 609.0 Million)

**Heritage**  
162.6 Million  
(26.7%)

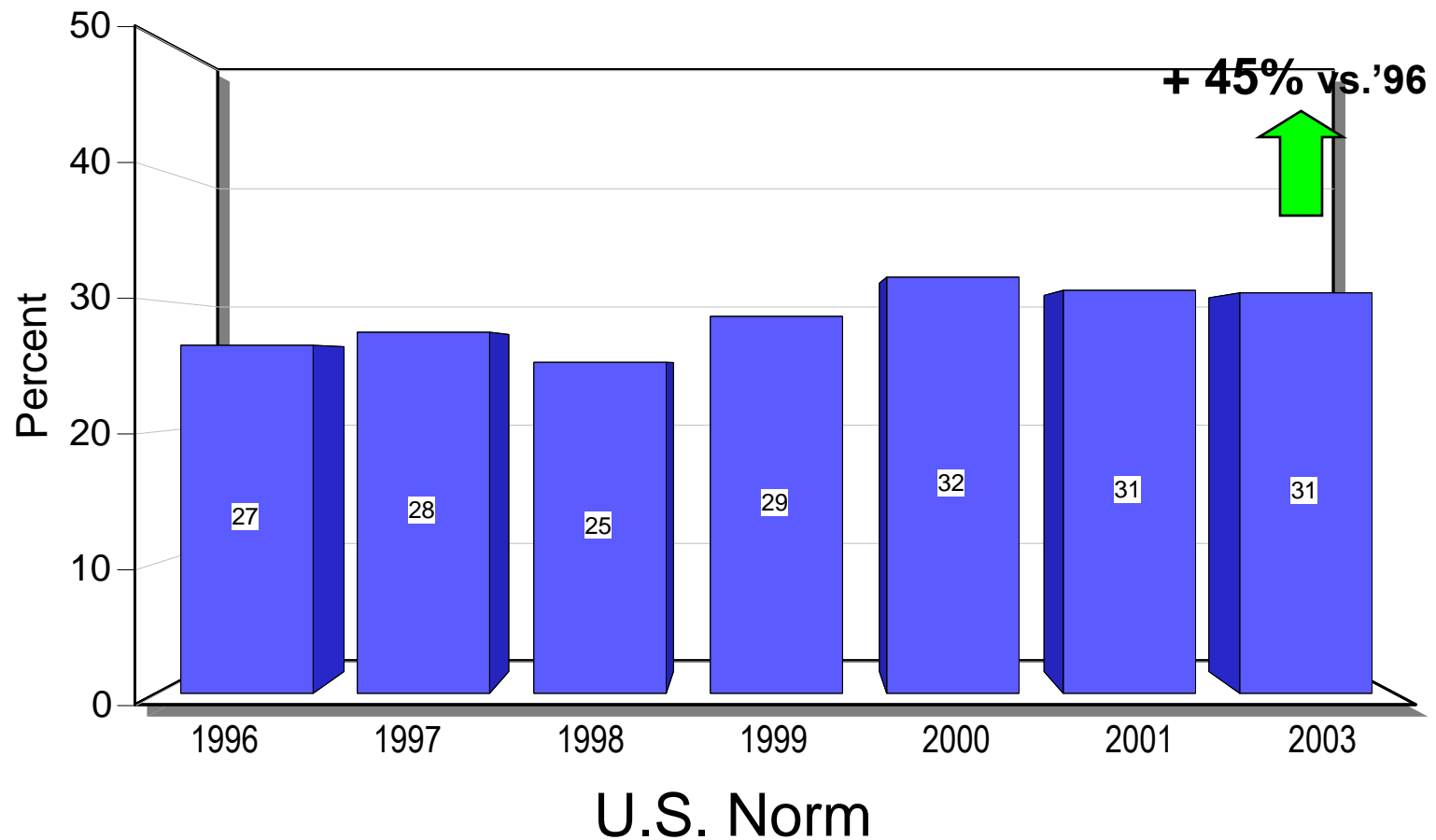


**Business Trips**  
(264.8 Million)

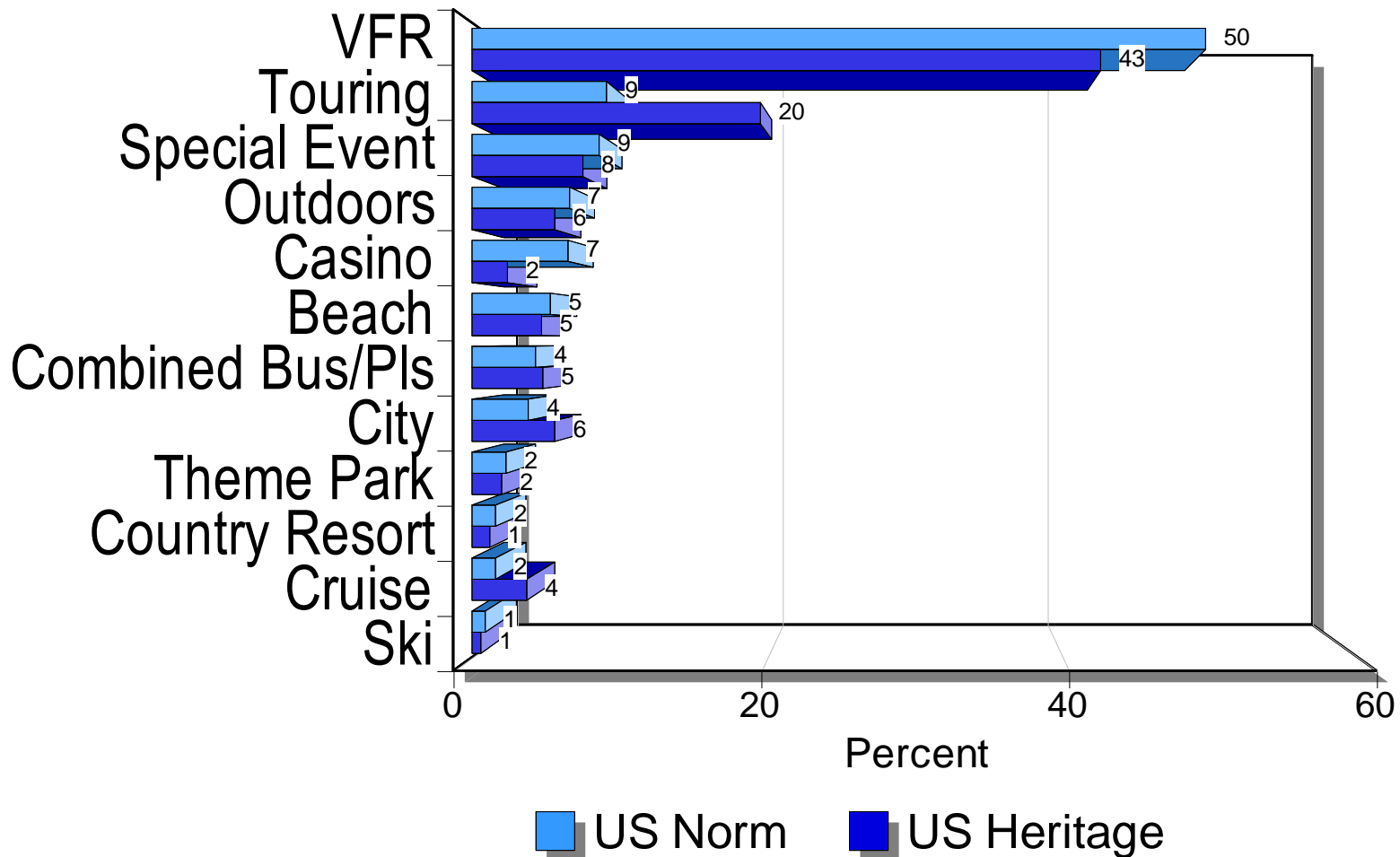
**Heritage**  
69.4 Million  
(26.2%)



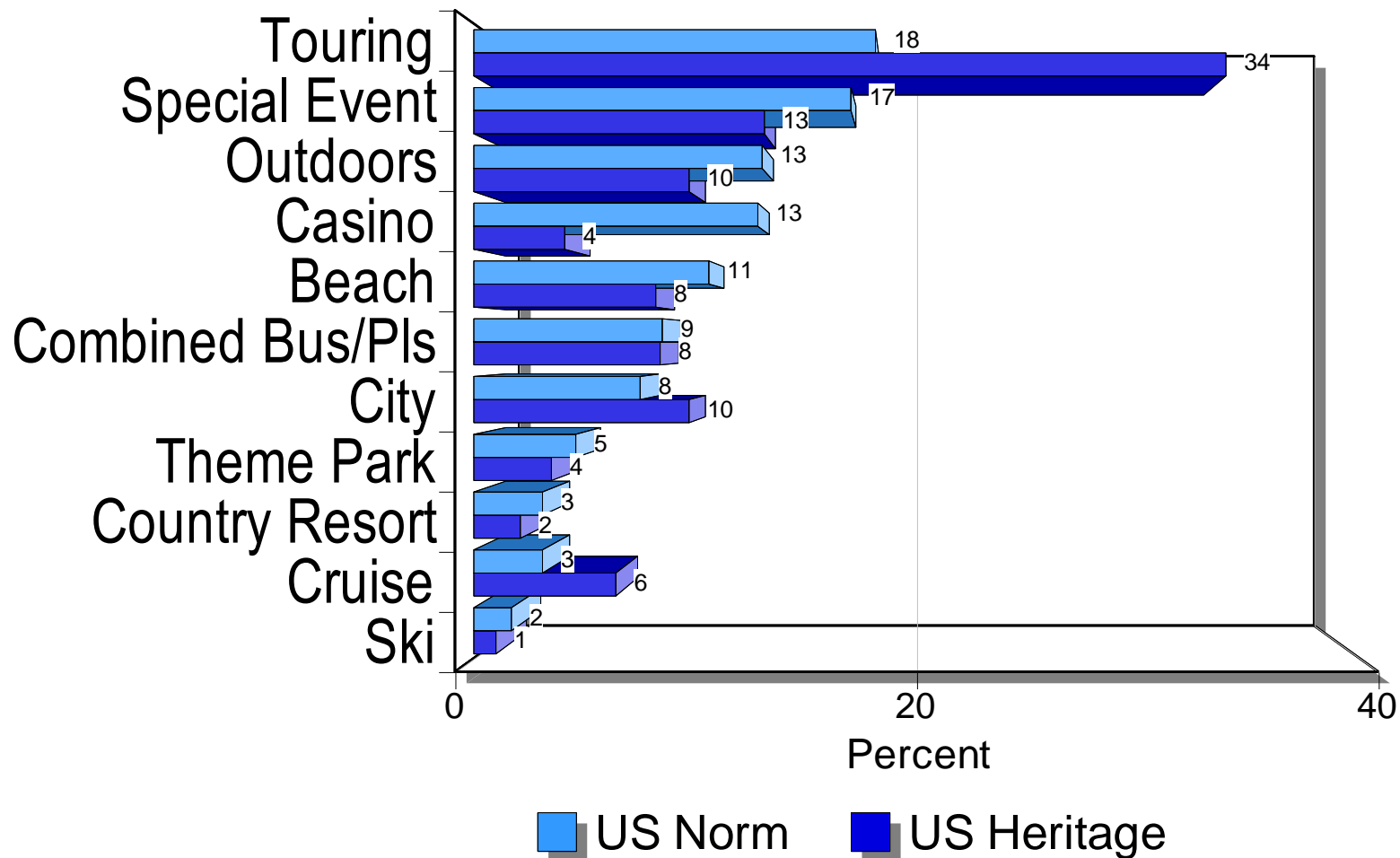
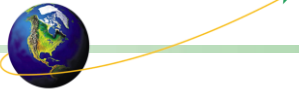
# Heritage Activities on Pleasure Trips — 1996 to 2003



# U.S. Pleasure Trip Mix — 2003 Travel Year



# U.S. Marketable Trip Mix — 2003 Travel Year



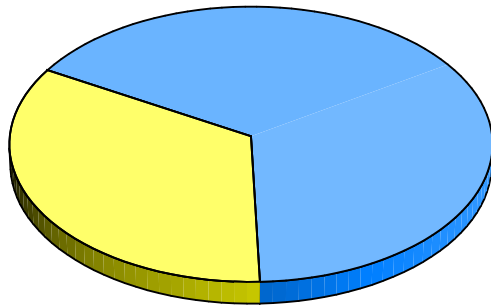
# Size & Structure of Colorado's Heritage Tourism Market



# Size of the Colorado Heritage Tourism Market – Overnight Trips in 2003

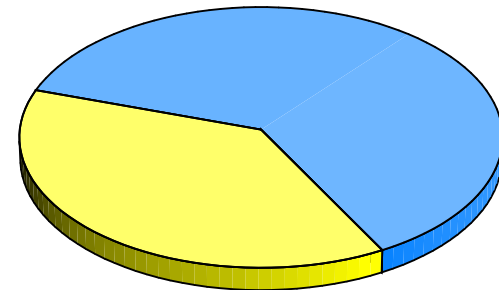


**Total Trips**  
(24.9 Million)



**Heritage**  
8.5 Million  
(34%)

**Pleasure Trips**  
(21.3 Million)



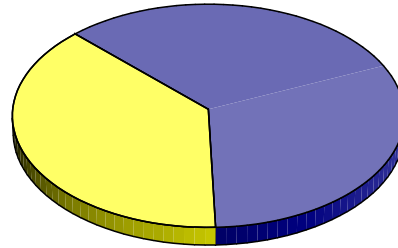
**Heritage**  
8.1 Million  
(38%)

# Size of the Colorado Heritage Tourism Market in 2003 – By Segment



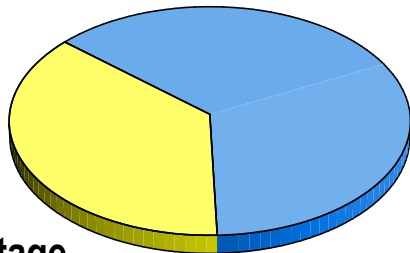
**Marketable Trips**  
(10.8 Million)

**Heritage**  
4.1 Million  
(38%)



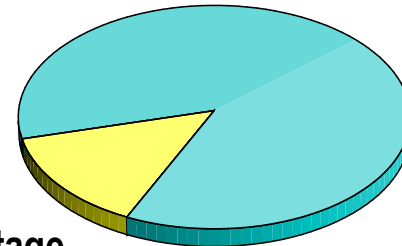
**VFR Trips**  
(10.5 Million)

**Heritage**  
3.9 Million  
(37%)

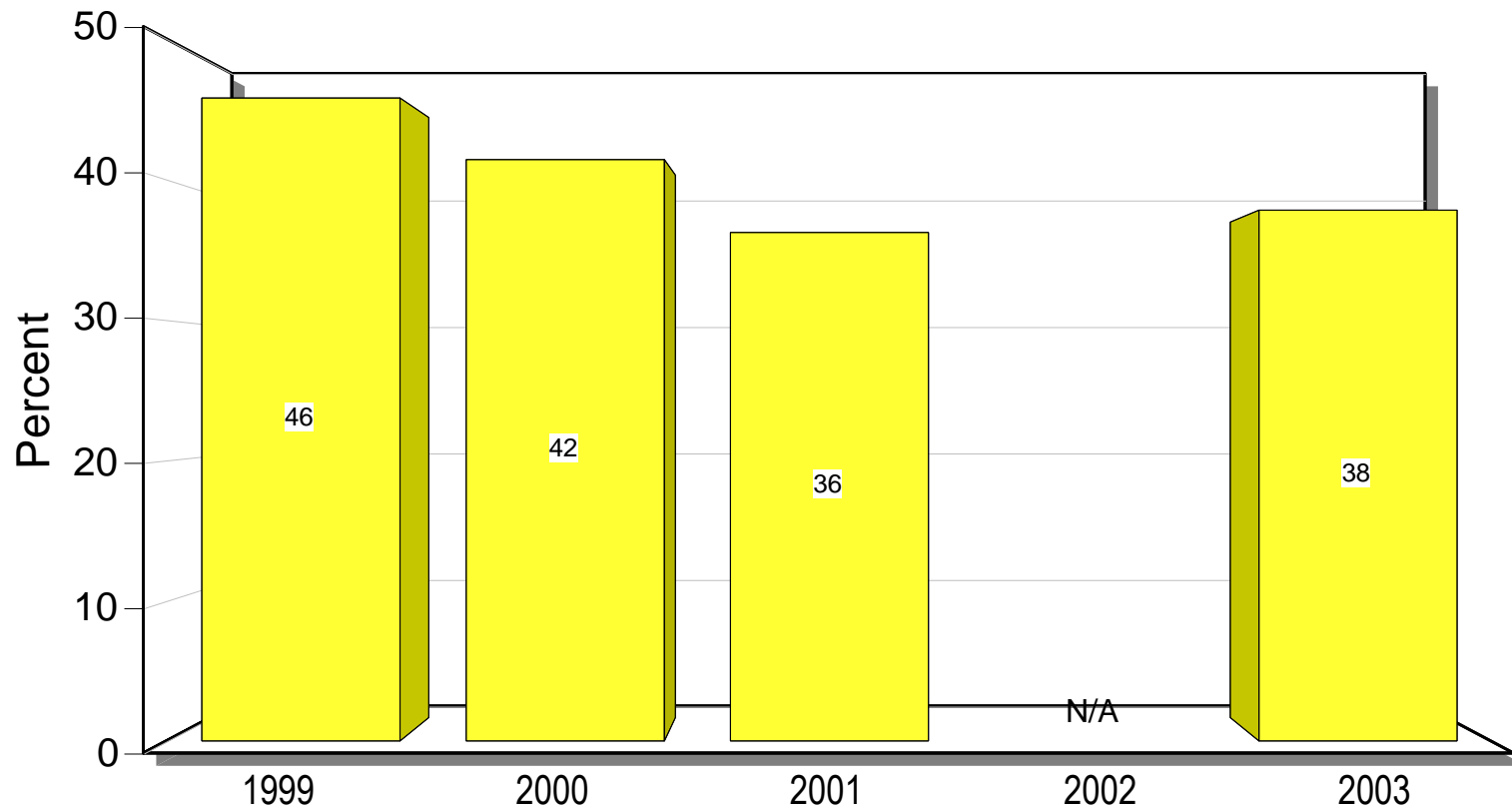


**Business Trips**  
(3.6 Million)

**Heritage**  
0.5 Million  
(14%)

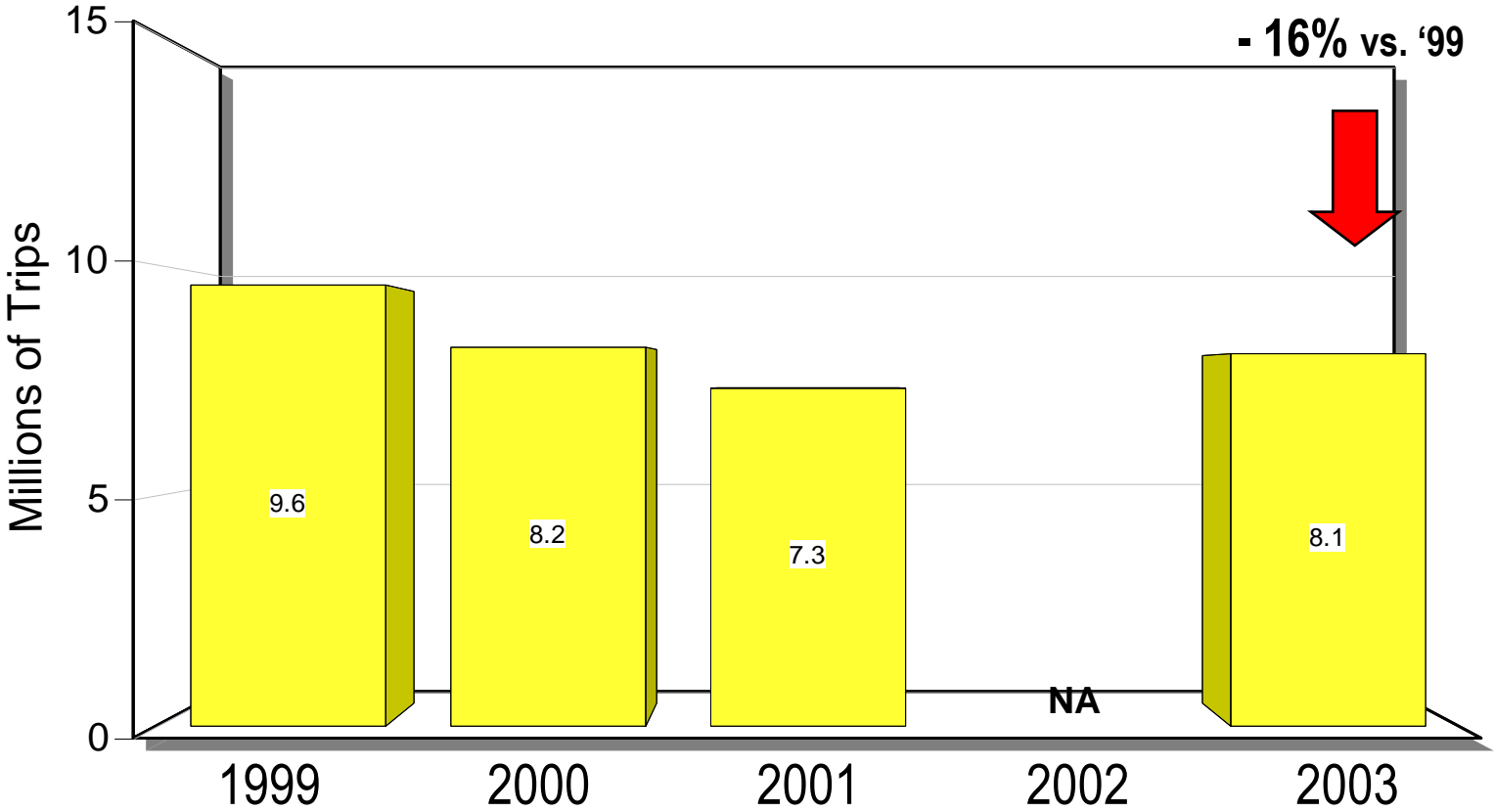


# Heritage Activities on Colorado Pleasure Trips – 1999 to 2003



Colorado

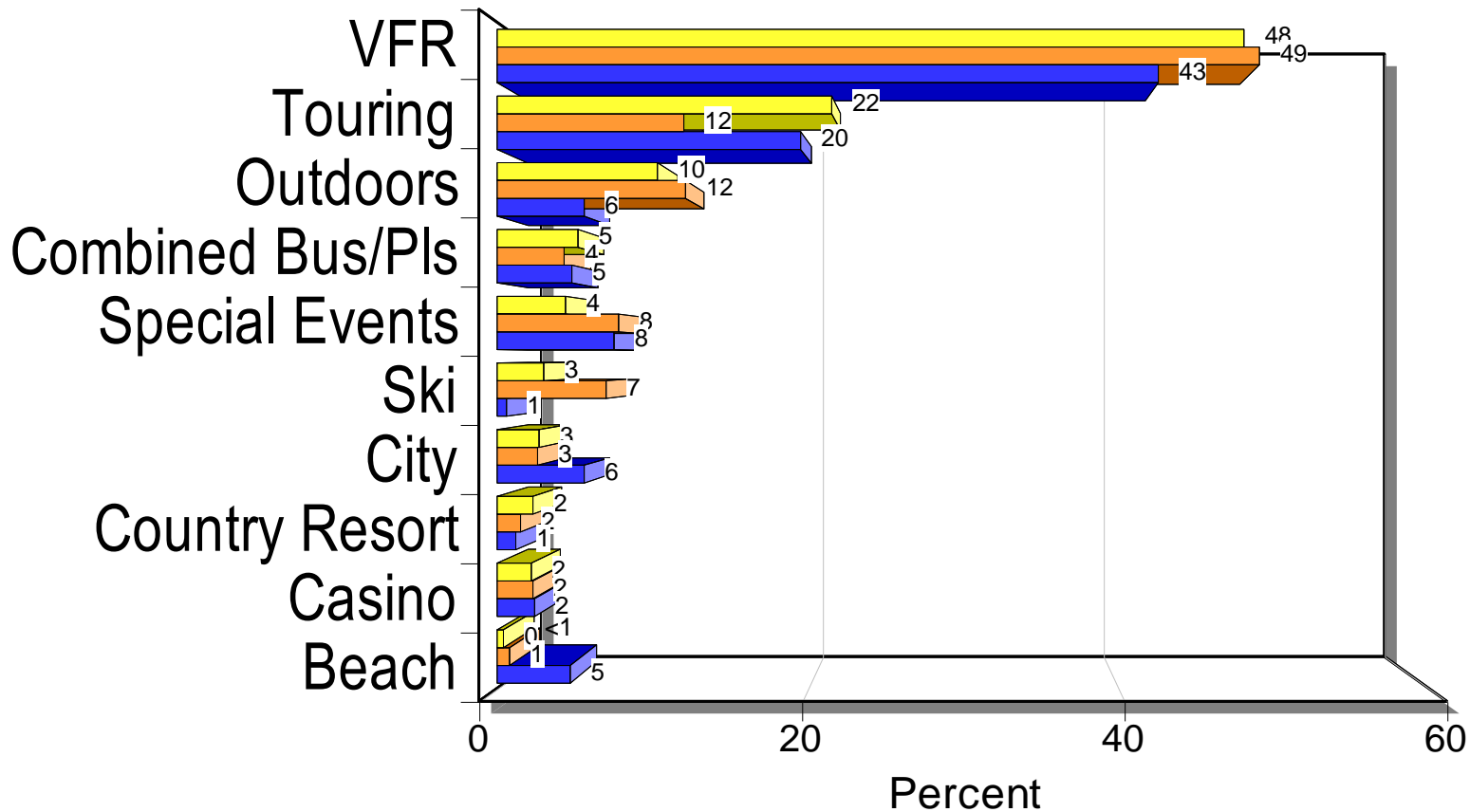
# Overnight Heritage Trips to Colorado — 1999 to 2003



# Main Purpose of Colorado Heritage Trips vs. Colorado & U.S. Norms



Base: Pleasure Travelers



■ Colorado Heritage Travel   
 ■ Colorado Total   
 ■ U.S. Heritage Norm

# Profile of Colorado Heritage Pleasure Travelers

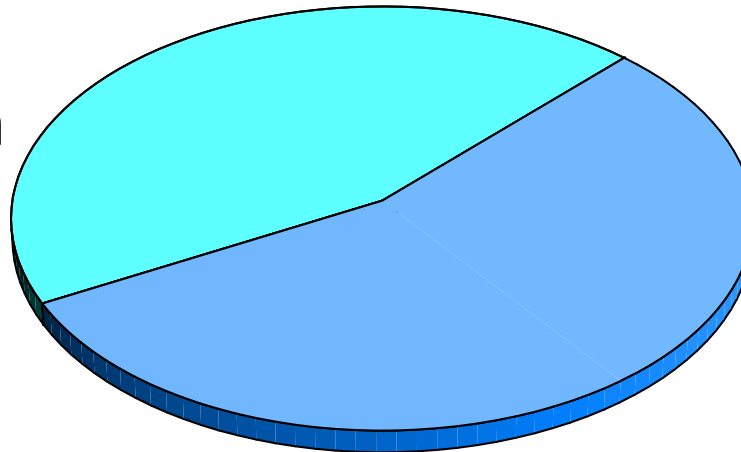
# Heritage Tourism Spending in Colorado

# Travel Spending on Colorado Overnight Leisure Trips



**Total = \$5.85 Billion**

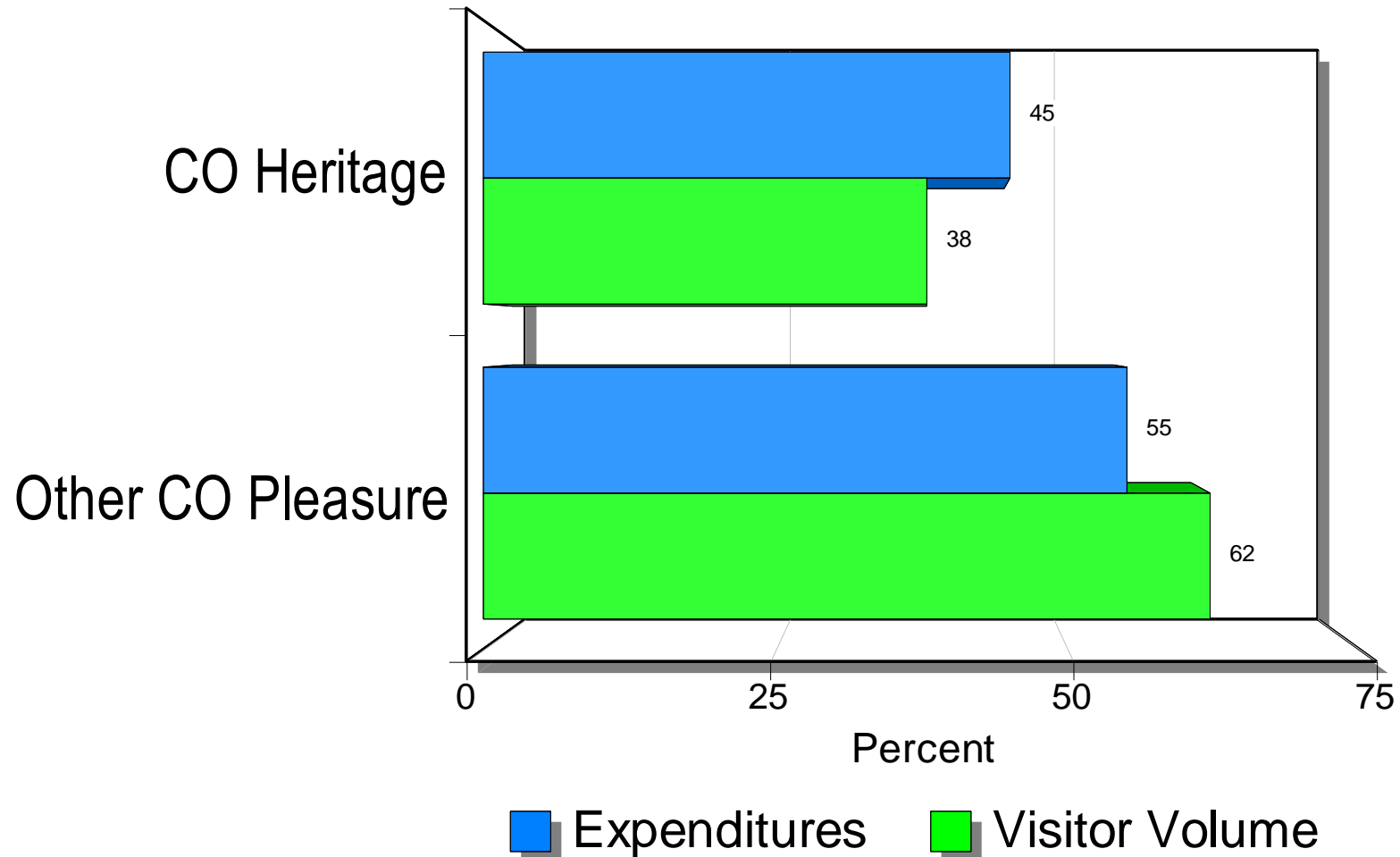
**Heritage  
Visitors**  
\$ 2.6 Billion  
(45%)



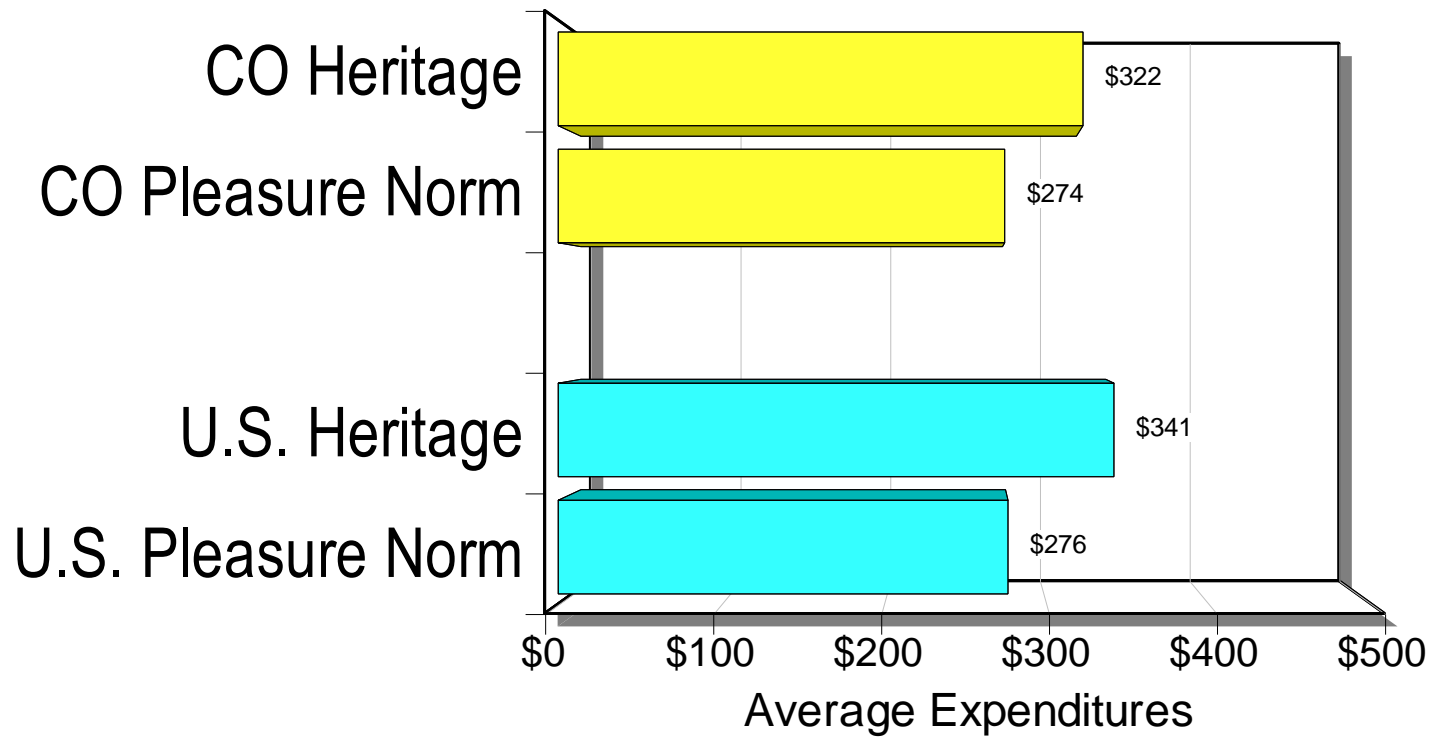
**Other Visitors**  
\$3.2 Billion  
(55%)



# Spending Versus Visitor Volumes



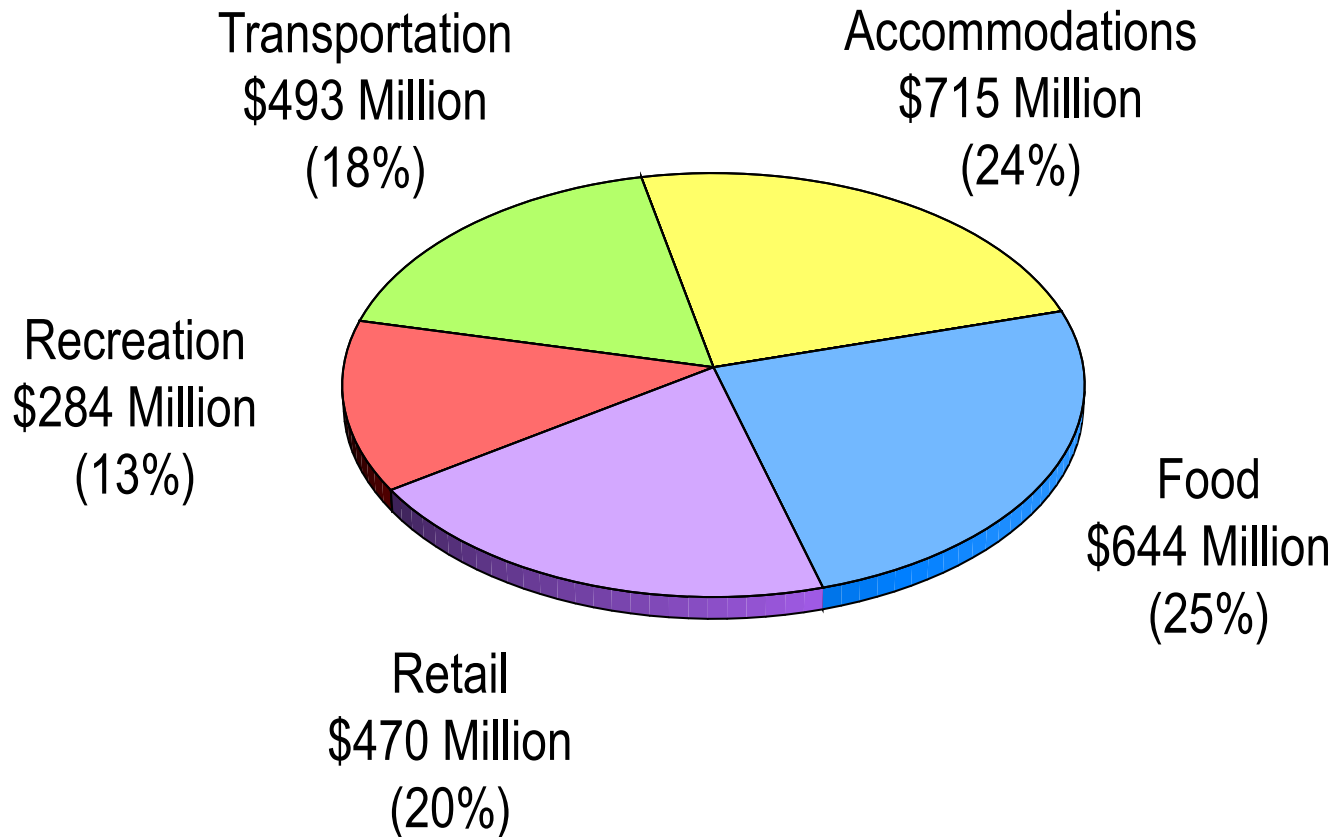
# Per Person Expenditures Per Stay



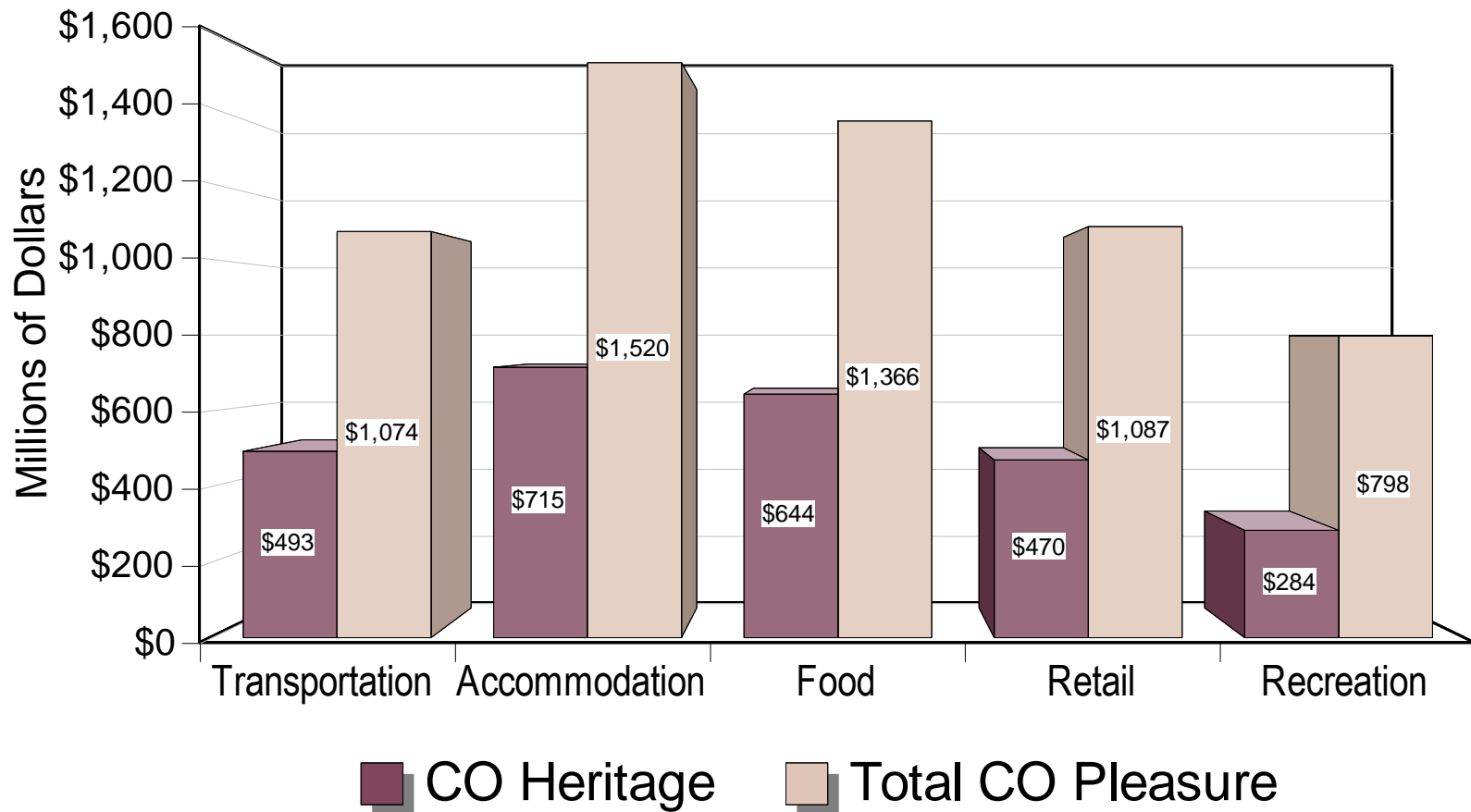
# Colorado Heritage Travel Spending by Sector



**Total = \$ 2.6 Billion**



# Travel Spending By Sector — Heritage vs. Total Pleasure



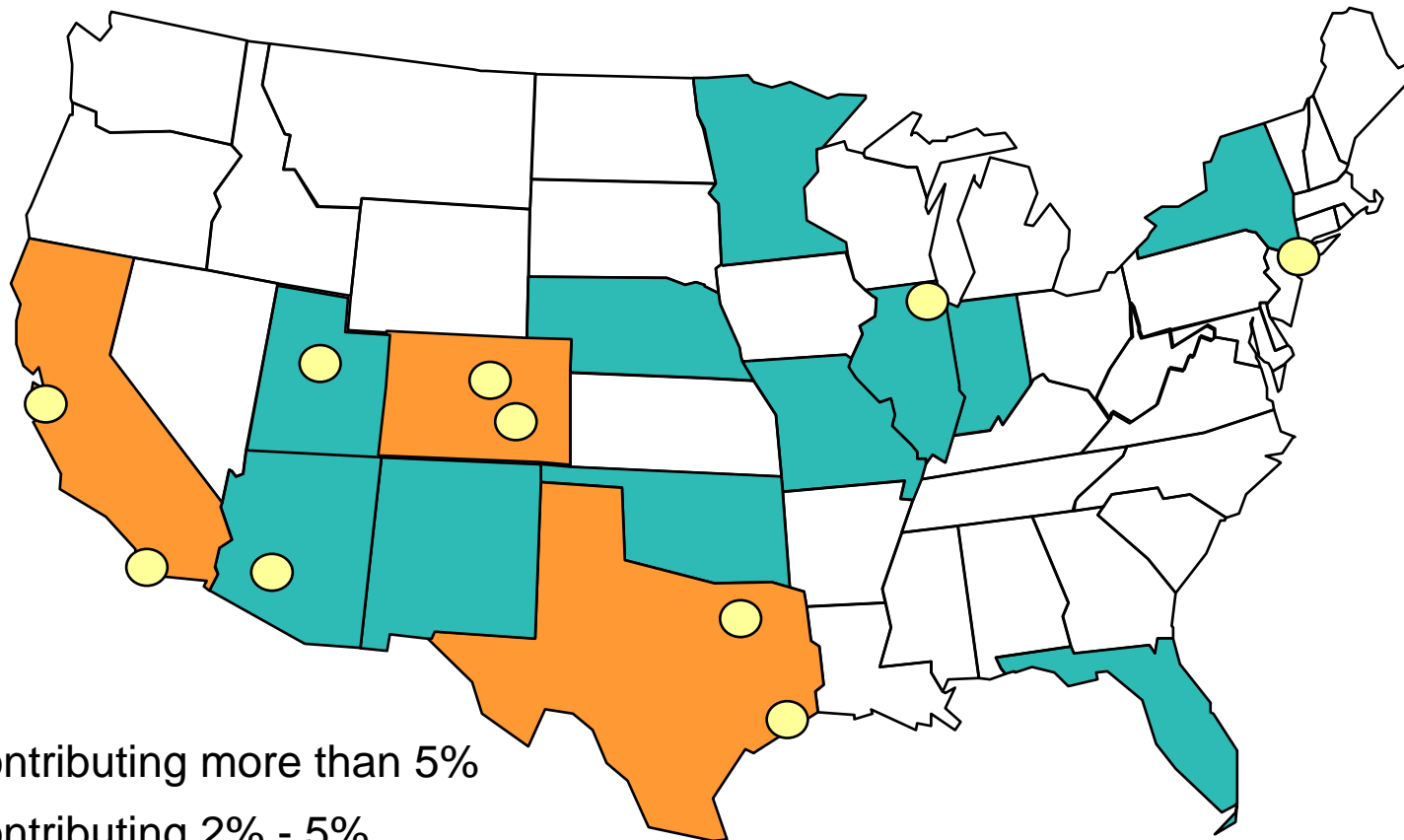
# 2003 Heritage Travel Profile

# Sources of Heritage Travel Business

# Sources of Colorado Heritage Travel Business



Base: Overnight Pleasure Trips

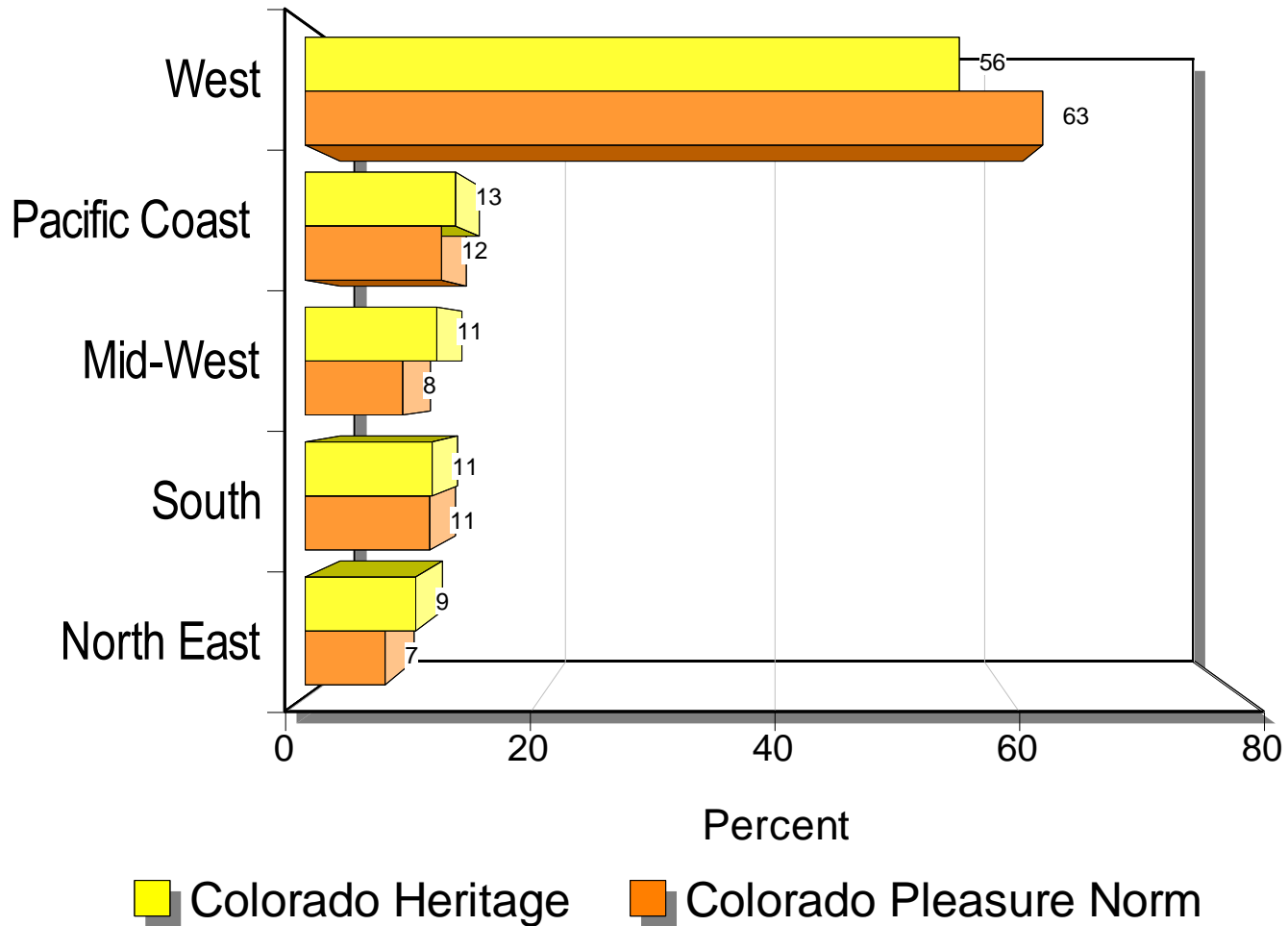


- States contributing more than 5%
- States contributing 2% - 5%
- DMA's contributing more than 2%

# Regional Sources of Business



Base: Overnight Pleasure Trips

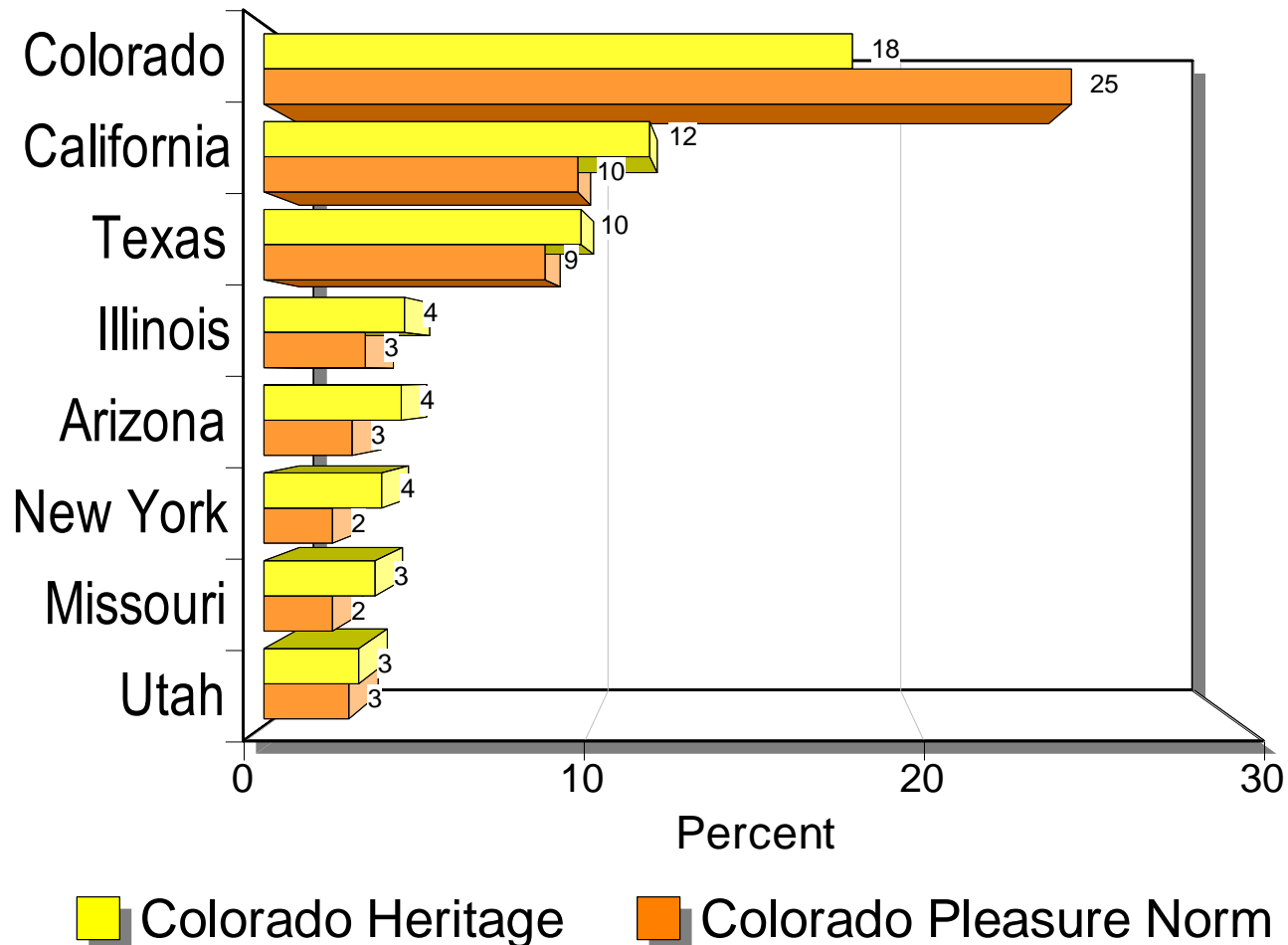




# State Sources of Business – Heritage Vs. Colorado Pleasure Norm



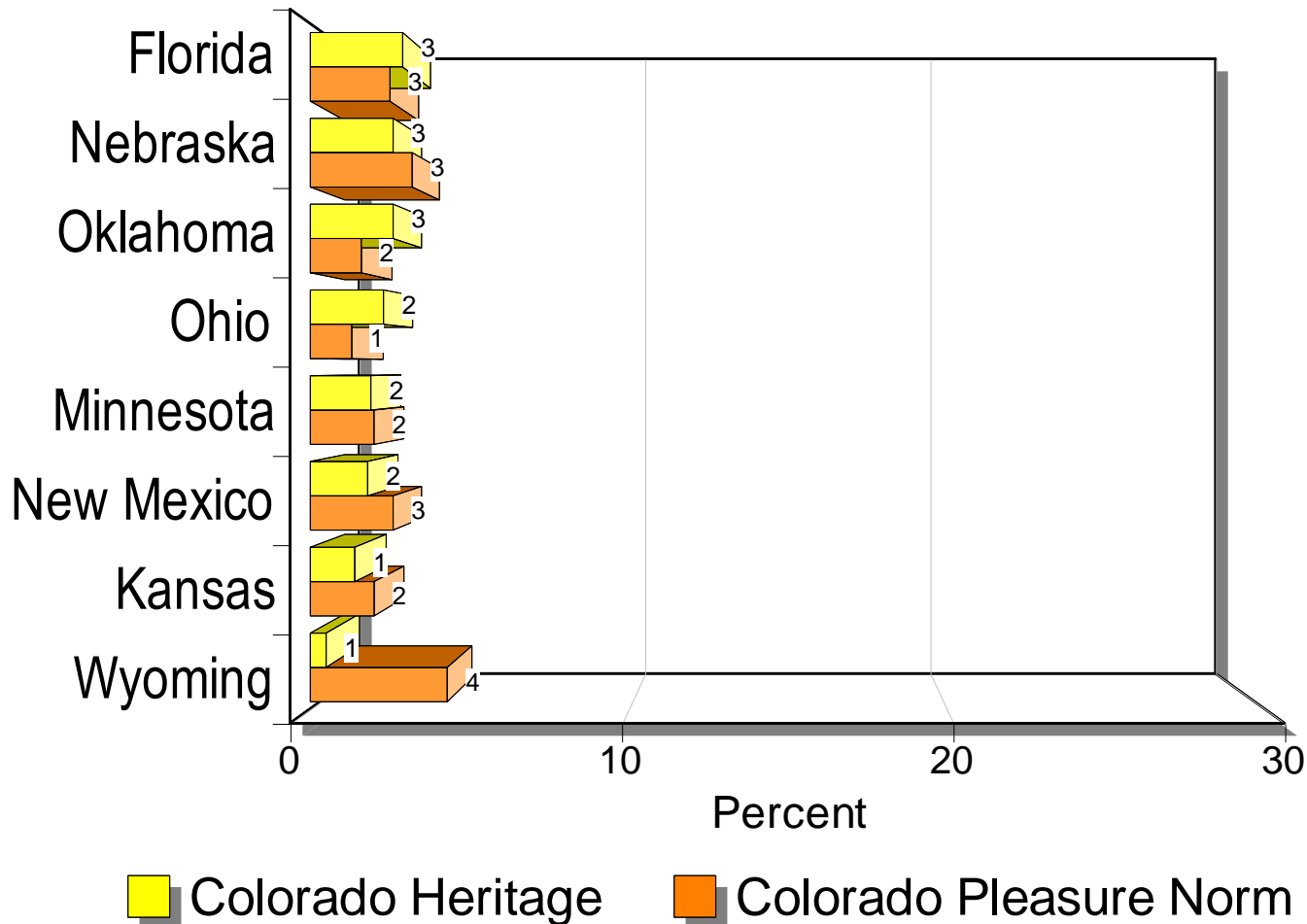
Base: Overnight Pleasure Trips



# State Sources of Business – Heritage Vs. Colorado Pleasure Norm (Cont'd)



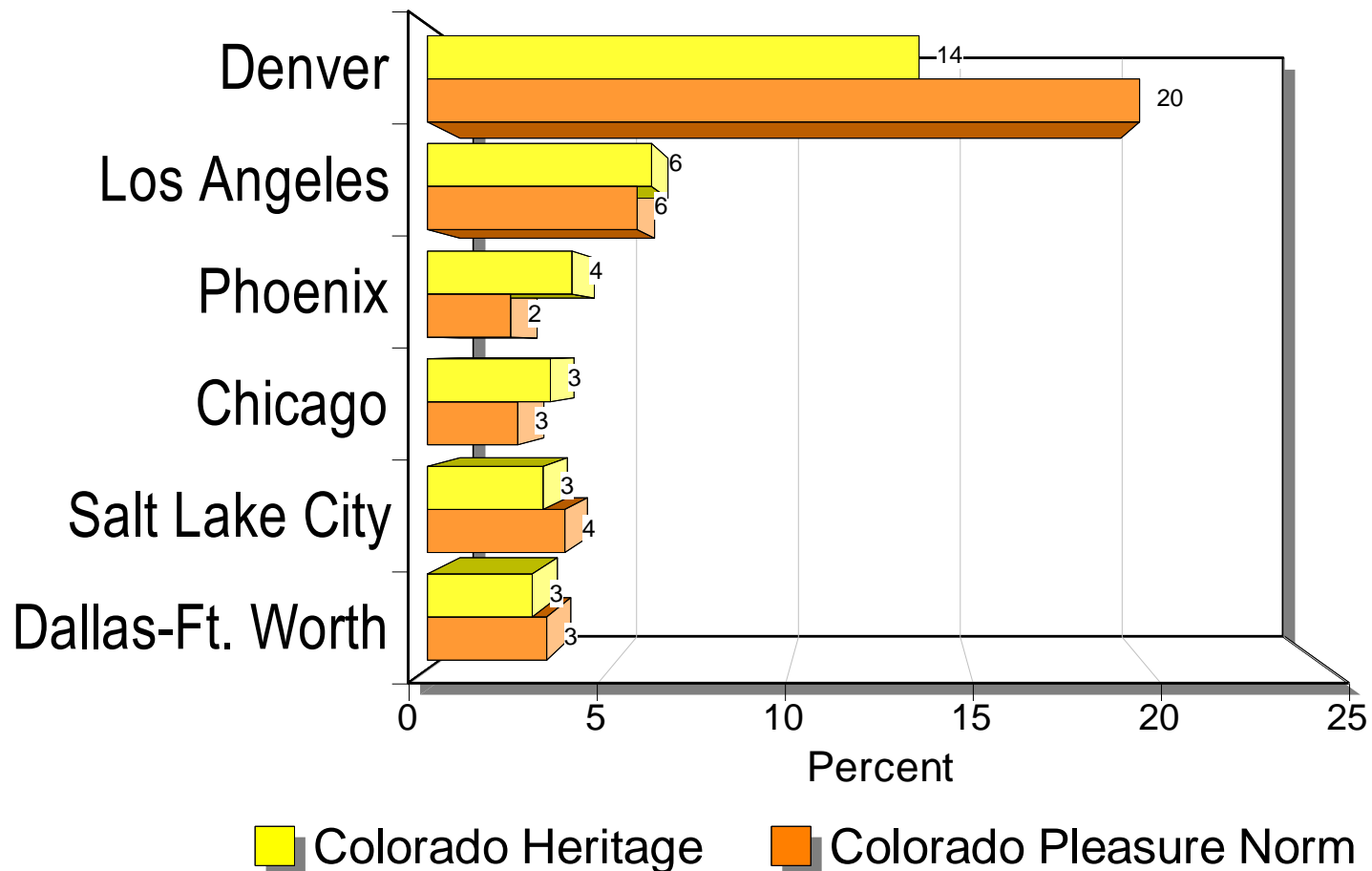
Base: Overnight Pleasure Trips



# Urban Sources of Business – Heritage Vs. Colorado Pleasure Norm



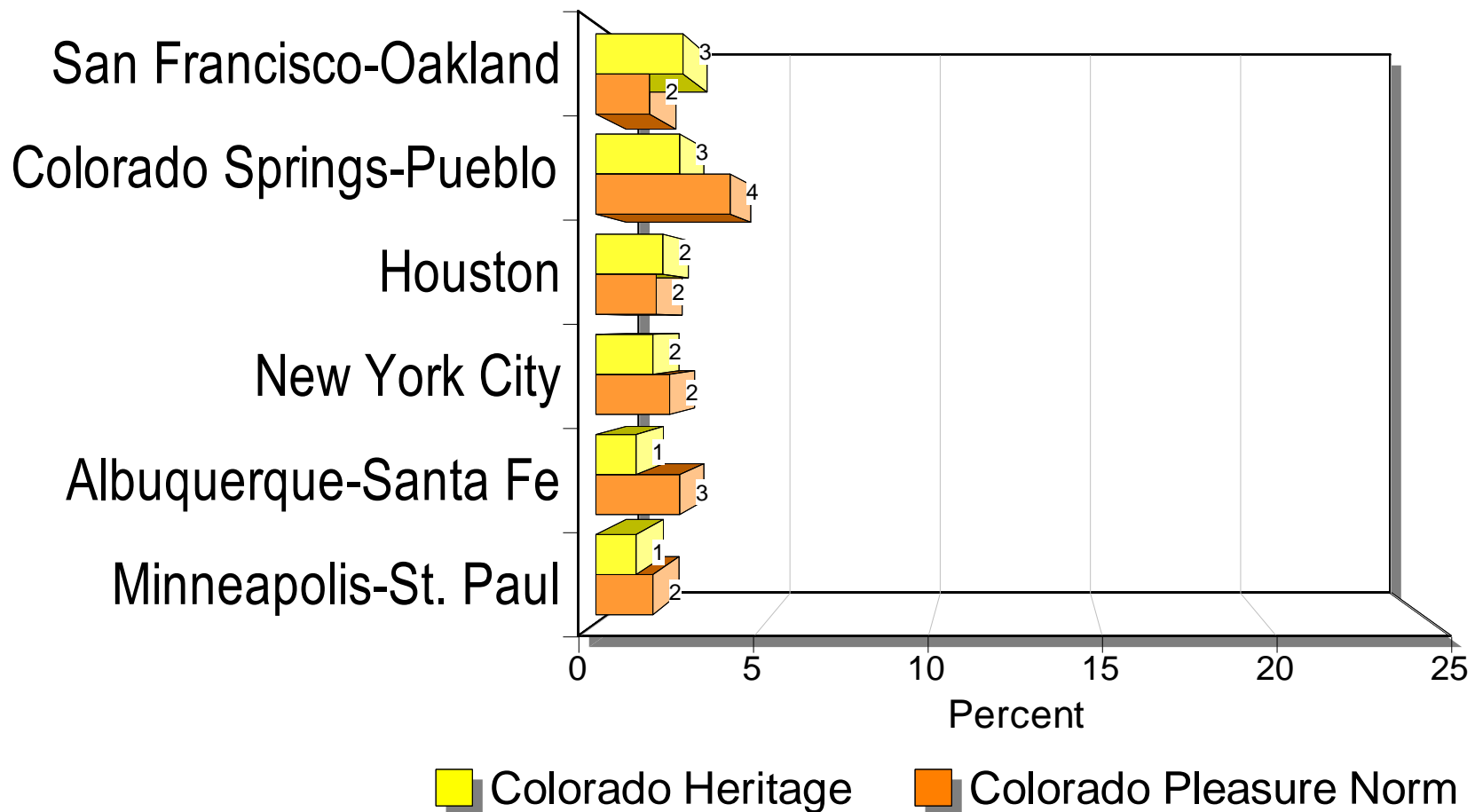
Base: Overnight Pleasure Trips



# Urban Sources of Business – Heritage Vs. Colorado Pleasure Norm (Cont'd)



Base: Overnight Pleasure Trips

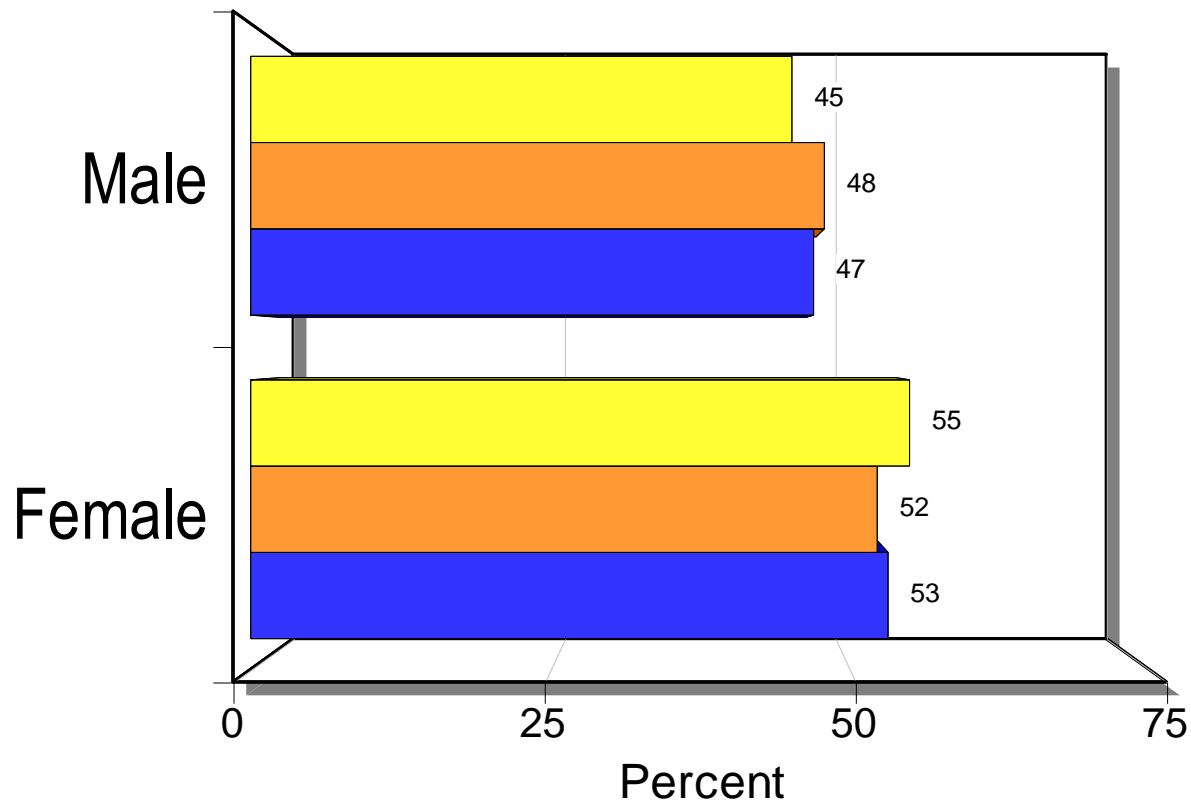


# Visitor Profile

# Gender



Base: Overnight Pleasure Trips

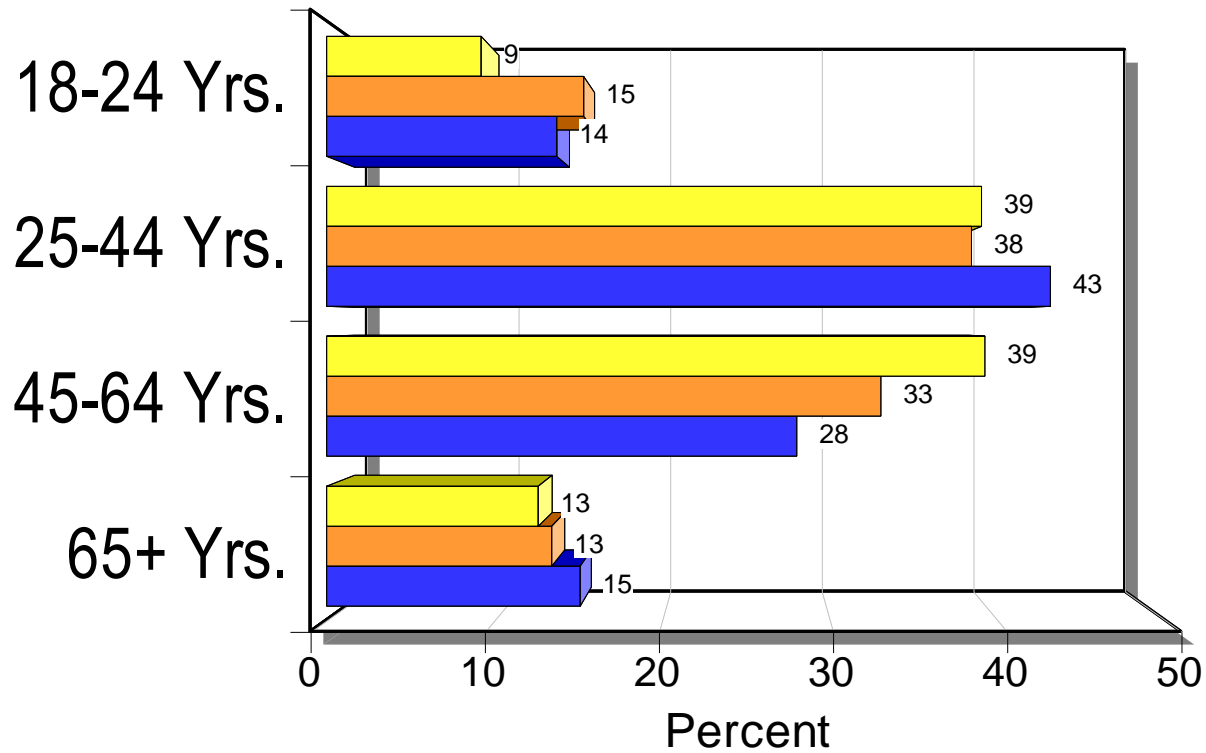


■ CO Heritage    ■ CO Pleasure Norm    ■ US Heritage Norm

# Age



Base: Overnight Pleasure Trips



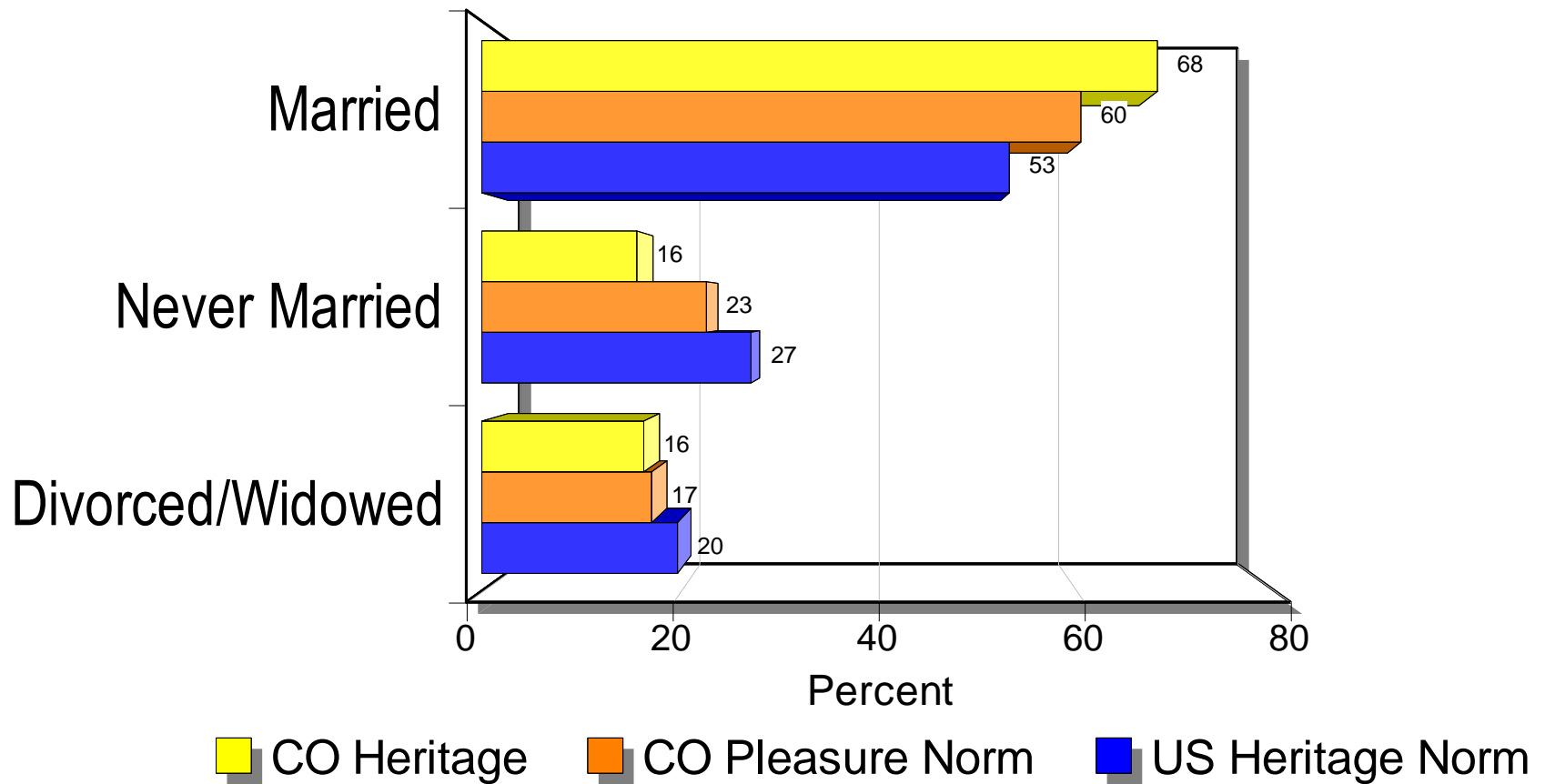
■ CO Heritage    
 ■ CO Pleasure Norm    
 ■ US Heritage Norm

	<u>CO Heritage</u>	<u>Colorado</u>	<u>U.S. Heritage Norm</u>	
Average Age	46.2	44.0	44.0	55

# Marital Status



Base: Overnight Pleasure Trips

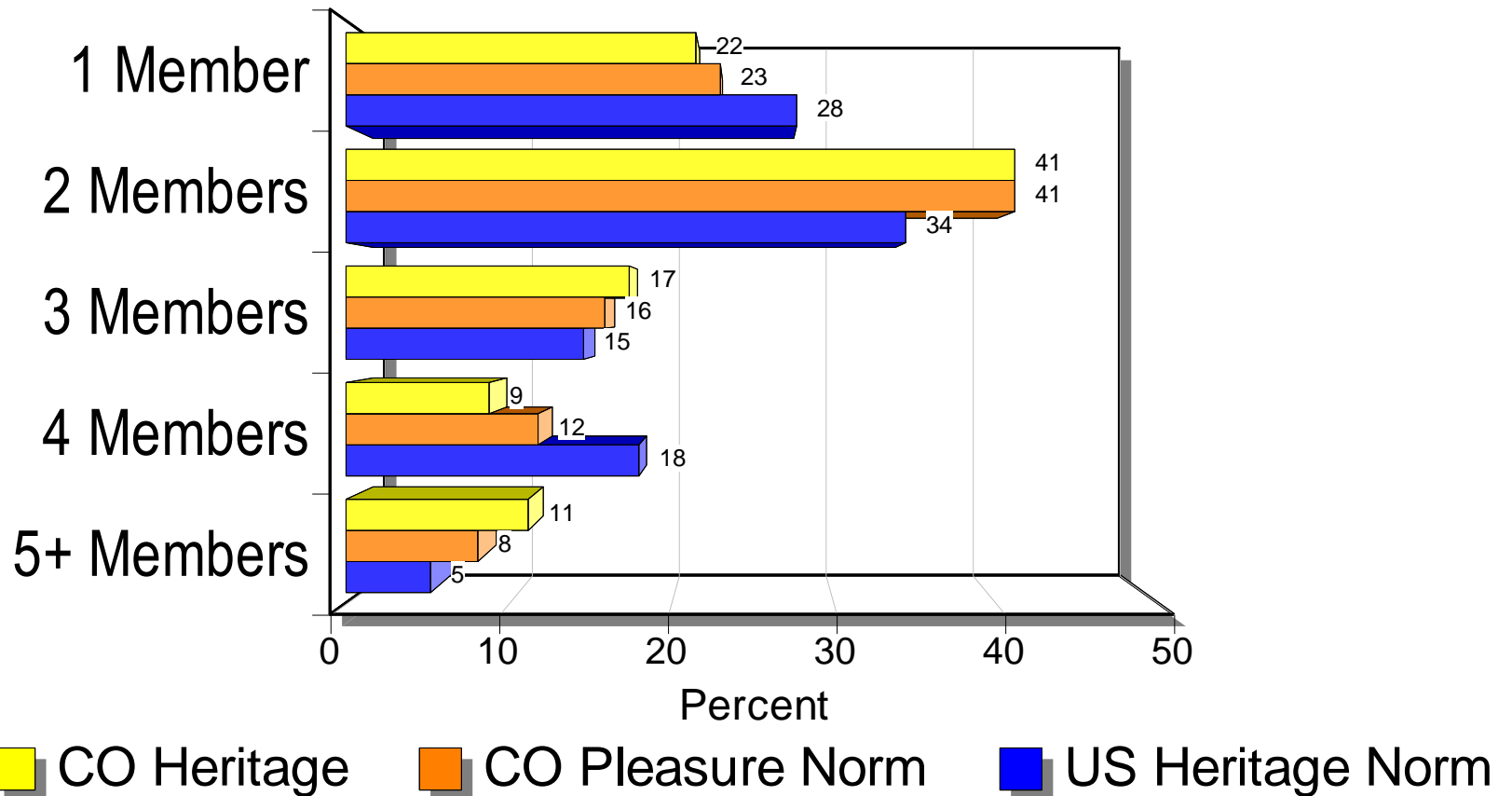




# Household Size



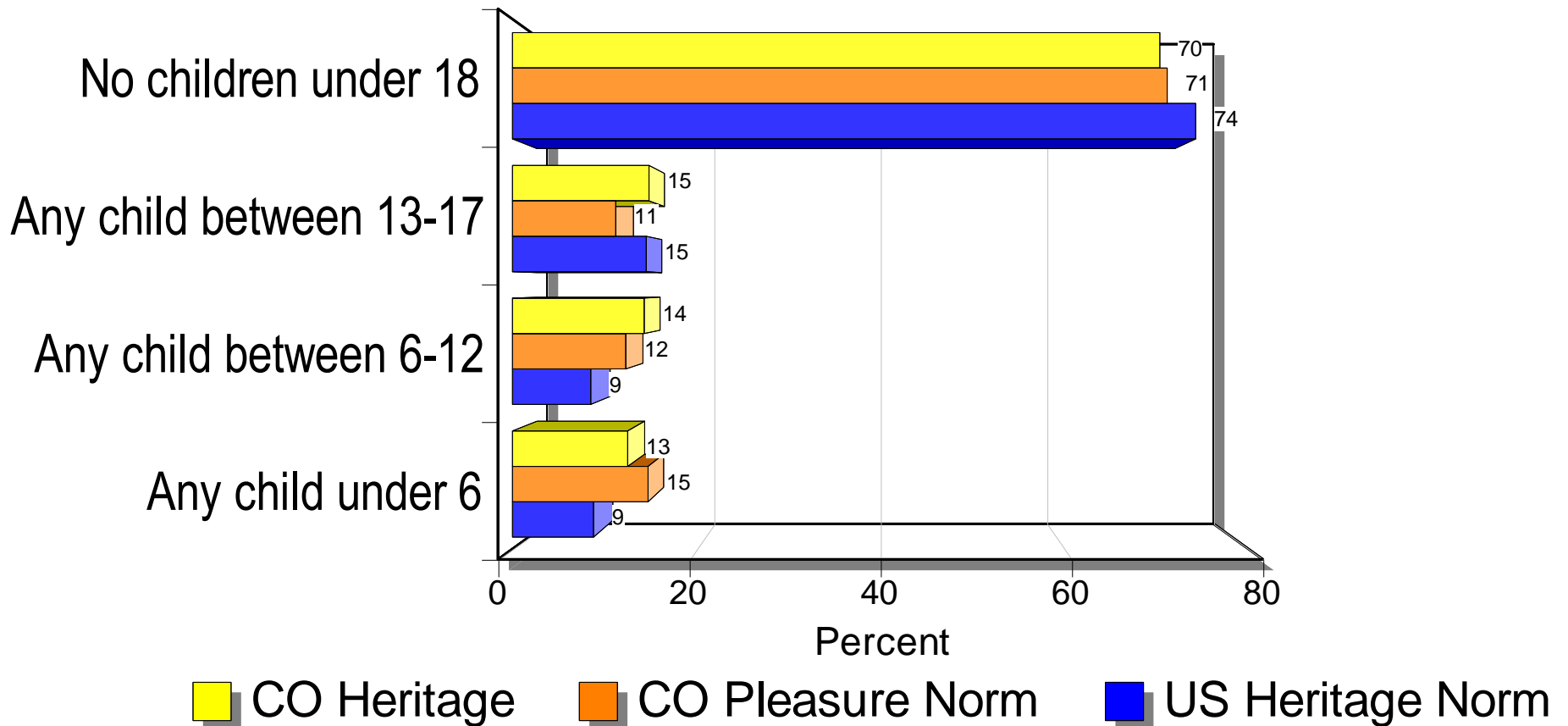
Base: Overnight Pleasure Trips



# Children in Household



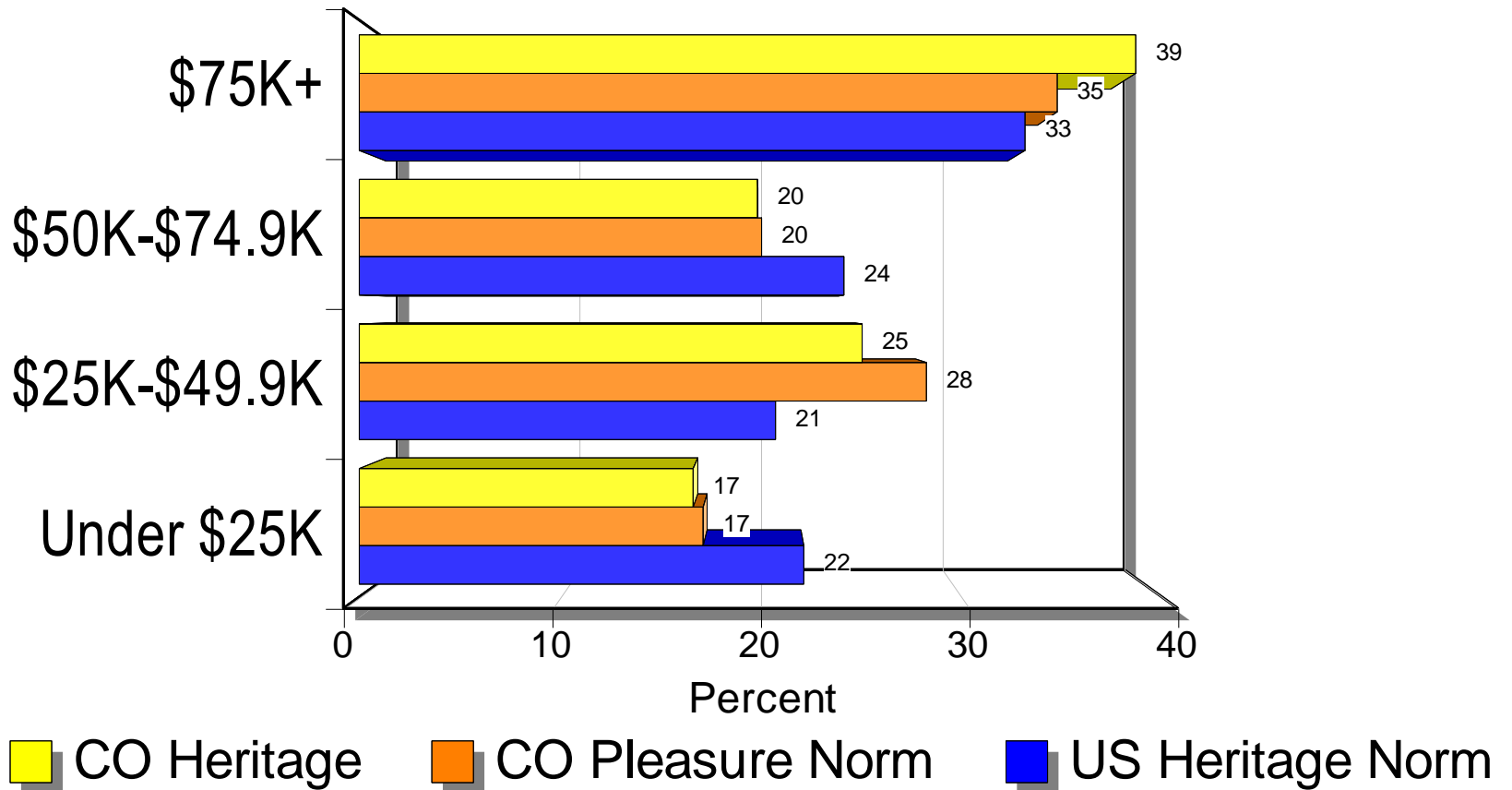
Base: Overnight Pleasure Trips



# Income



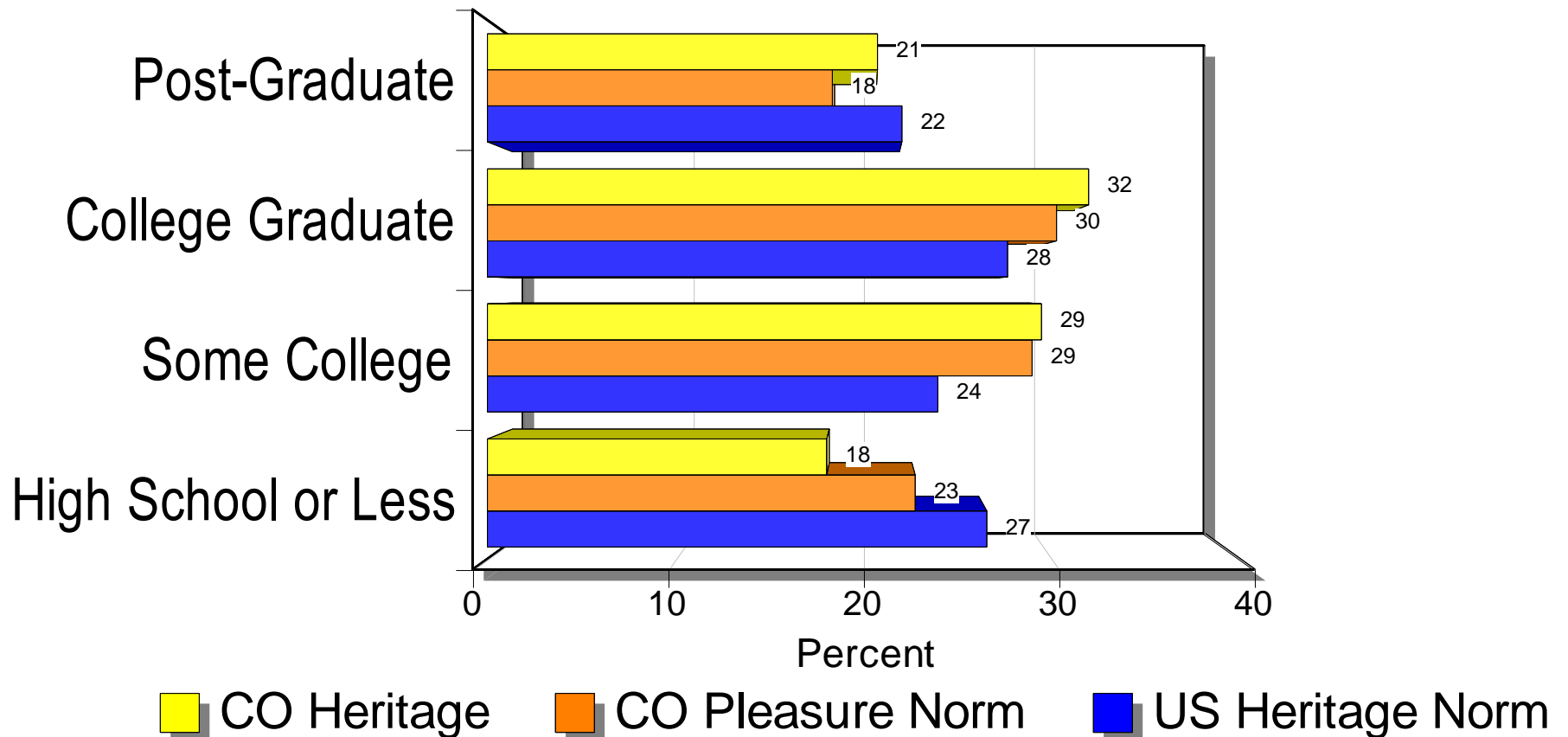
Base: Overnight Pleasure Trips



# Education



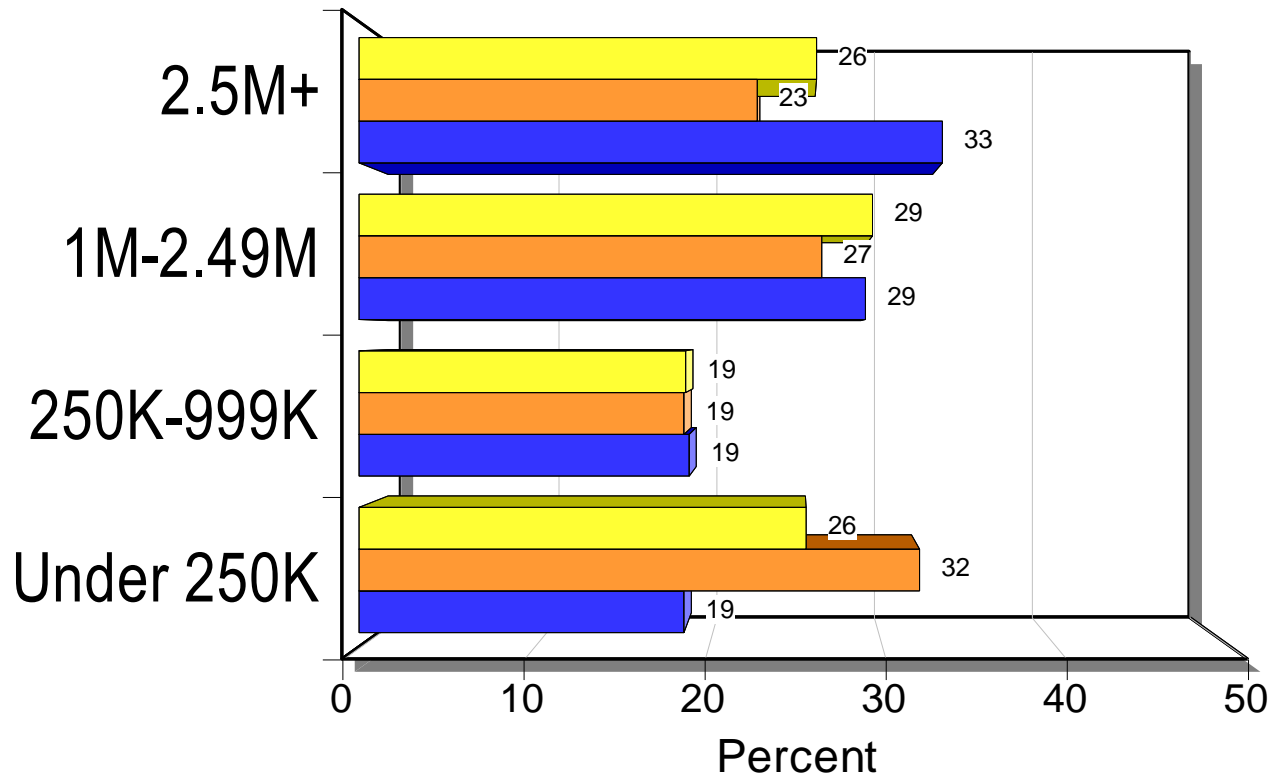
Base: Overnight Pleasure Trips



# Community Size



Base: Overnight Pleasure Trips



CO Heritage

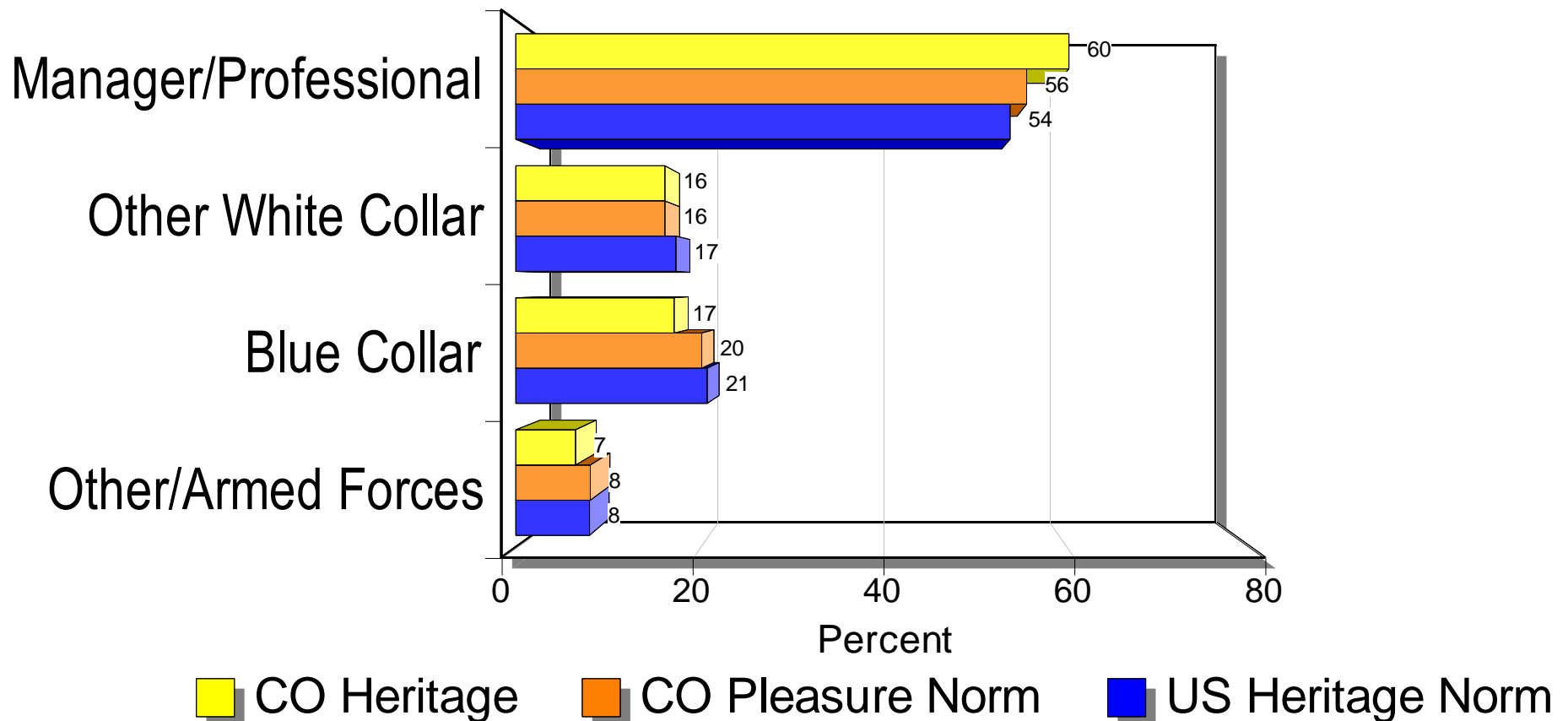
CO Pleasure Norm

US Heritage Norm

# Occupation



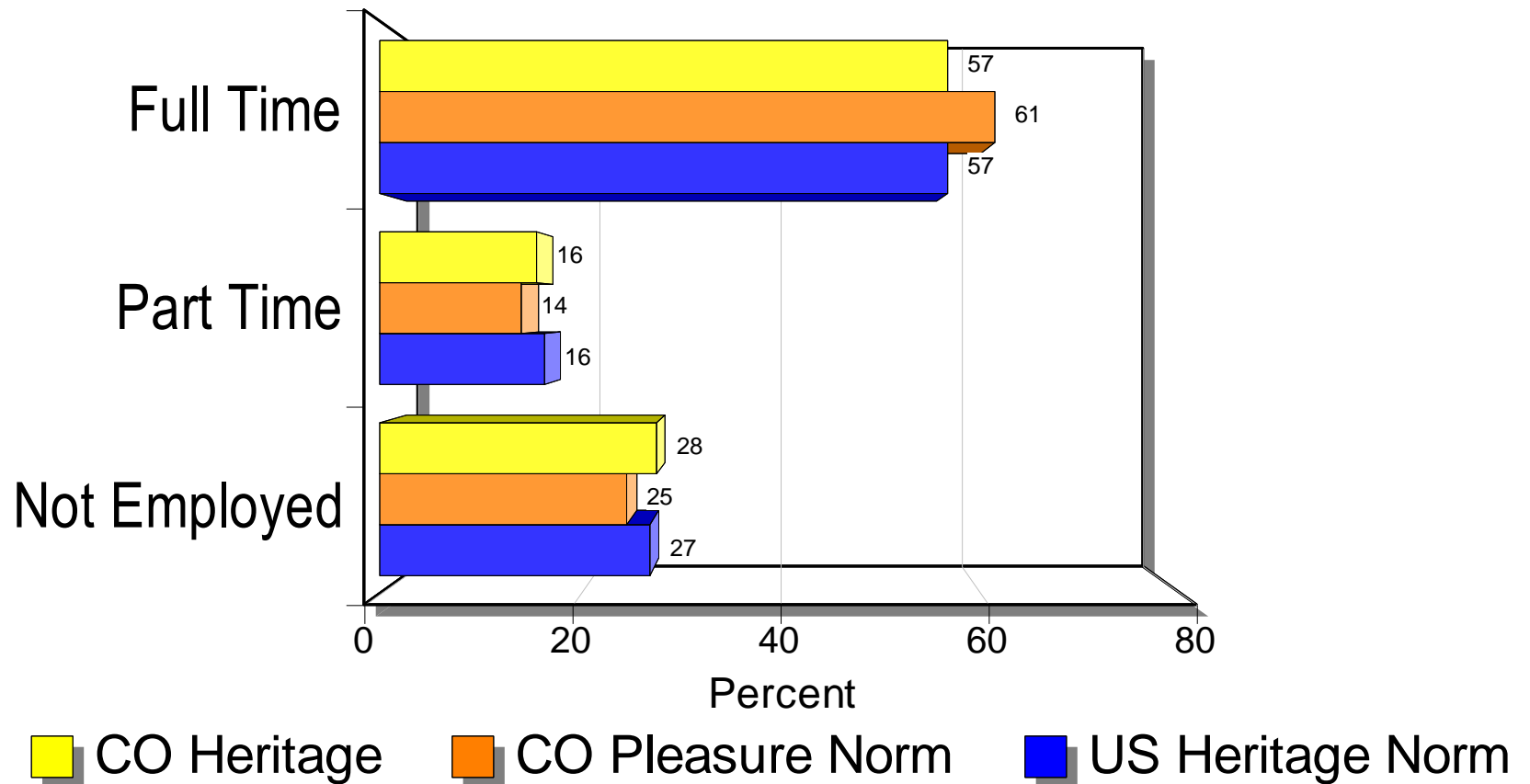
Base: Overnight Pleasure Trips by Those Who Are Employed



# Employment



Base: Overnight Pleasure Trips



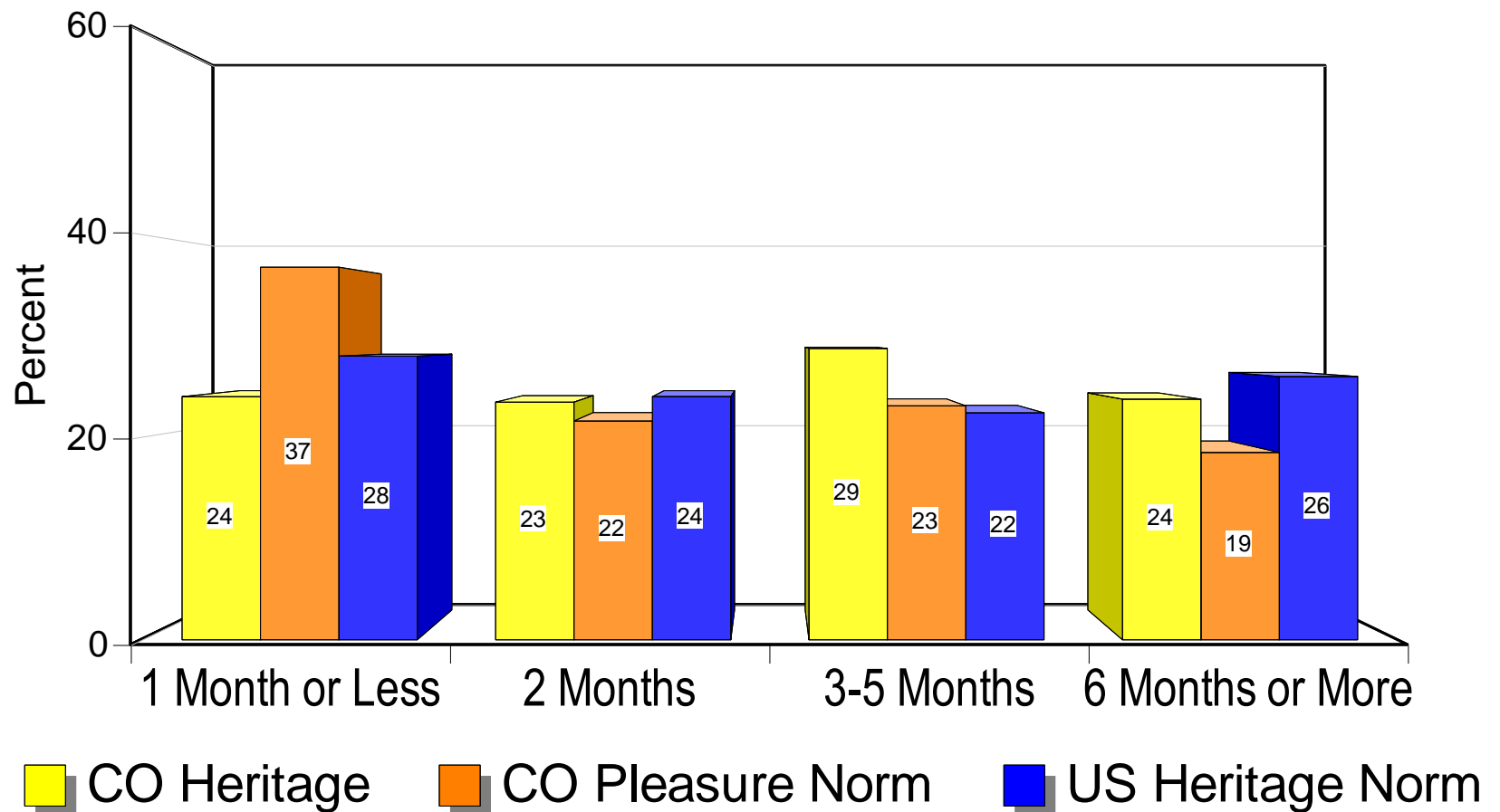
# Planning and Booking of Overnight Pleasure Trips



# Planning Cycle



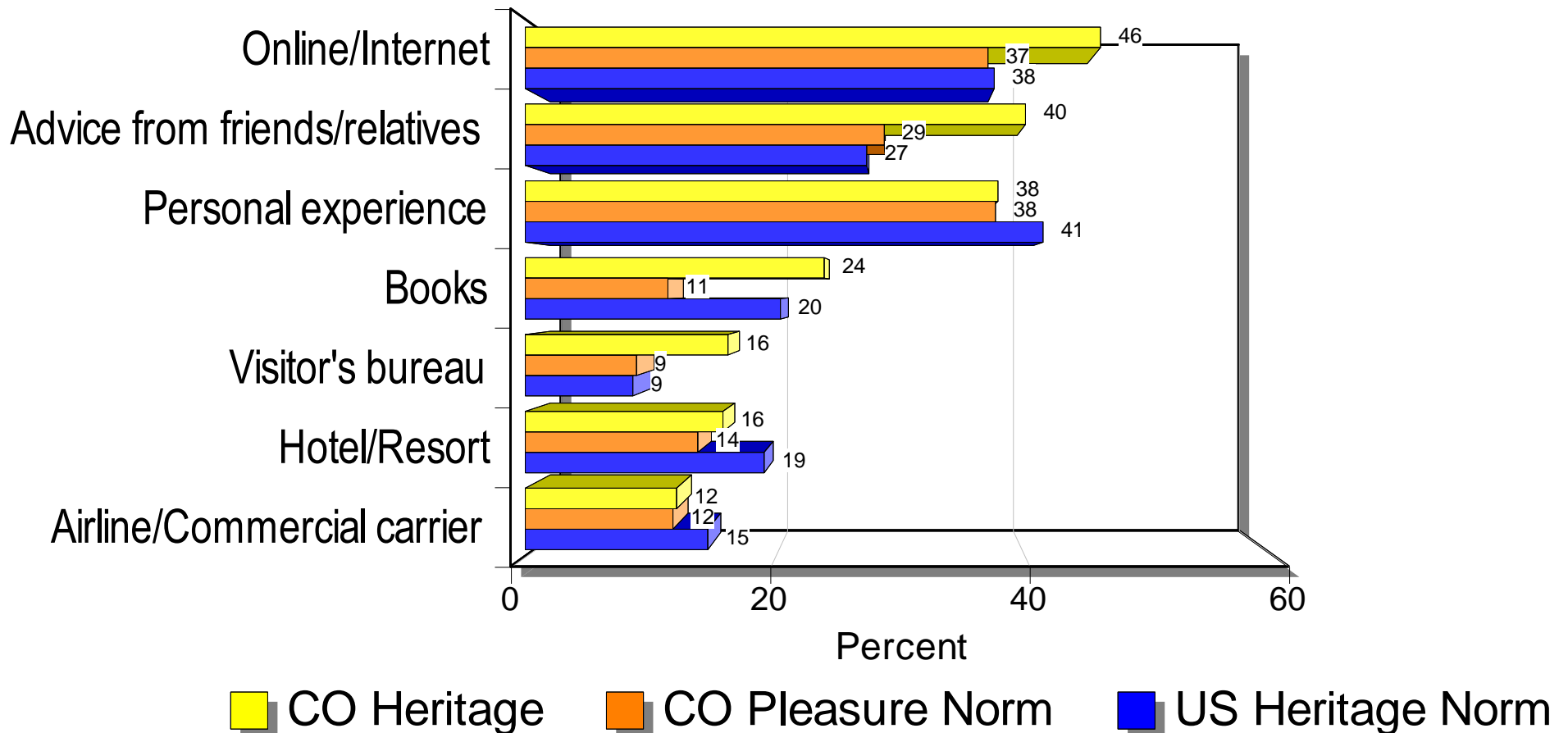
Base: Overnight Pleasure Trips



# Information Sources Used for Planning



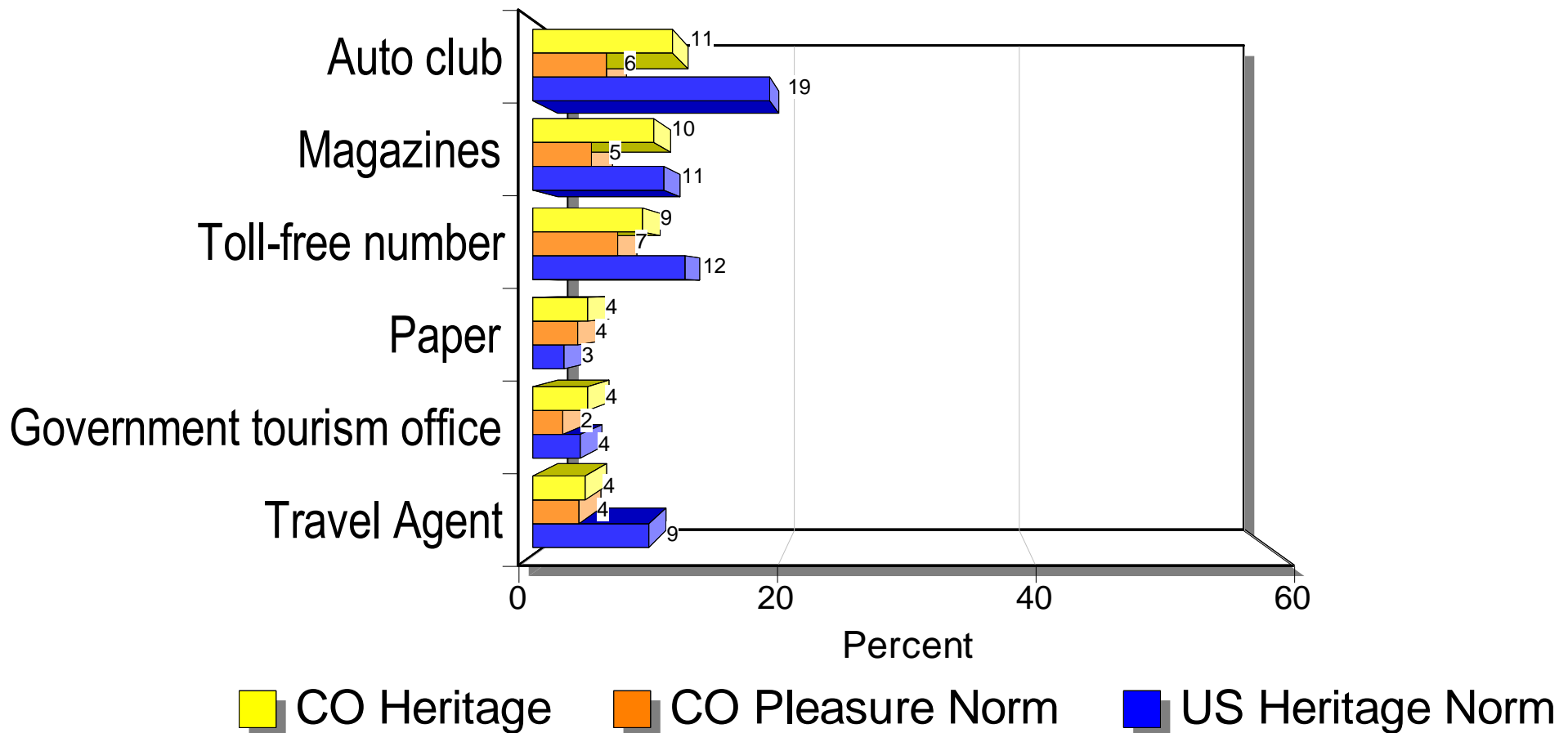
Base: Overnight Pleasure Trips



# Information Sources Used for Planning (Cont'd)



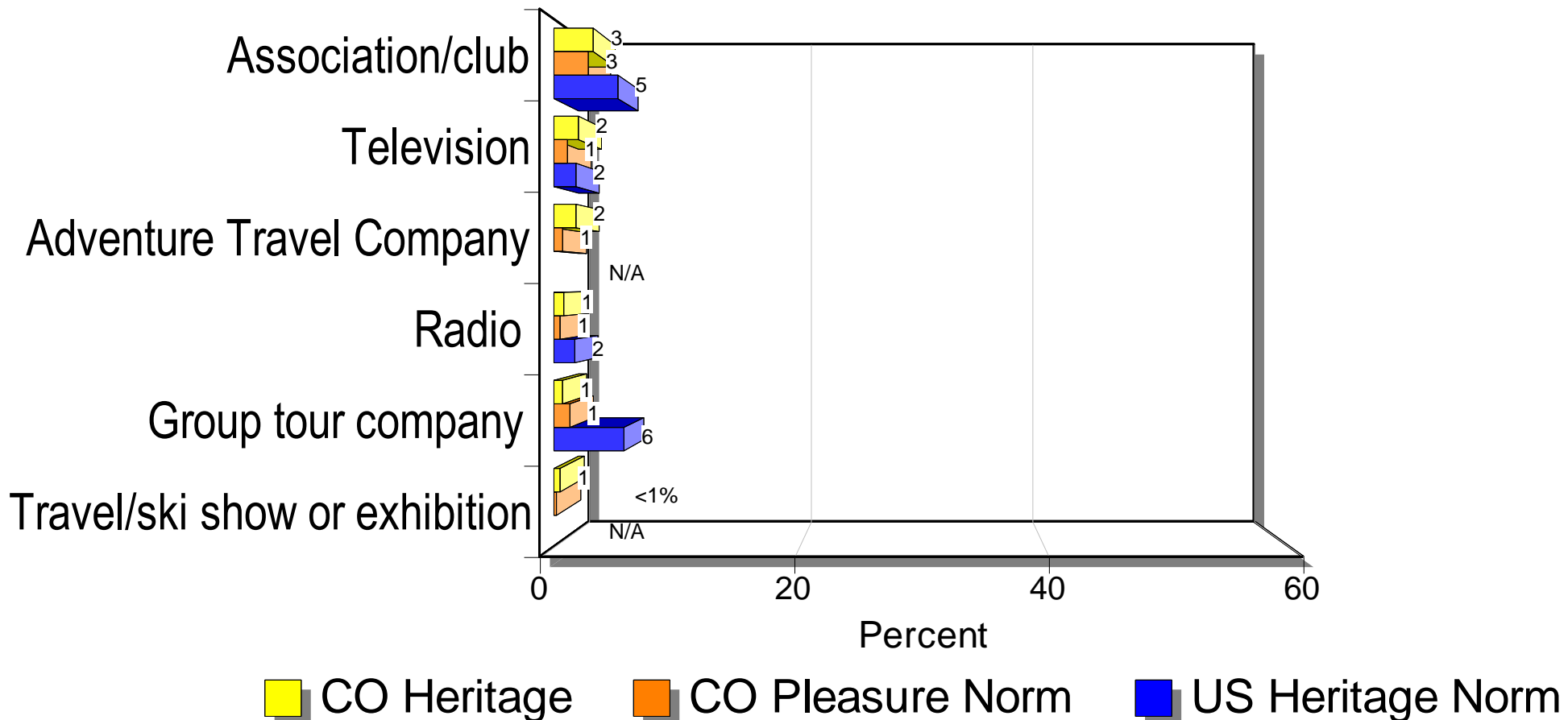
Base: Overnight Pleasure Trips



# Information Sources Used for Planning (Cont'd)



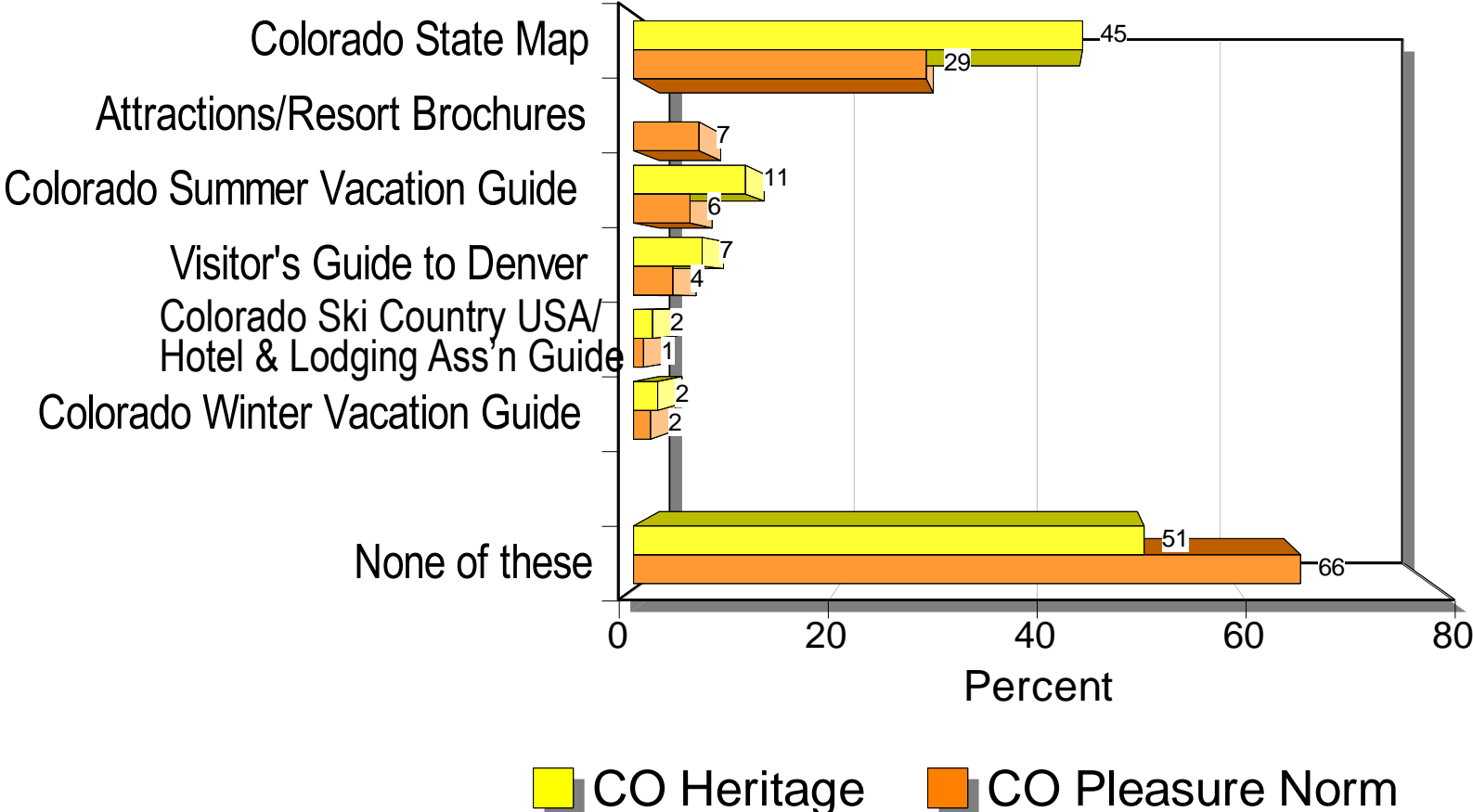
Base: Overnight Pleasure Trips



# Publications Used for Trip Planning



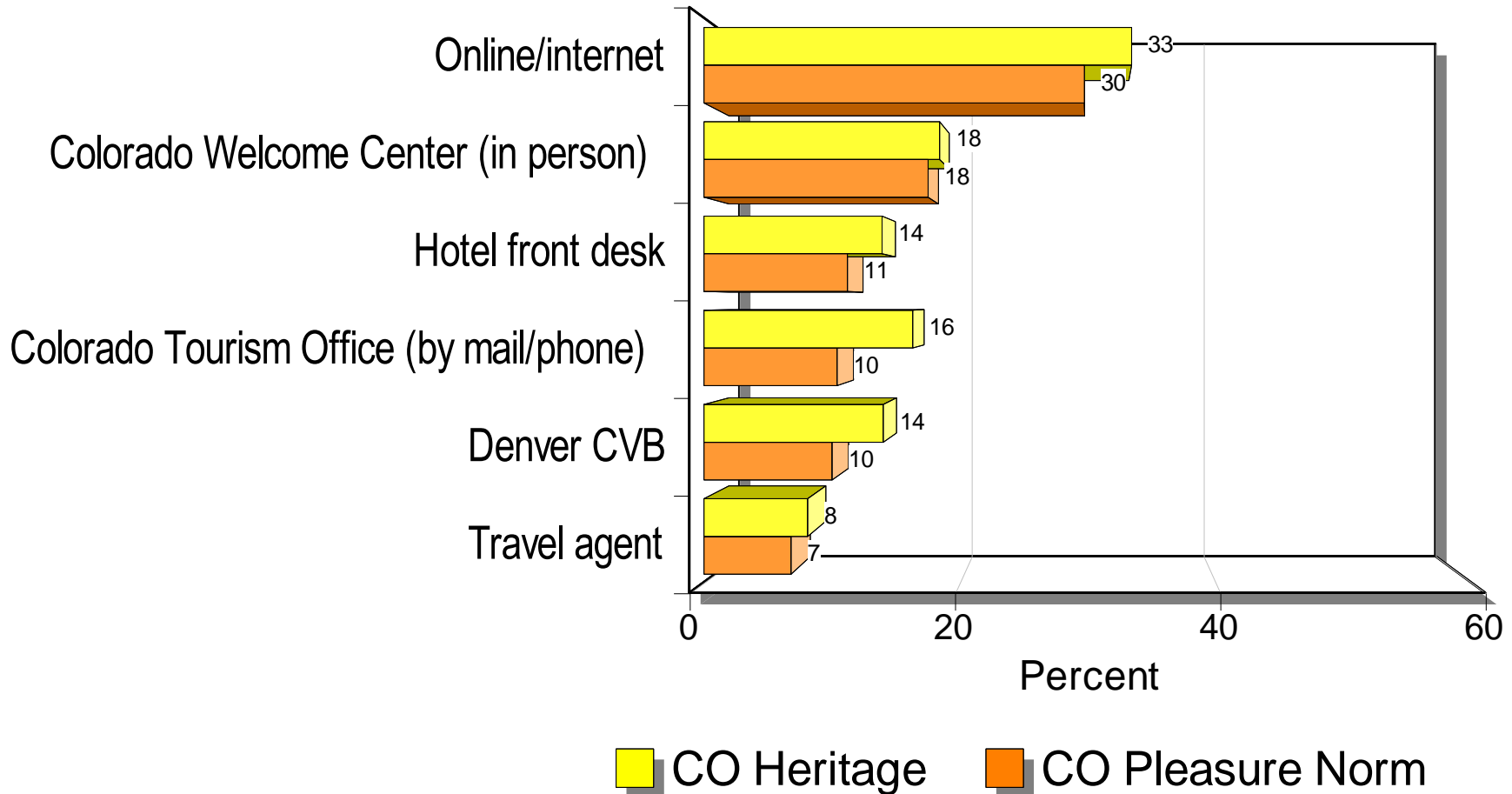
Base: Overnight Pleasure Trips



# Place Where Publications Were Obtained



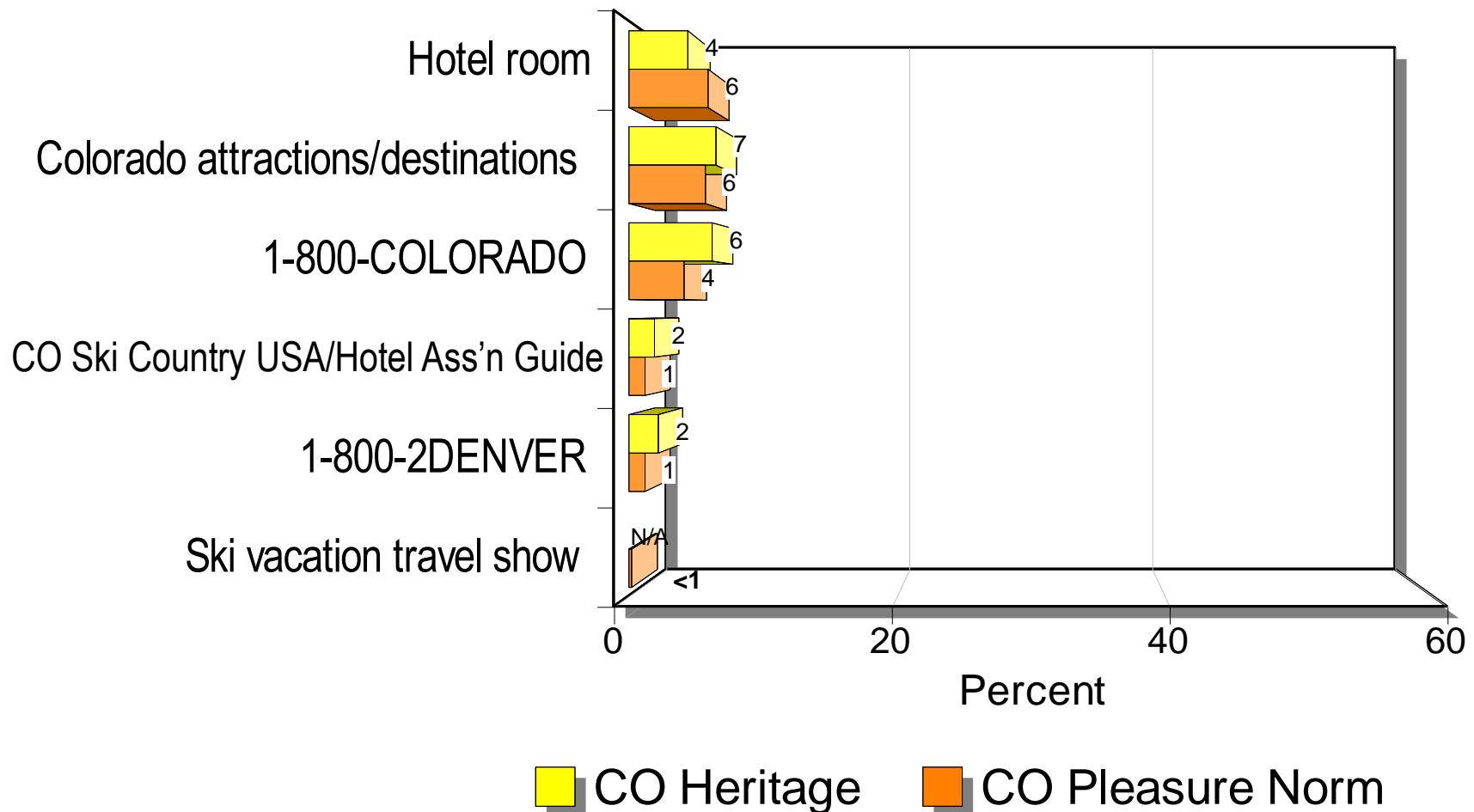
Base: Used At Least One Publication



# Place Where Publications Were Obtained (Cont'd)



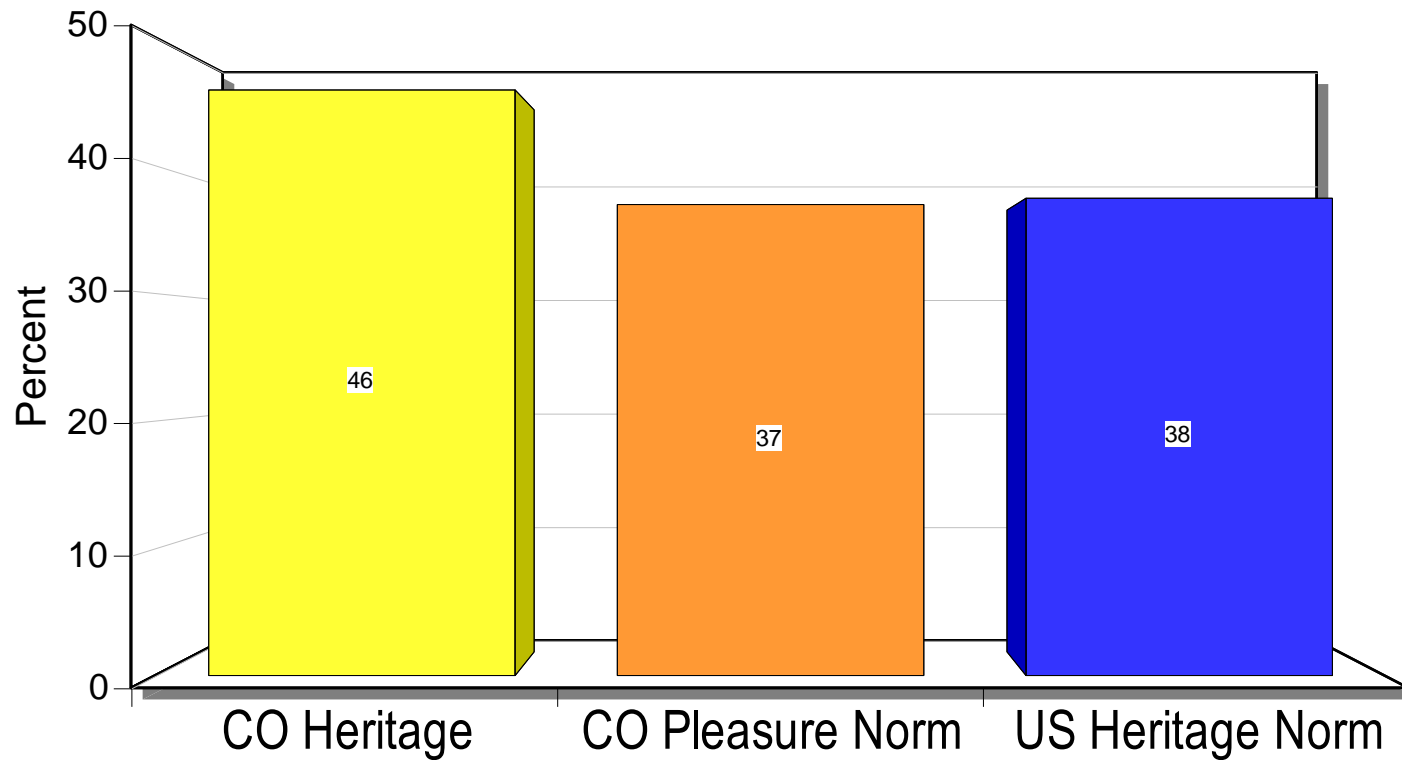
Base: Used At Least One Publication



# Use of Internet for Trip Planning

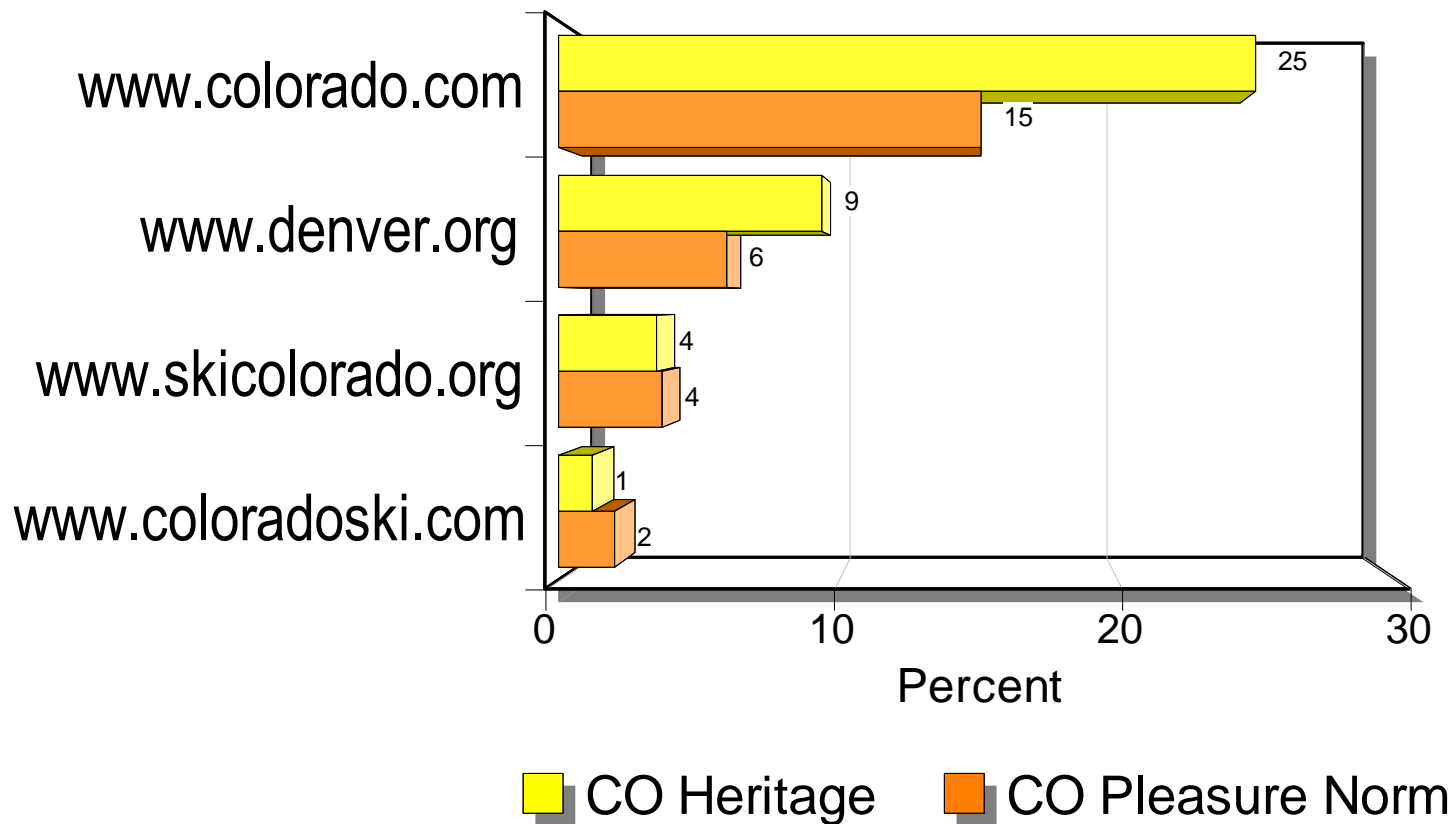


Base: Overnight Pleasure Trips





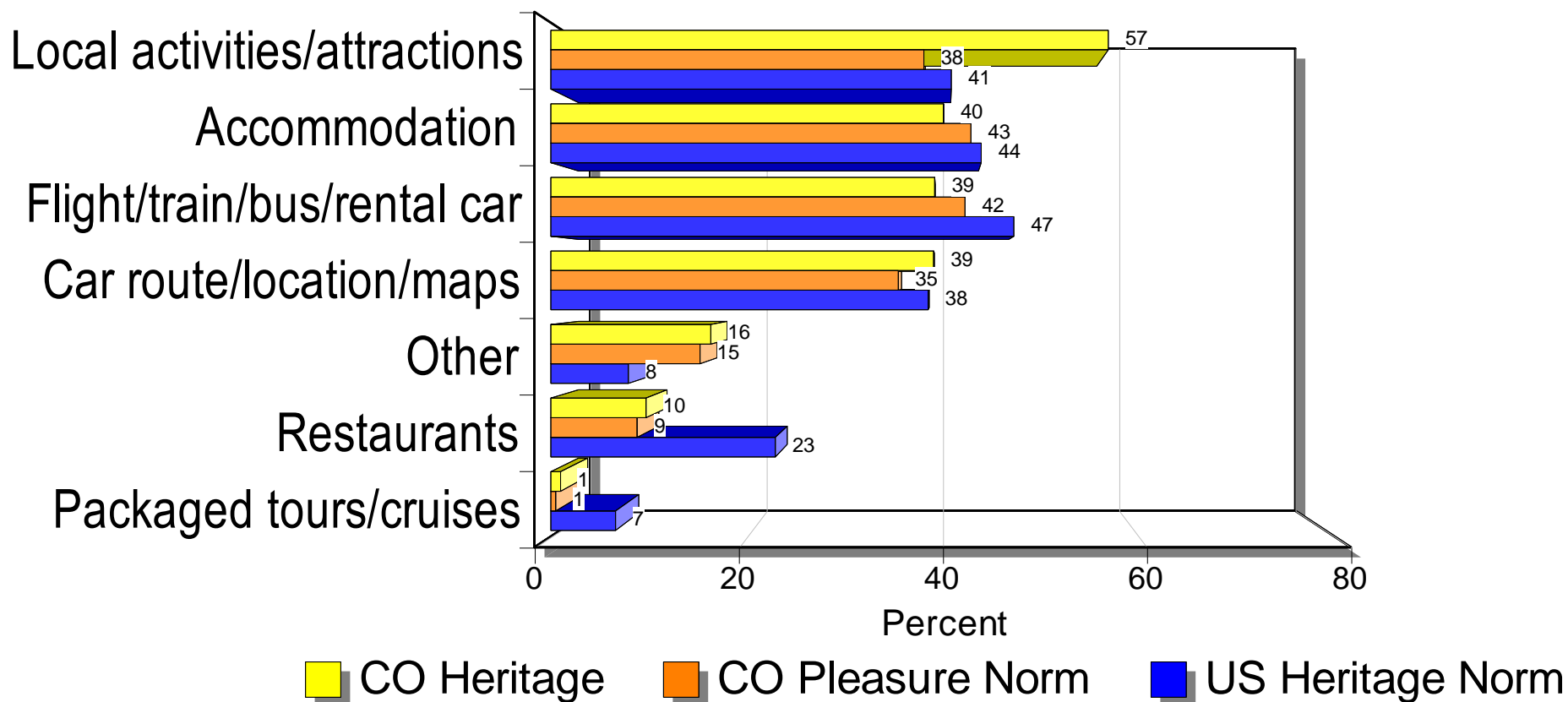
# Internet Sites Used When Planning Colorado Pleasure Trip



# Elements of Trip Planned Online



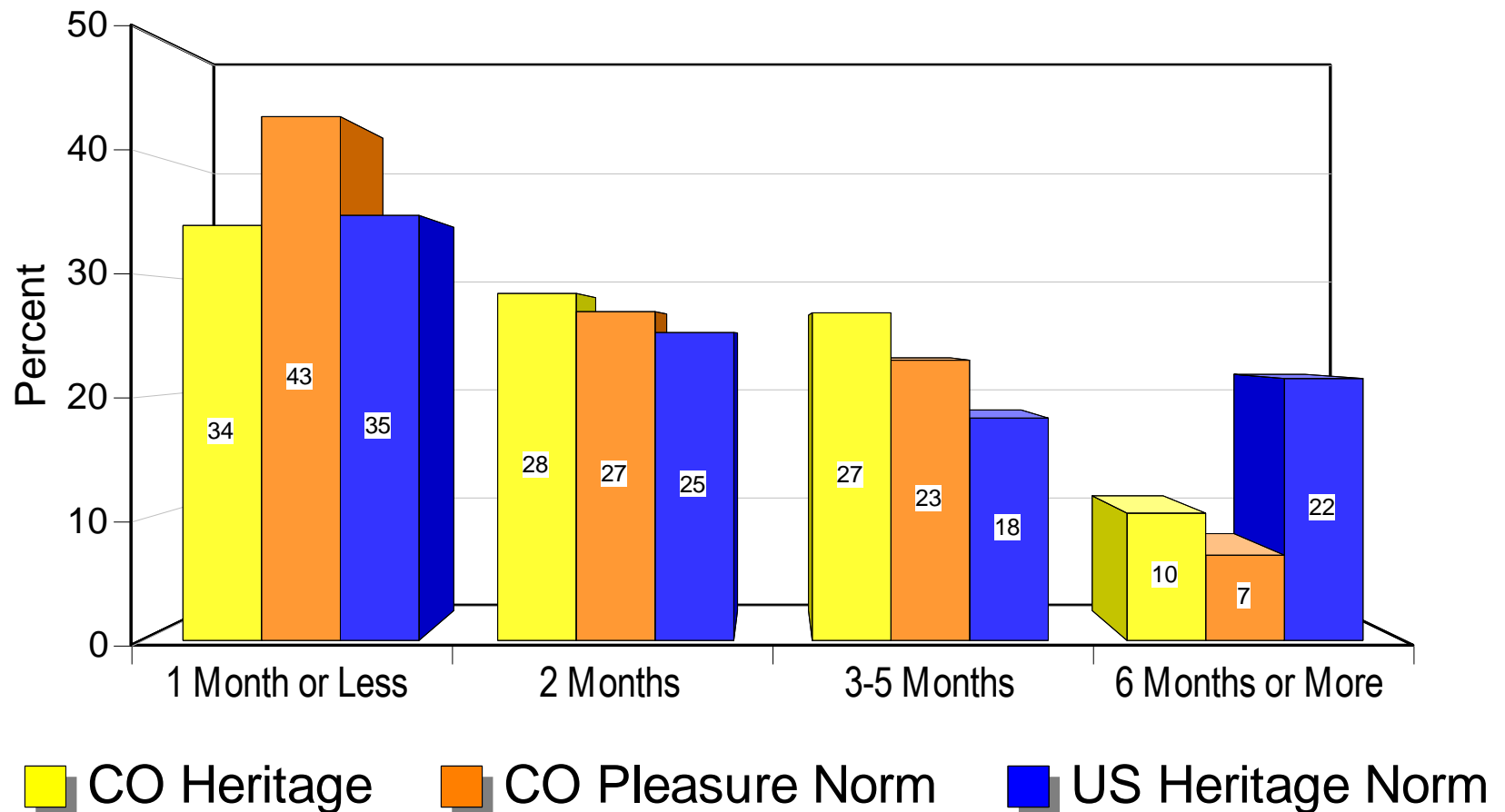
Base: Used Internet to Plan Trip



# Booking Cycle



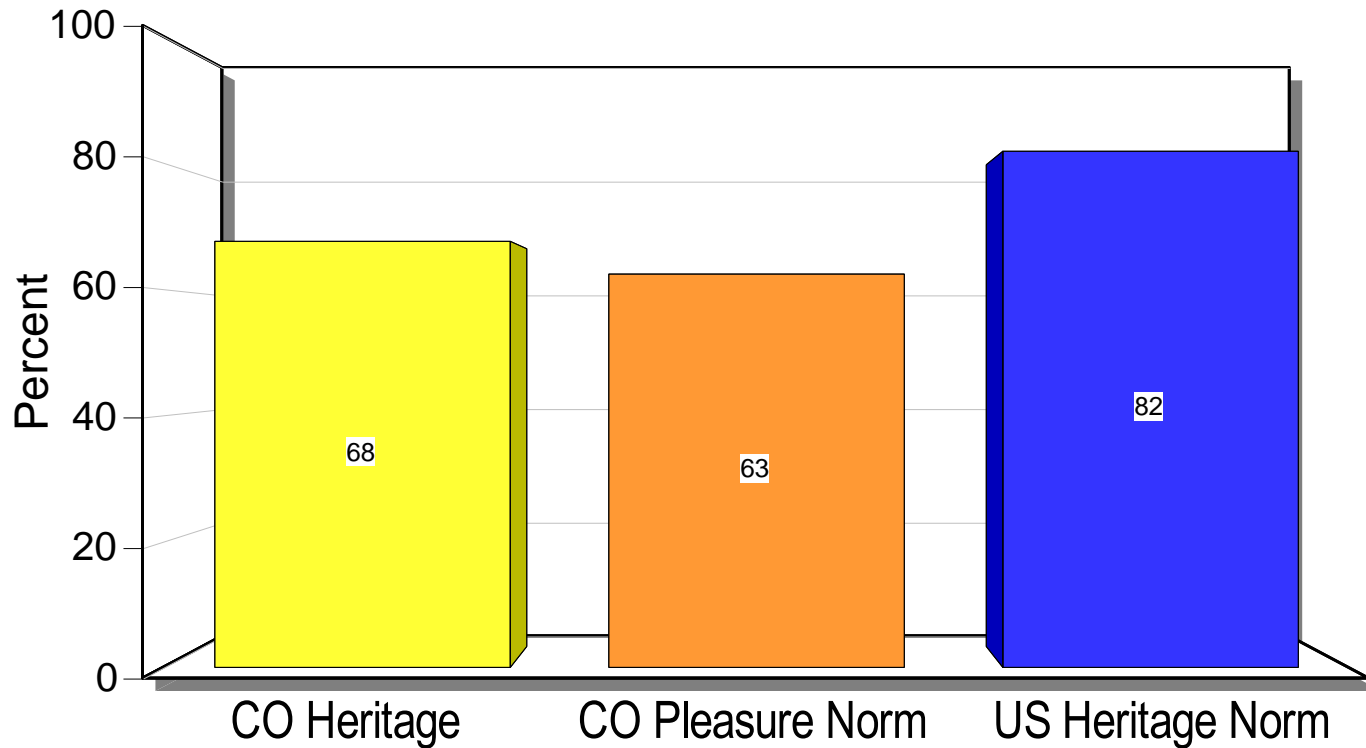
Base: Overnight Pleasure Trips Booked in Advance



# Percent Who Booked In Advance



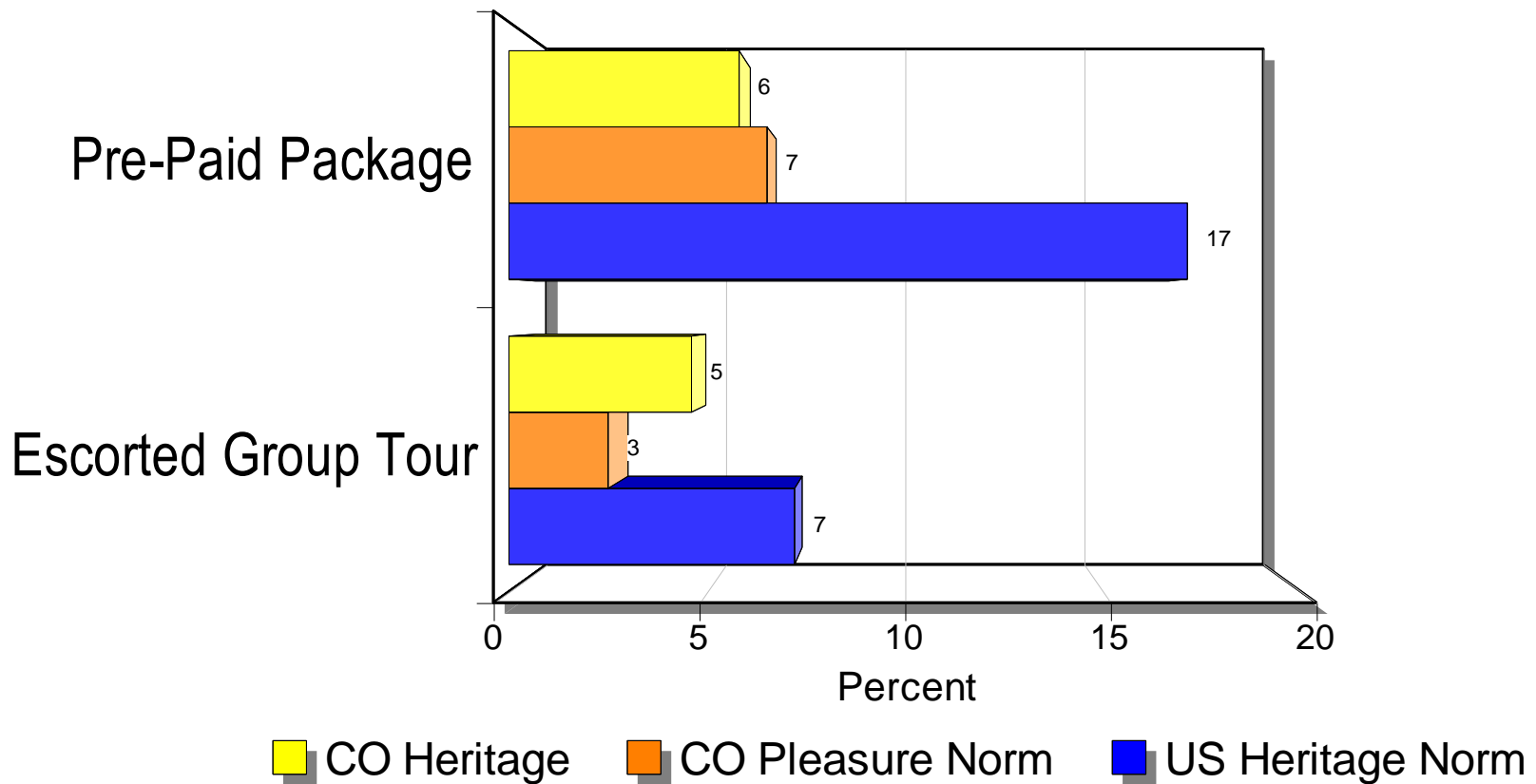
Base: Overnight Pleasure Trips



# Use of Vacation Packages and Group Travel



Base: Overnight Pleasure Trips

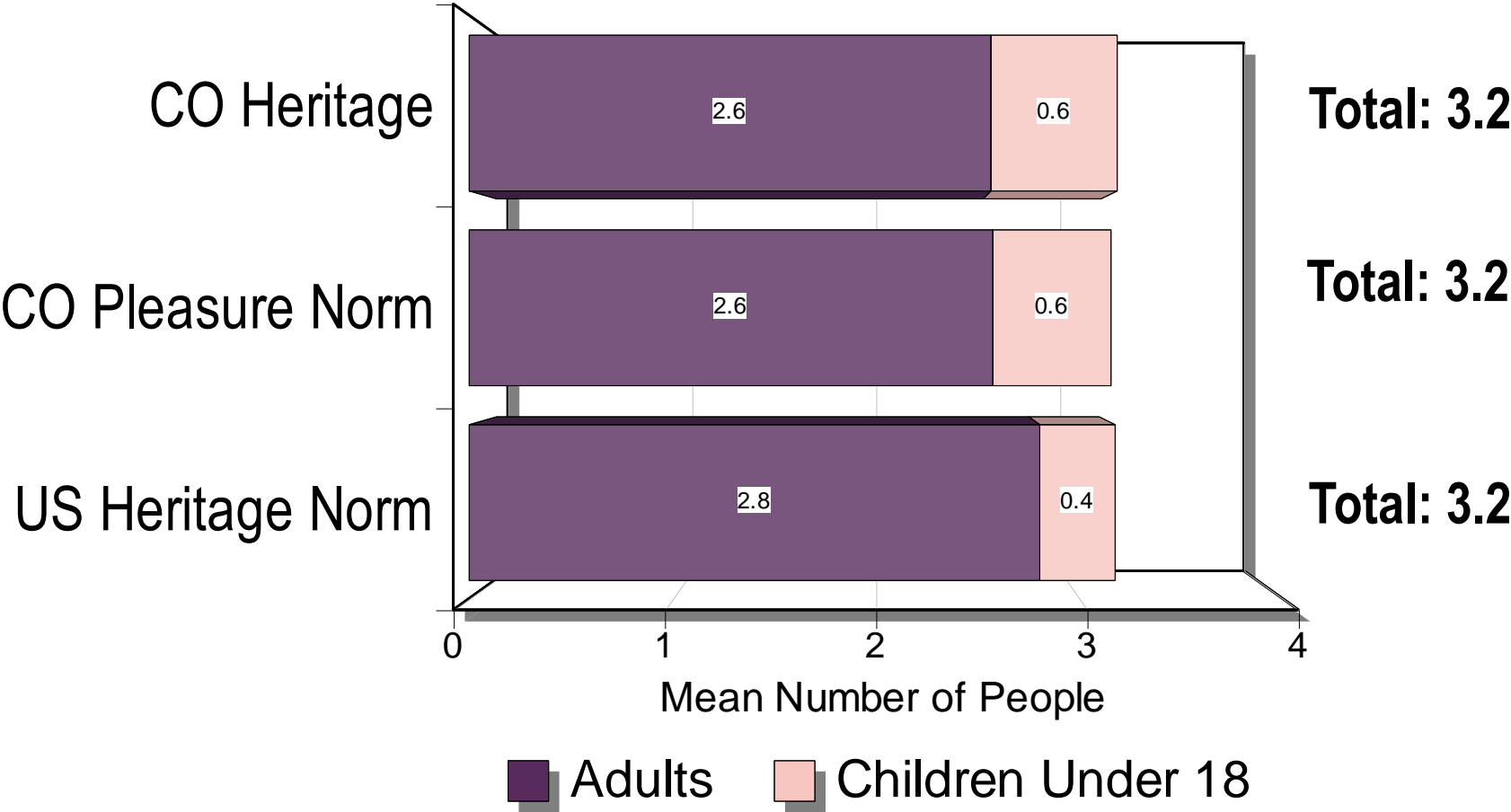


# Heritage Trip Characteristics

# Size of Travel Party



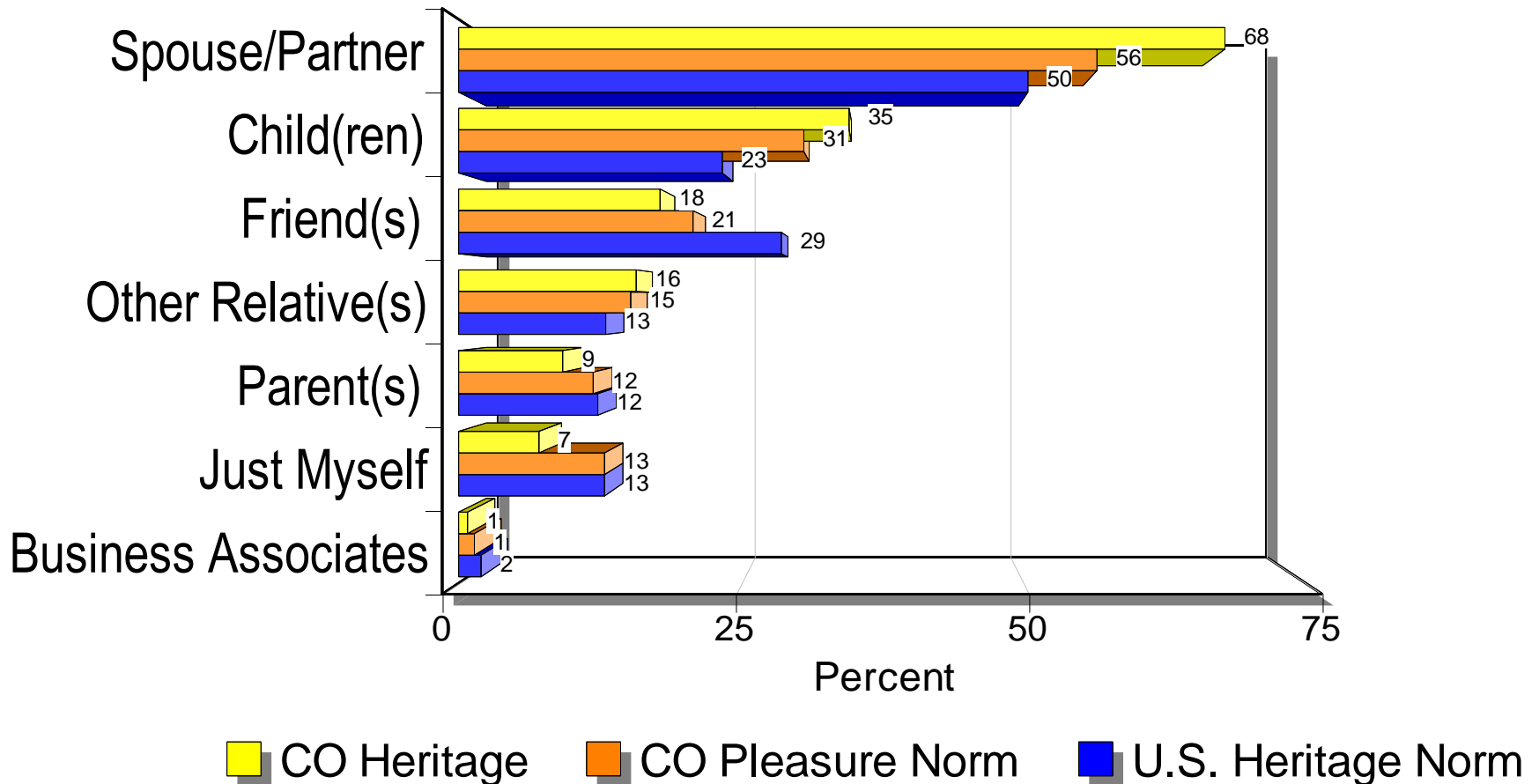
Base: Overnight Pleasure Trips



# Composition of Travel Party



Base: Overnight Pleasure Trips

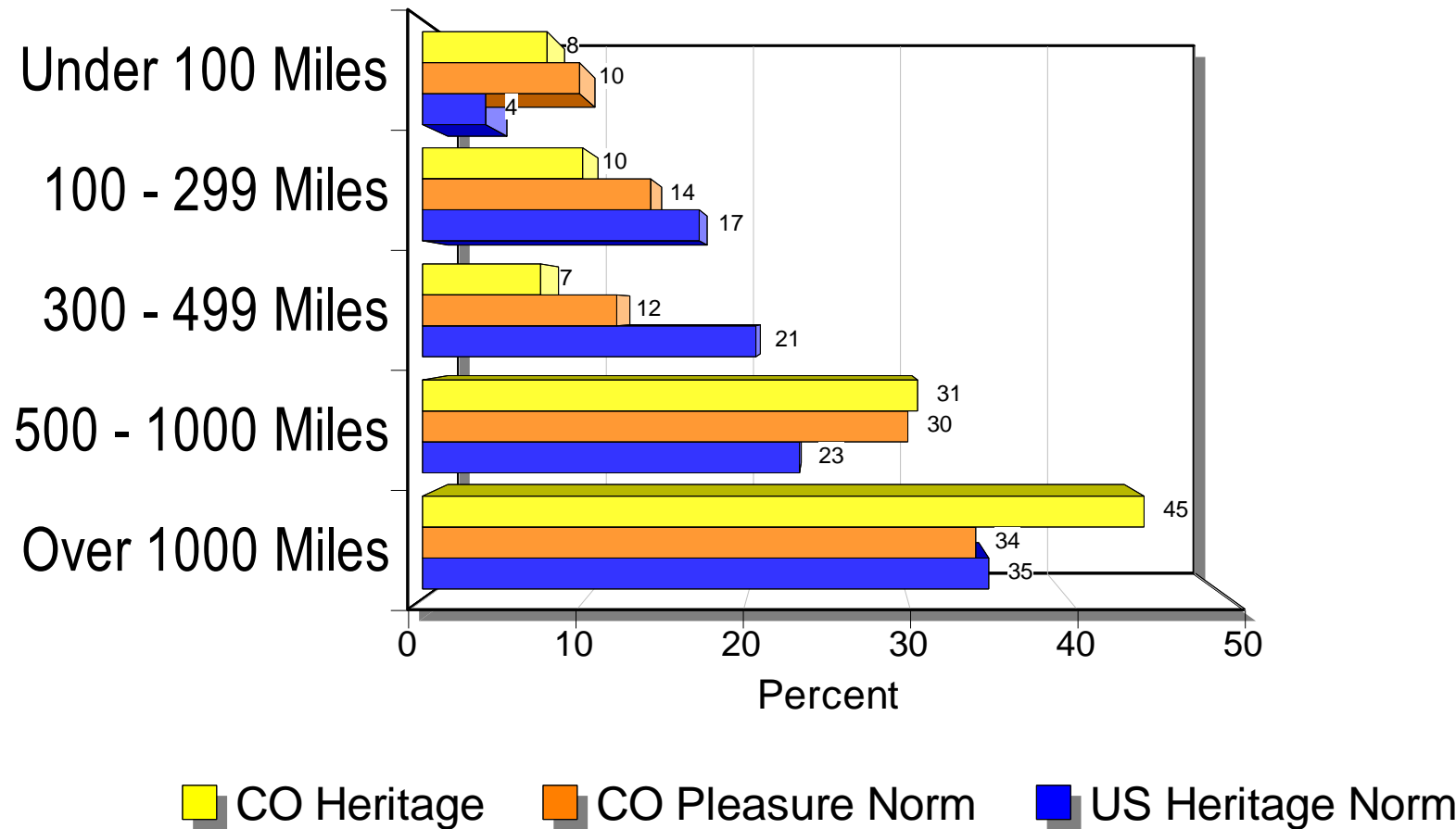




# Distance Traveled



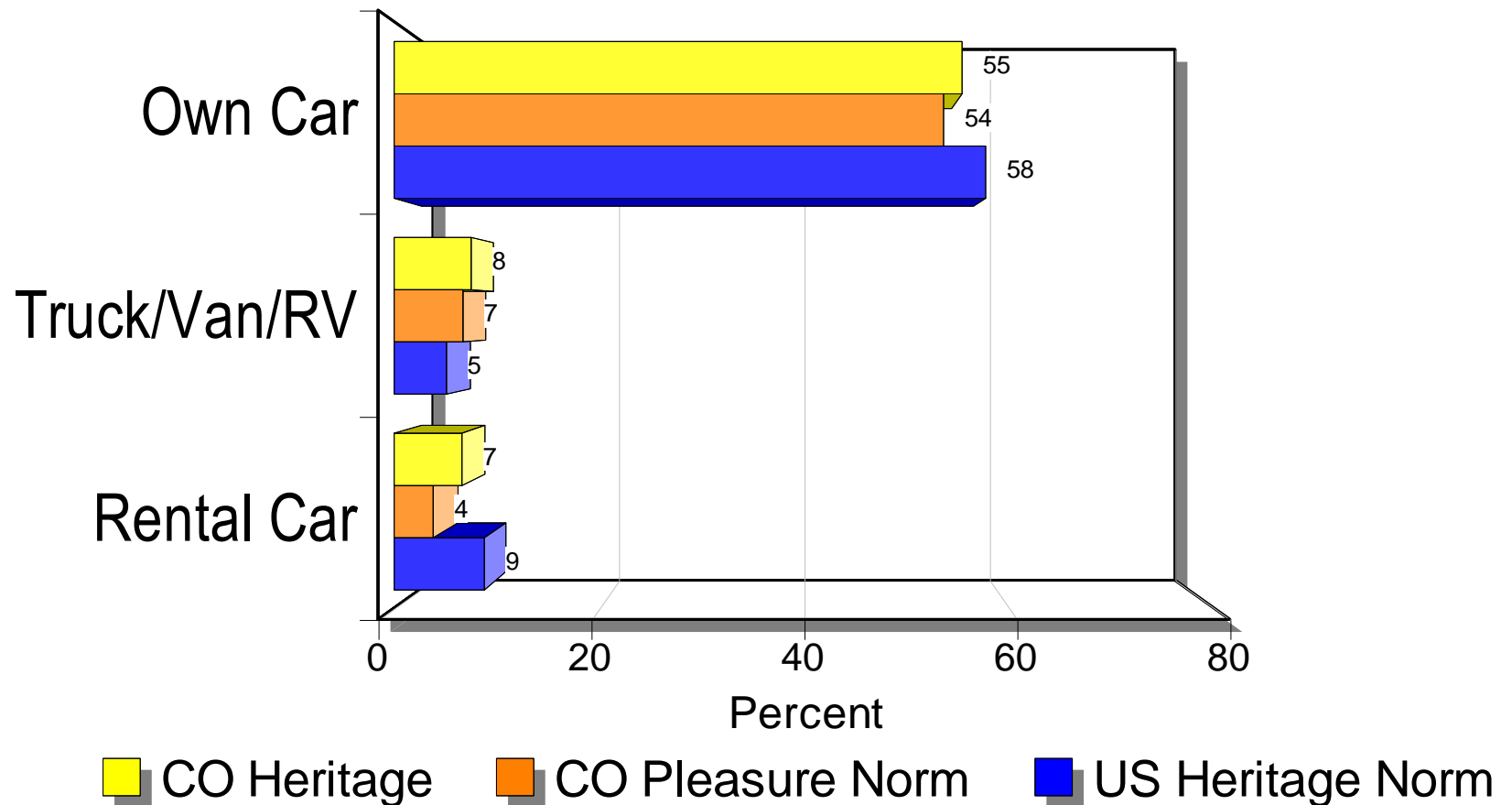
Base: Overnight Pleasure Trips



# Transportation Used to Enter Colorado – Personal



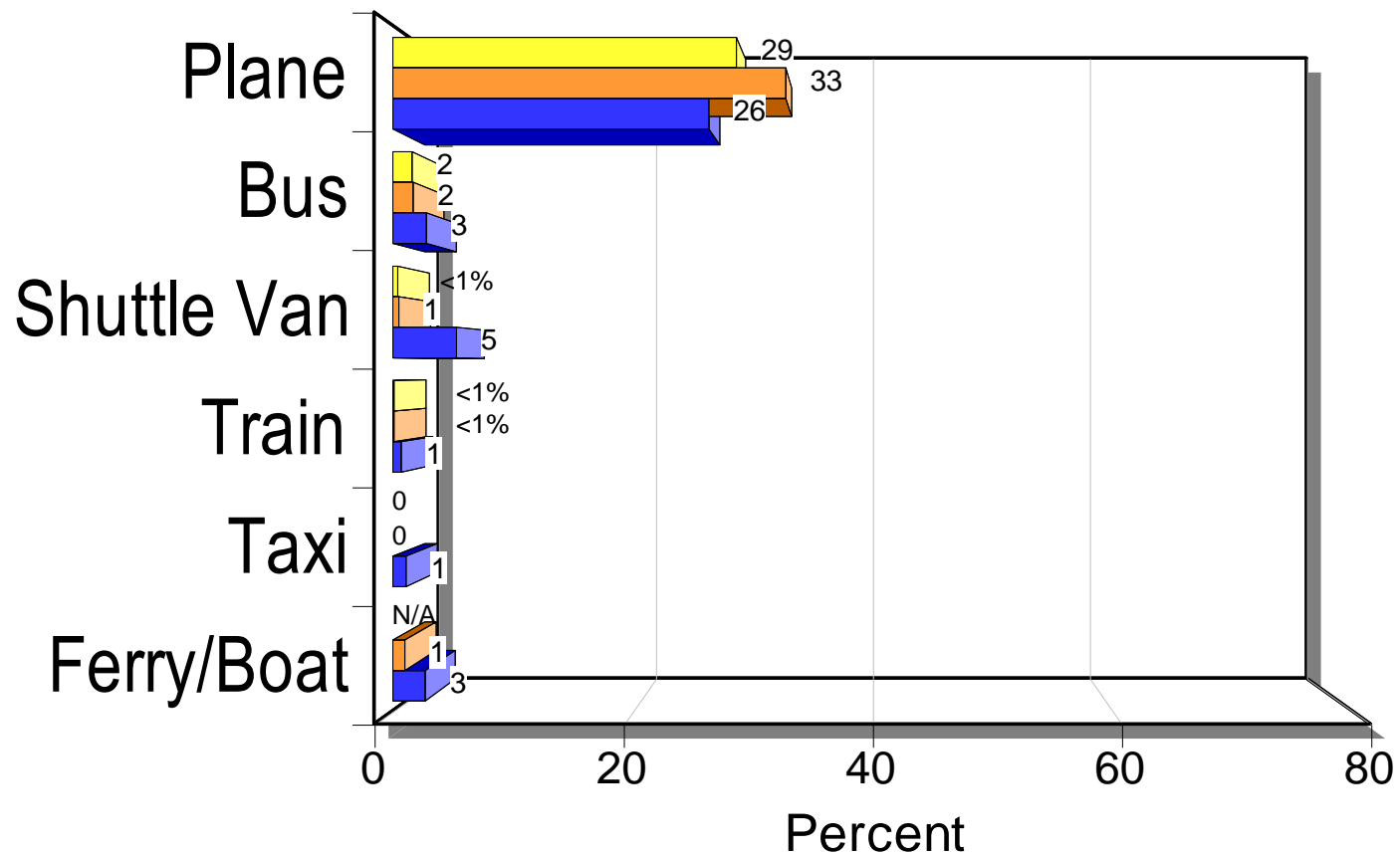
Base: Overnight Pleasure Trips



# Transportation Used to Enter Colorado – Commercial



Base: Overnight Pleasure Trips

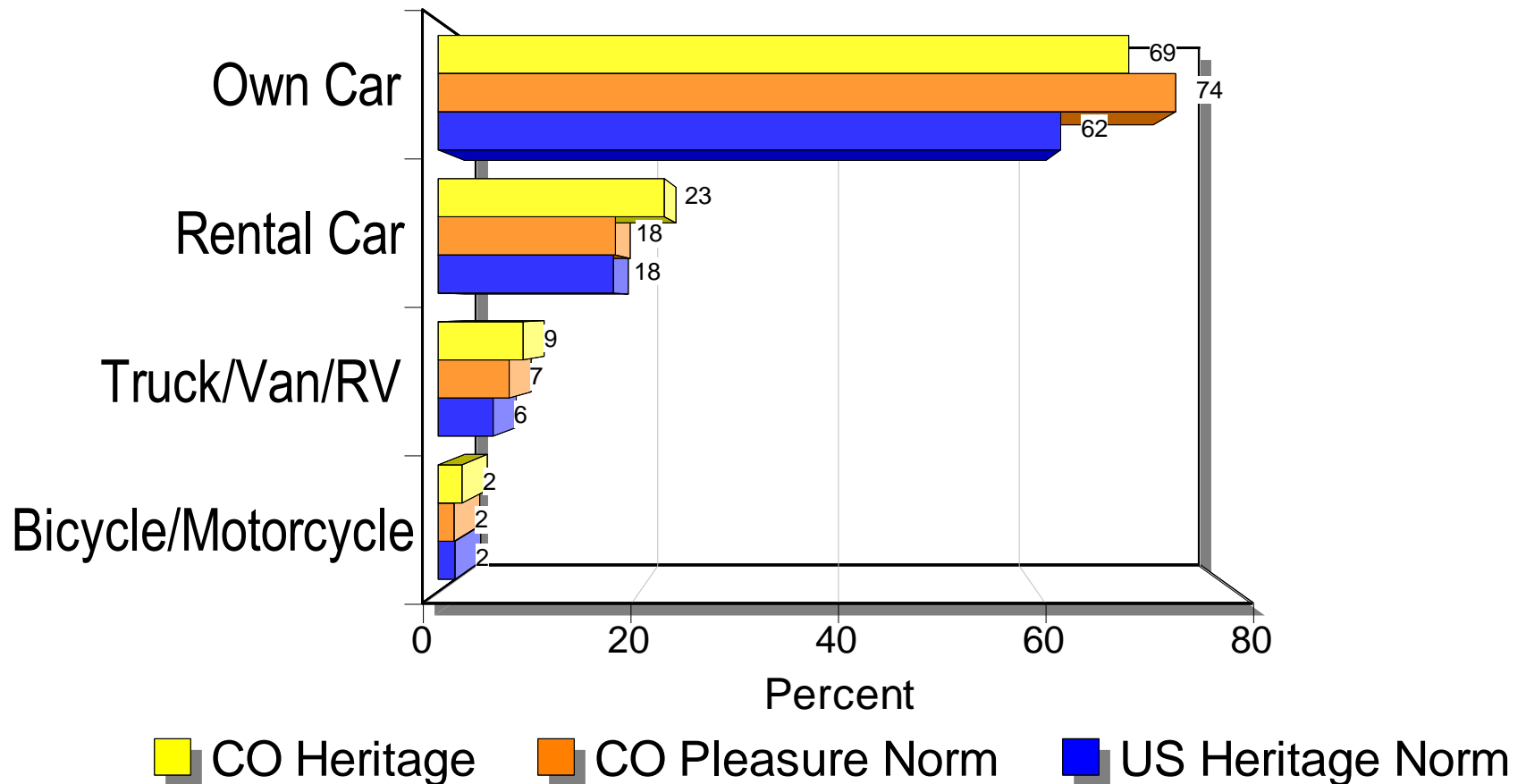


CO Heritage
  CO Pleasure Norm
  US Heritage Norm

# Transportation Used In Colorado — Personal



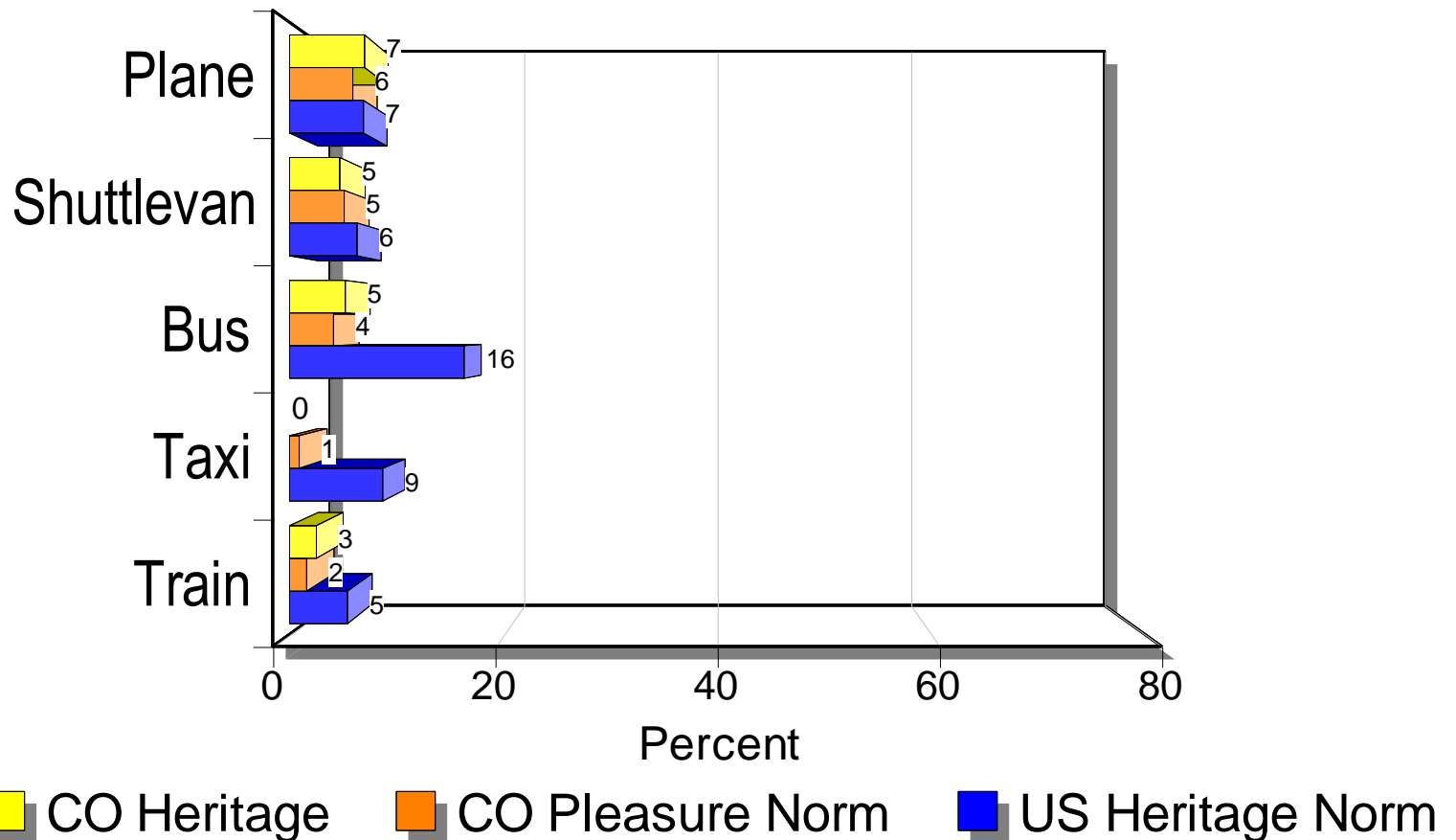
Base: Overnight Pleasure Trips



# Transportation Used In Colorado – Commercial



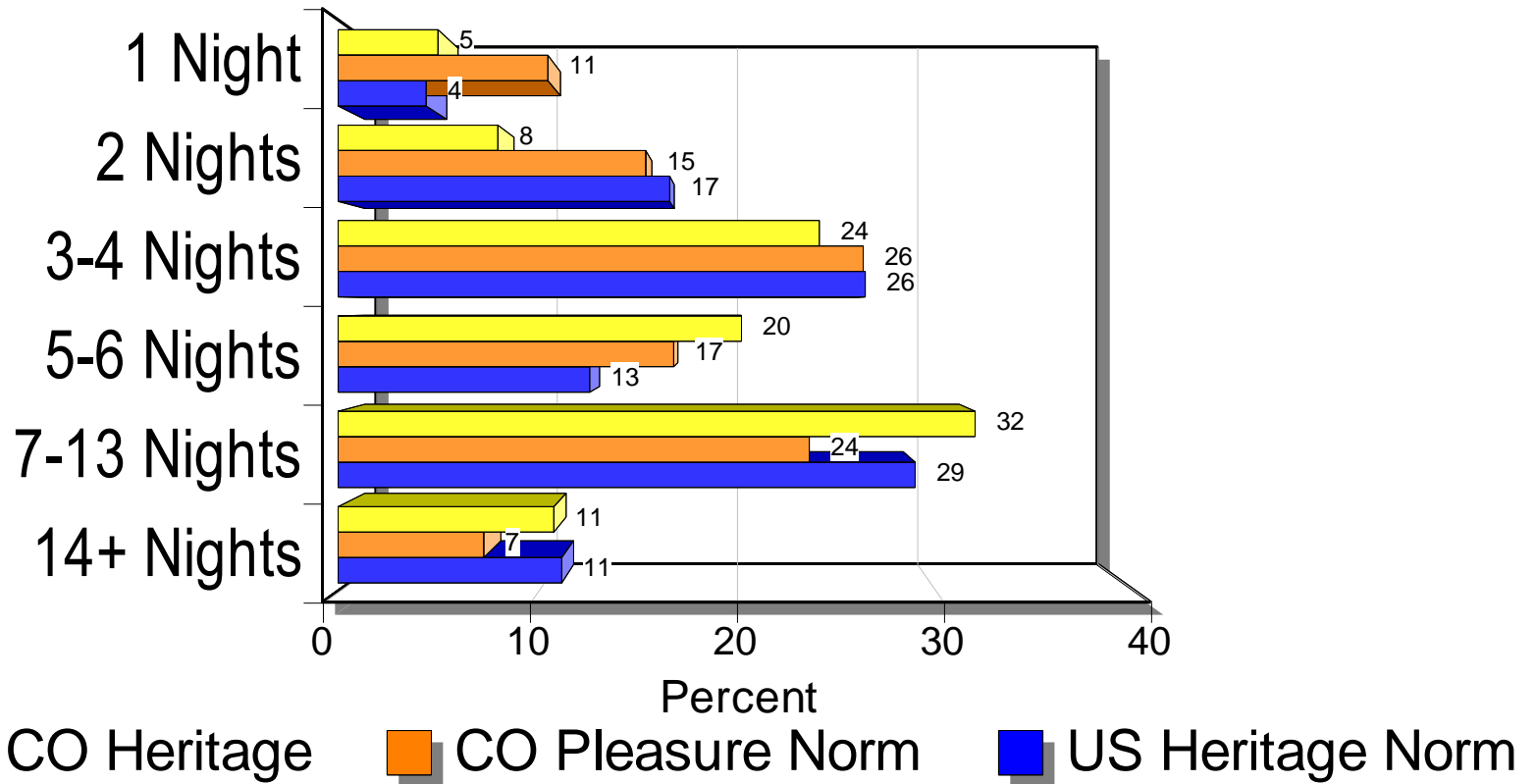
Base: Overnight Pleasure Trips



# Total Nights Away



Base: Overnight Pleasure Trips

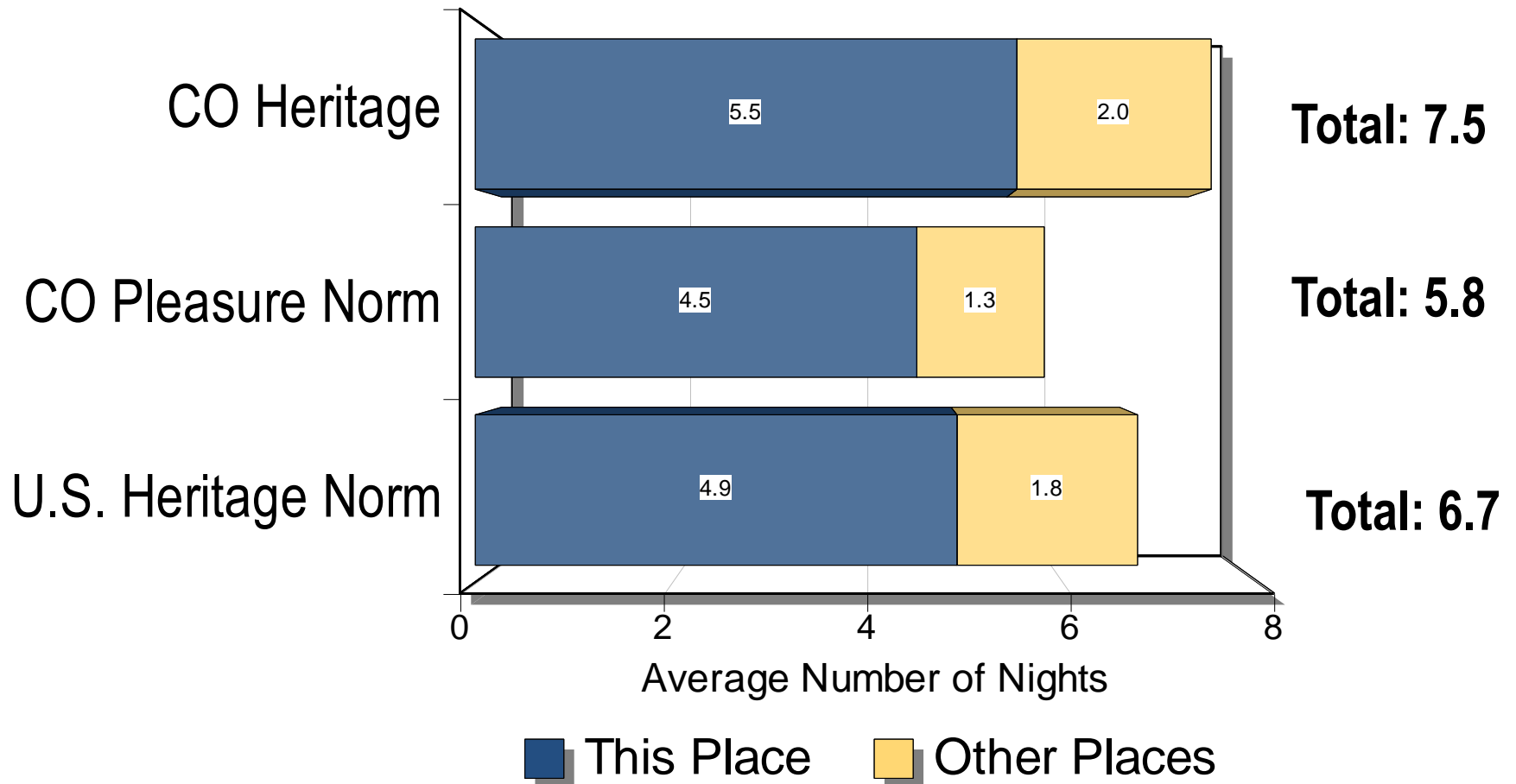


	<u>CO Heritage</u>	<u>CO Pleasure Norm</u>	<u>U.S. Heritage Norm</u>
Average Number of Nights Away	7.5	5.8	6.8

# Length of Stay



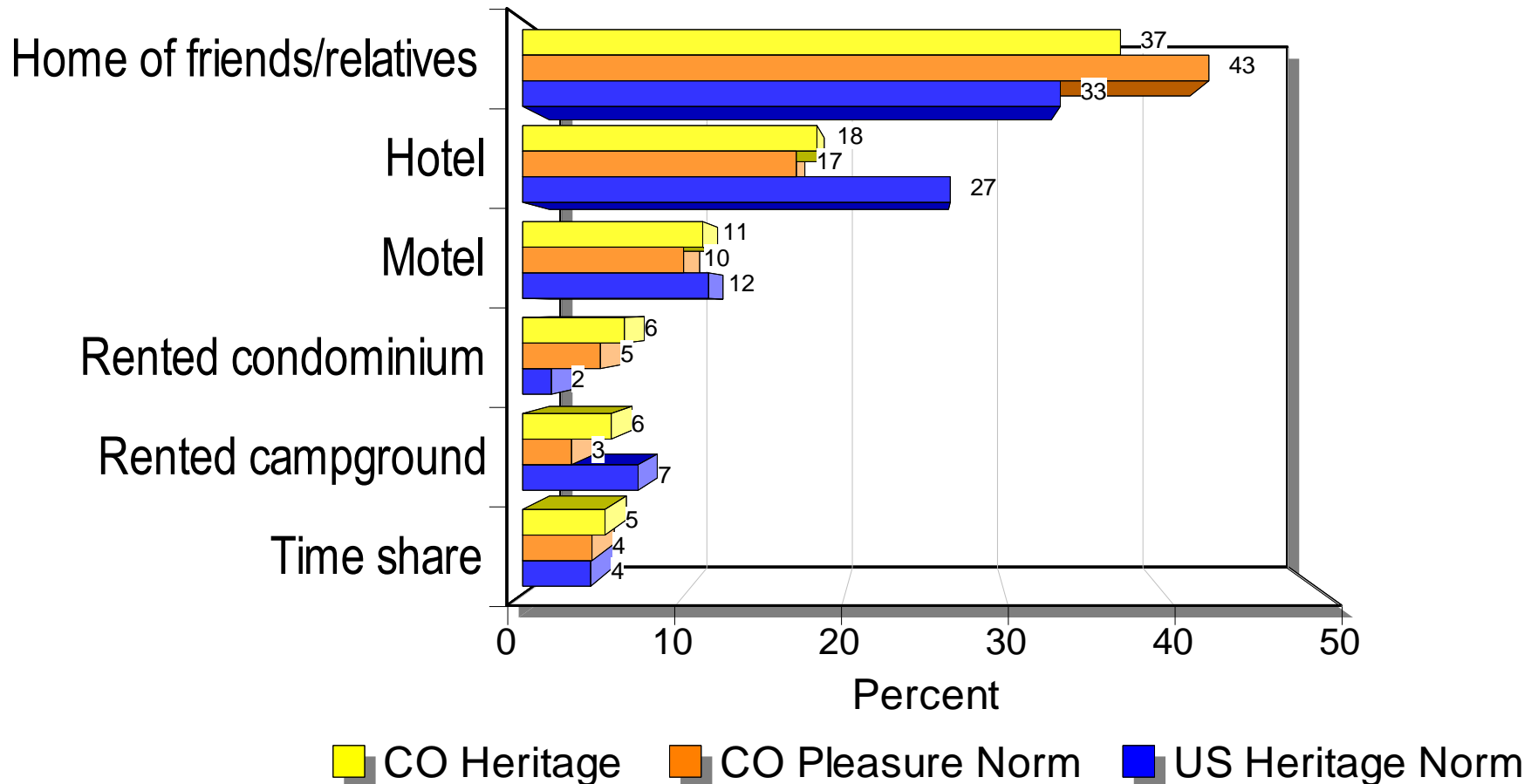
Base: Overnight Pleasure Trips



# Accommodations\*



Base: Overnight Pleasure Trips



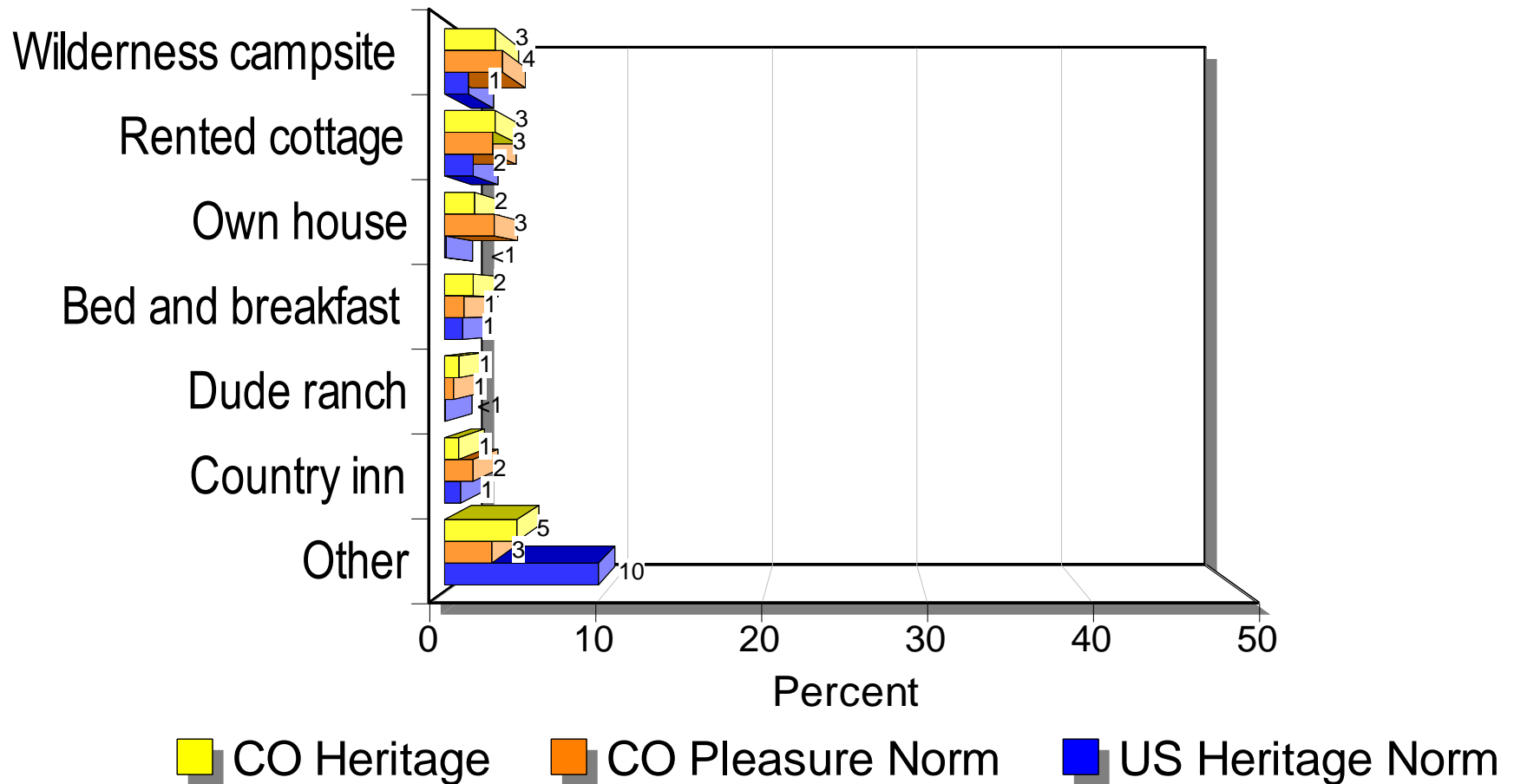
\* Percent of trip nights spent in each type of accommodation



# Accommodations\* (Cont'd)



Base: Overnight Pleasure Trips

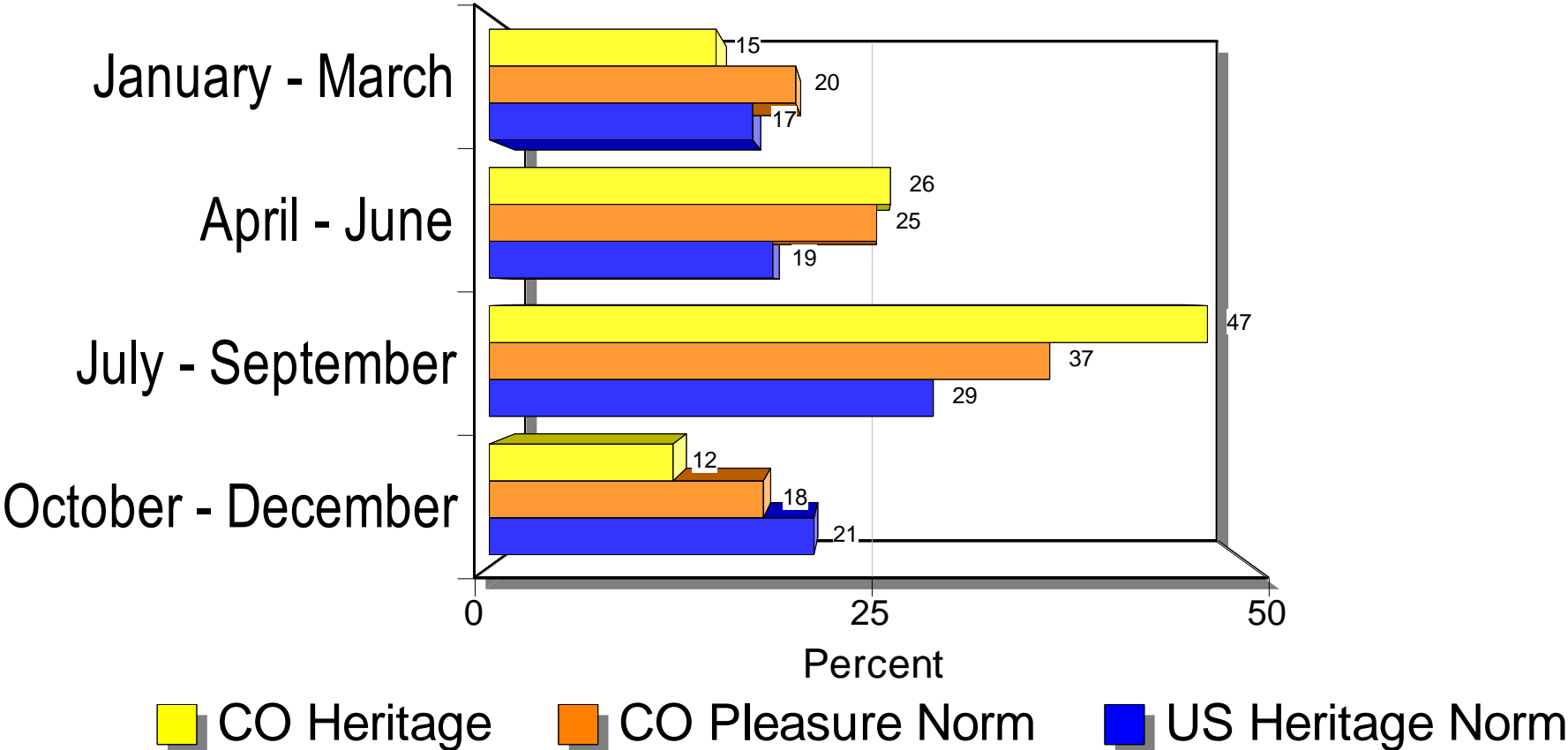


\* Percent of trip nights spent in each type of accommodation

# Distribution of Trips By Quarter



Base: Overnight Pleasure Trips

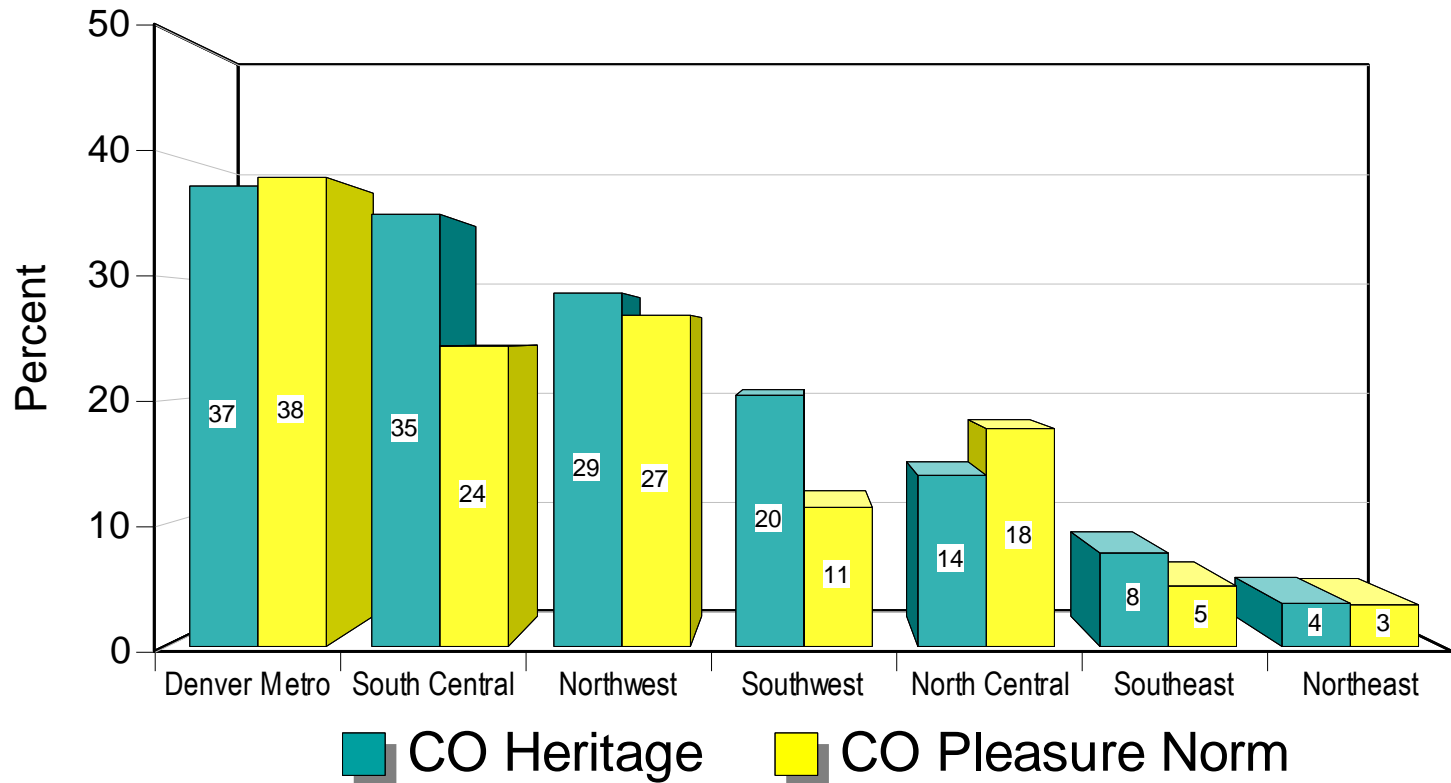


# Heritage Trip Experiences

# Stayed Overnight in Each Region



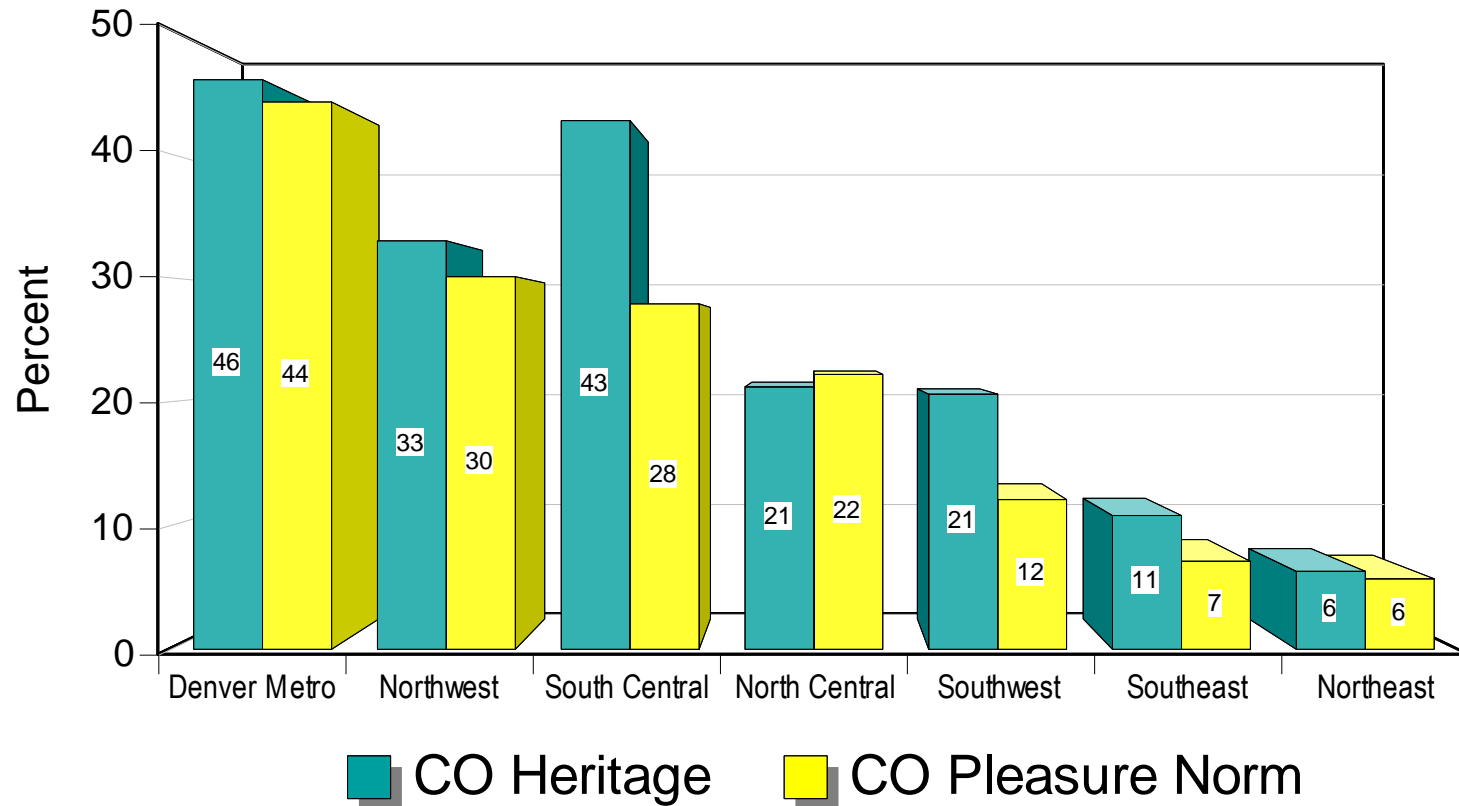
Base: Overnight Pleasure Trips



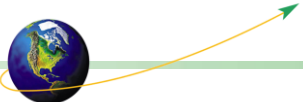
# Spent Time in Each Region



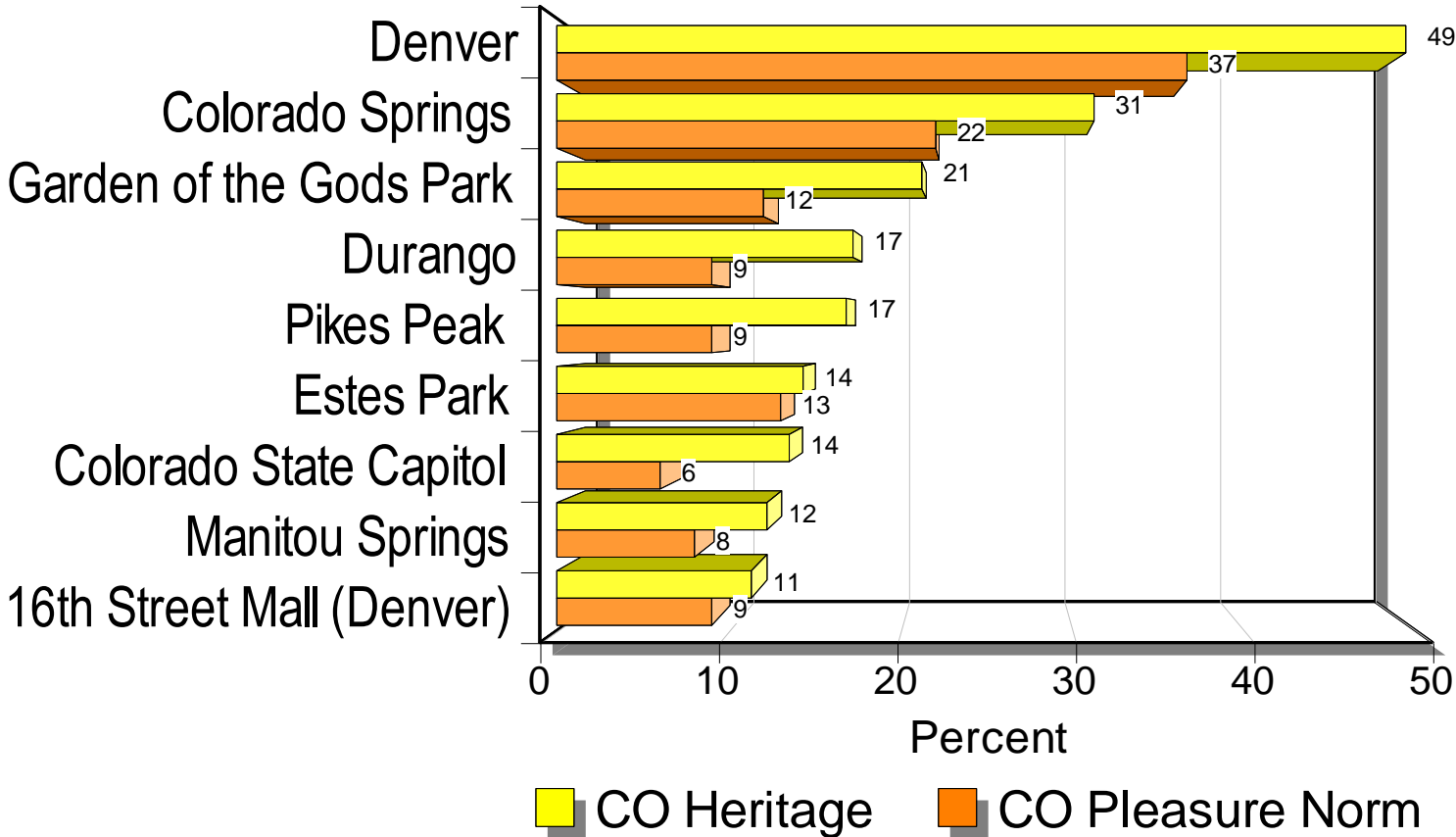
Base: Overnight Pleasure Trips



# Most Popular Colorado Attractions



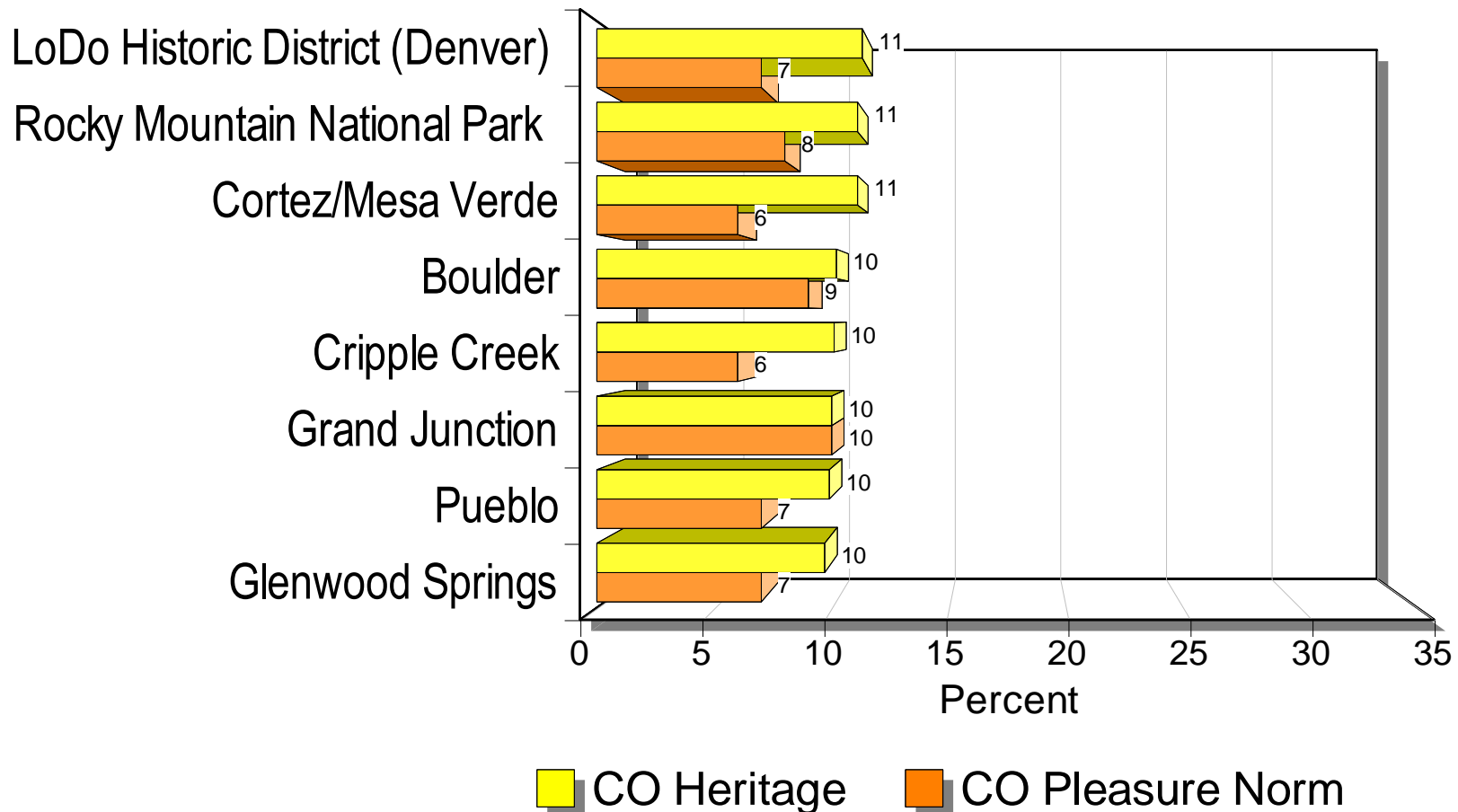
Base: Overnight Pleasure Trips



# Most Popular Colorado Attractions (Cont'd)



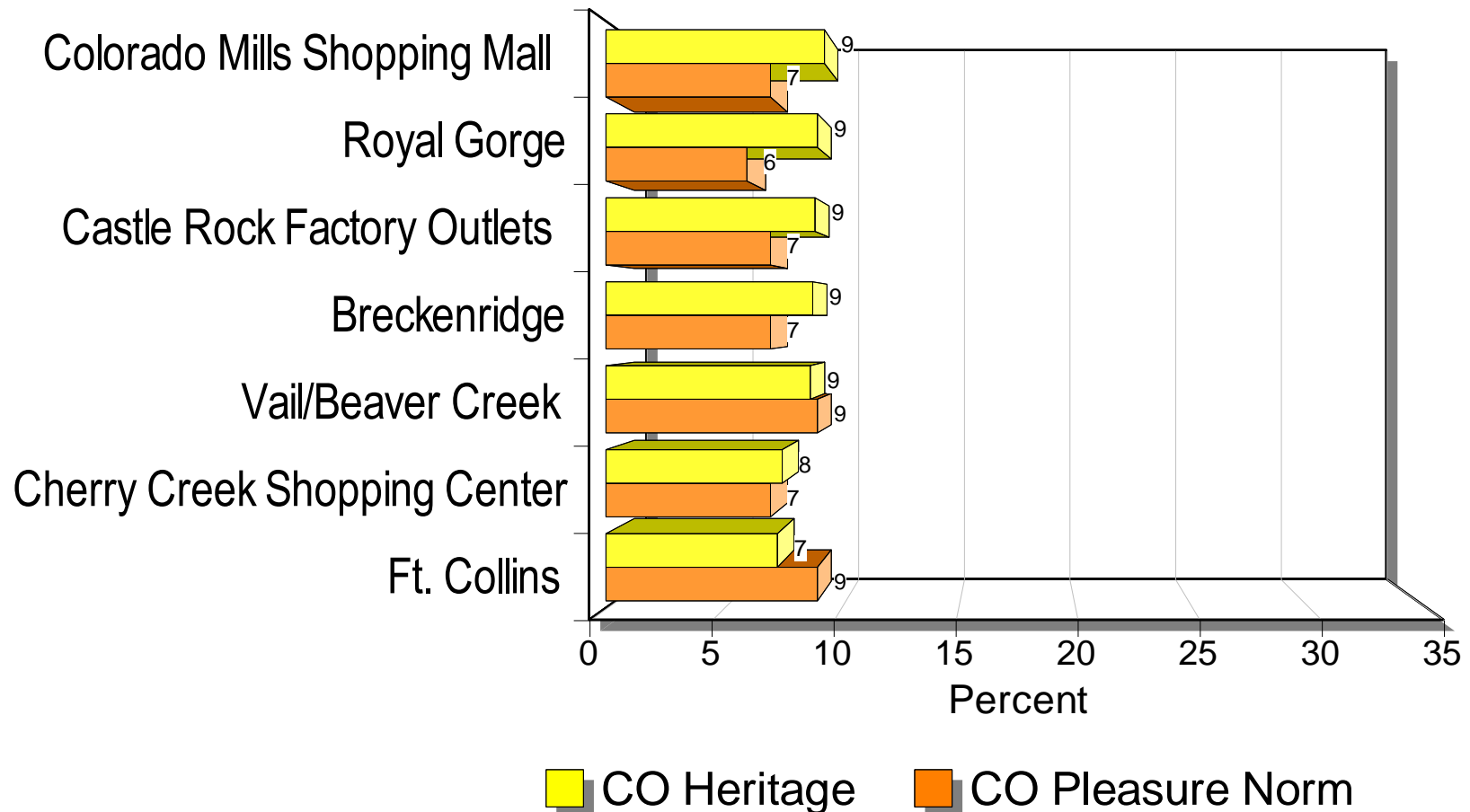
Base: Overnight Pleasure Trips



# Most Popular Colorado Attractions (Cont'd)



Base: Overnight Pleasure Trips

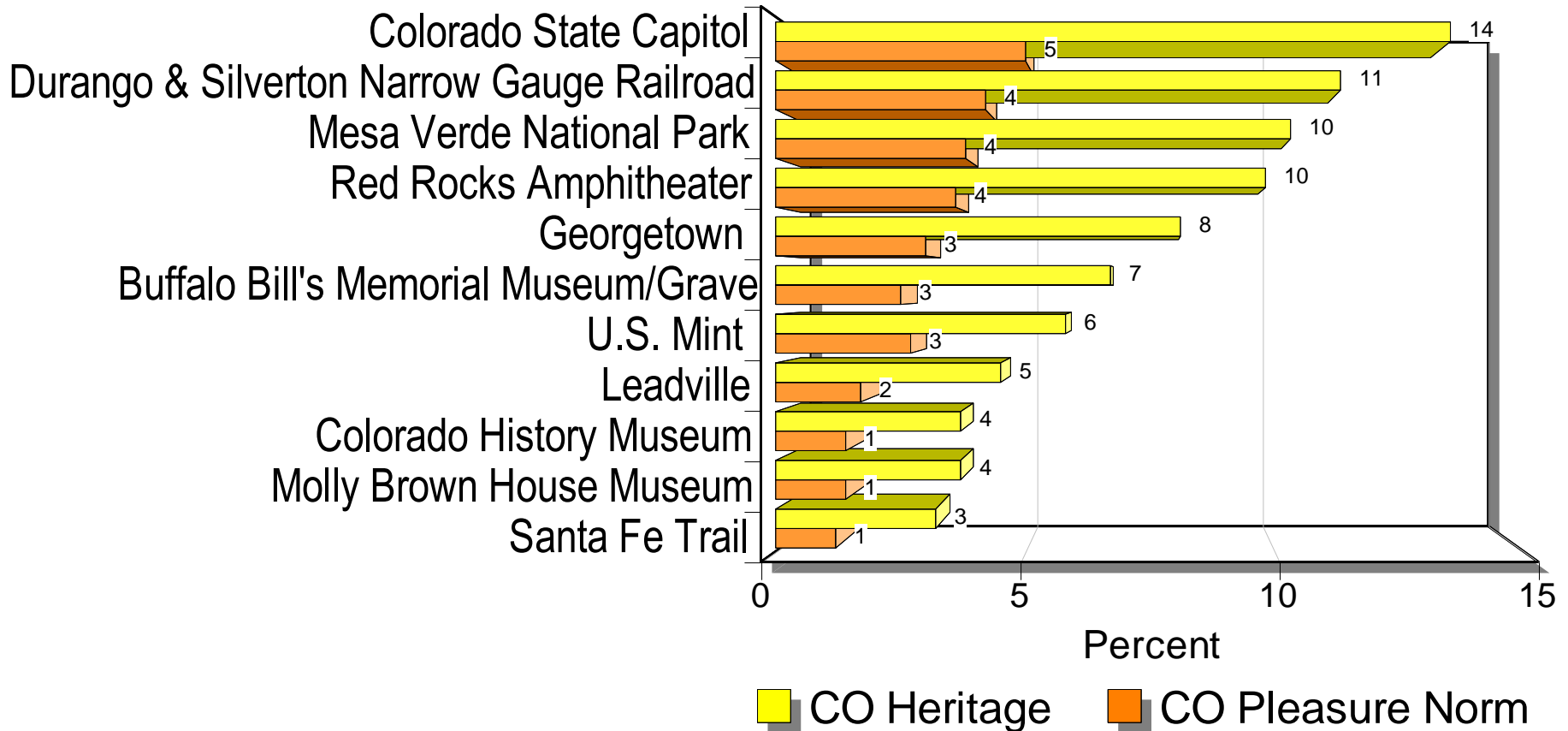




# Most Popular Colorado Heritage Attractions



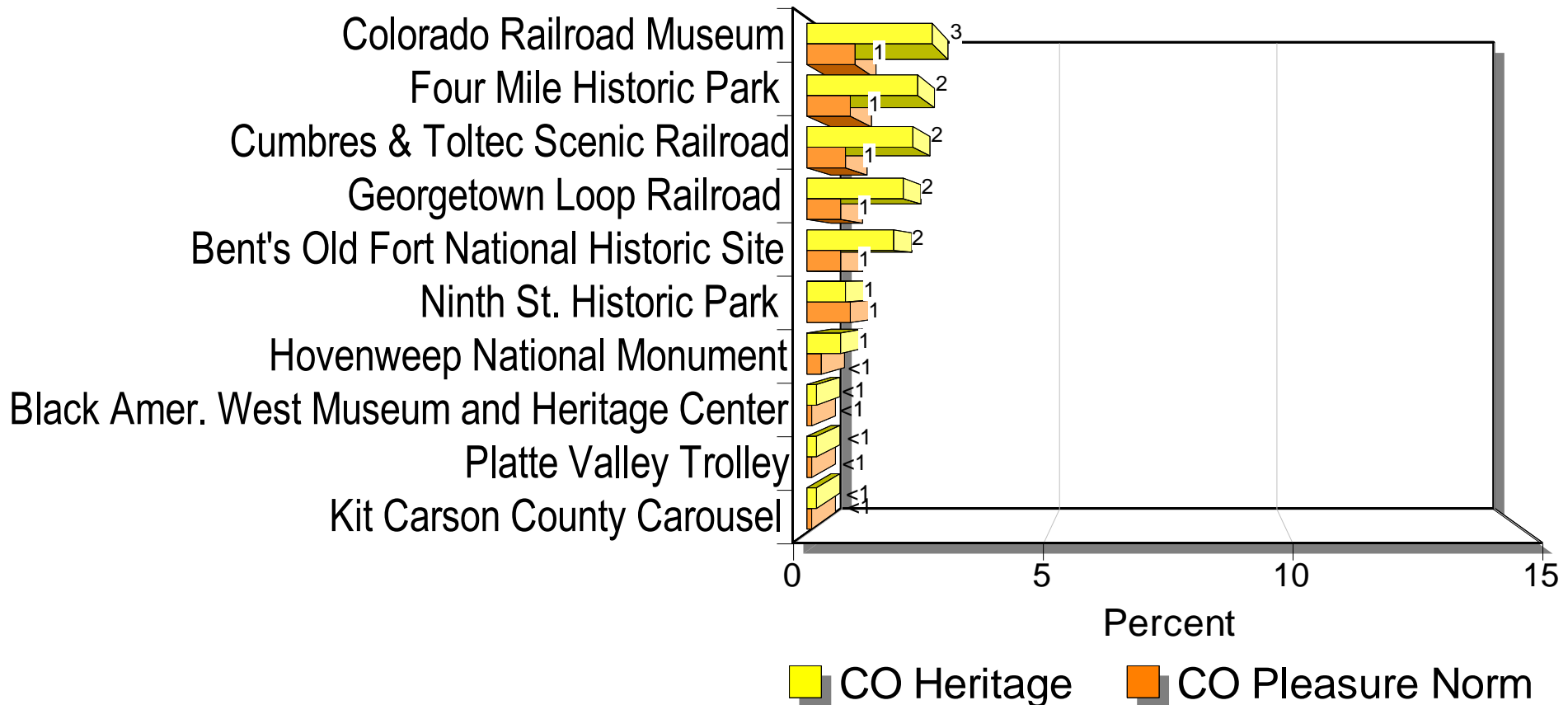
Base: Overnight Pleasure Trips



# Most Popular Colorado Heritage Attractions (Cont'd)



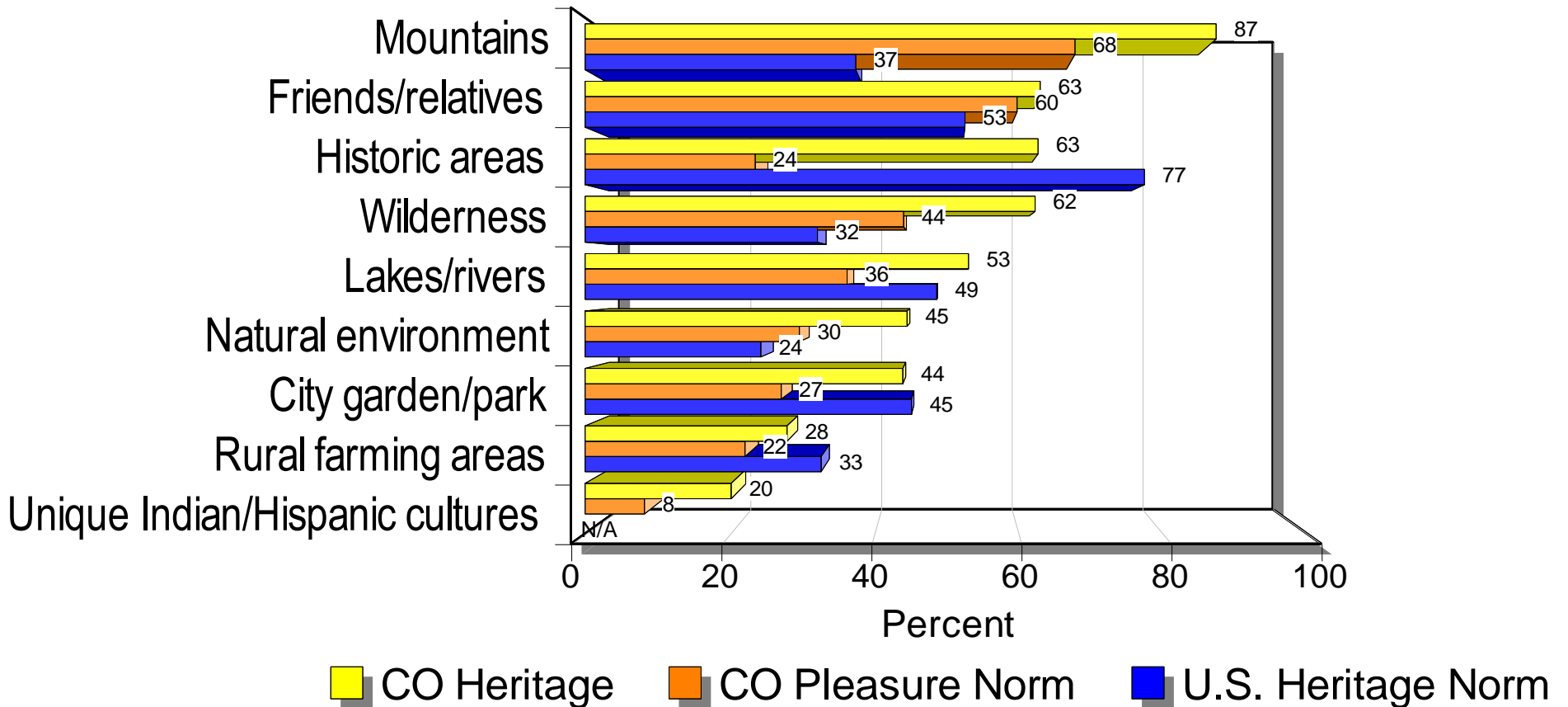
Base: Overnight Pleasure Trips



# Things Experienced on Trip



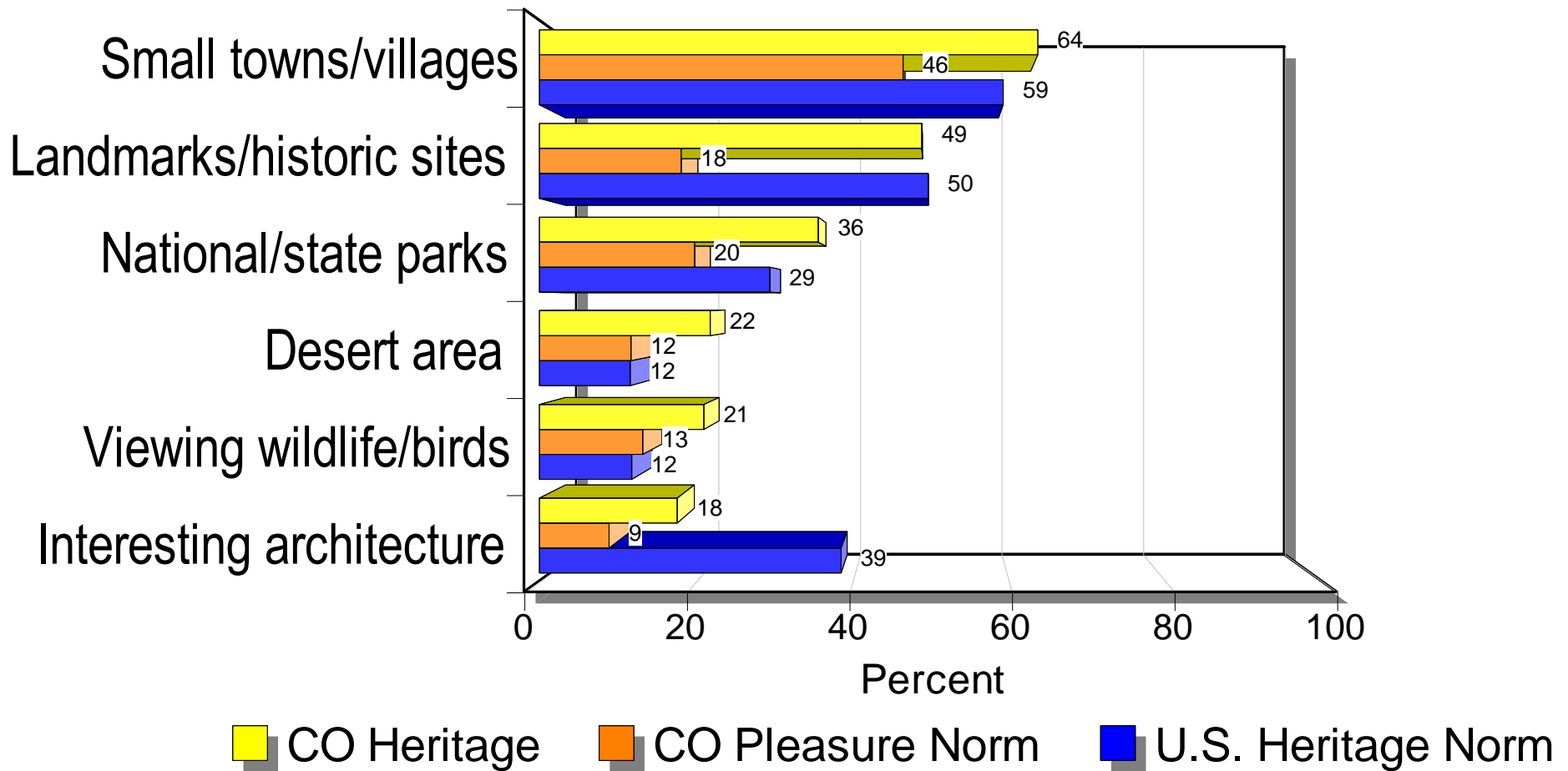
Base: Overnight Pleasure Trips



# Sightseeing



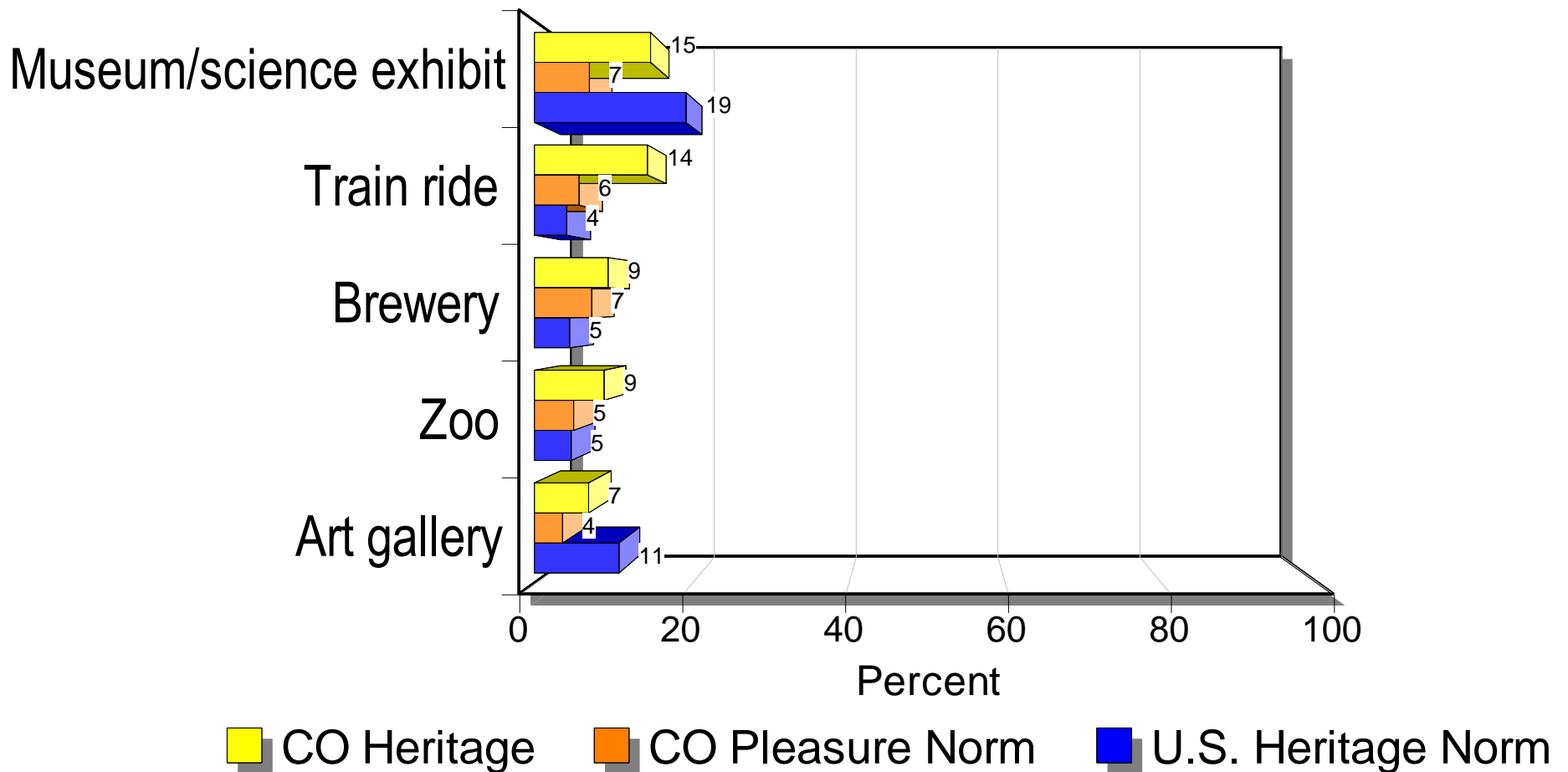
Base: Overnight Pleasure Trips



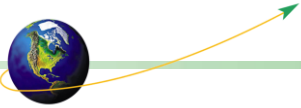
# Sightseeing (Cont'd)



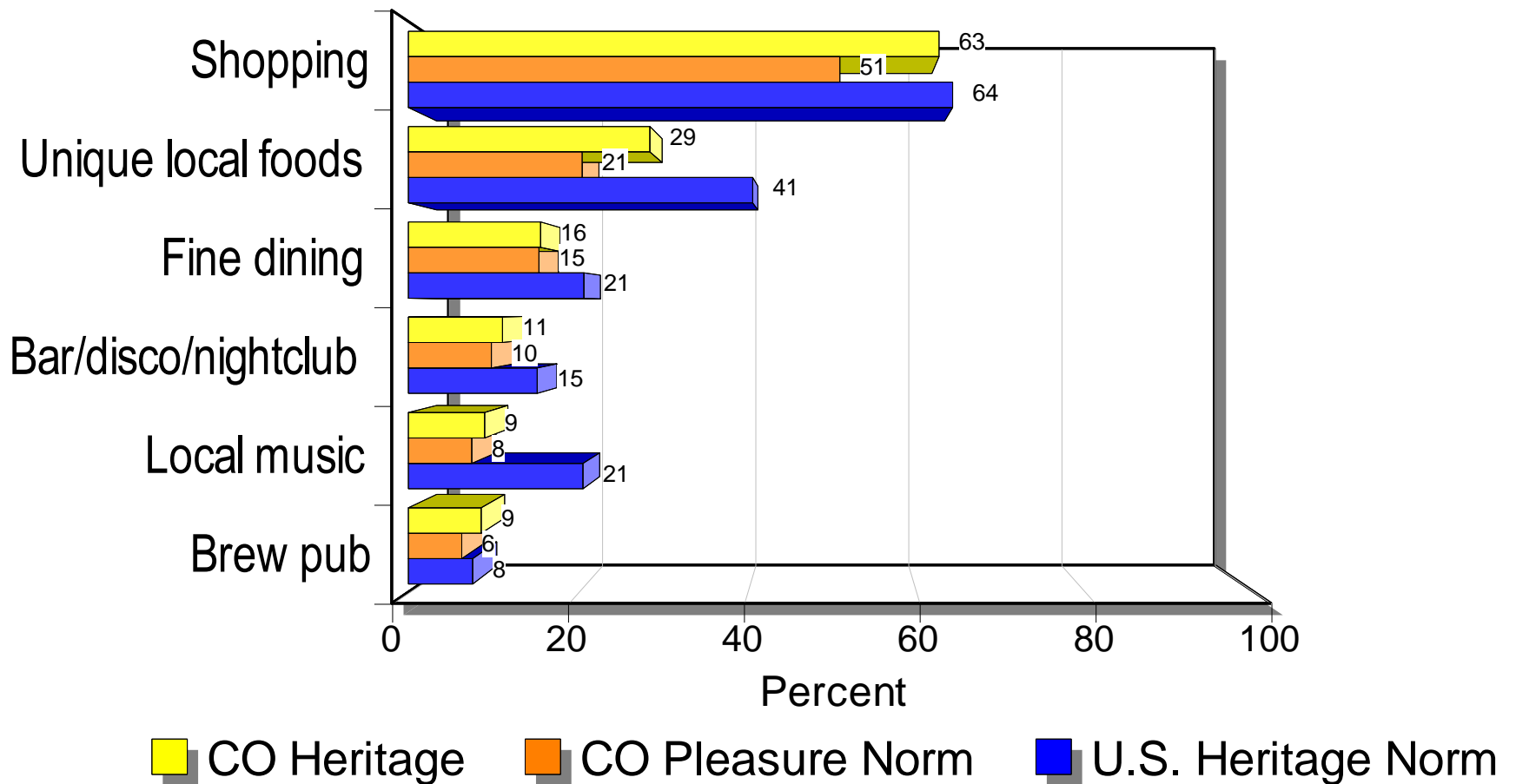
Base: Overnight Pleasure Trips



# Entertainment



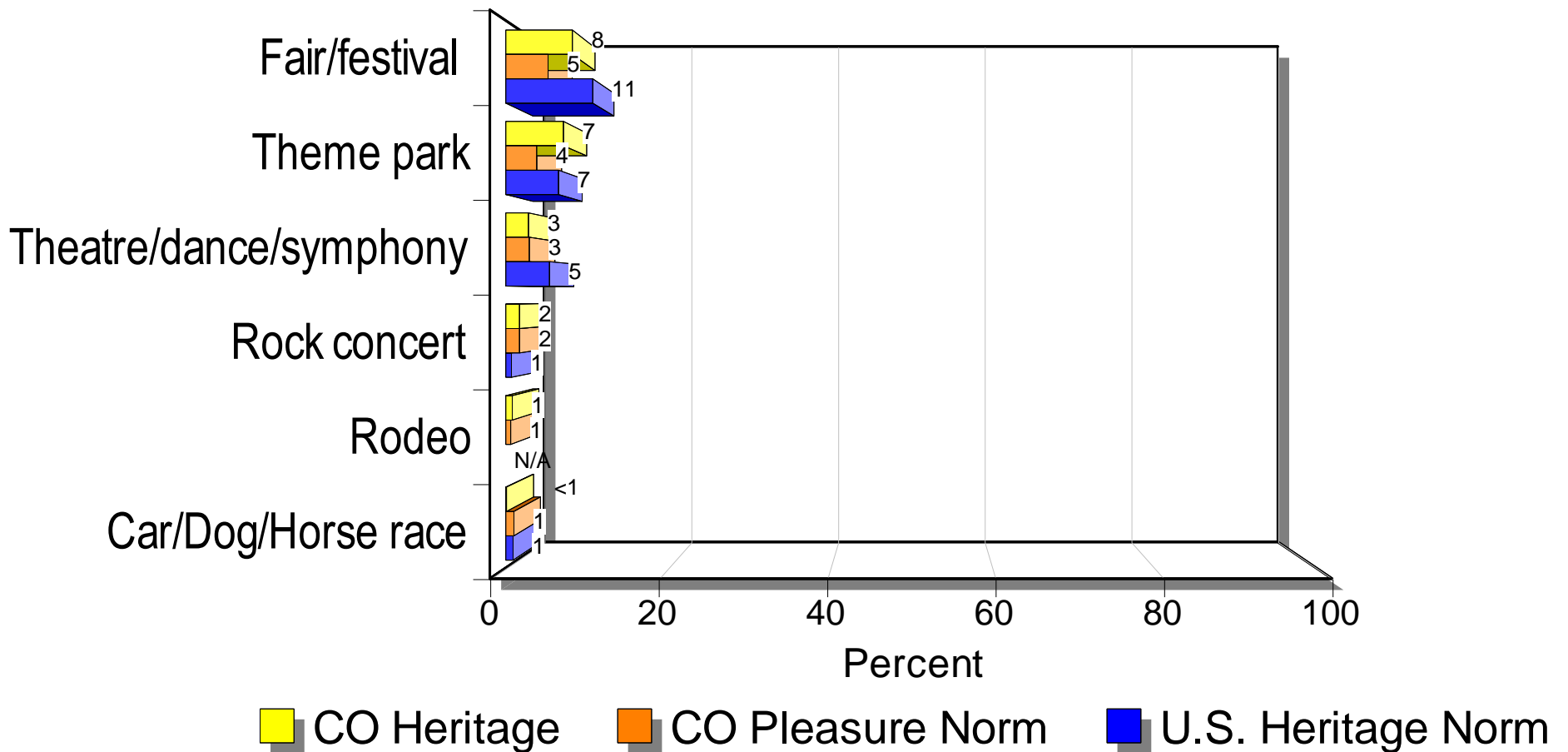
Base: Overnight Pleasure Trips



# Entertainment (Cont'd)



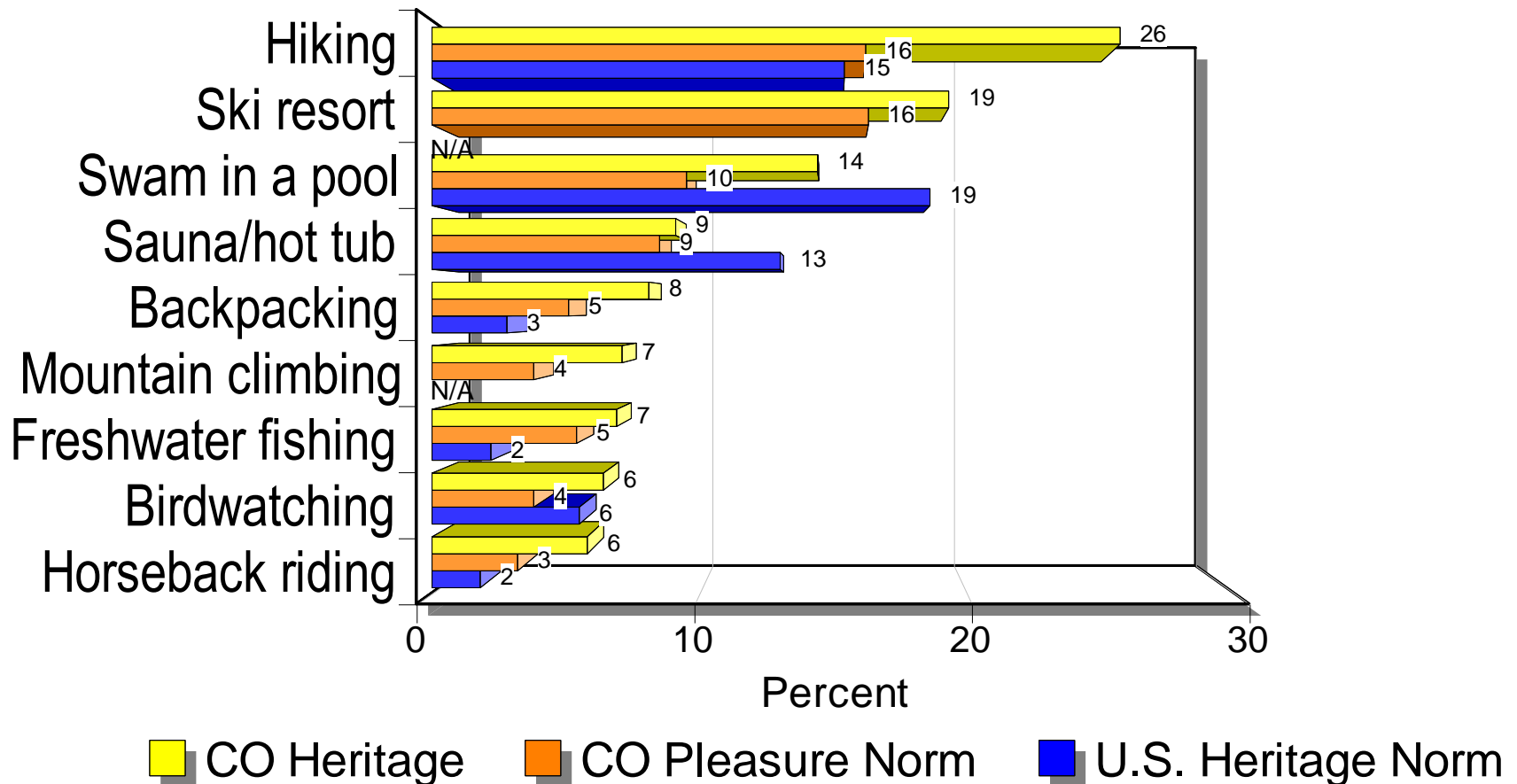
Base: Overnight Pleasure Trips



# Sports and Recreation



Base: Overnight Pleasure Trips

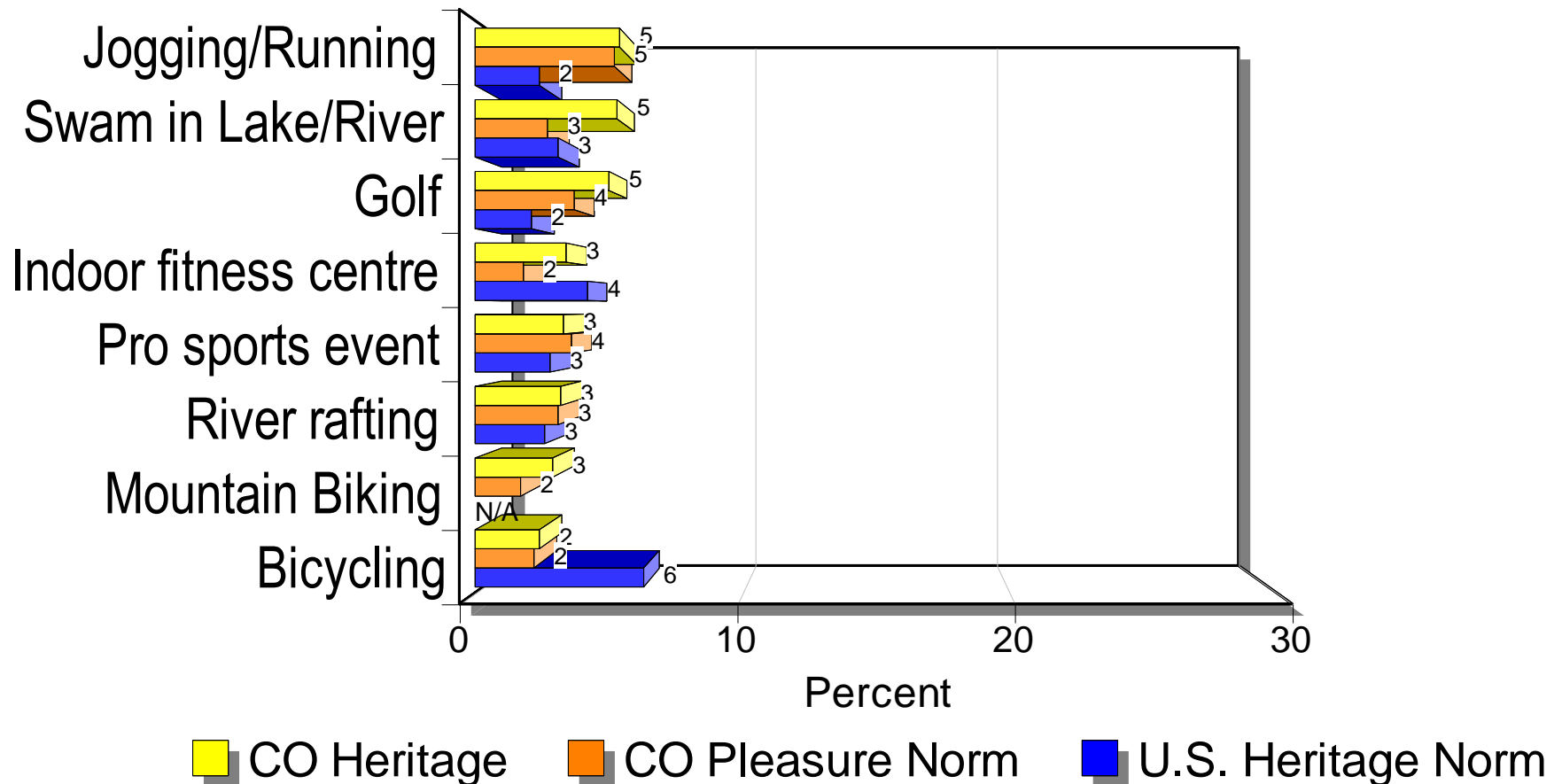




# Sports and Recreation (Cont'd)

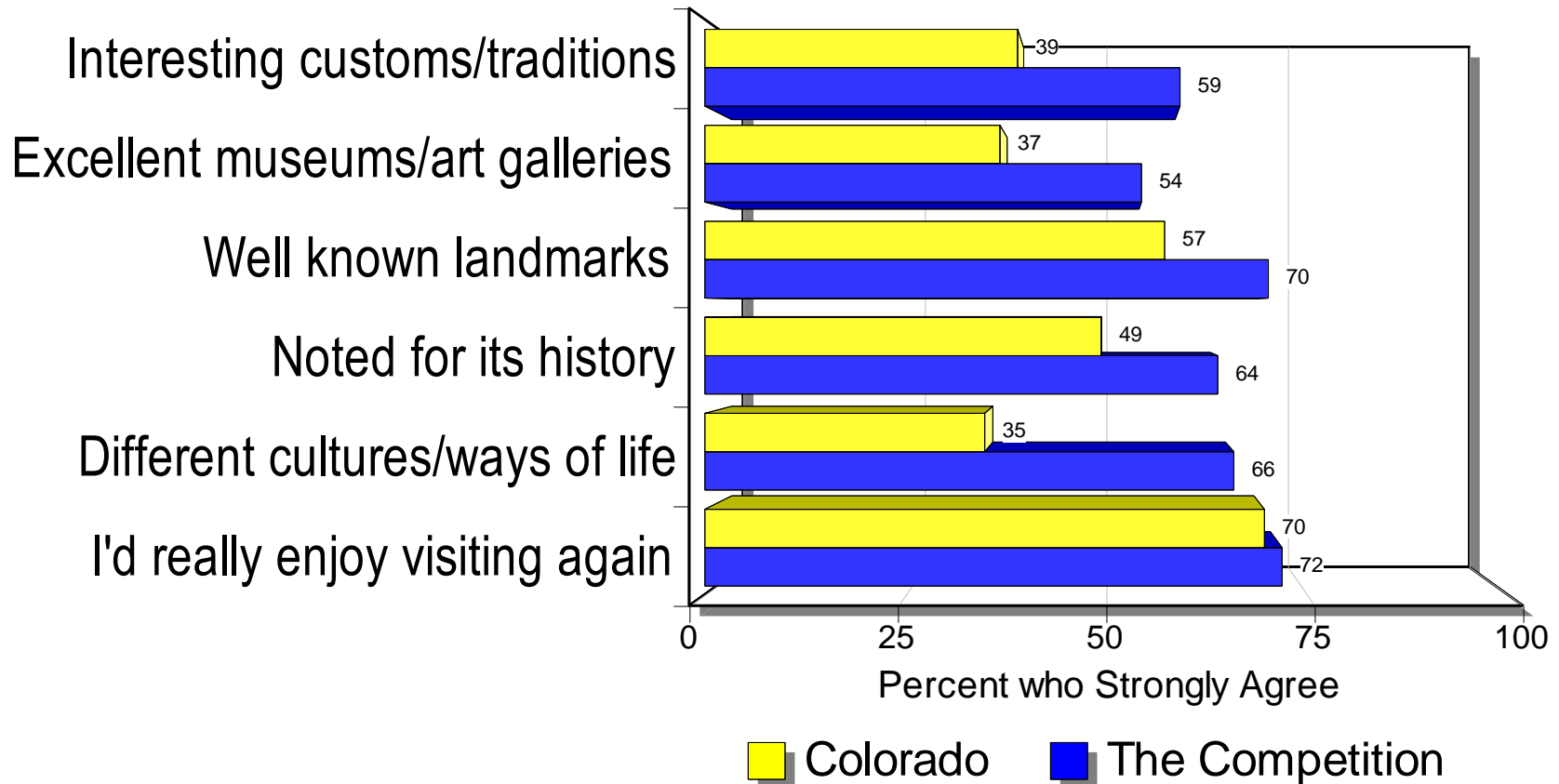


Base: Overnight Pleasure Trips



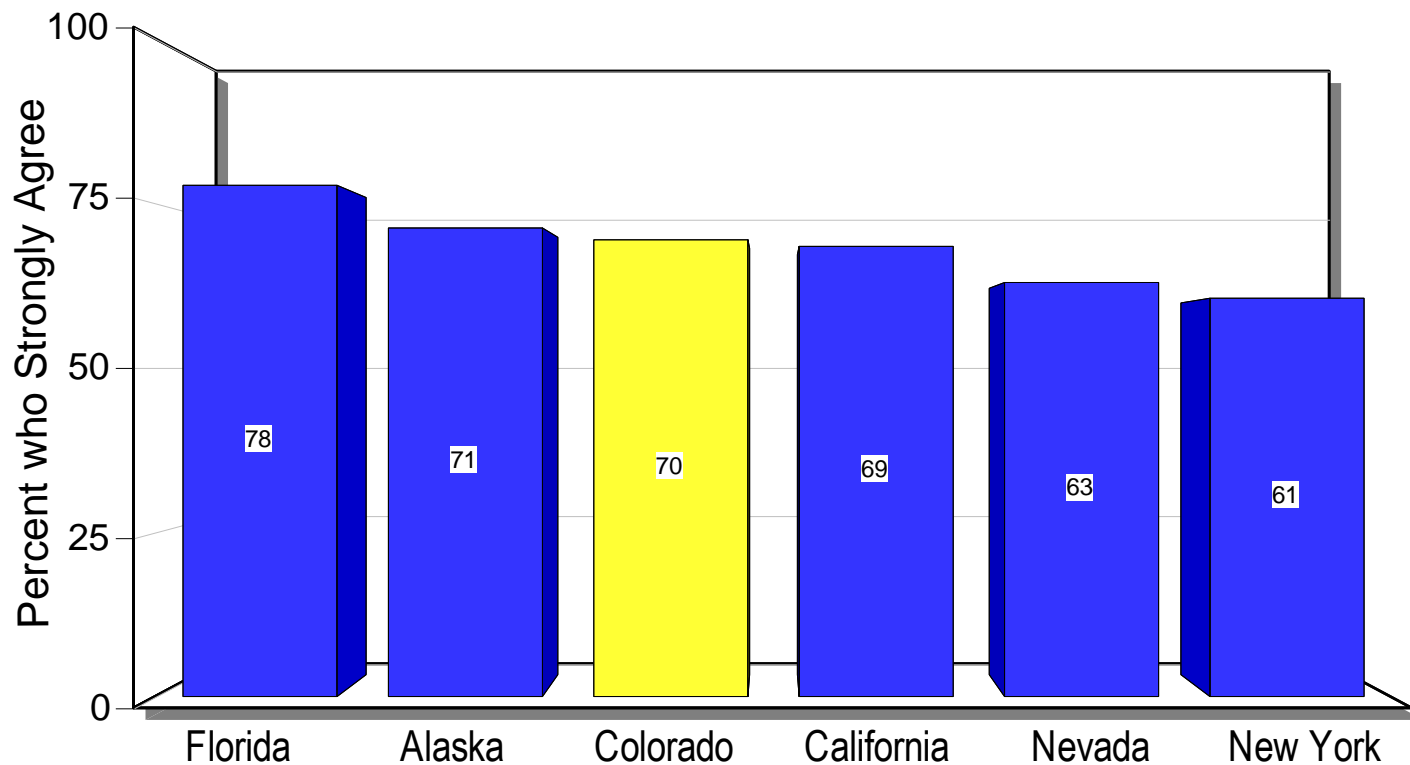
# Colorado's Heritage Tourism Image

# Colorado's Image vs. The Competition\* On Heritage Attributes

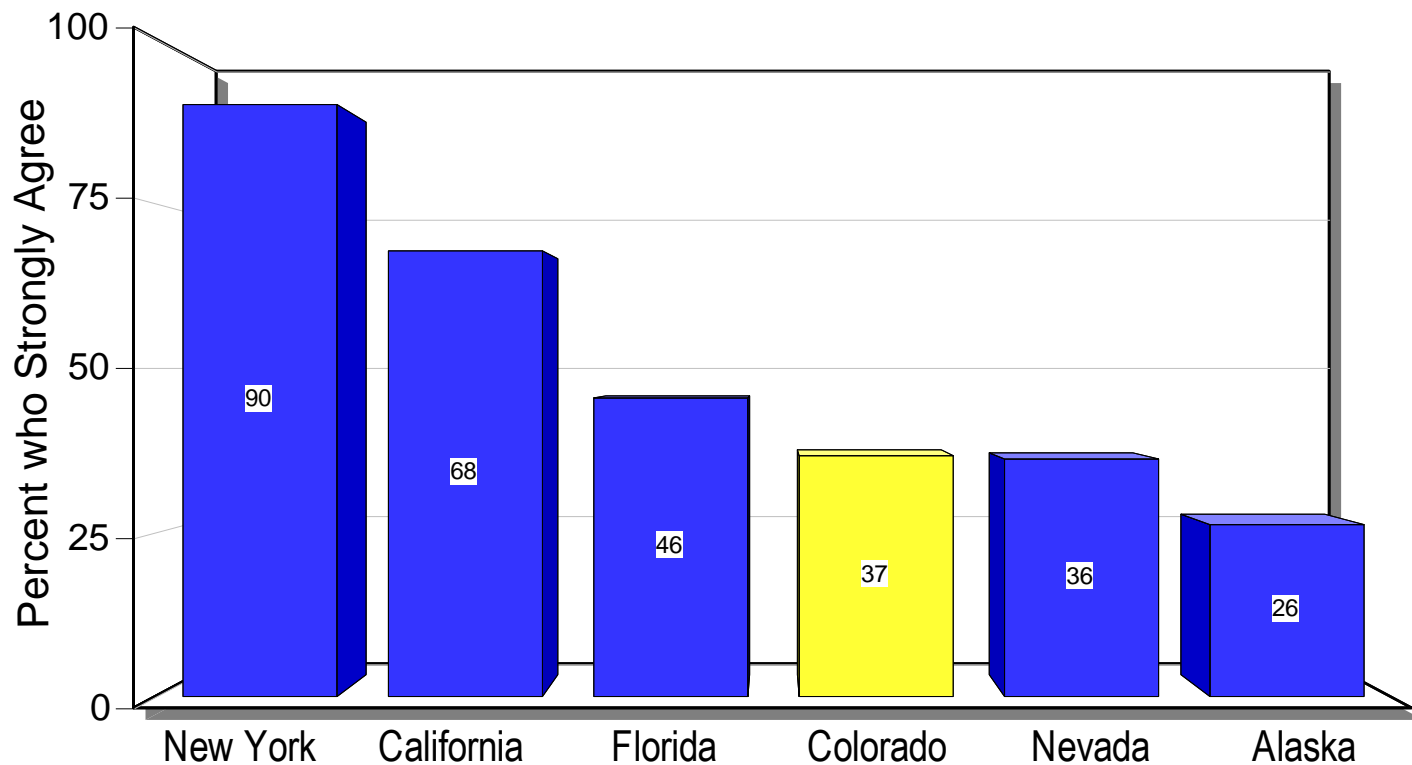


\* California, New York, Florida, Hawaii, Alaska and Nevada

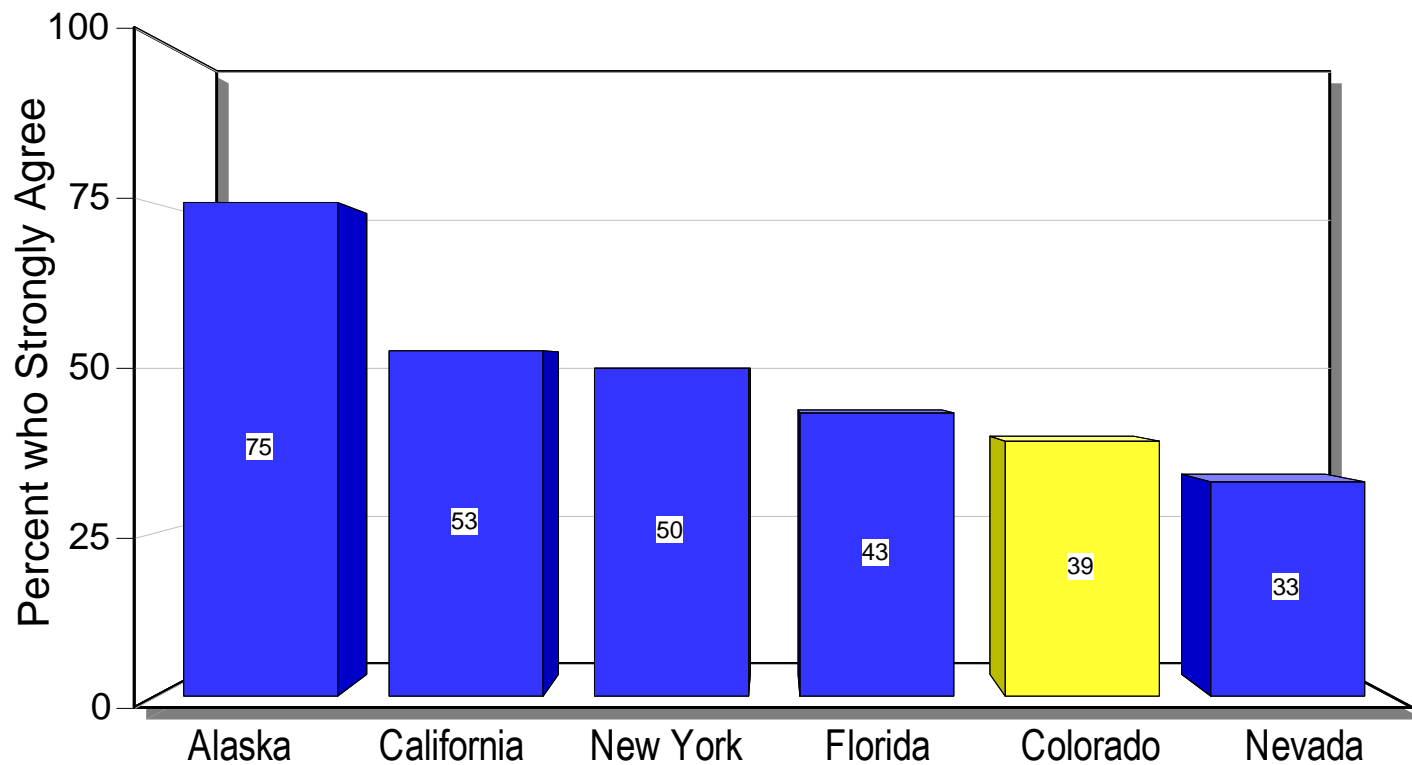
# Colorado's Overall Image – “A Place I Would Really Enjoy Visiting”



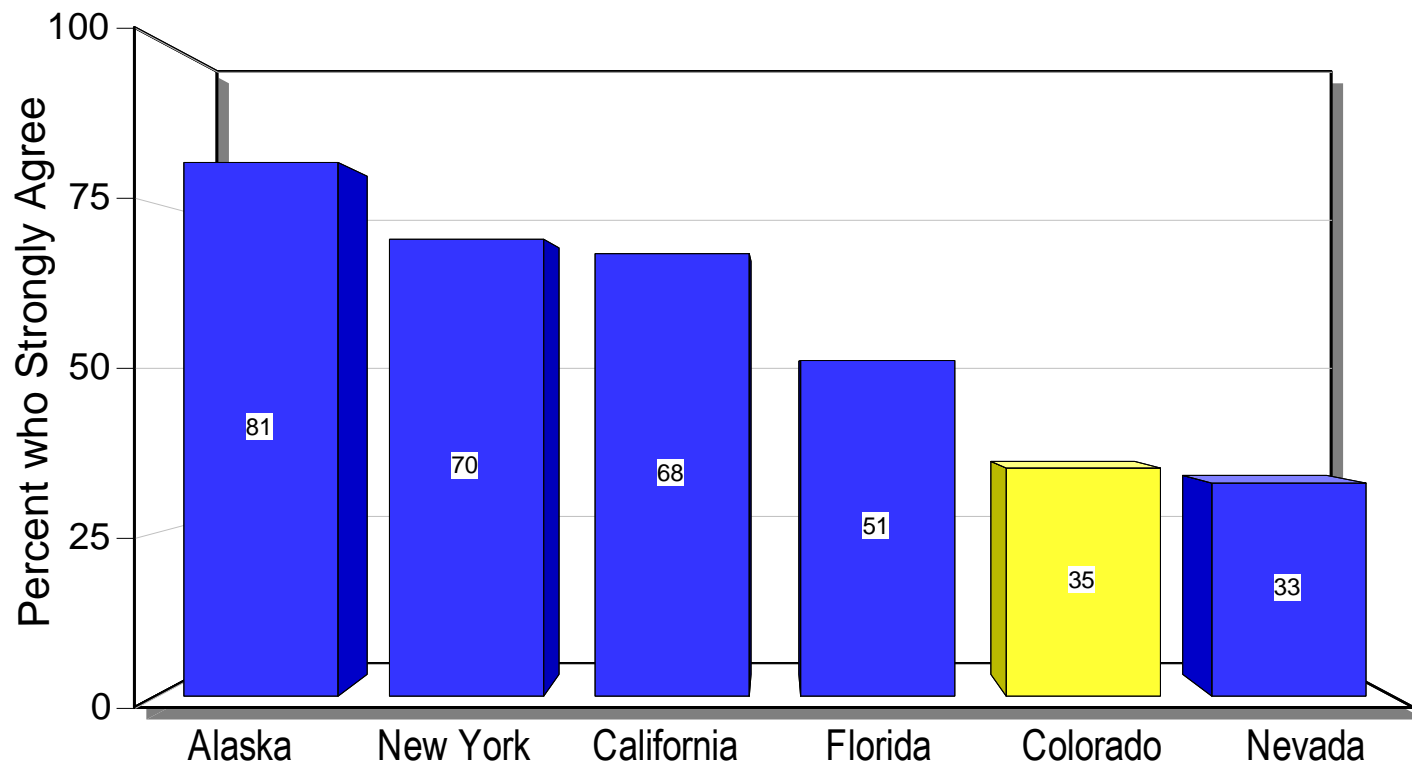
# Colorado's Image – “Excellent Museums/Art Galleries”



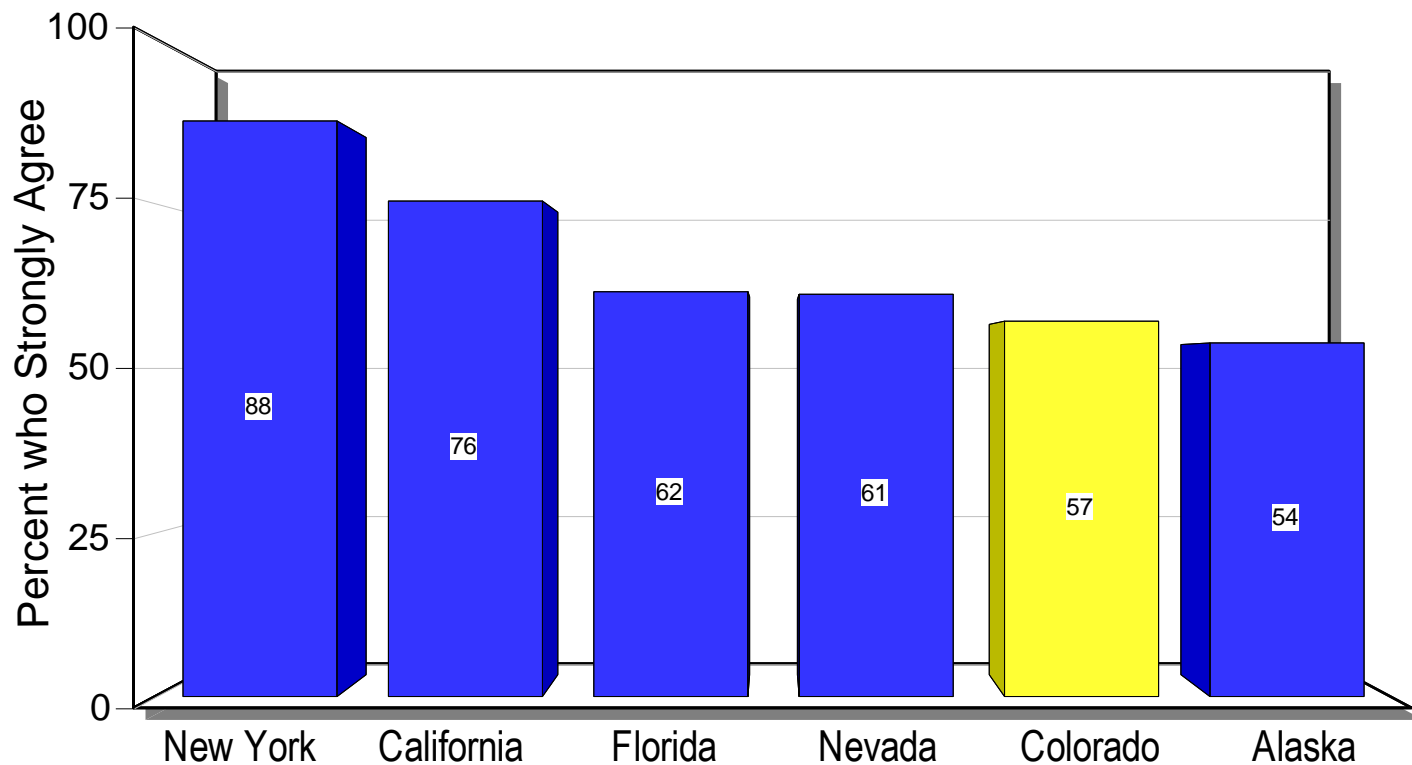
# Colorado's Image – “Interesting Customs/Traditions”



# Colorado's Image – “Different Cultures/Ways of Life”

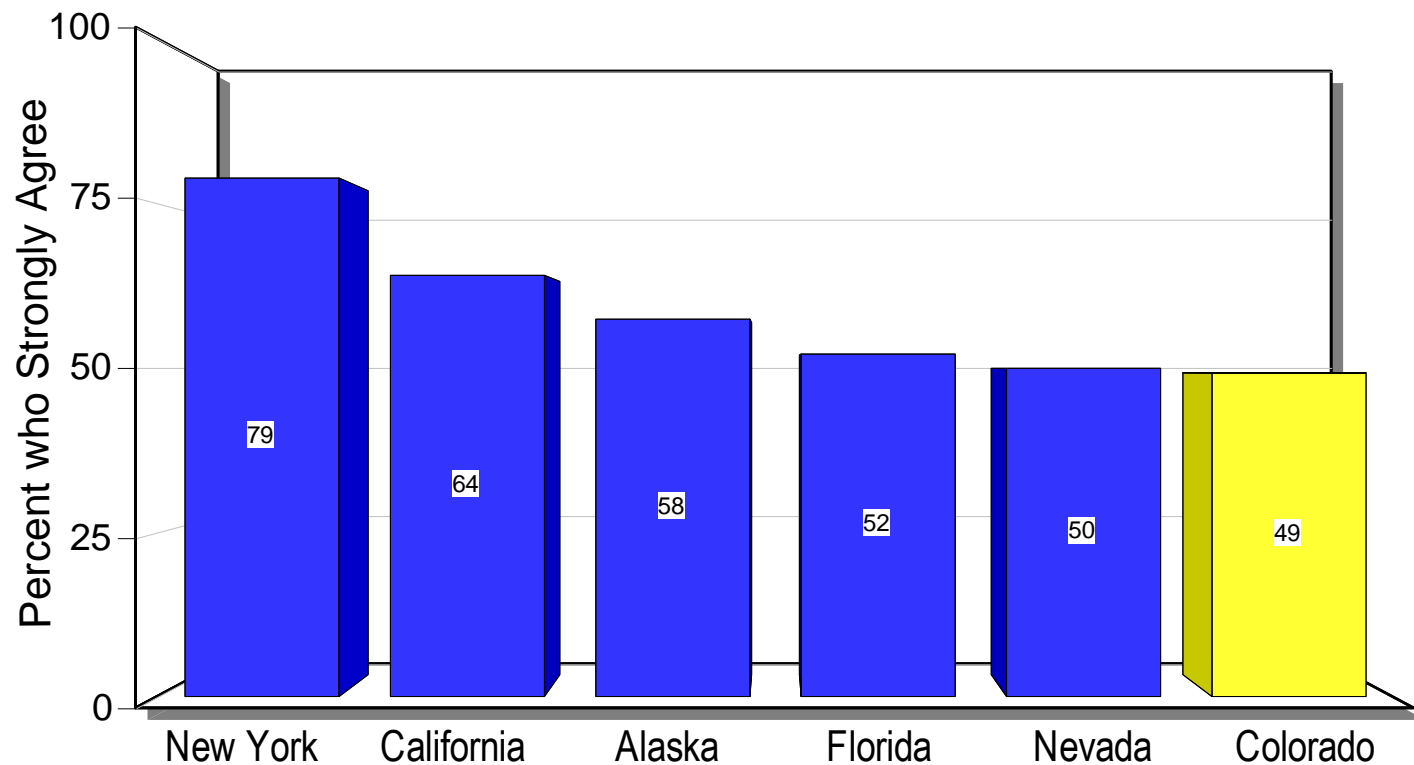


# Colorado's Image – “Well-known Landmarks”

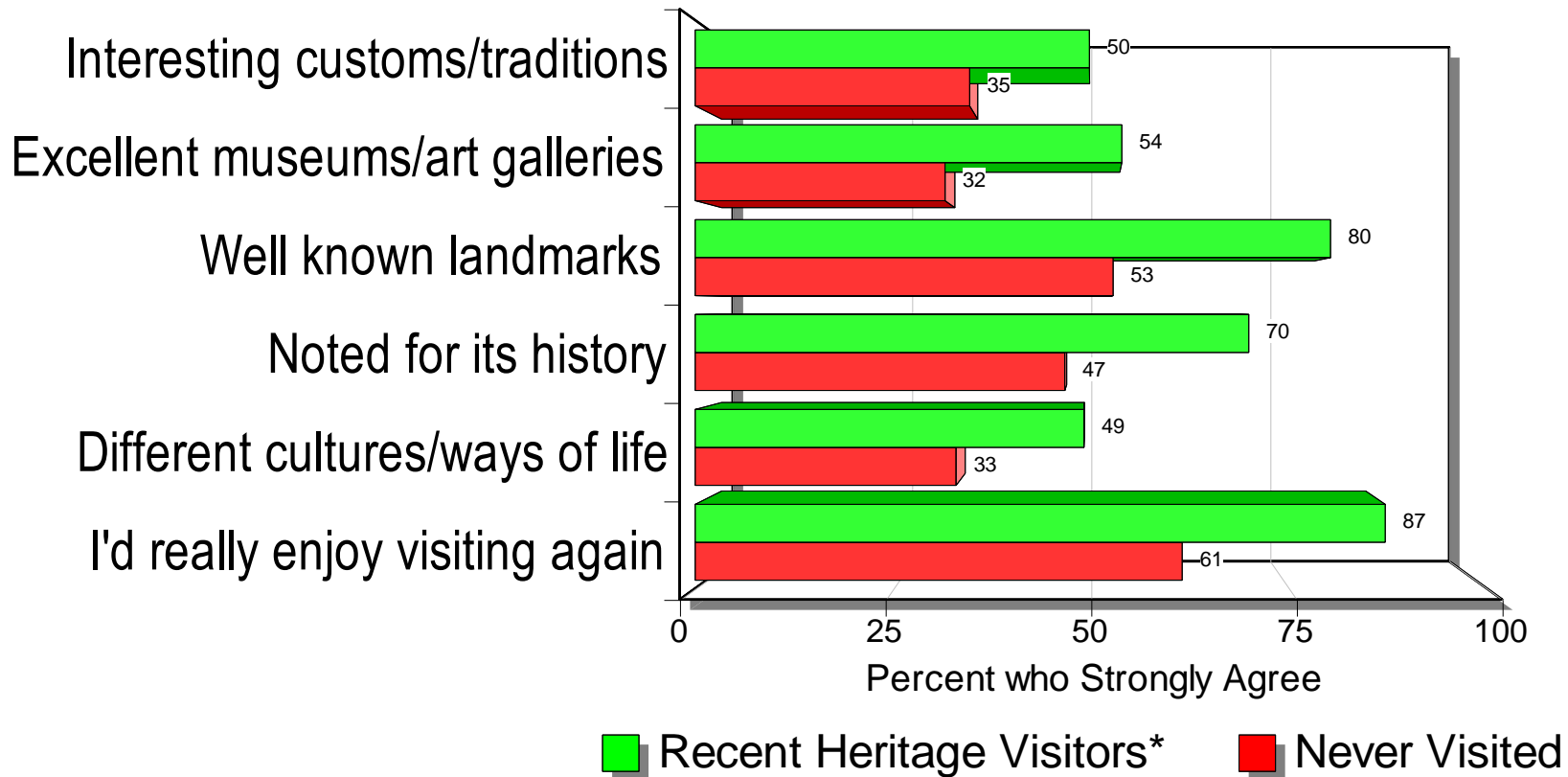
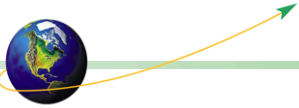




# Colorado's Image – “Noted For Its History”

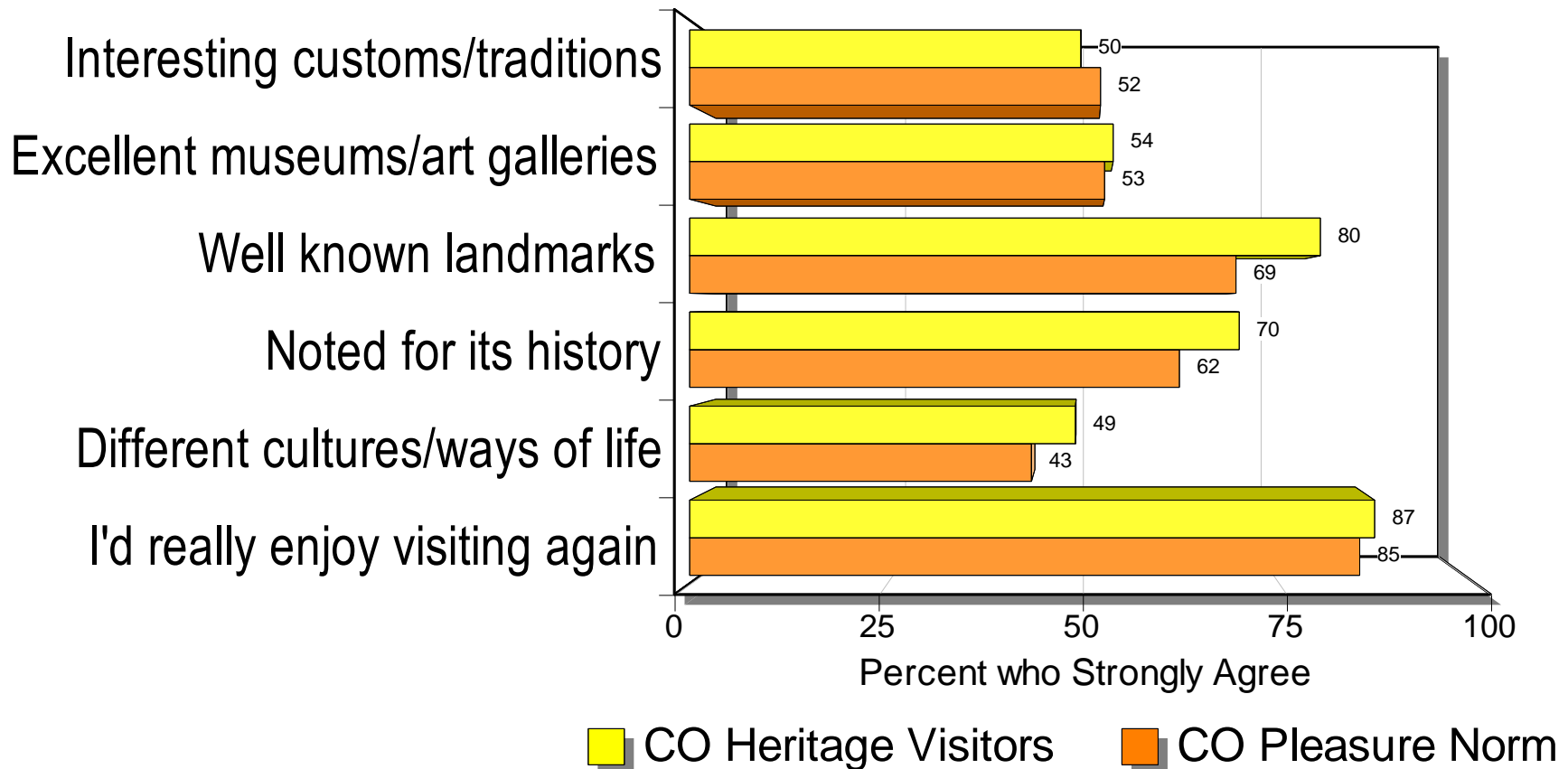
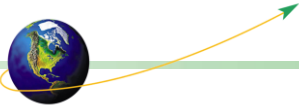


# Colorado's Product vs. Image

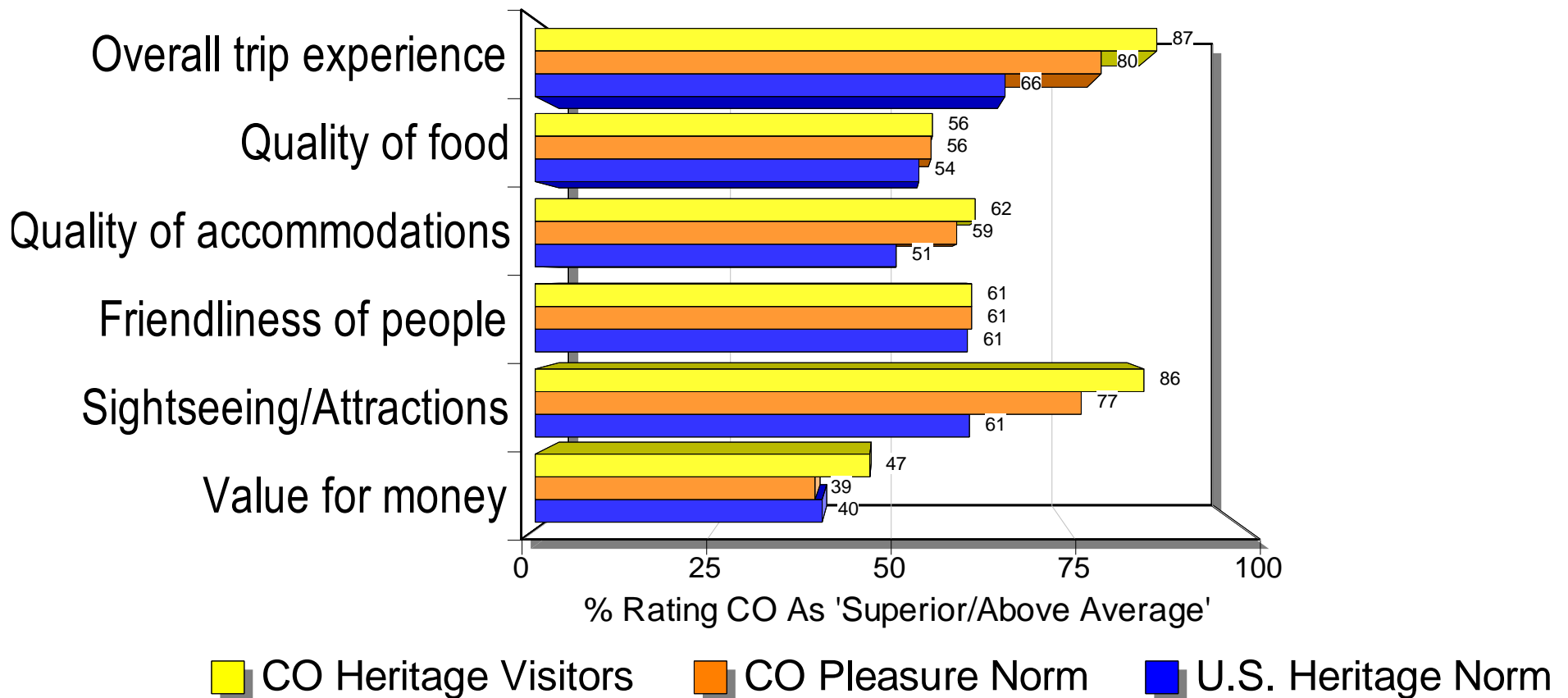


\* Visited in 2003

# Colorado's Product – Heritage Visitors vs. Colorado Pleasure Norm



# Trip Satisfaction



# Percent Who Are Repeat Visitors



Base: Overnight Pleasure Trips

