



Longwoods
Travel USA®

Colorado Springs, CO

2015 Visitor Report

Table of Contents



Introduction	3
Research Objectives	4
Methodology	5
Key Findings	6
Size & Structure of the U.S. Travel Market	12
Size & Structure of Colorado Springs' Domestic Travel Market	16
Overnight Trip Detail	26
Overnight Expenditures.....	27
Overnight Trip Characteristics.....	34
Demographic Profile of Overnight Visitors	63
Day Trip Detail	74
Day Trip Expenditures.....	75
Day Trip Characteristics.....	82
Demographic Profile of Day Visitors	97
Size & Structure of Colorado Springs/Pikes Peak Region Domestic Travel Market	108
Appendix: Key Terms Defined	115

Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides an overview for Colorado Springs' **domestic** tourism business in 2015.

Research Objectives



- The visitor research program is designed to provide:
 - *Estimates of domestic overnight and day visitor volumes to Colorado Springs*
 - *A profile of Colorado Springs' performance within its overnight travel market*
 - *Domestic visitor expenditures in Colorado Springs*
 - *Profiles of Colorado Springs' day travel market*
 - *Relevant trends in each of these areas*

Methodology



- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the **Travel USA®** survey:
 - *Selected to be representative of the U.S. adult population*
- For the 2015 travel year, this yielded :
 - 337,164 trips for analysis nationally:
 - 237,555 overnight trips
 - 99,609 day trips
- For Colorado Springs, the following sample was achieved in 2015:
 - 1,421 trips:
 - 987 overnight trips
 - 444 day trips
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings

Key Findings



- In 2015, Colorado Springs welcomed 15.2 million visitors, increasing 13% from 2014. Of these trips, 48% were overnight trips. The rest were day trips. The increase in visitation was reflected in both overnight trips (up 7%) and day trips (up 18%).
- Overnight travel to Colorado Springs has risen 25% since 2011, compared to a national growth rate of 11%.
- The Colorado Springs trends are consistent with state trends which show similar strong upticks in travel over the period.
- The overnight trips to Colorado Springs generated \$1.019 billion in spending, up 3% from 2014.
- “Visiting friends and relatives” (at 45%) was the most frequent purpose for an overnight trip to Colorado Springs. Marketable trips (those influenced by marketing efforts) were 43% of the total overnight trips. Visiting on a “touring trip” was the most prevalent marketable trip purpose.
- For overnight trips, the top state markets for Colorado Springs visitors were Colorado, California and Texas. Among DMAs, the top three visitor sources were Denver, Los Angeles and New York City.

Key Findings



- About 7 in 10 (72%) Colorado Springs overnight visitors, were very satisfied with their overall trip experience. Relative to the national average, visitors were slightly more satisfied with the sightseeing/attractions aspect of their trip to Colorado Springs, but slightly less satisfied on other elements.
- Among overnight travelers, over half (54%) indicated they had visited Colorado Springs at least once before, and the vast majority of these people had done so in the past year.
- With Colorado Springs situated relatively distant from most large population centers, the typical trip involves a fairly long planning cycle. Over 6 in 10 (63%) of overnight trips were planned 2 months or more before the trip, which is considerably higher than the norm (51%).

Key Findings



- ◉ “Advice from relatives or friends”, online travel agencies, airline/commercial carriers, and hotels/resorts were the most common information sources visitors used to plan their Colorado Springs overnight trip. Online travel agencies, airline/commercial carriers, and hotels/resorts were also the most common sources used for booking their travel.
- ◉ Almost three-quarters (72%) of overnight visitors used a smart phone for travel/activity planning purposes during their trip.
- ◉ The average number of nights spent in Colorado Springs on an overnight trip in 2015 was 3.1 nights, about the same as in most recent years. The average travel party size was 3.0 persons.
- ◉ Almost 6 in 10 (56%) of overnight Colorado Springs travelers arrived by personal car or truck, while most of the remainder (37%) flew in* and used a rental car (31%)

Key Findings – (Cont'd)



- The top five activities and experiences on an overnight trip to Colorado Springs were shopping, visiting a national or state park, visiting a landmark/historic Site, hiking/backpacking, and fine dining.
- Although the proportion of travelers using social media for planning specific trips is still in the minority (13% for Colorado Springs overnight trips), the vast majority of Colorado Springs travelers (84%) use social media to discuss and explore travel in general.
 - *The most common social media activities that travelers say they undertook “in the past three months” include posting travel photos/videos online, reading travel reviews, looking at travel photos/videos online, and looking for information about travel deals, news, events, or promotions.*

Key Findings – (Cont'd)



- ◉ The broader tourism region that comprises both Colorado Springs and the Pikes Peak Attractions counties attracted 20.5 million visitors in 2015, including 8.8 million overnight and 11.7 million day visitors.
- ◉ There is some overlap in visitors between the two entities, with about 4 million visitors taking in both destinations on their trips – about 20% of overnight and day visitors.
- ◉ However, Colorado Springs remains the primary destination, with about 62% of overnight regional visitors and 63% of day visitors indicating they visited Colorado Springs only on their trip, versus 16% and 19% indicating they visited only Pikes Peak region.

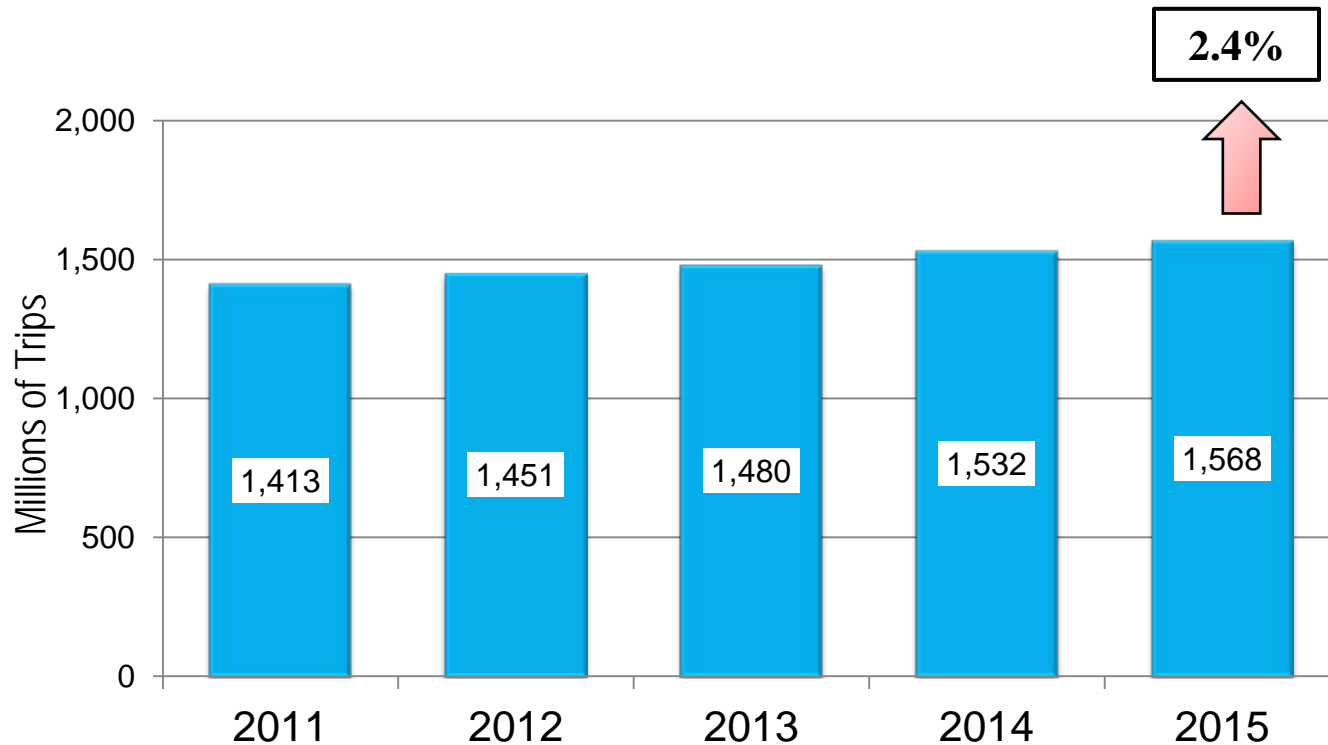


Size & Structure of the U.S. Travel Market

Total Size of the U.S. Travel Market — 2011-2015



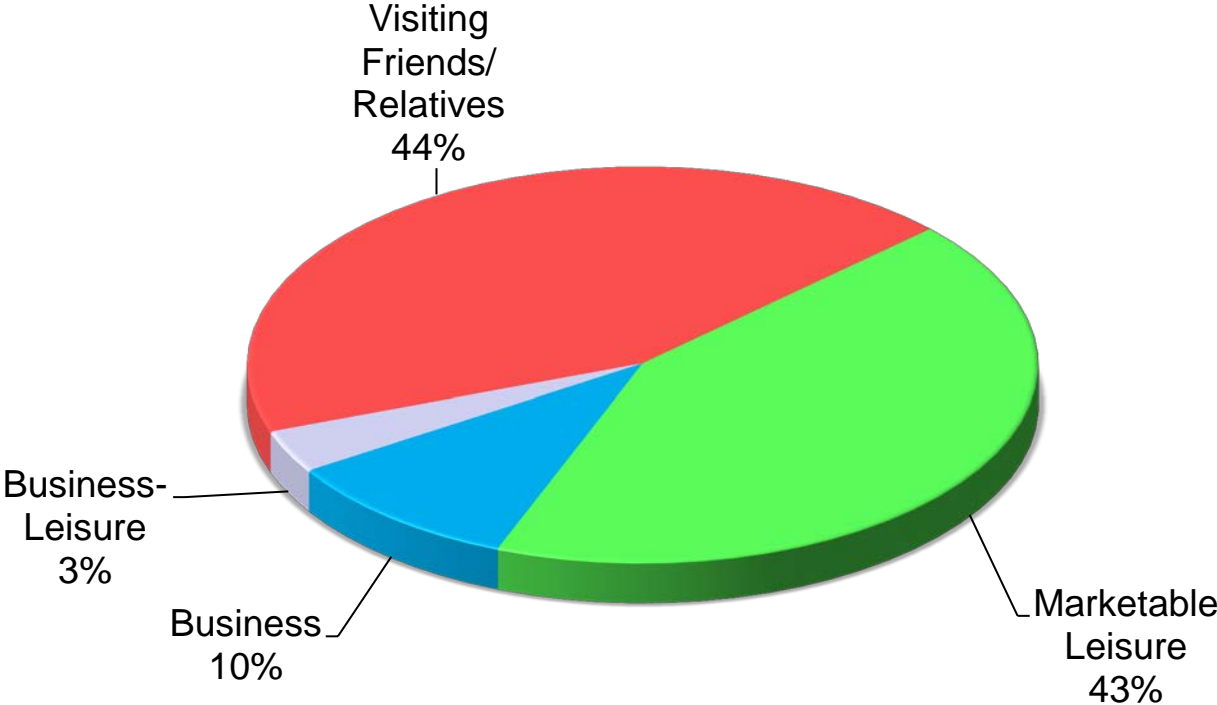
Base: Total Overnight Person-Trips



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



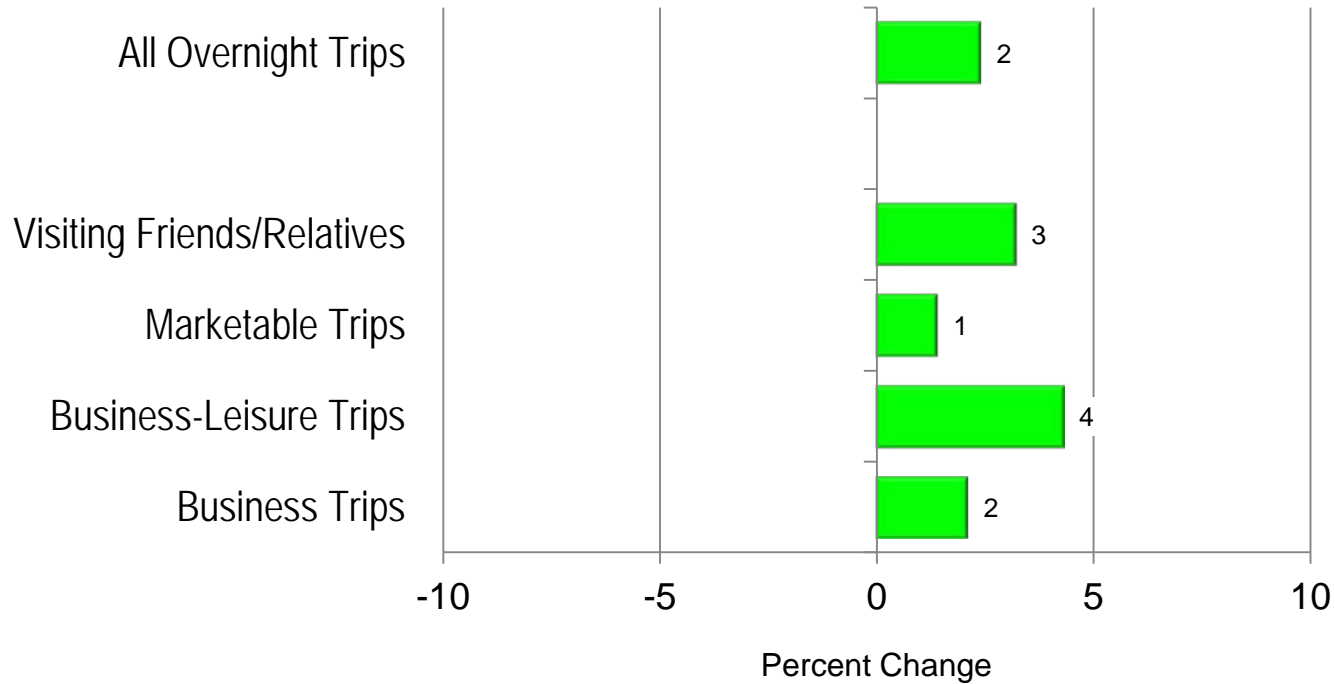
Base: Total Overnight Person-Trips



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



Base: Total Overnight Person-Trips





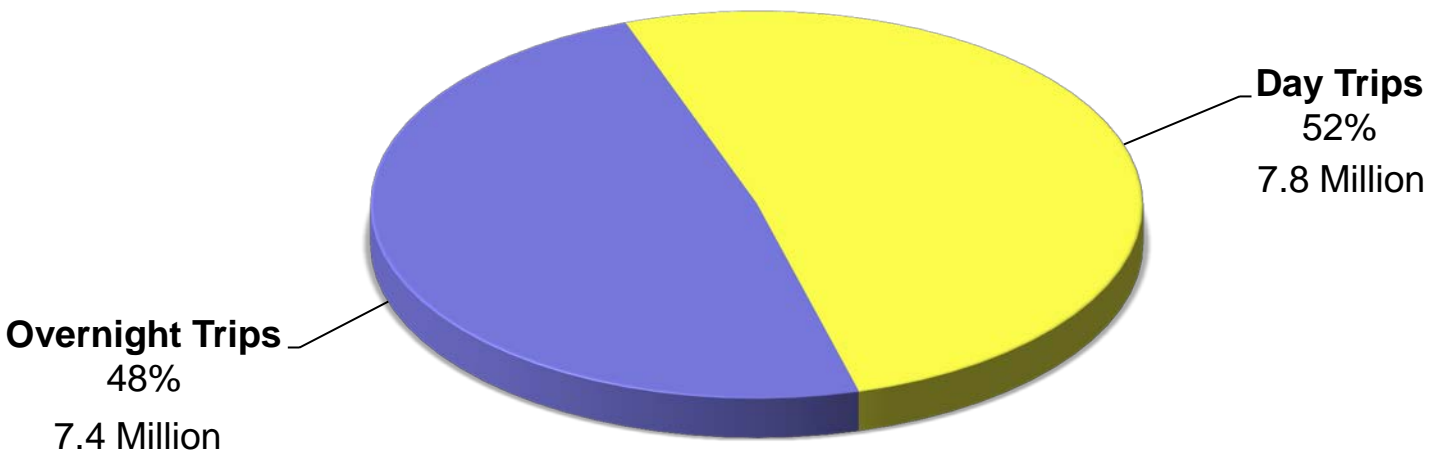
Size & Structure of Colorado Springs Domestic Travel Market

Total Size of Colorado Springs Domestic Travel Market in 2015



Total Person-Trips = 15.2 Million

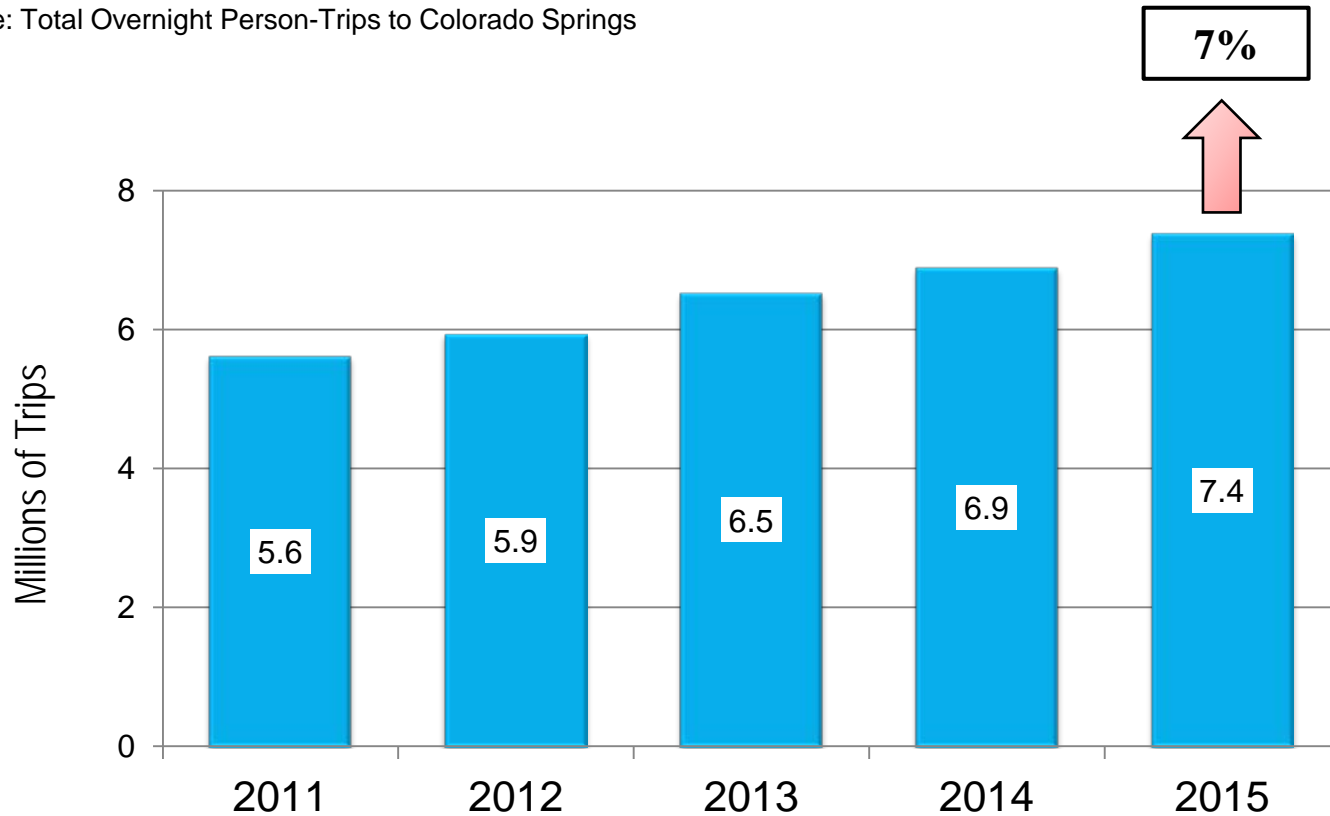
+13% vs. 2014



Size of the Colorado Springs Overnight Travel Market – 2011-2015



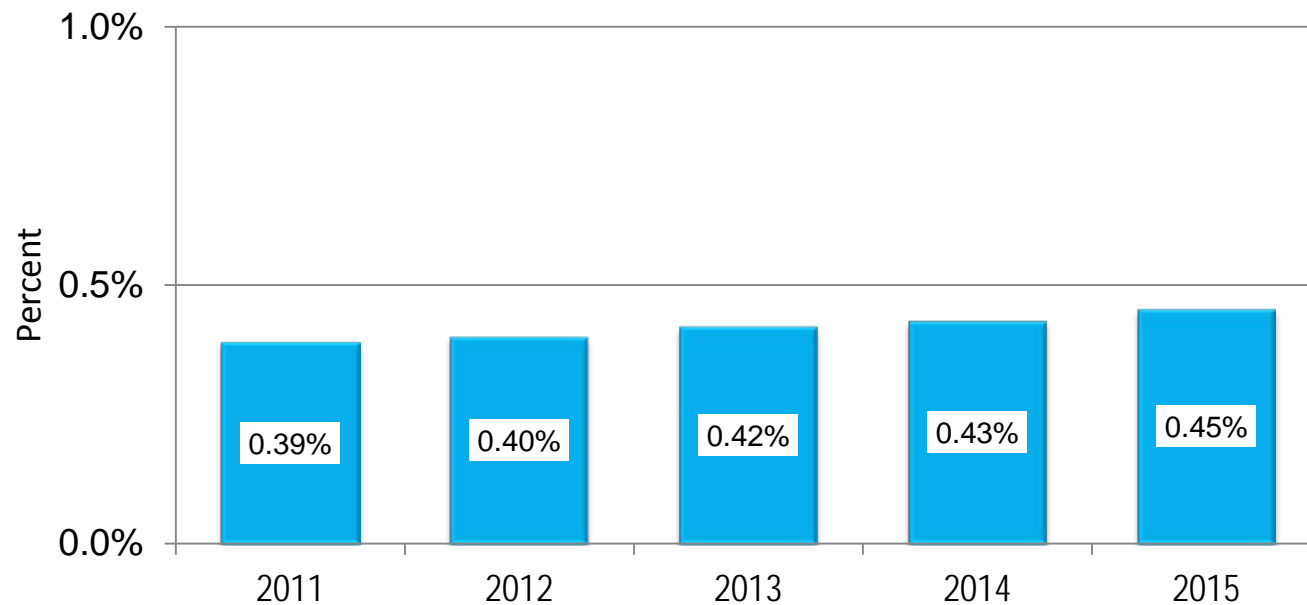
Base: Total Overnight Person-Trips to Colorado Springs



Colorado Springs' Share of Domestic Overnight Trips



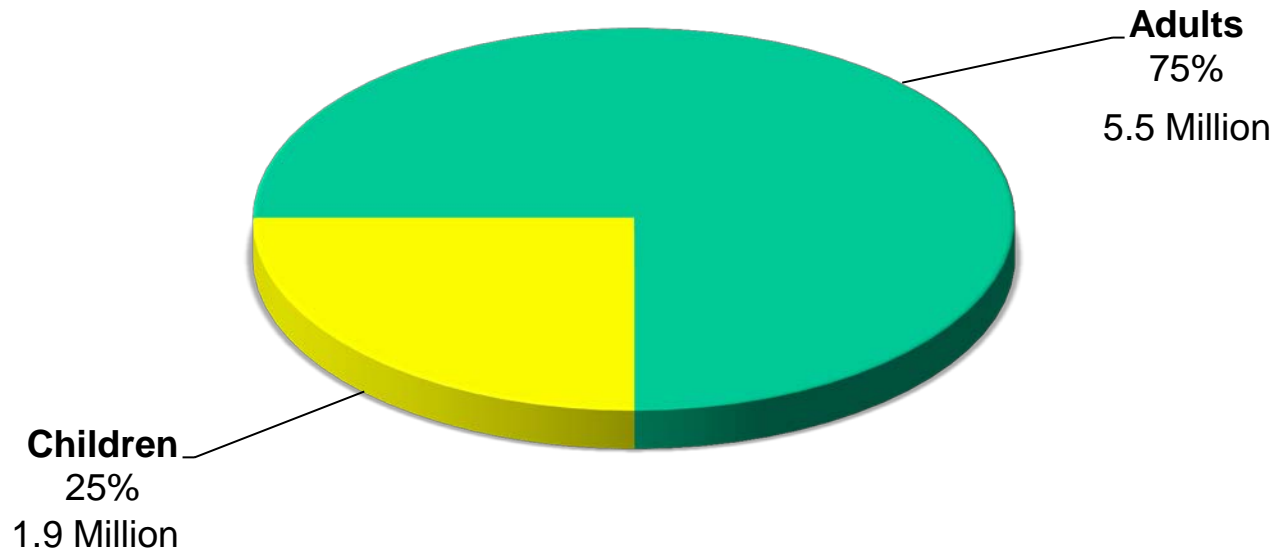
Base: Total Overnight Person-Trips



Size of Colorado Springs Overnight Travel Market – Adults vs. Children



Total Overnight Person-Trips = 7.4 Million

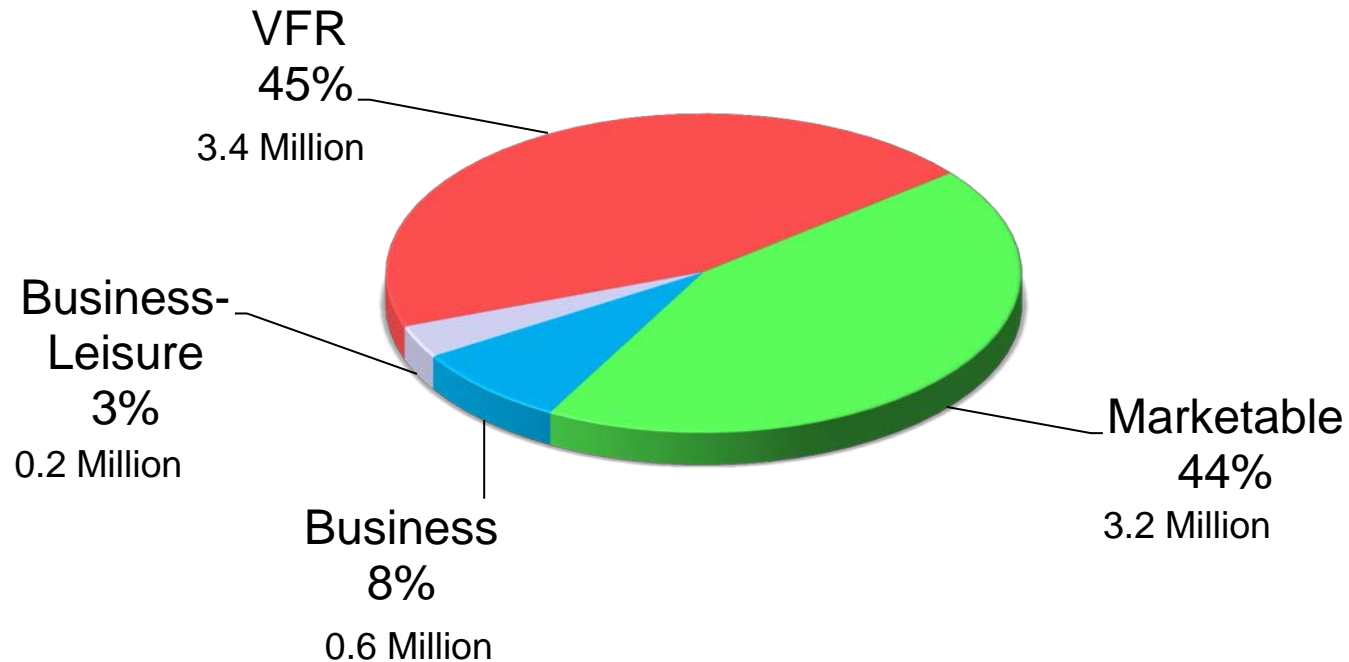


Colorado Springs Overnight Travel Market — by Main Trip Purpose



Total Overnight Person-Trips = 7.4 Million

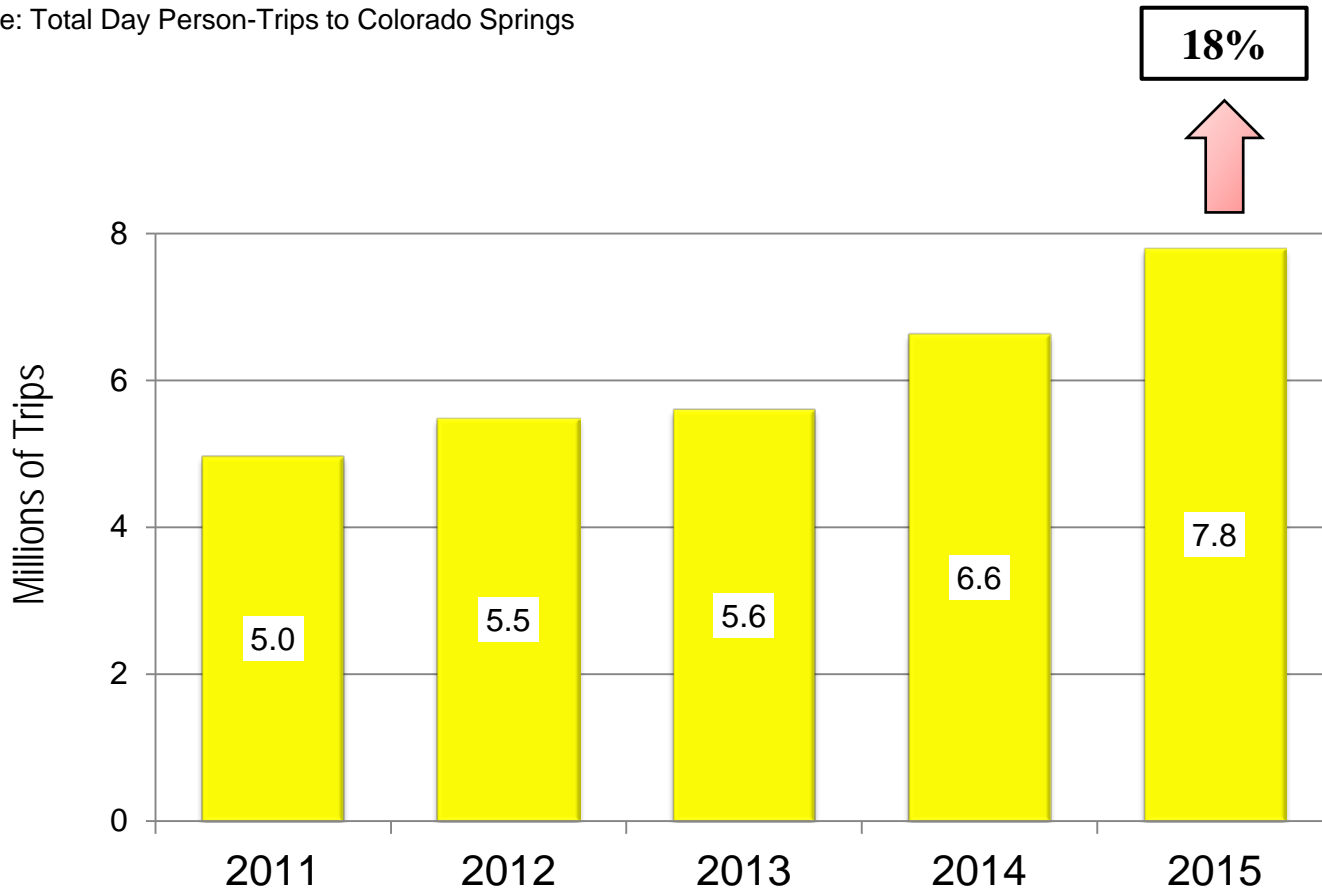
+7% vs. 2014



Size of the Colorado Springs Day Travel Market — 2011-2015



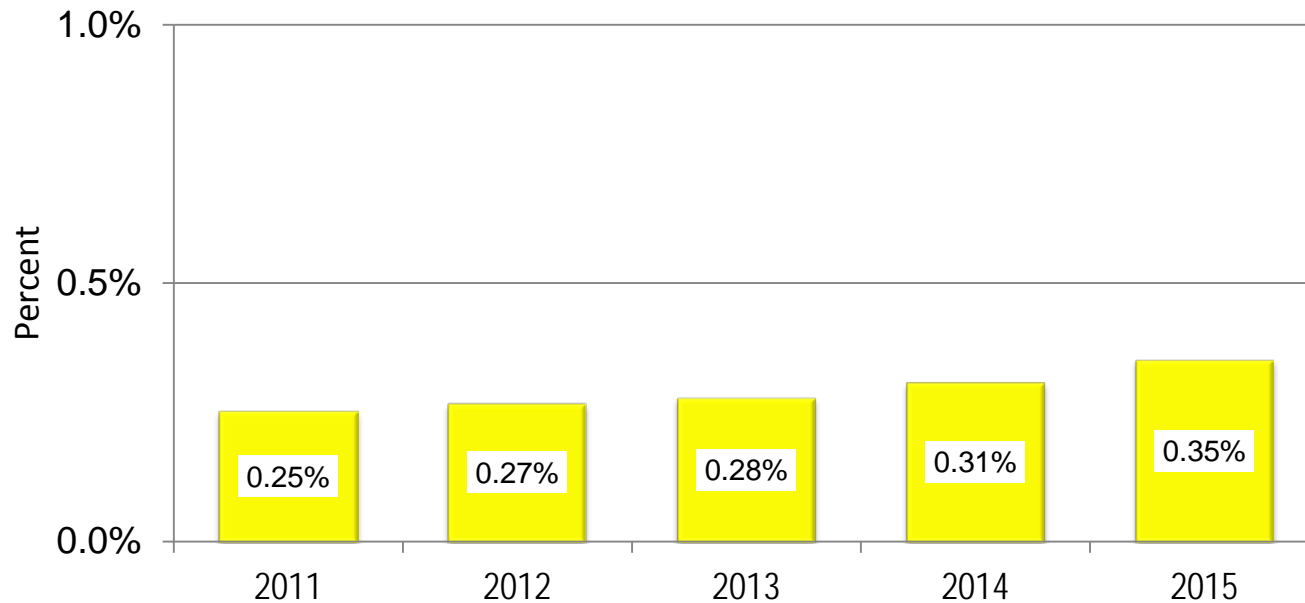
Base: Total Day Person-Trips to Colorado Springs



Colorado Springs' Share of Domestic Day Trips



Base: Total Day Person-Trips

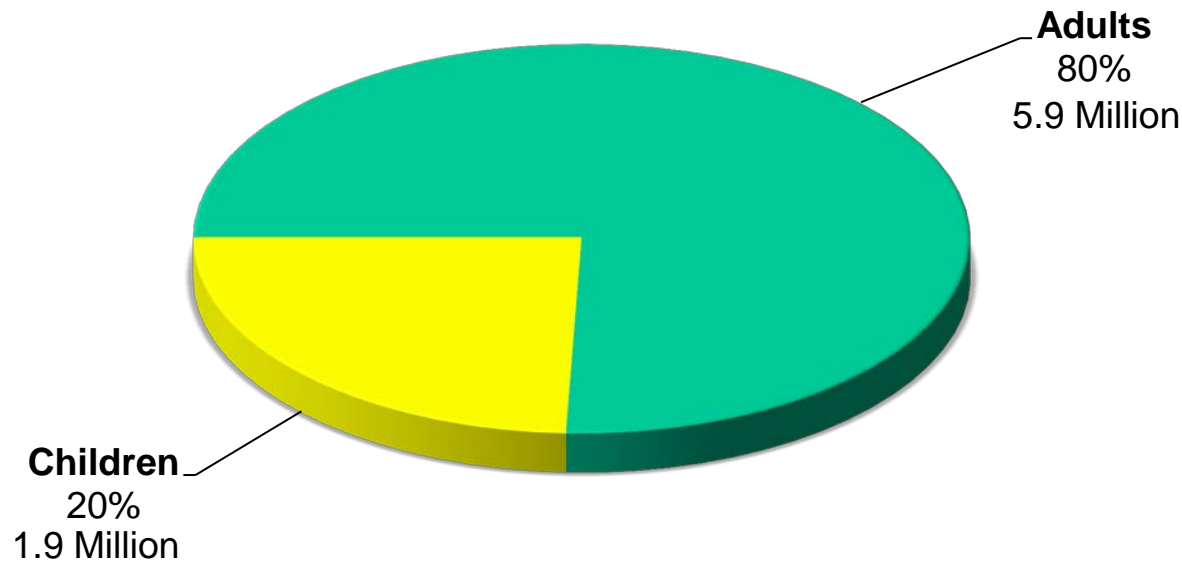


Size of Colorado Springs Day Travel Market – Adults vs. Children



Total Day Person-Trips = 7.8 Million

+18% vs. 2014

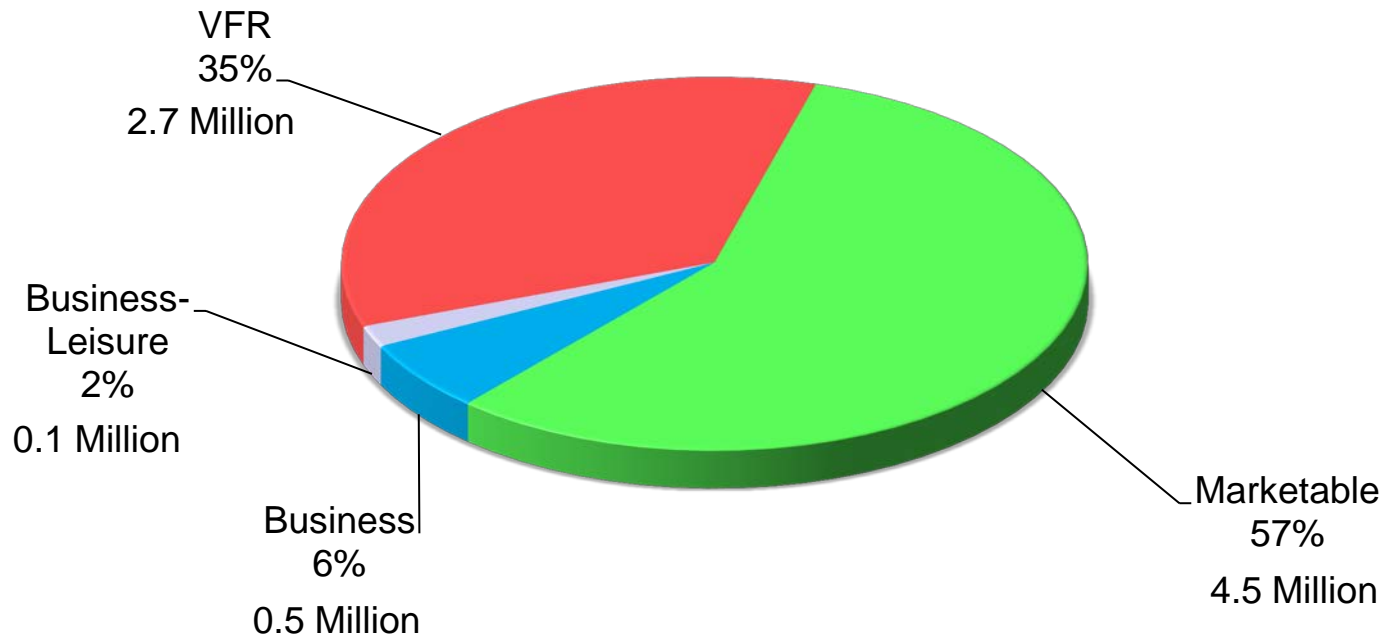


Colorado Springs Day Travel Market – by Trip Purpose



Total Day Person-Trips = 7.8 Million

+18% vs. 2014





Overnight Trip Detail

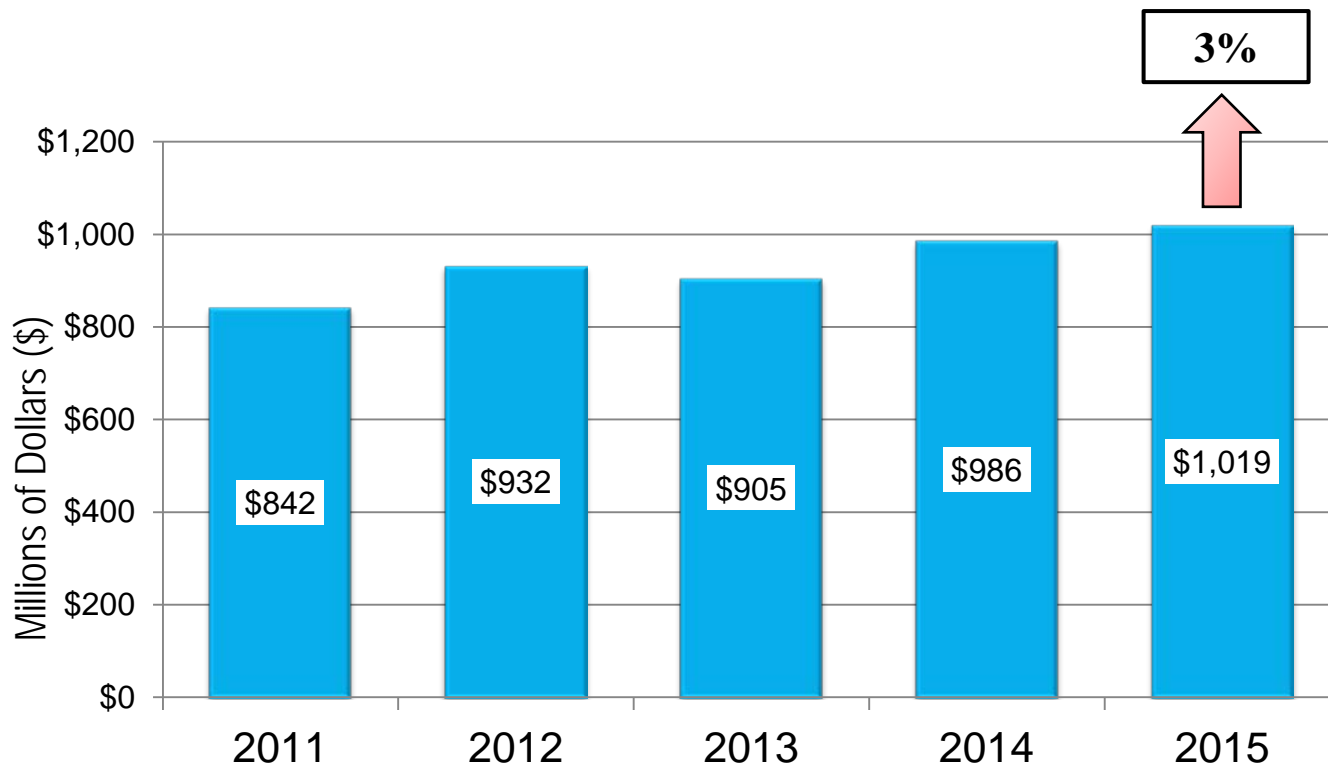


Overnight Trip Expenditures

Total Domestic Spending in Colorado Springs on Overnight Trips – 2011-2015



Base: Total Overnight Person-Trips to Colorado Springs

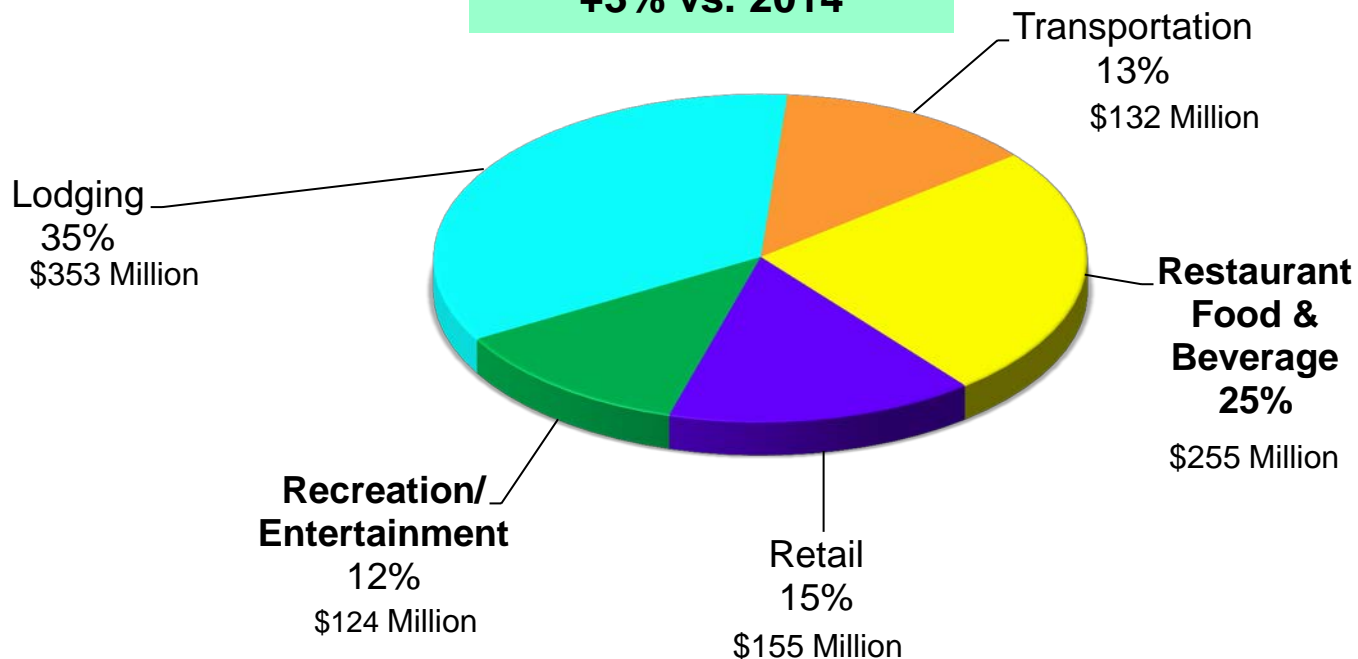


Total Domestic Spending in Colorado Springs on Overnight Trips – by Sector



Total Spending = \$1.019 Billion

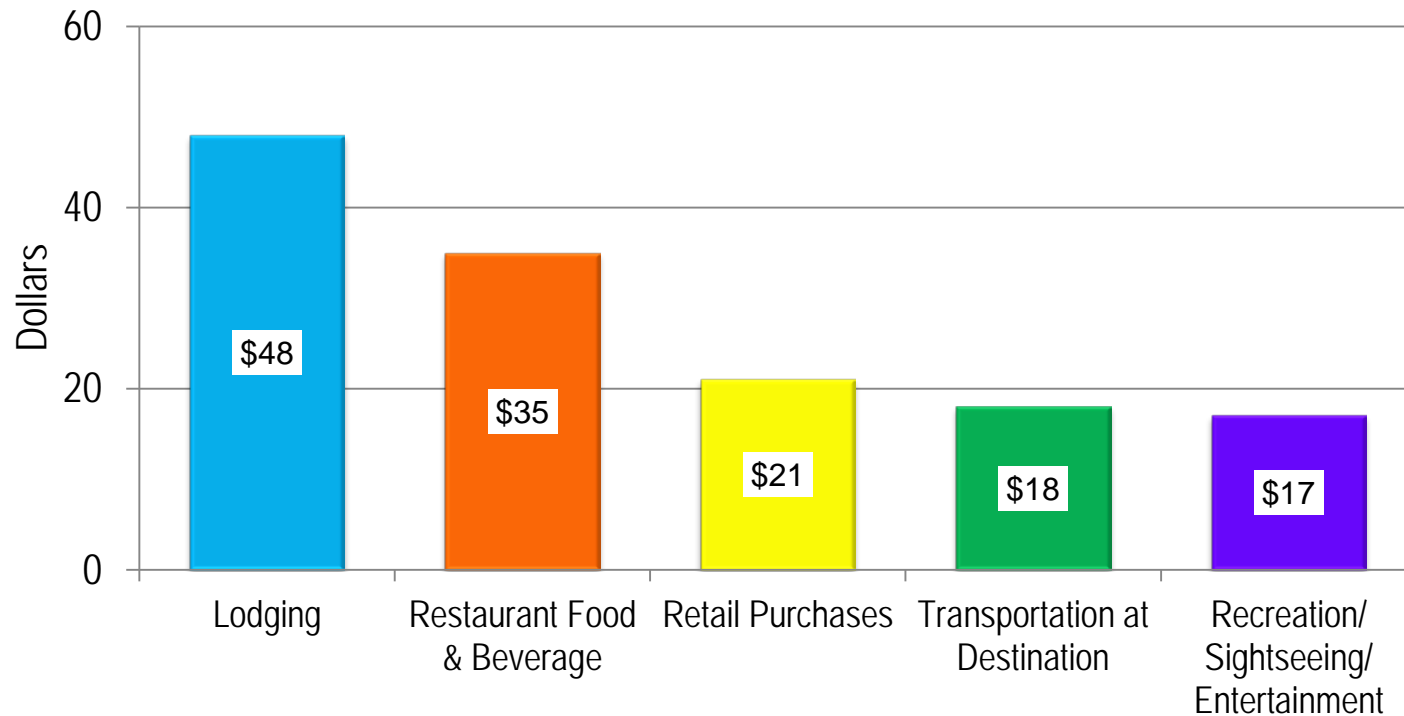
+3% vs. 2014



Average Per Person Expenditures on Domestic Overnight Trips – By Sector



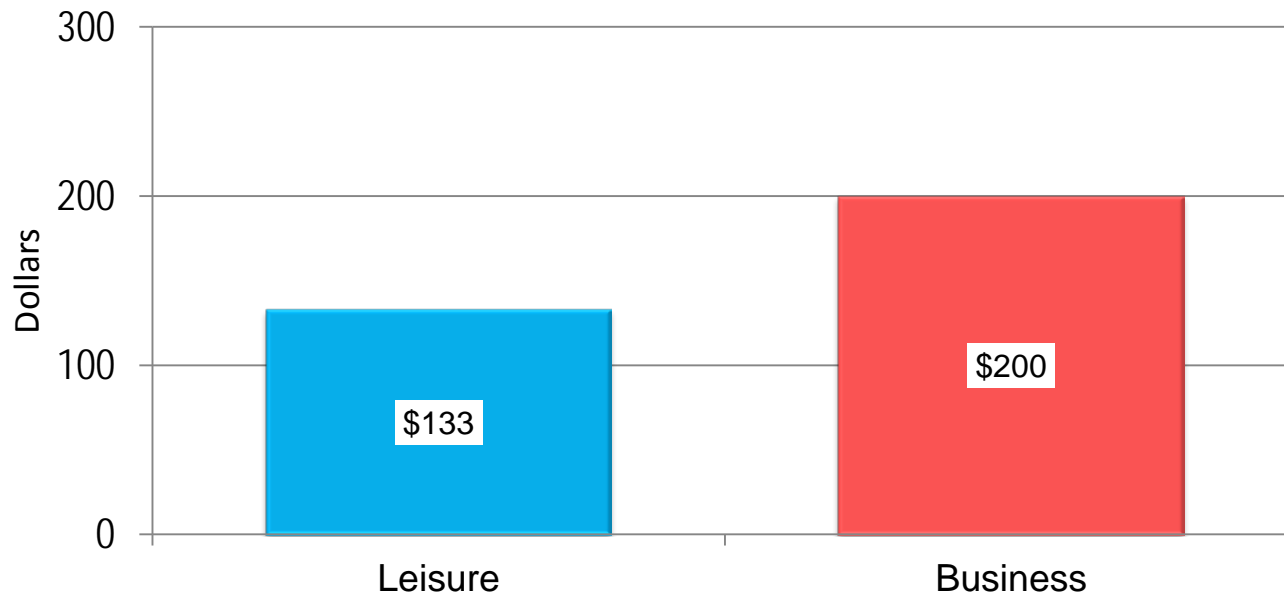
Base: Total Overnight Person-Trips to Colorado Springs



Average Per Person Expenditures on Domestic Overnight Trips – by Trip Purpose



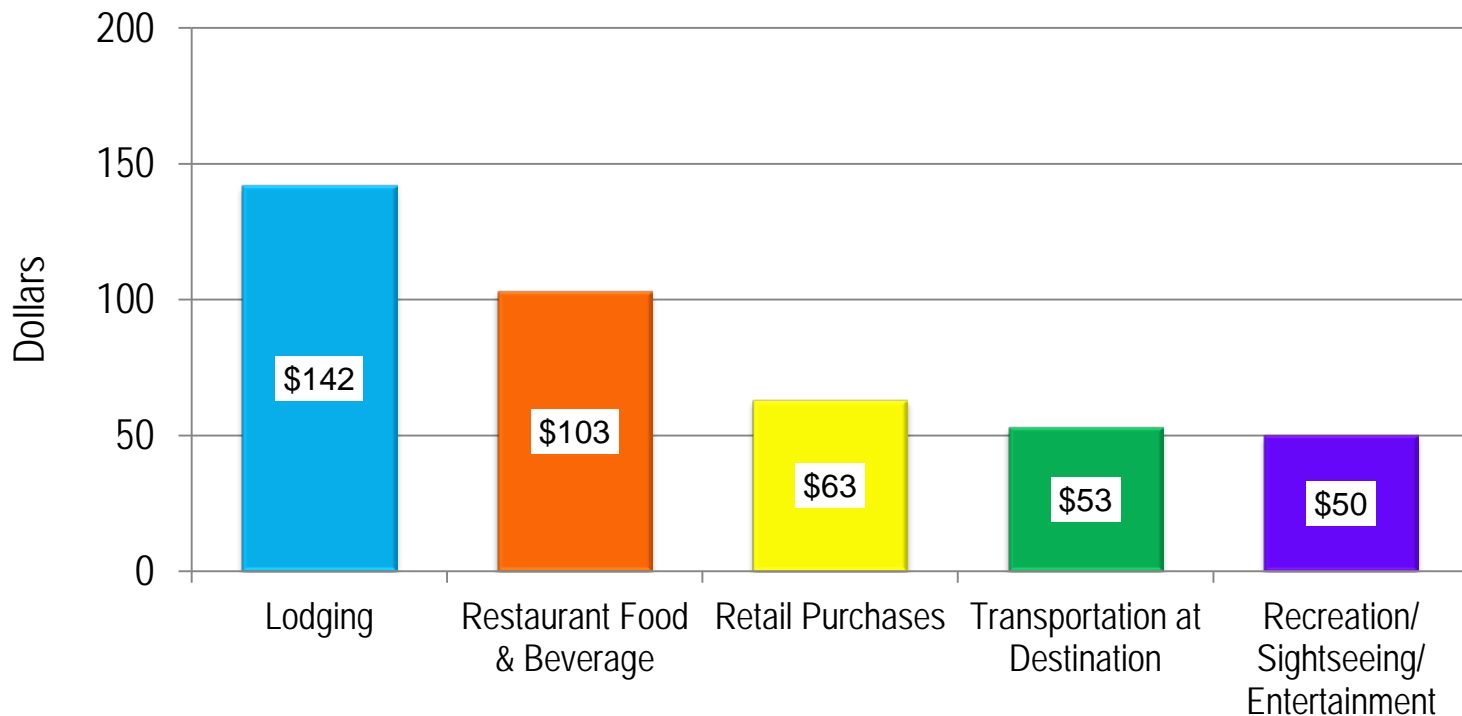
Base: Total Overnight Person-Trips to Colorado Springs



Average Per Party Expenditures on Domestic Overnight Trips – By Sector



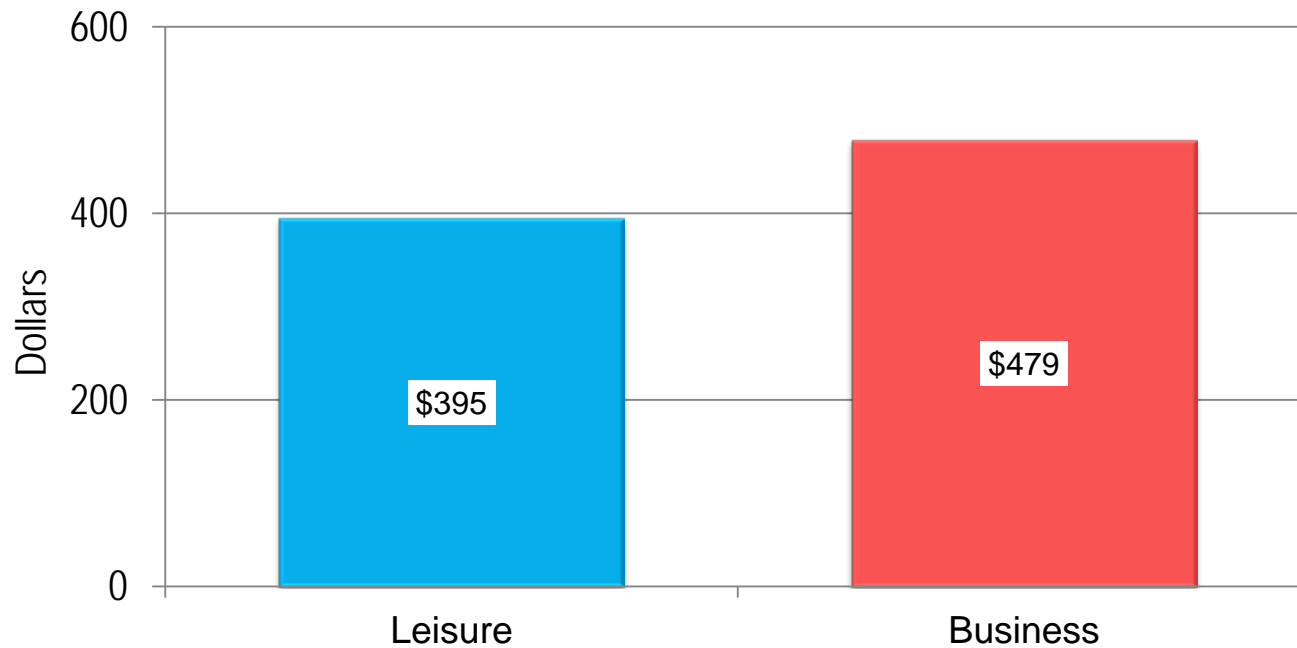
Base: Total Overnight Person-Trips to Colorado Springs



Average Per Party Expenditures on Domestic Overnight Trips – by Trip Purpose



Base: Total Overnight Person-Trips to Colorado Springs





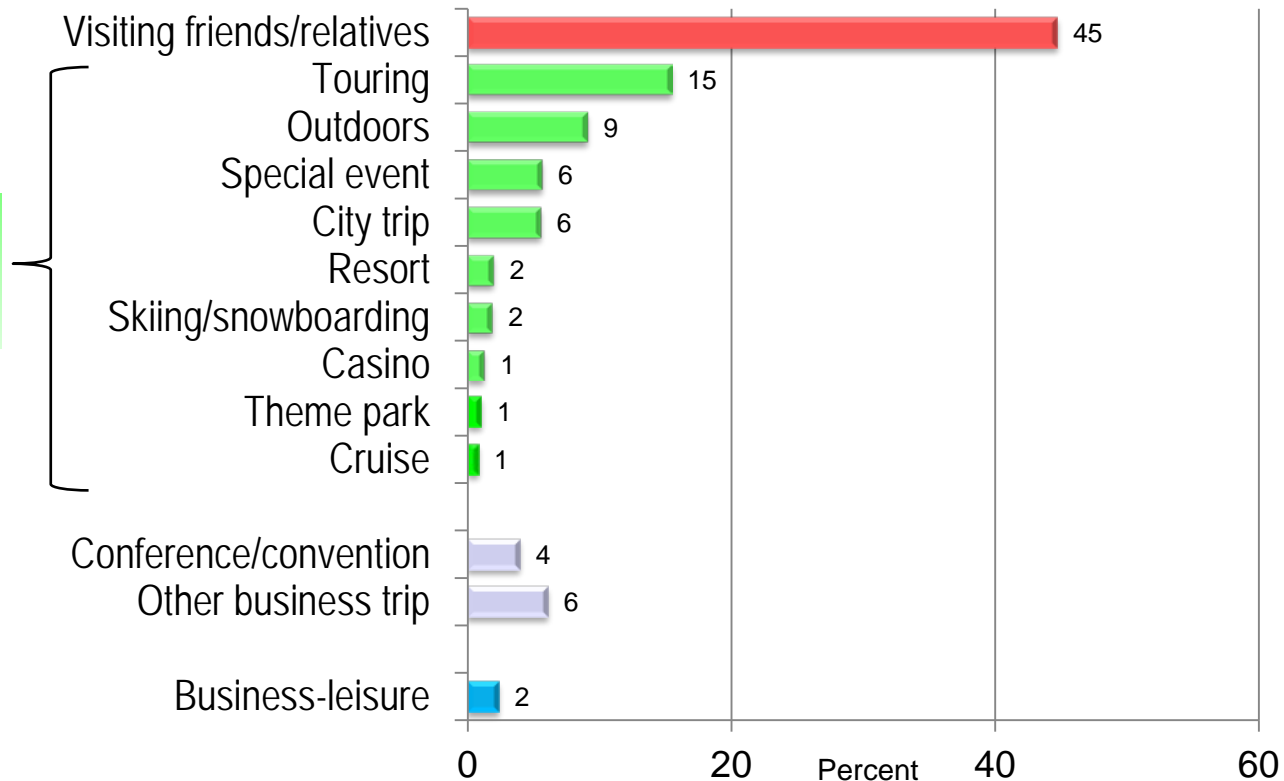
Overnight Trip Characteristics

Main Purpose of Trip



Base: Adult Overnight Trips to Colorado Springs

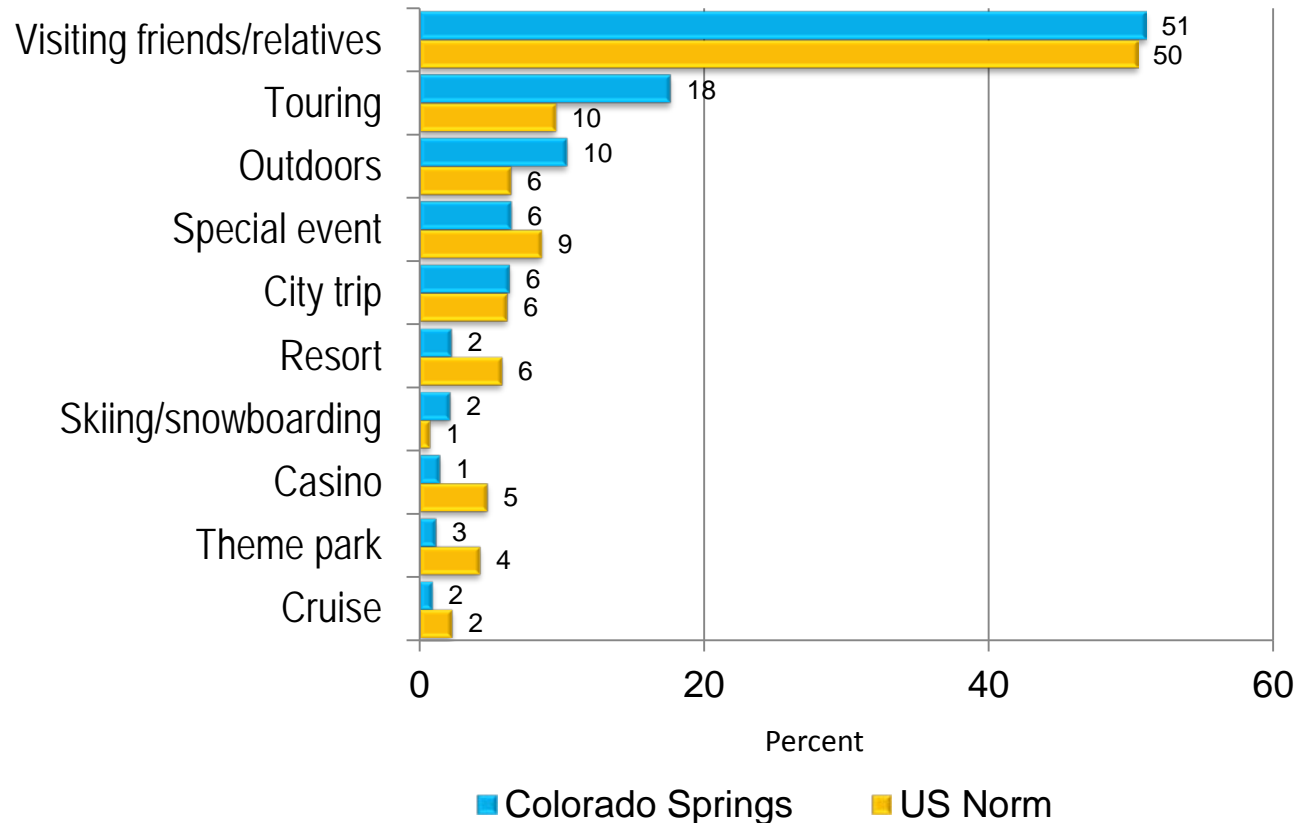
**Marketable
Trips
43%**



Main Purpose of Leisure Trip — Colorado Springs vs. US Norm



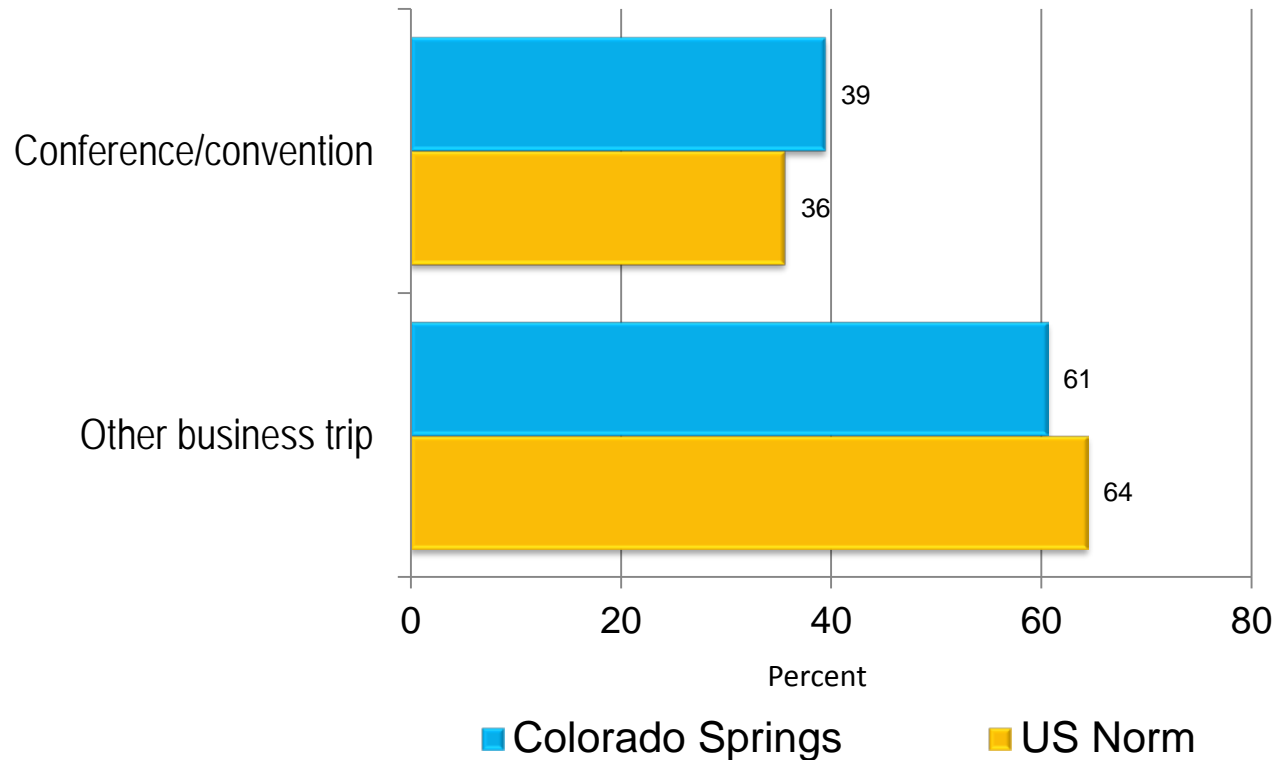
Base: Adult Overnight Leisure Person-Trips



Main Purpose of Business Trip — Colorado Springs vs. US Norm



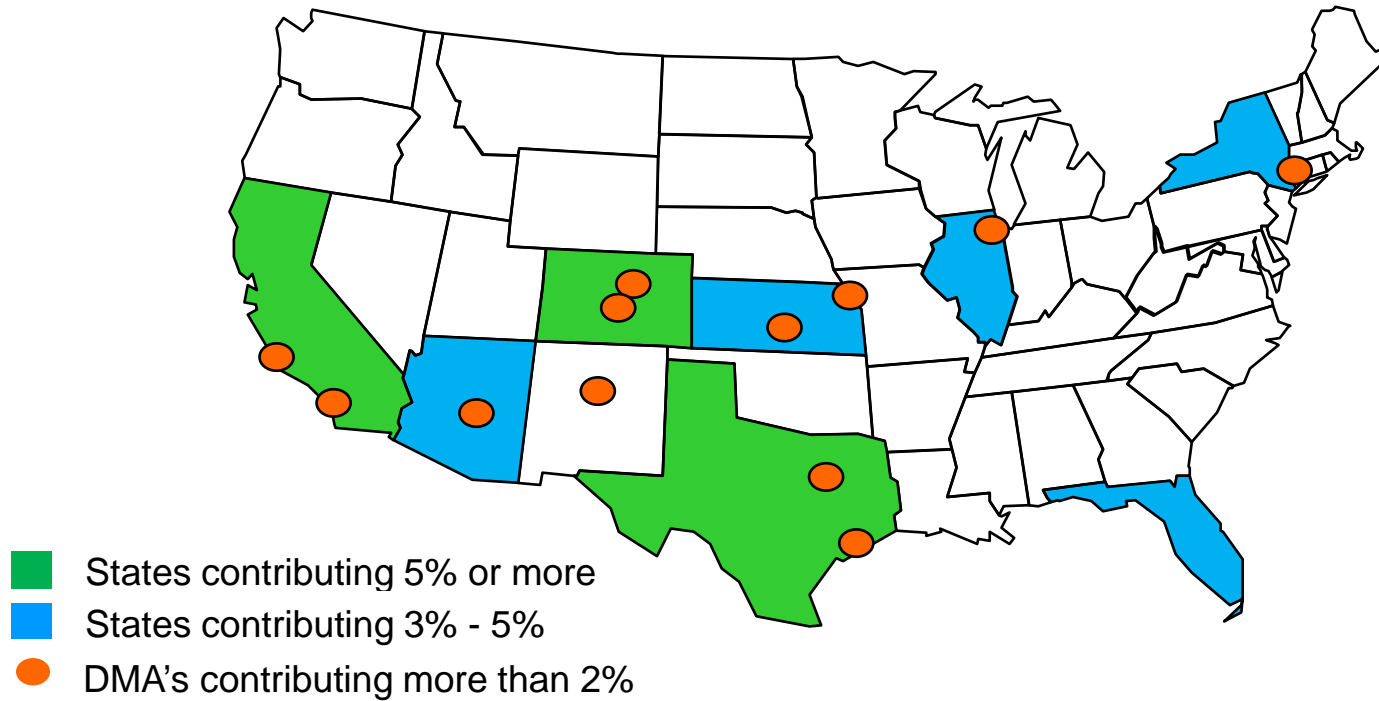
Base: Adult Overnight Business Person-Trips



Sources of Business



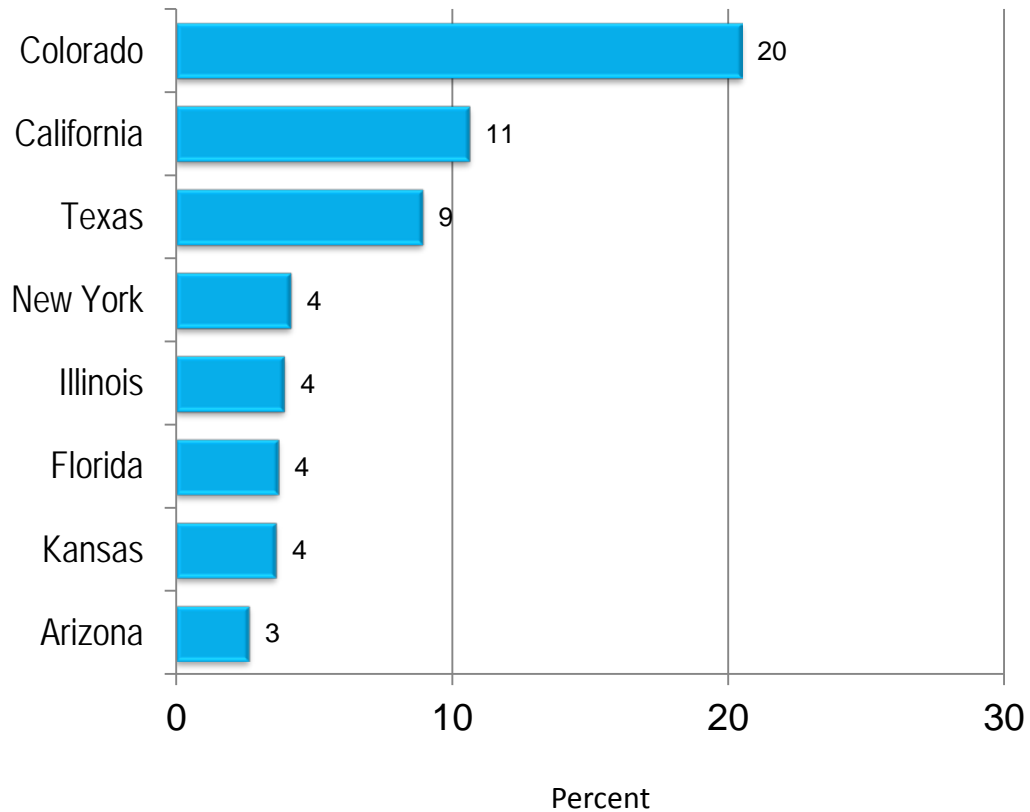
Base: Adult Overnight Person-Trips to Colorado Springs



State Origin Of Trip



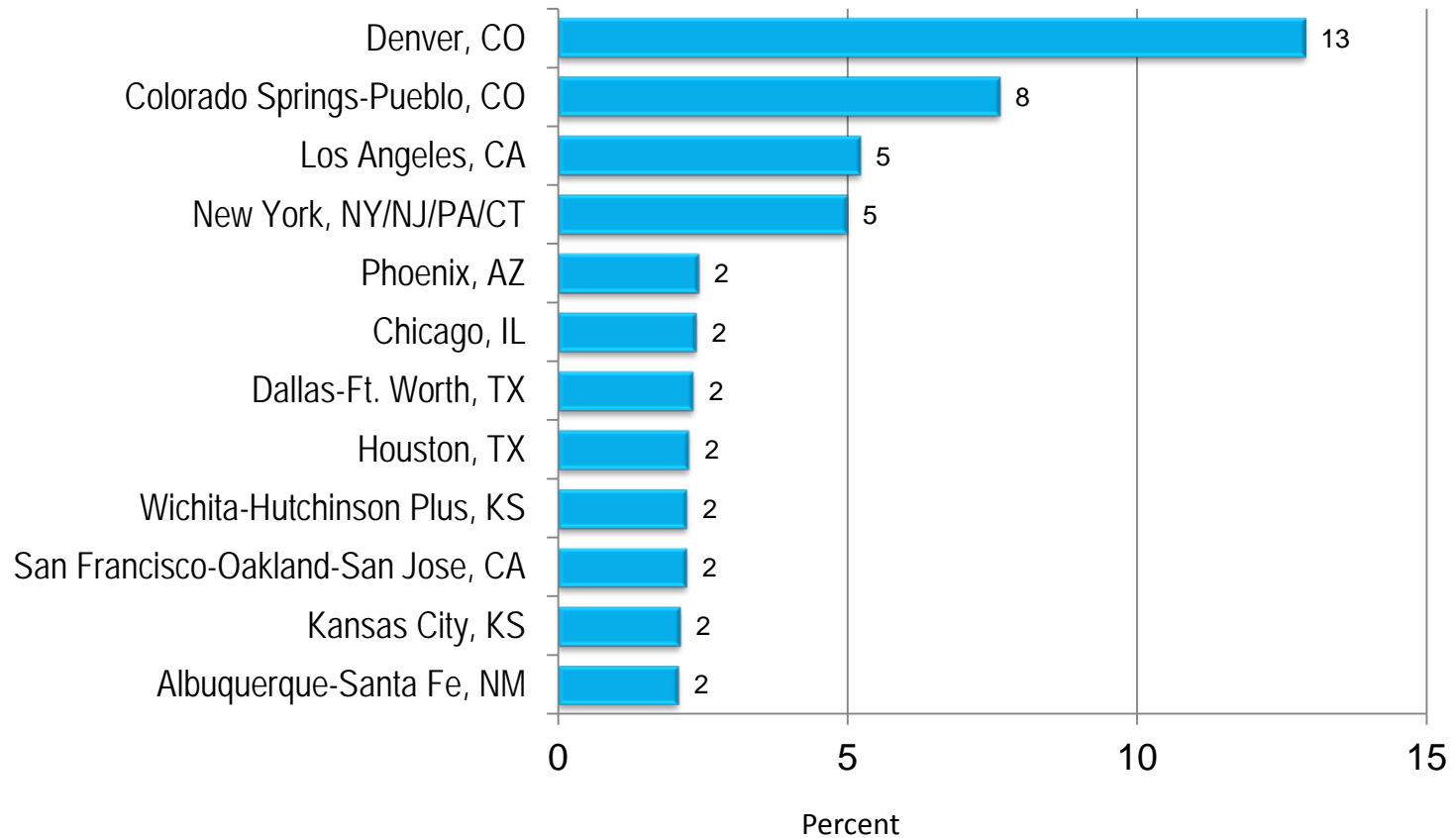
Base: Adult Overnight Person-Trips to Colorado Springs



DMA Origin Of Trip



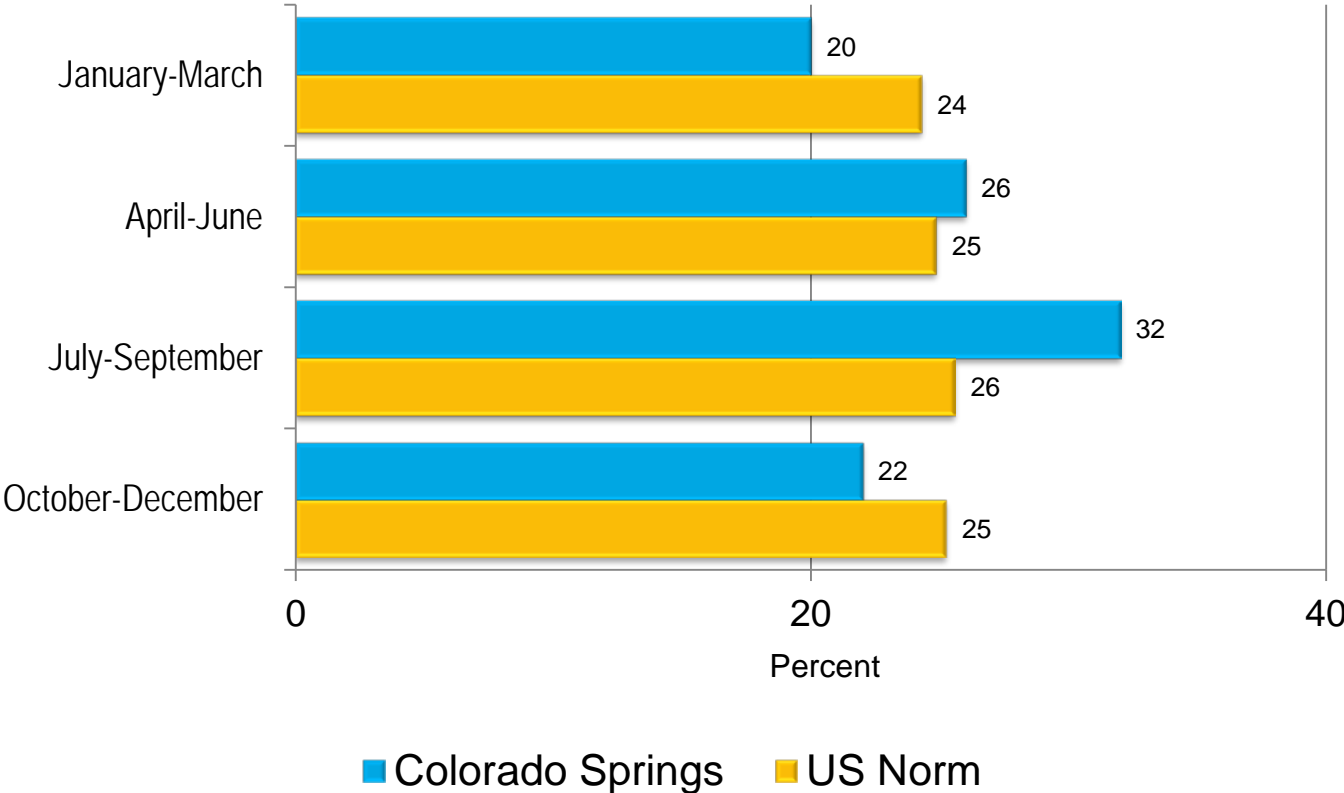
Base: Adult Overnight Person-Trips to Colorado Springs



Season of Trip



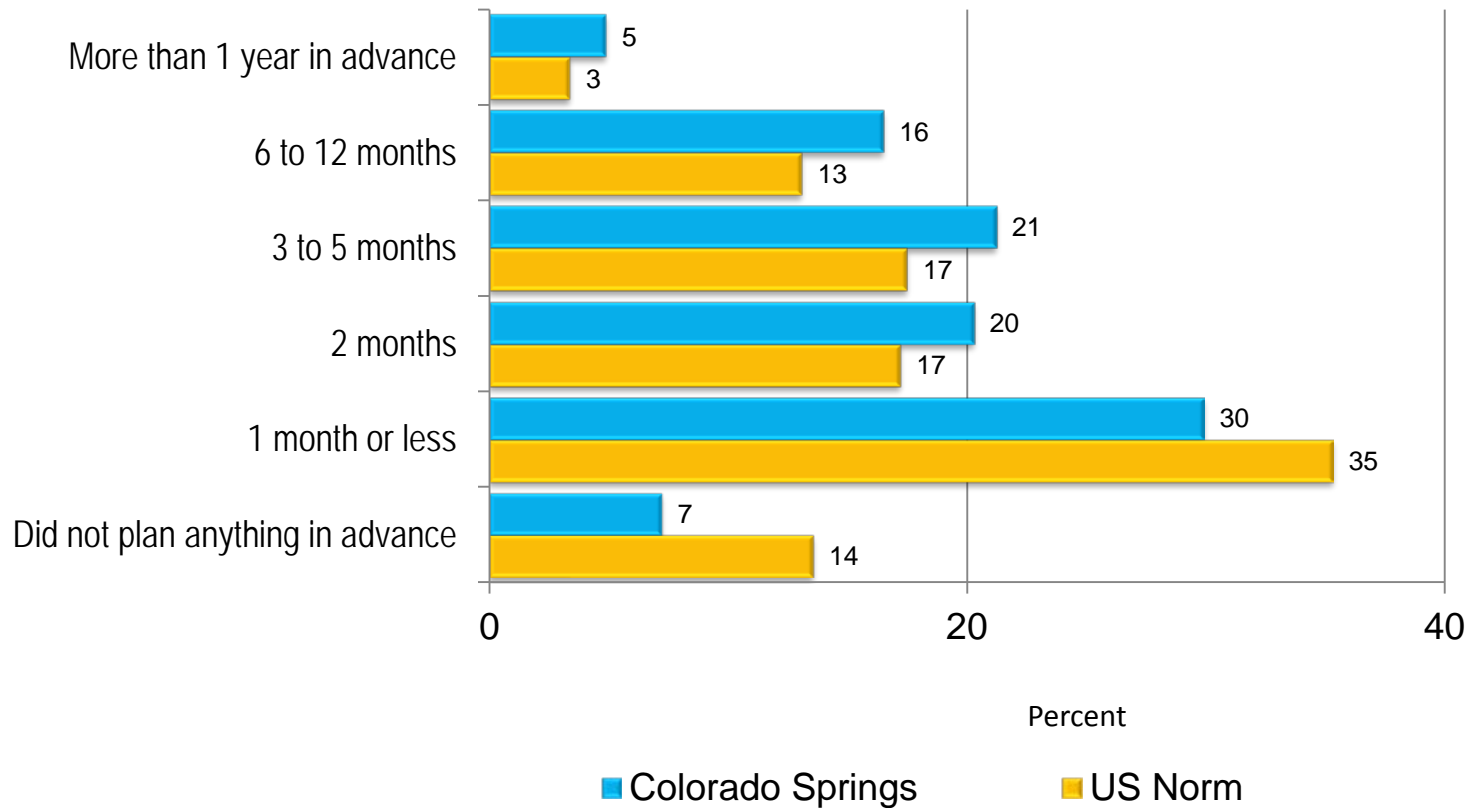
Base: Adult Overnight Person-Trips



Length of Planning Trip



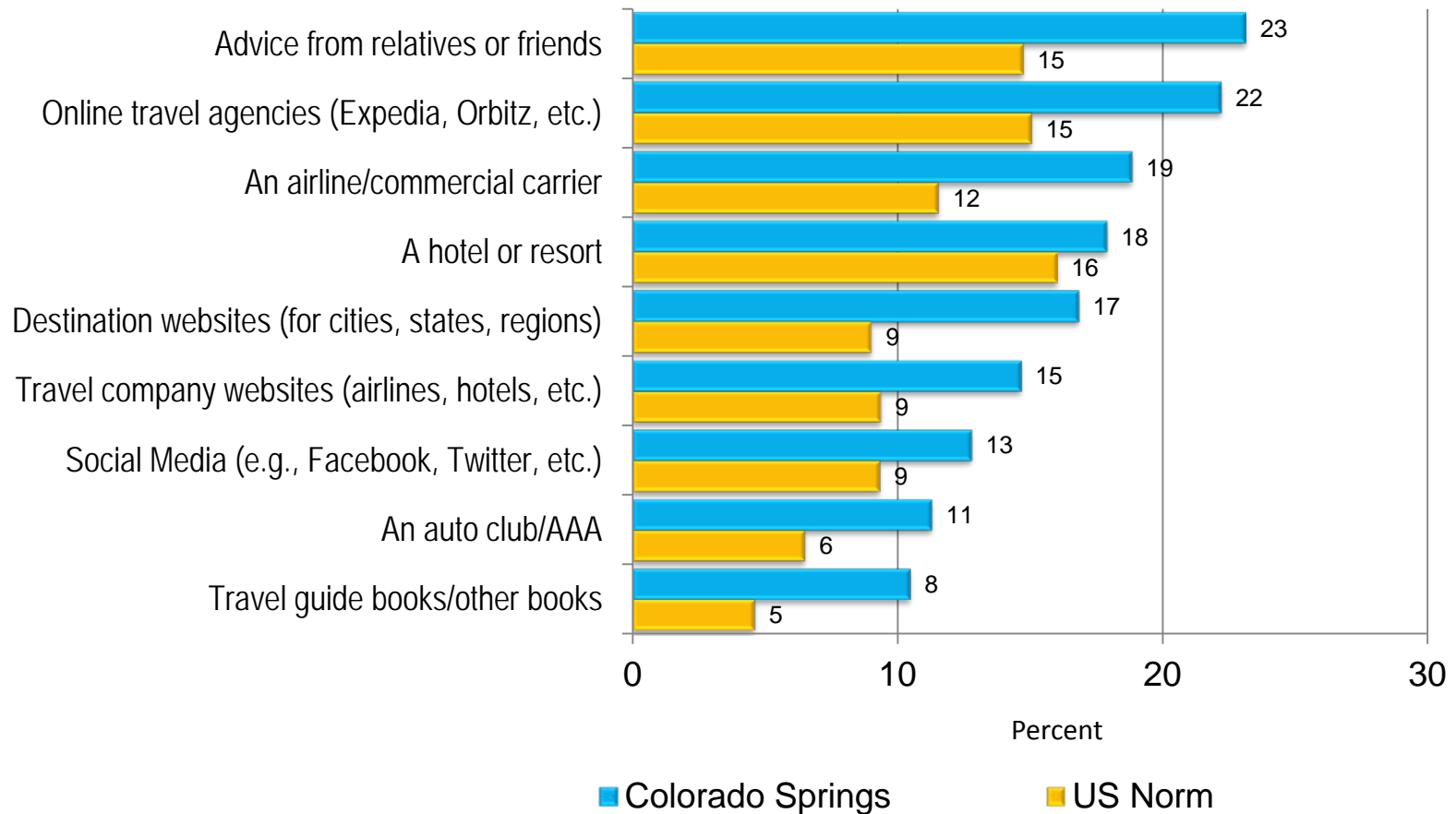
Base: Adult Overnight Person-Trips



Method of Planning Trip



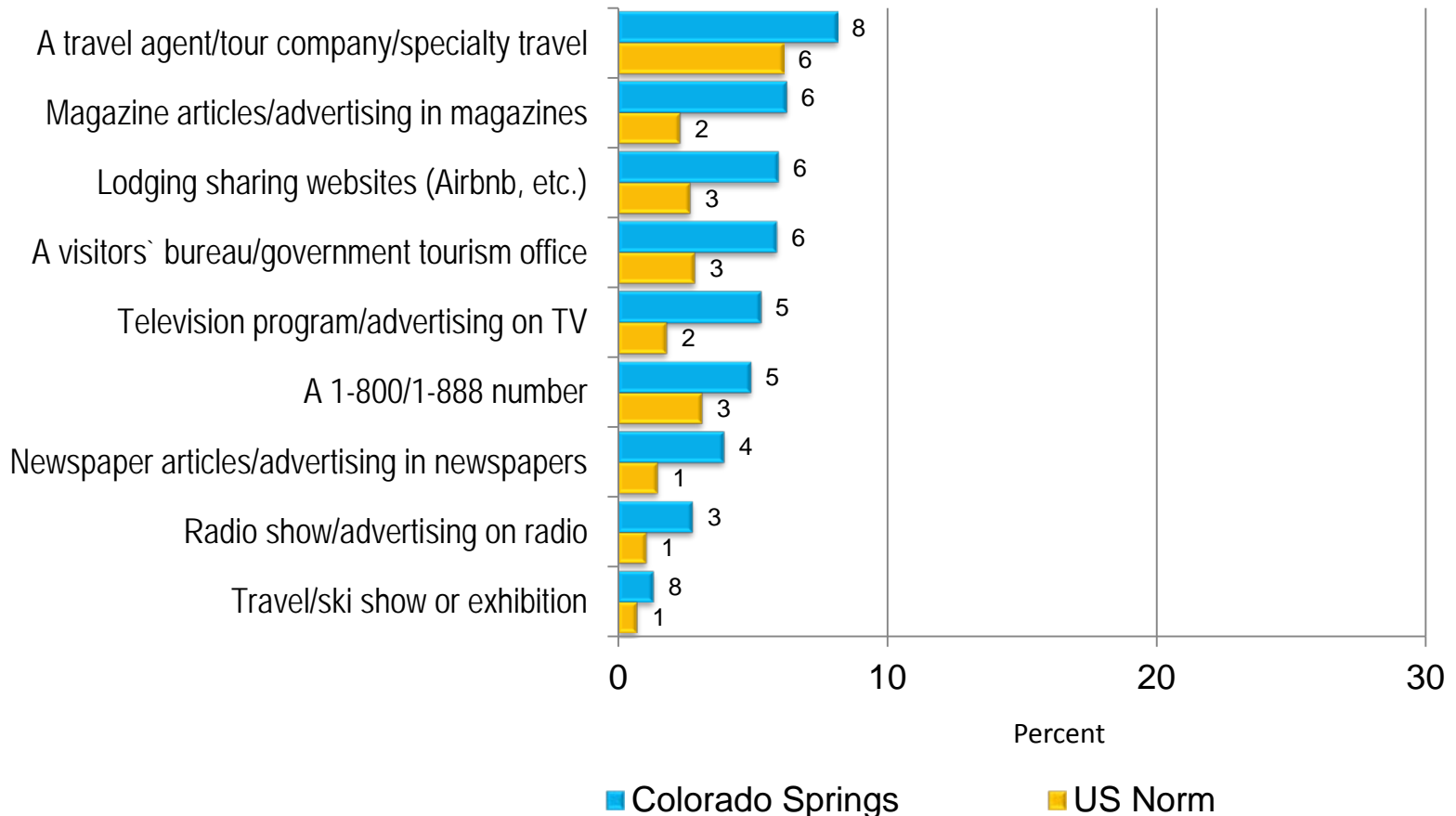
Base: Adult Overnight Person-Trips



Method of Planning Trip (Cont'd)



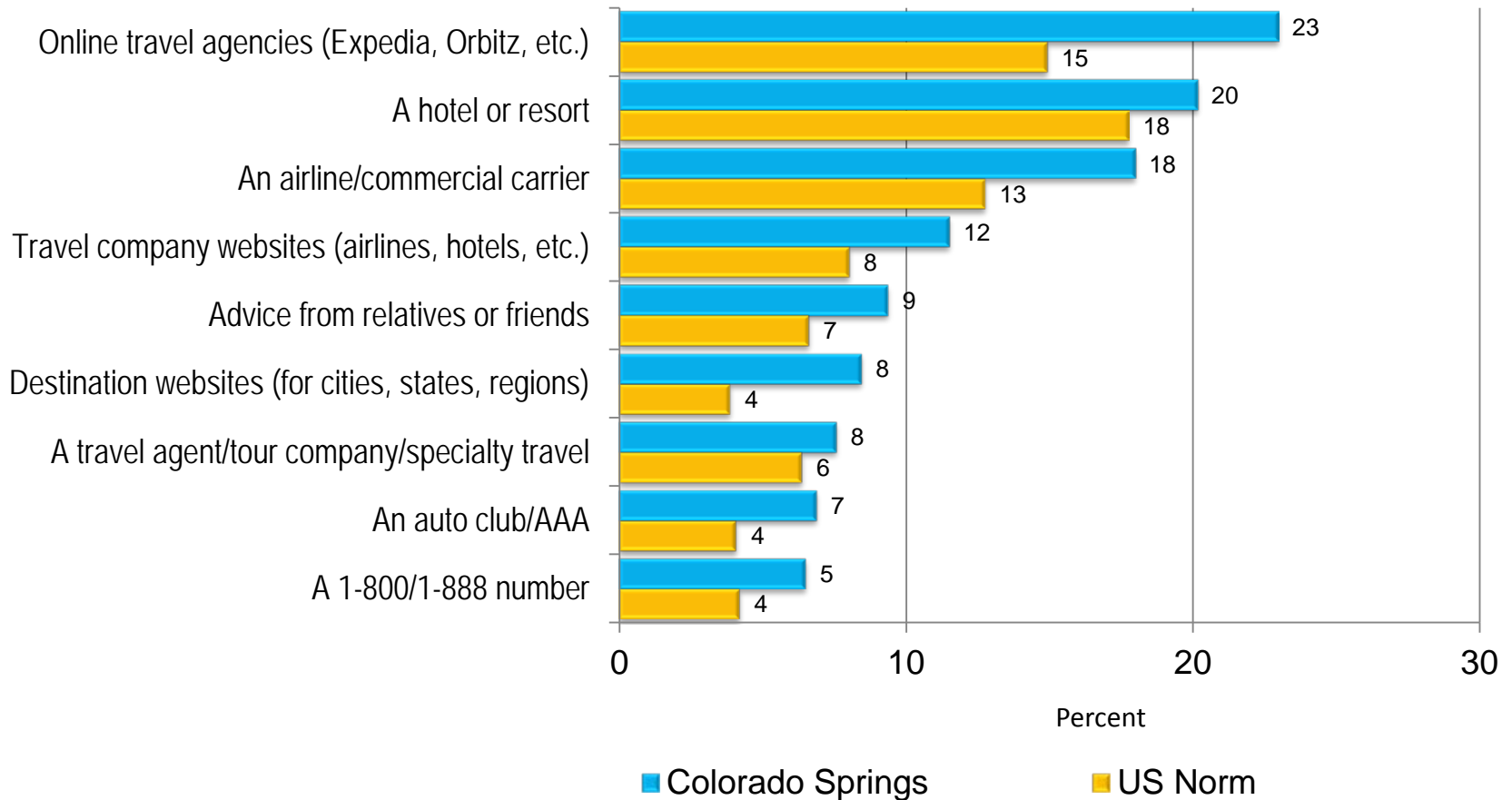
Base: Adult Overnight Person-Trips



Method of Booking Trip



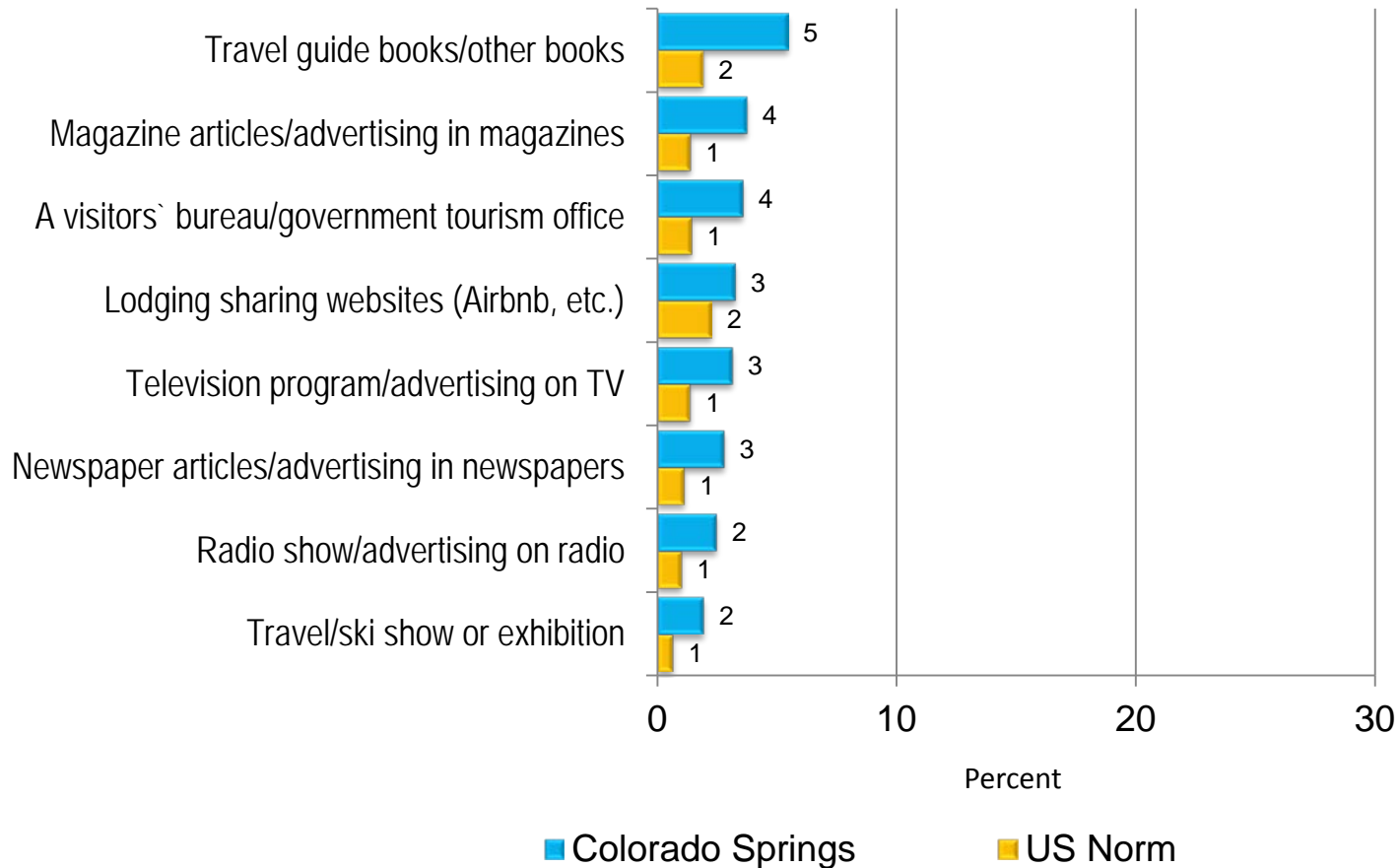
Base: Adult Overnight Person-Trips



Method of Booking Trip (Cont'd)



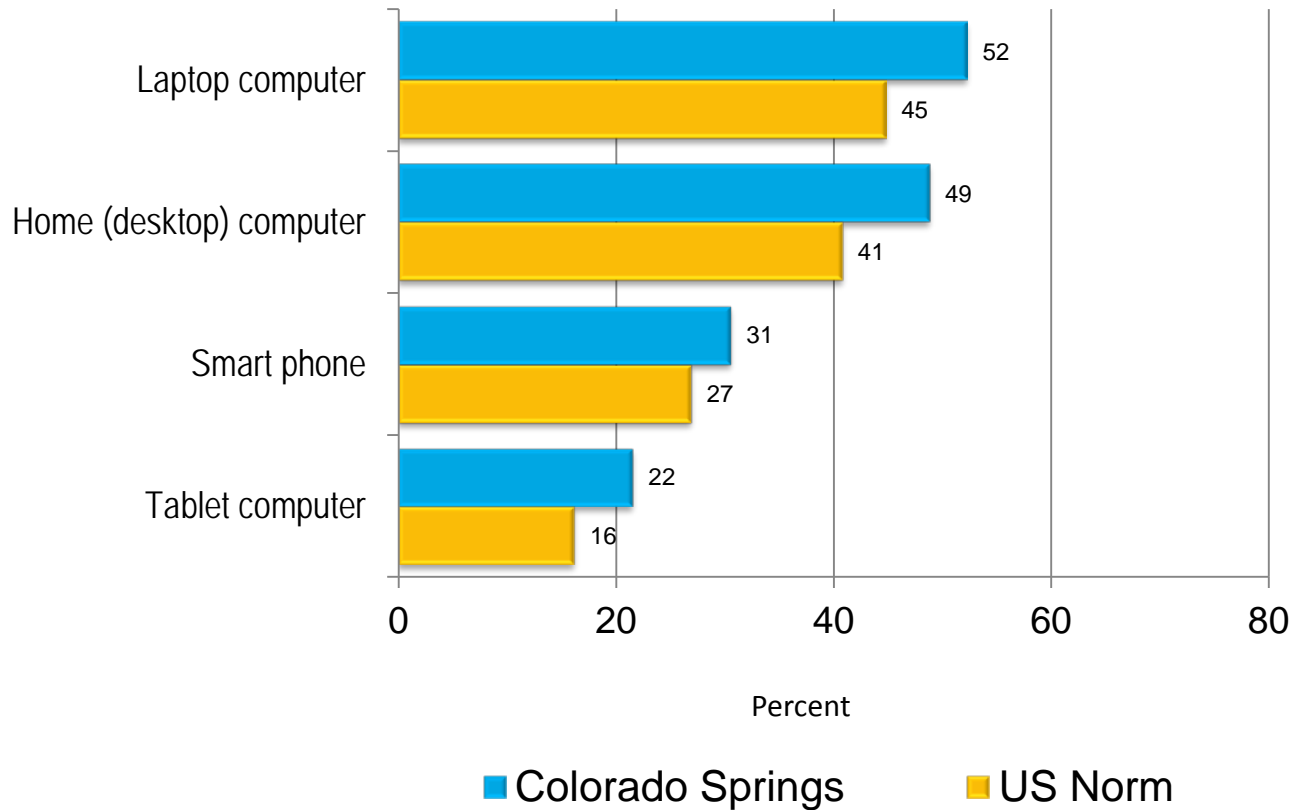
Base: Adult Overnight Person-Trips



Devices Used for Trip Planning



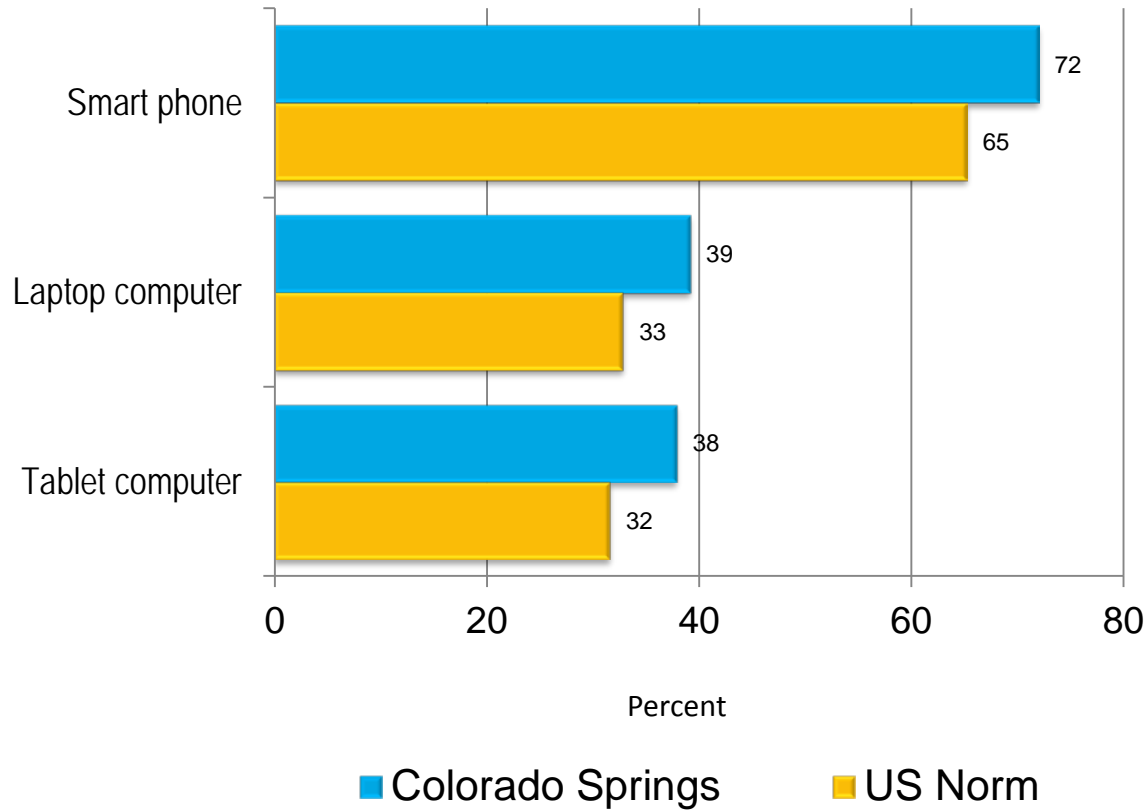
Base: Adult Overnight Person-Trips



Devices Used During Trip



Base: Adult Overnight Person-Trips



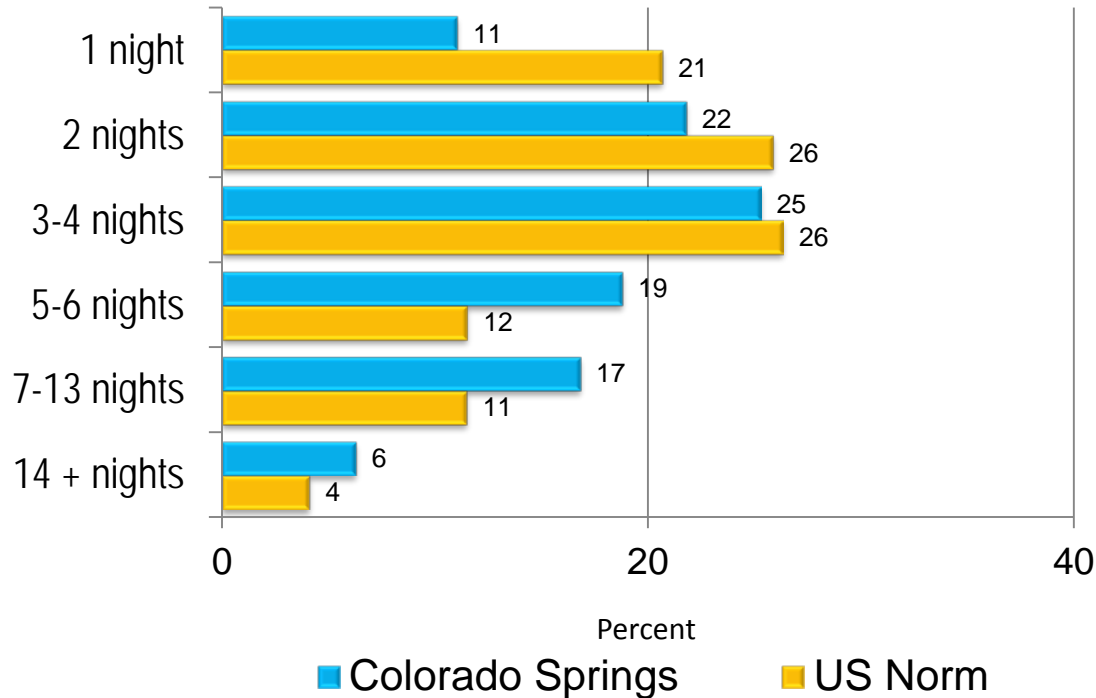
Total Nights Away on Trip



Base: Adult Overnight Person-Trips

**Average
Colorado Springs
= 5.0 nights**

**Average
US Norm
= 4.0 nights**

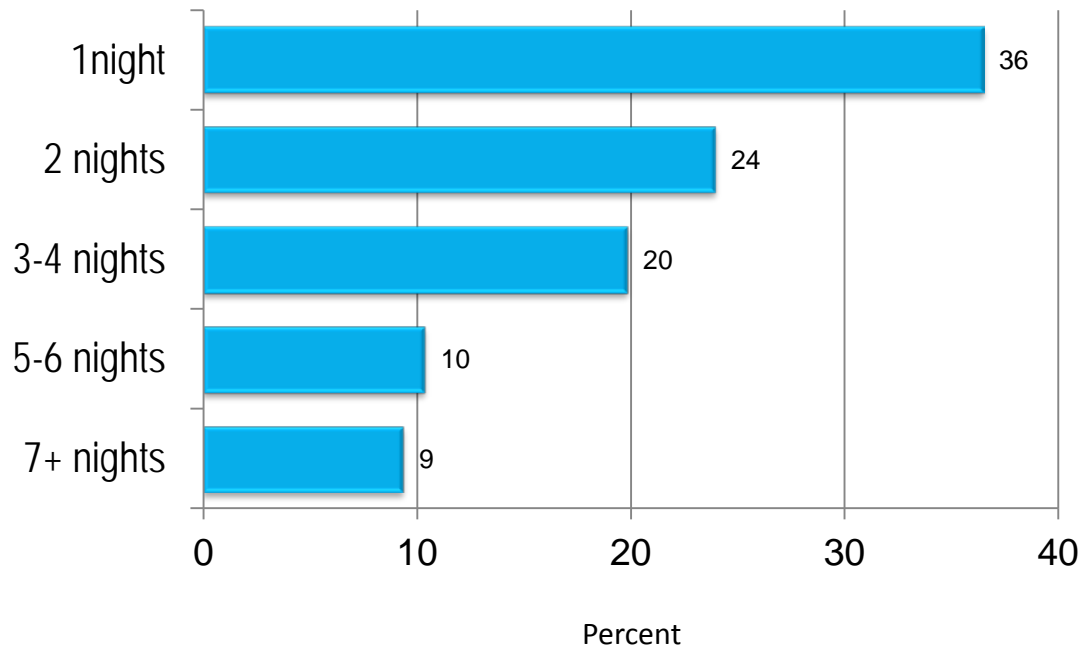


Number of Nights Spent in Colorado Springs



Base: Adult Overnight Person-Trips with 1+ Nights Spent in the Colorado Springs

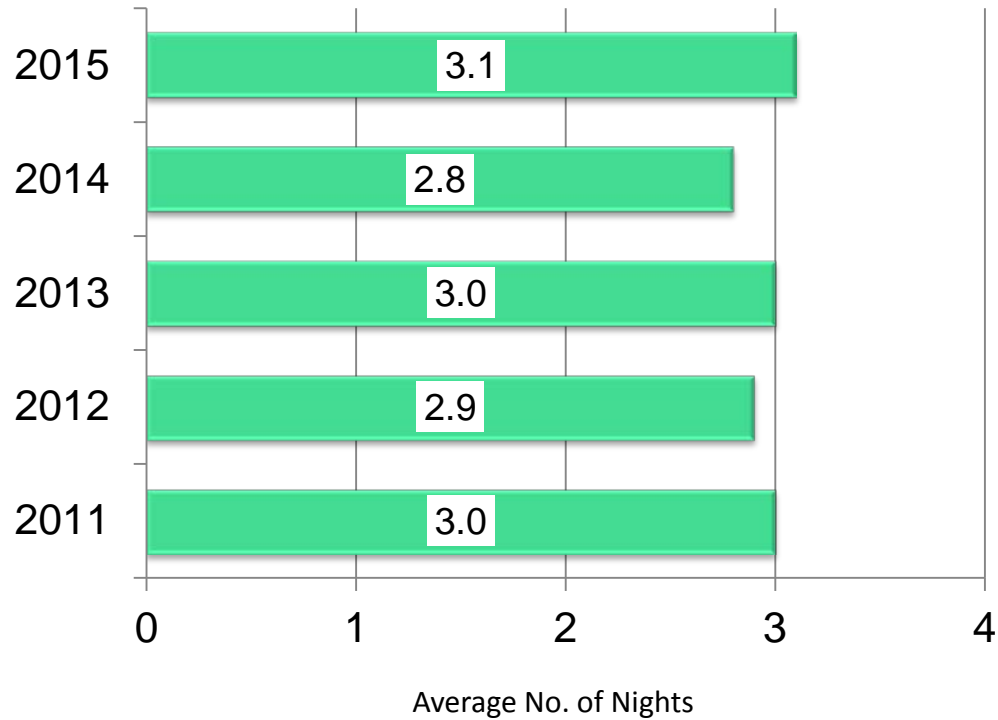
Average Nights Spent in Colorado Springs = 3.1 nights



Number of Nights Spent in Colorado Springs



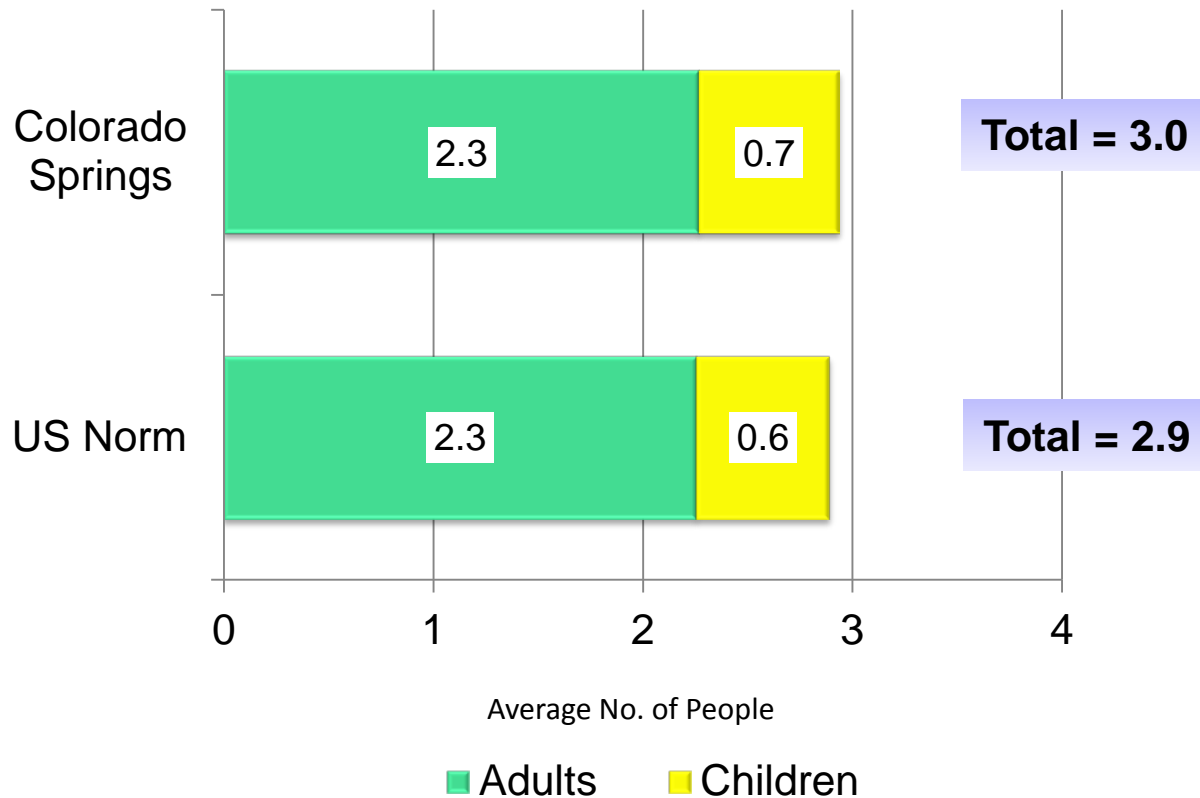
Base: Adult Overnight Person-Trips to Colorado Springs



Size of Travel Party



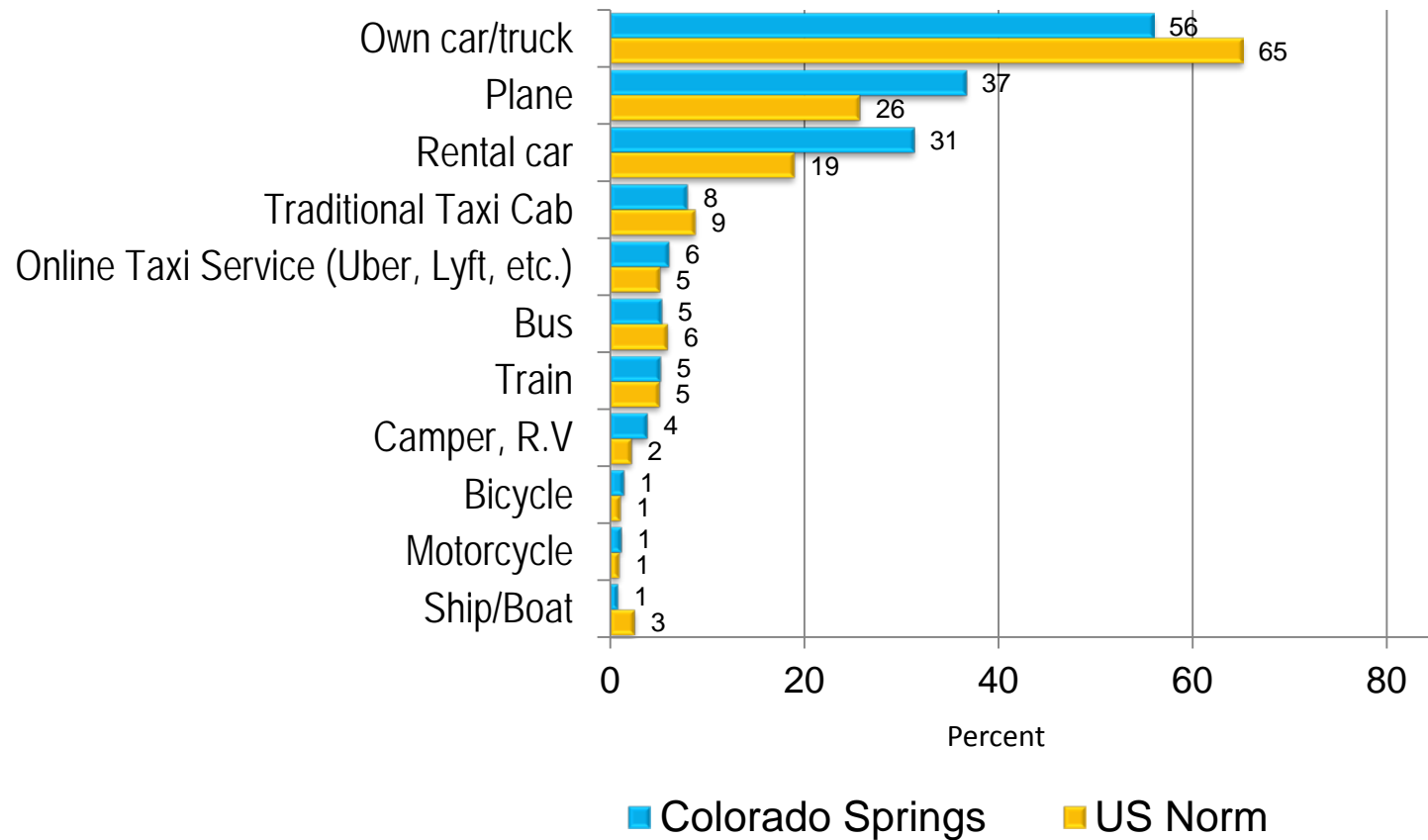
Base: Adult Overnight Person-Trips



Transportation



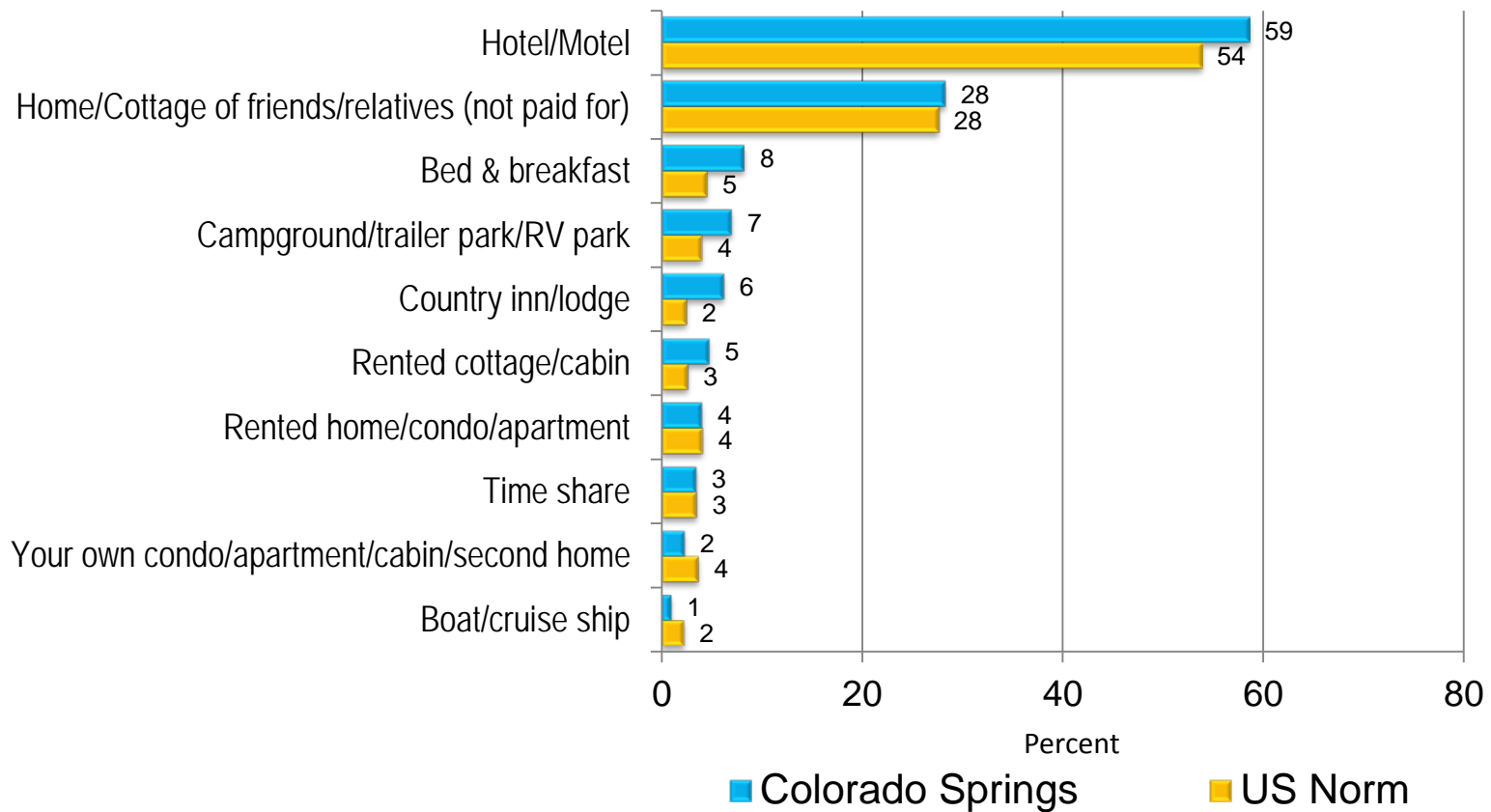
Base: Adult Overnight Person-Trips



Accommodations



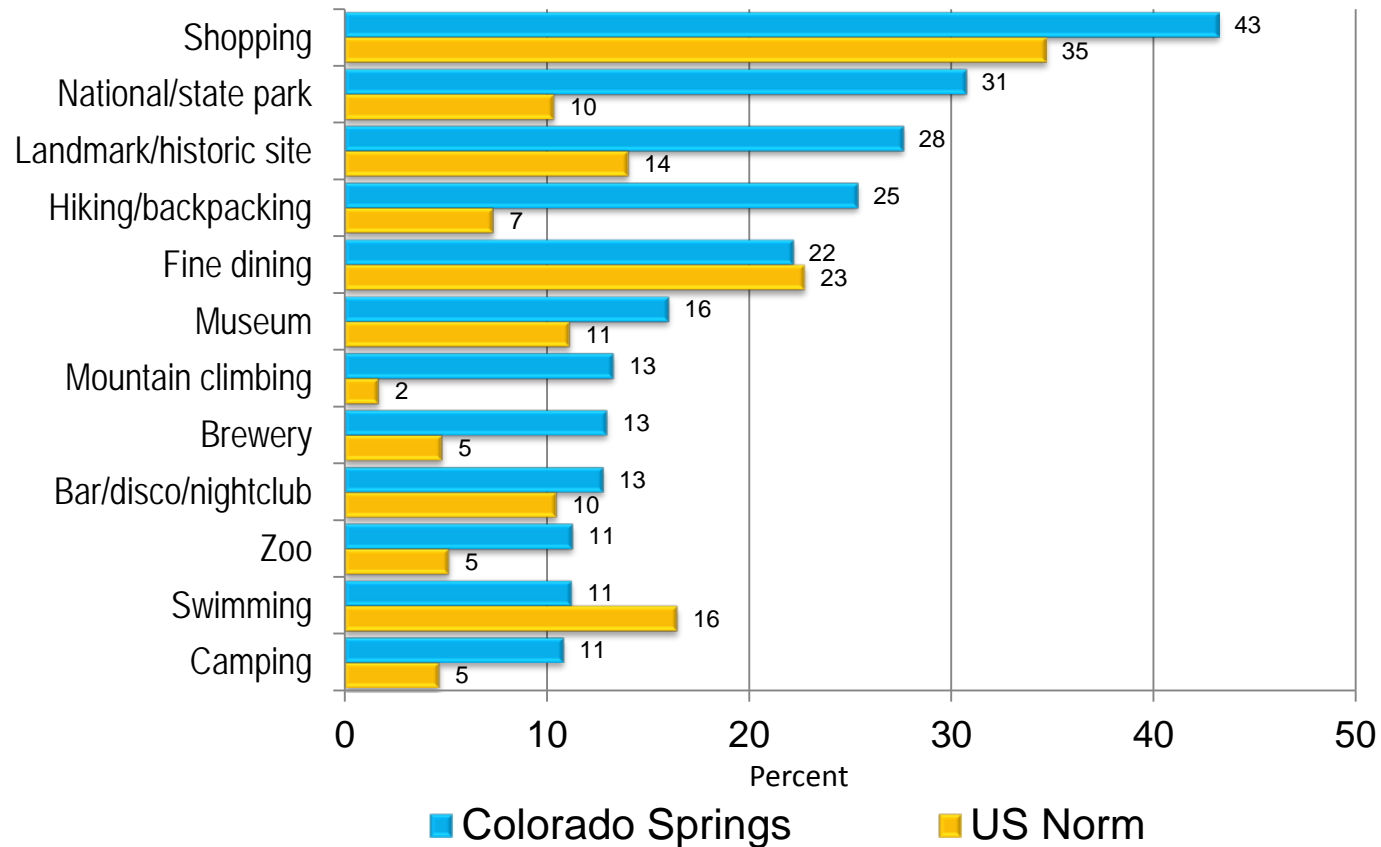
Base: Adult Overnight Person-Trips



Activities and Experiences



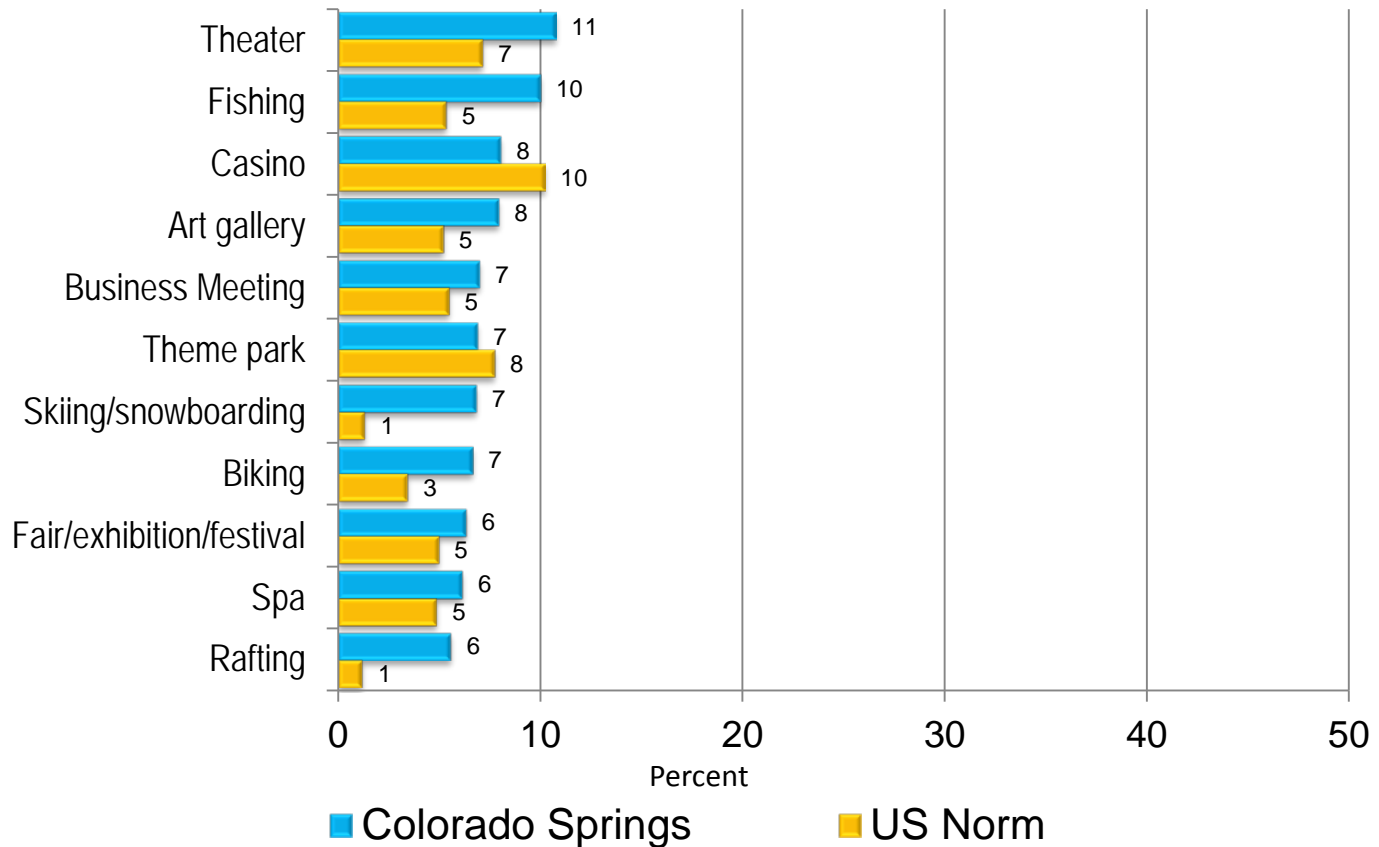
Base: Adult Overnight Person-Trips



Activities and Experiences (Cont'd)



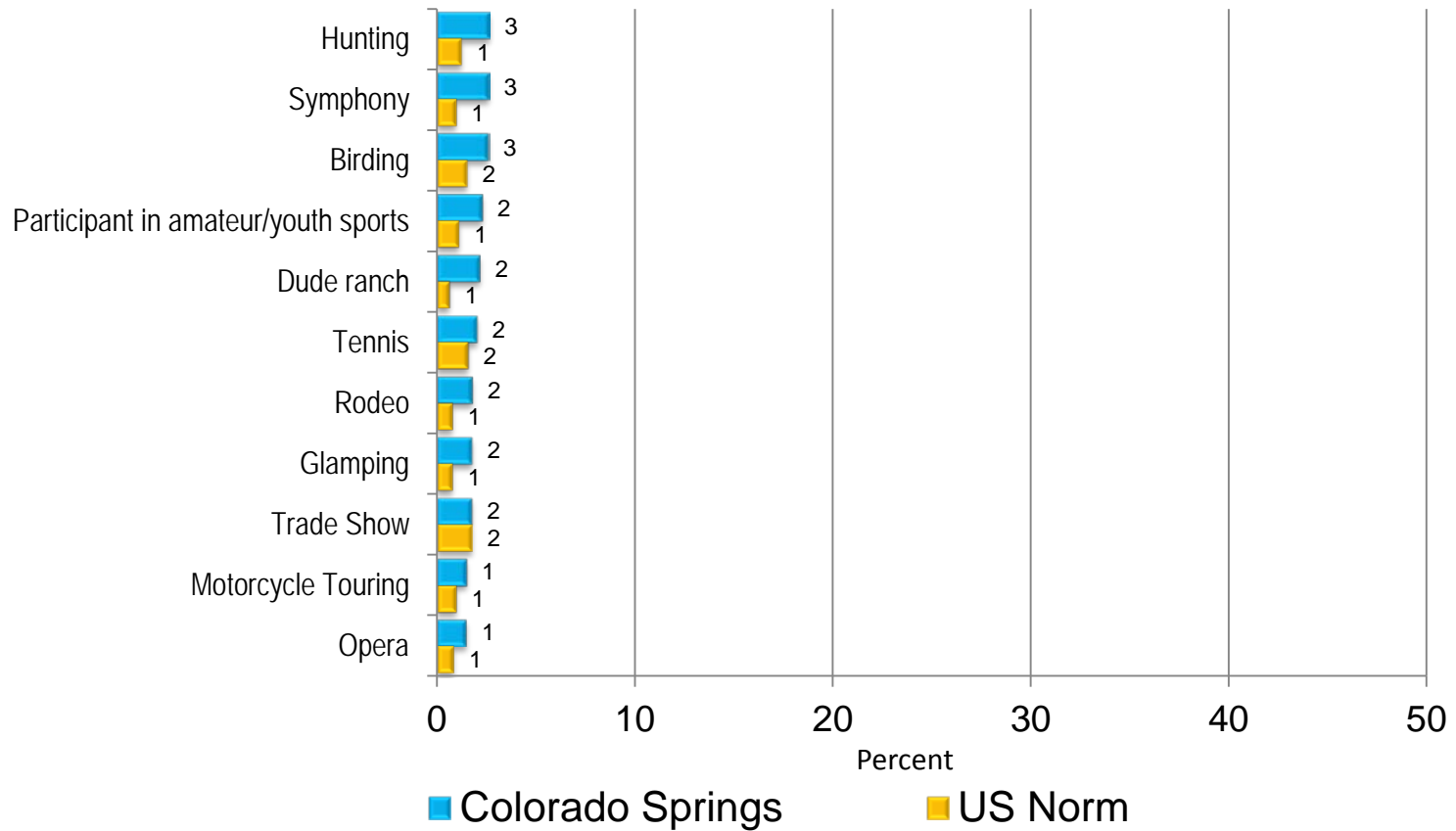
Base: Adult Overnight Person-Trips



Activities and Experiences (Cont'd)



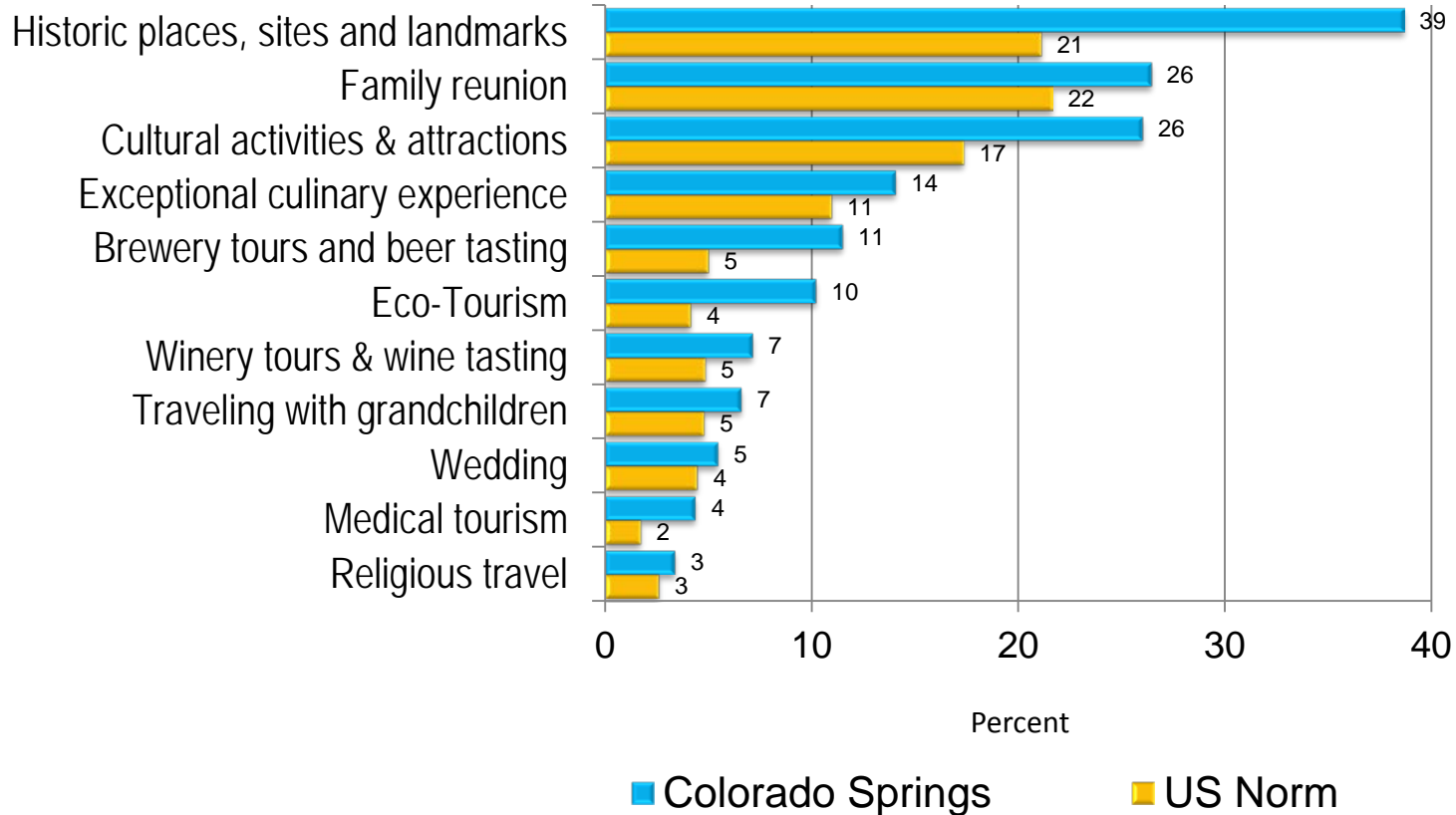
Base: Adult Overnight Person-Trips



Activities of Special Interest



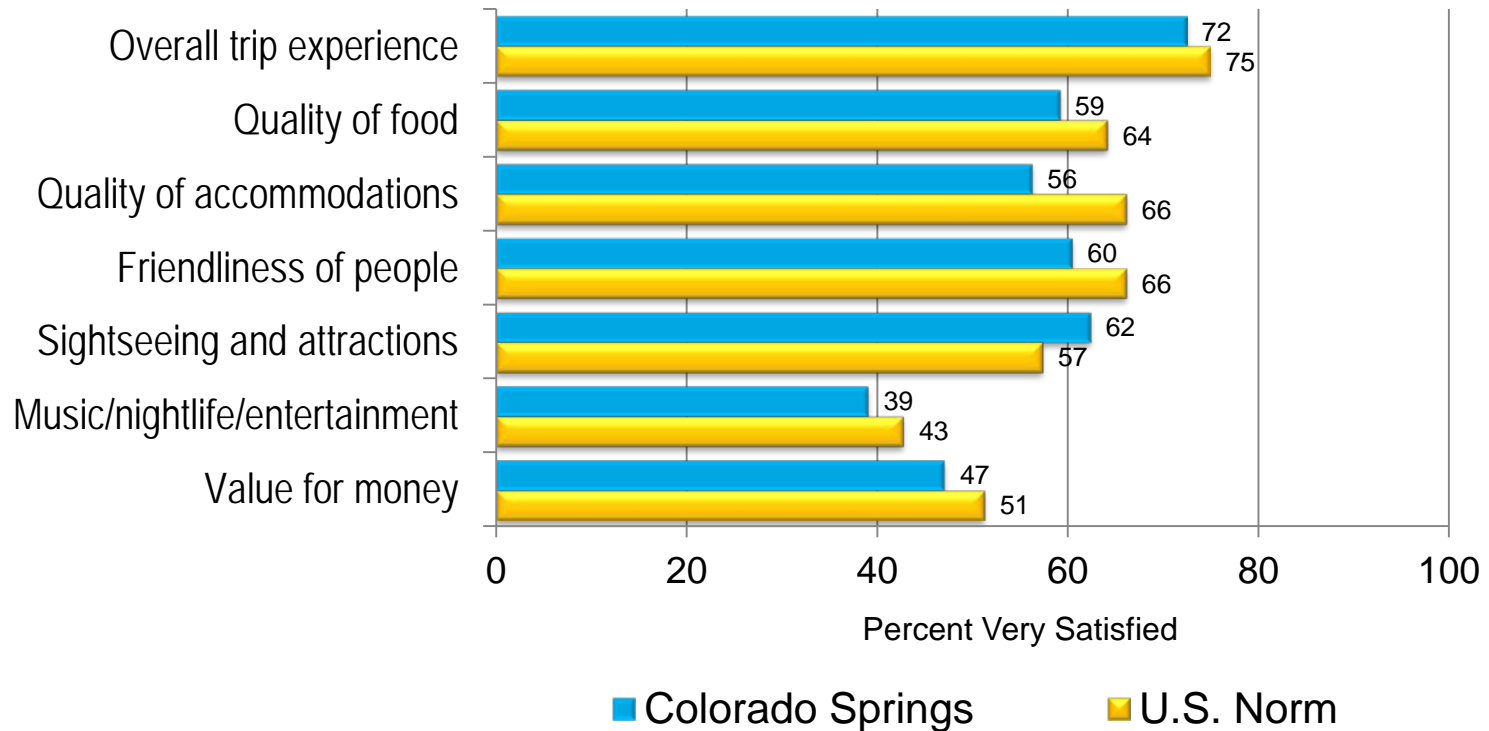
Base: Adult Overnight Person-Trips



Trip Satisfaction - % Very Satisfied



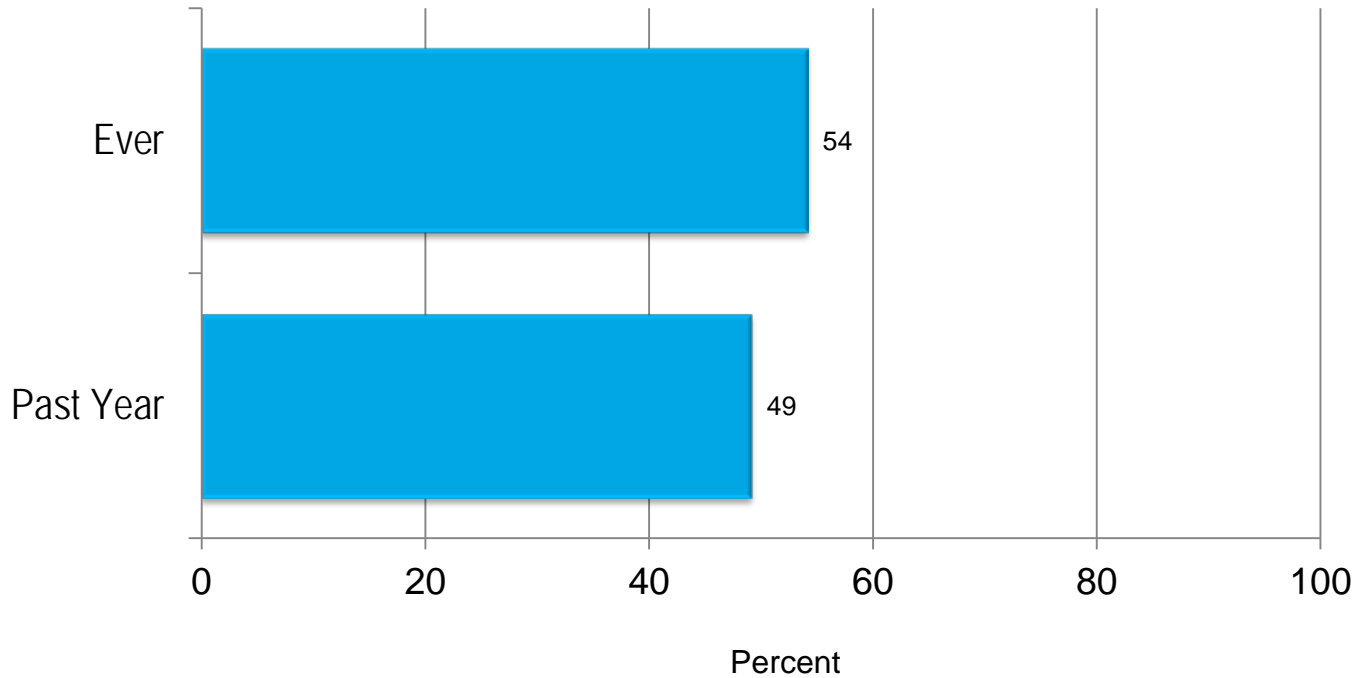
Base: Adult Overnight Person-Trips



Past Visitation to Colorado Springs



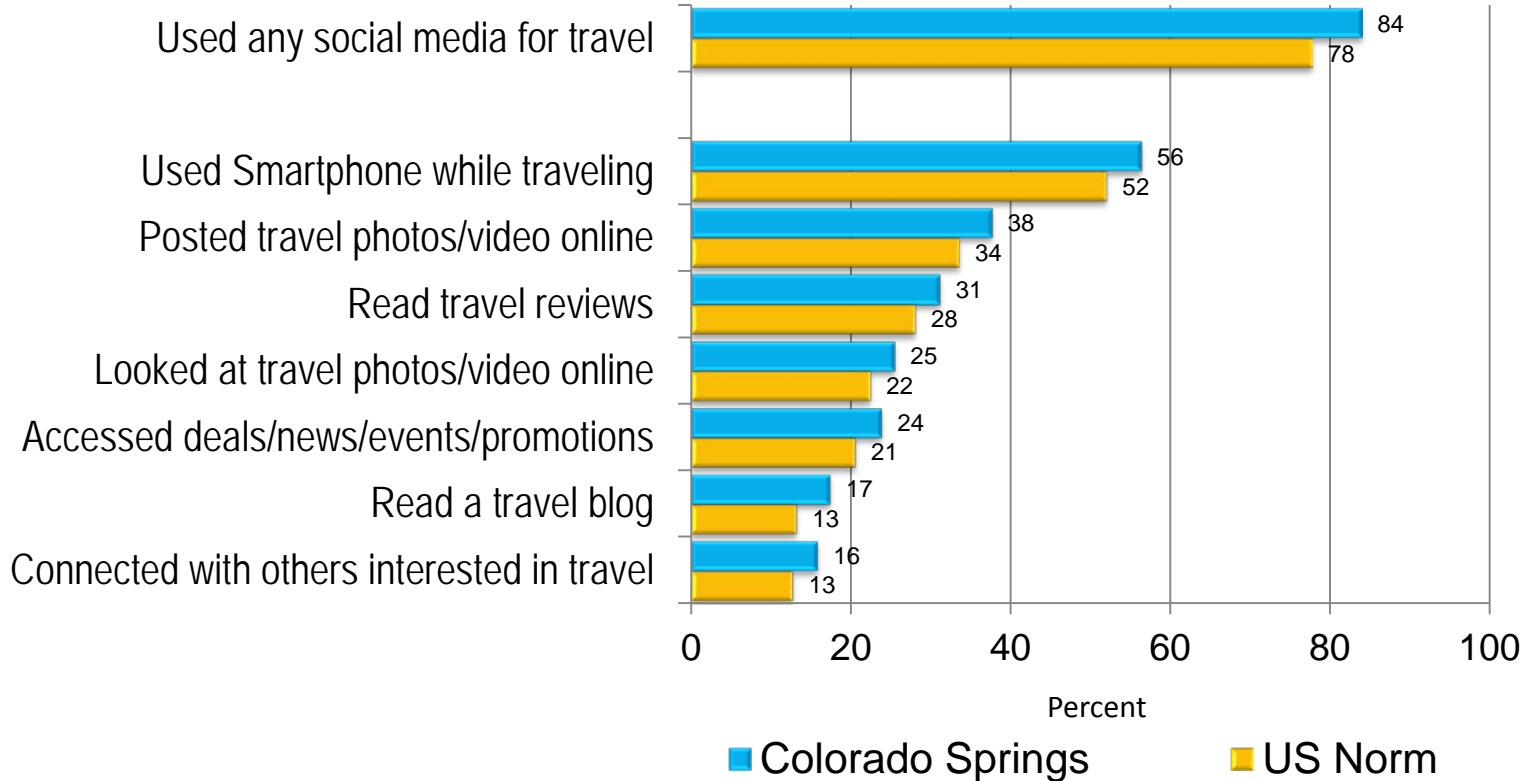
Base: Adult Overnight Person-Trips to Colorado Springs



Use of Social Media for Travel



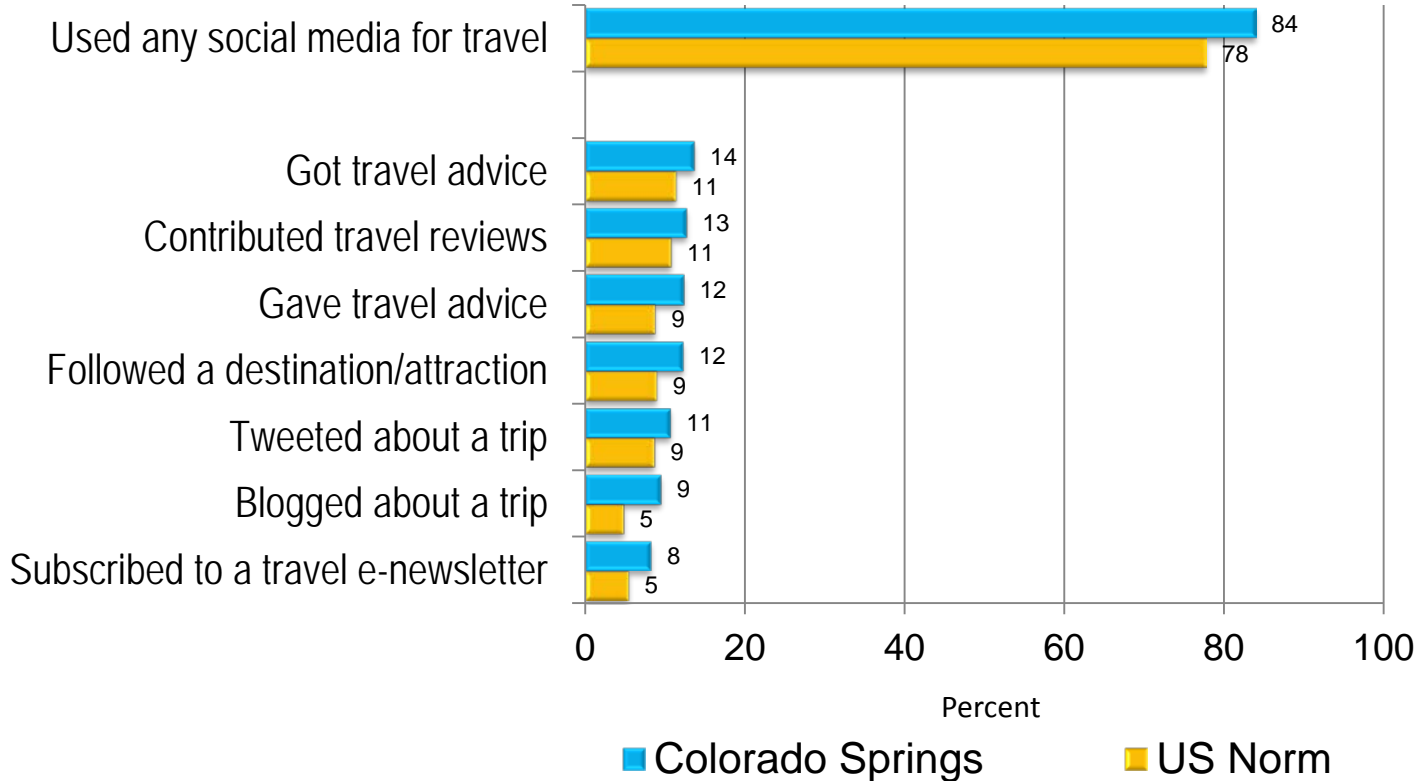
Base: Adult Overnight Person-Trips



Use of Social Media for Travel (Cont'd)



Base: Adult Overnight Person-Trips



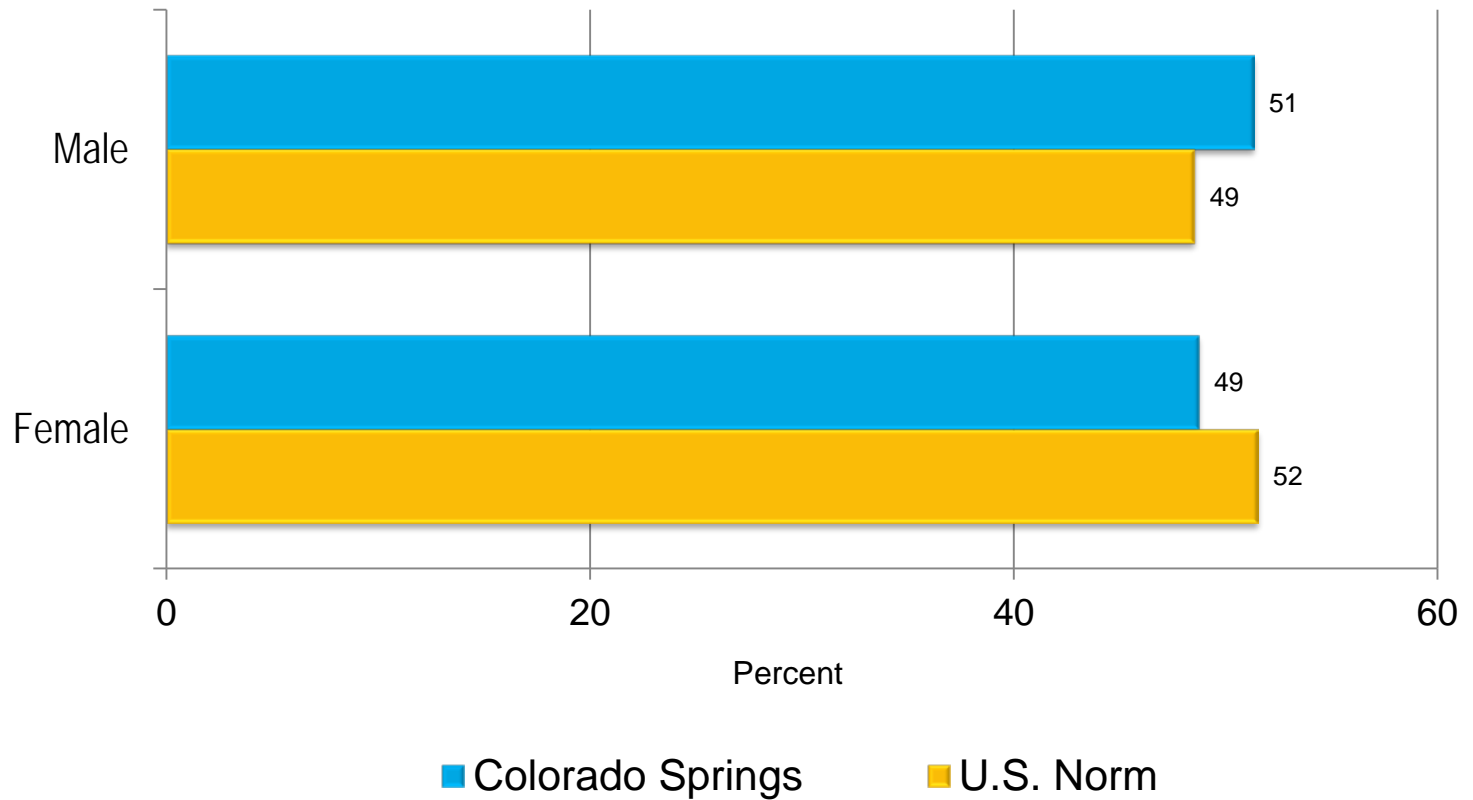


Demographic Profile of Overnight Visitors

Gender



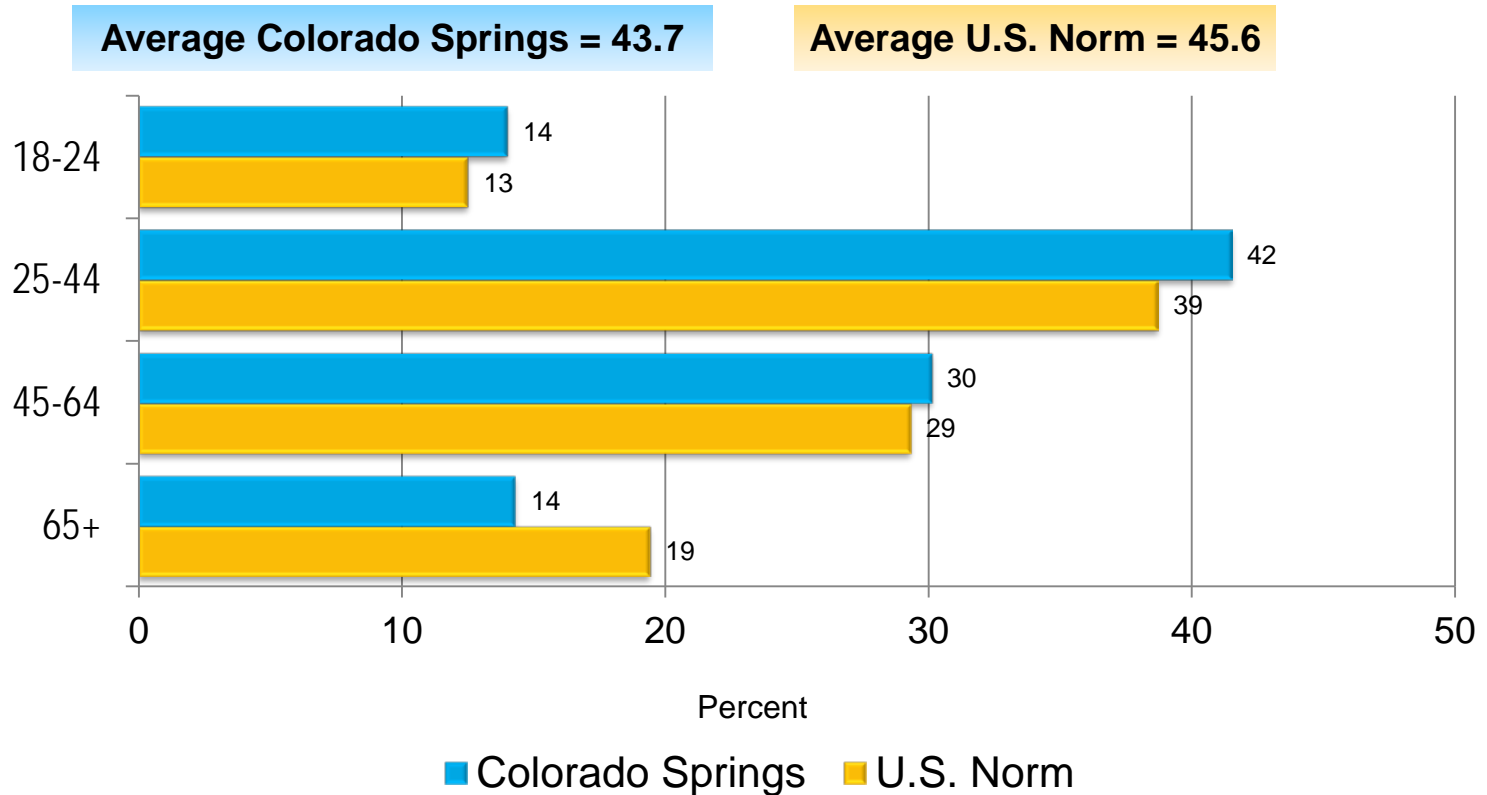
Base: Adult Overnight Person-Trips



Age



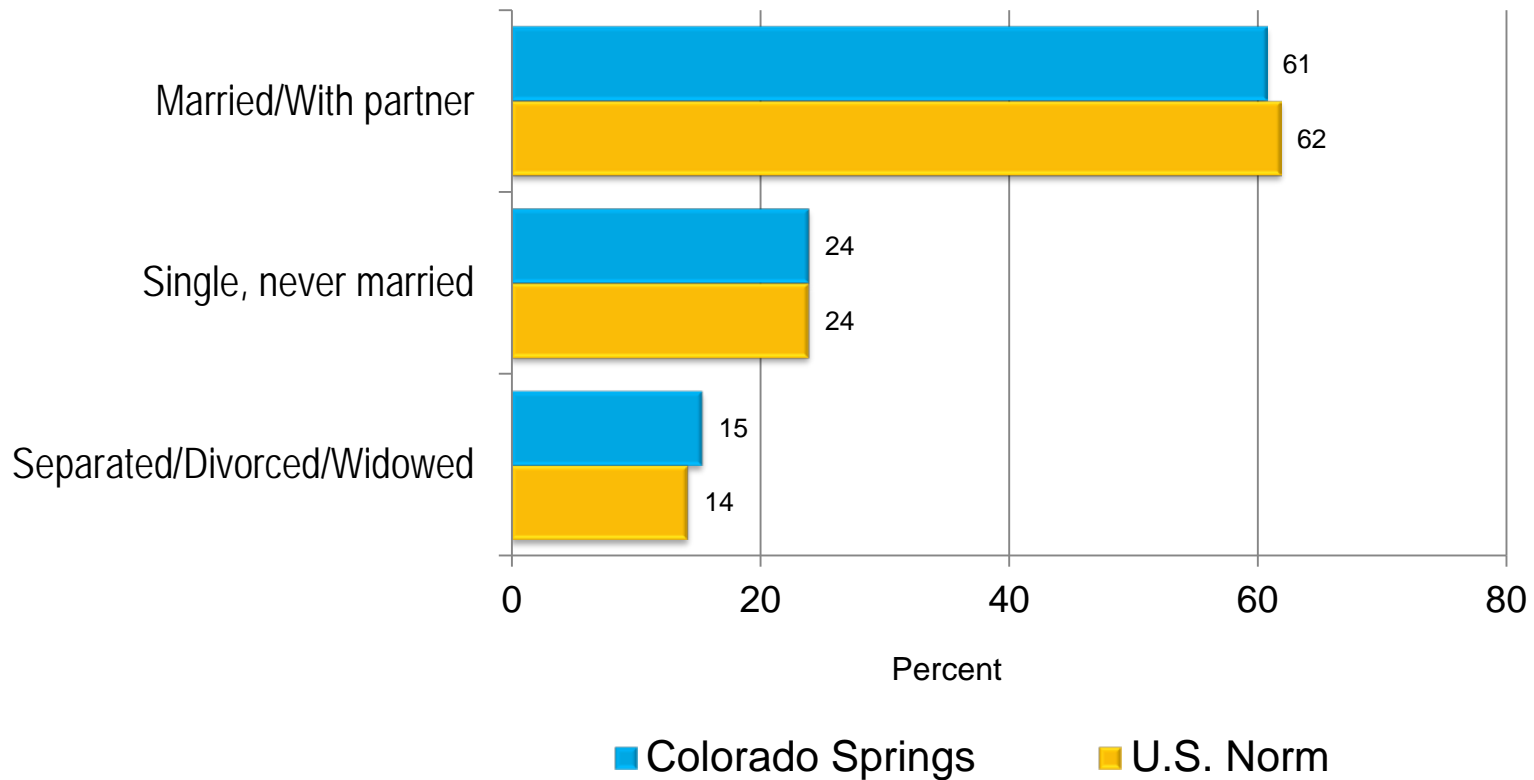
Base: Adult Overnight Person-Trips



Marital Status



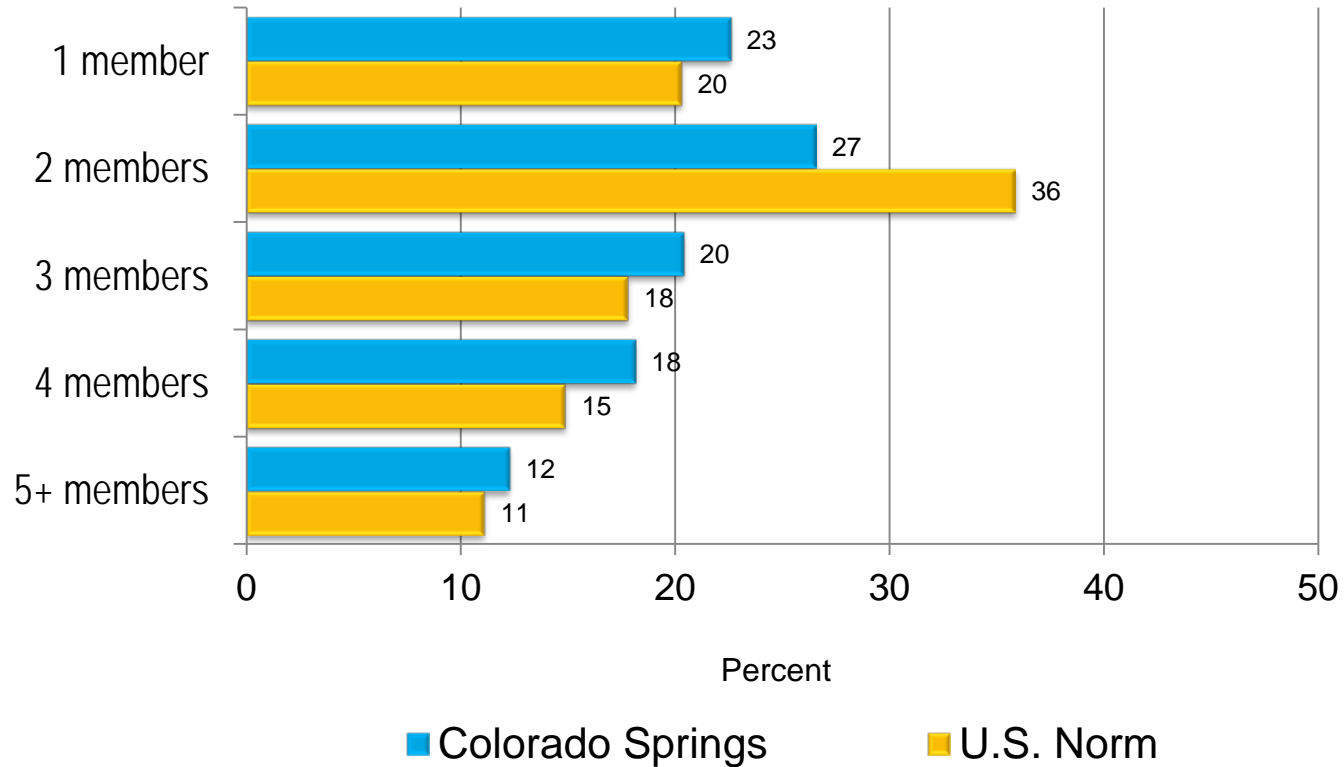
Base: Adult Overnight Person-Trips



Household Size



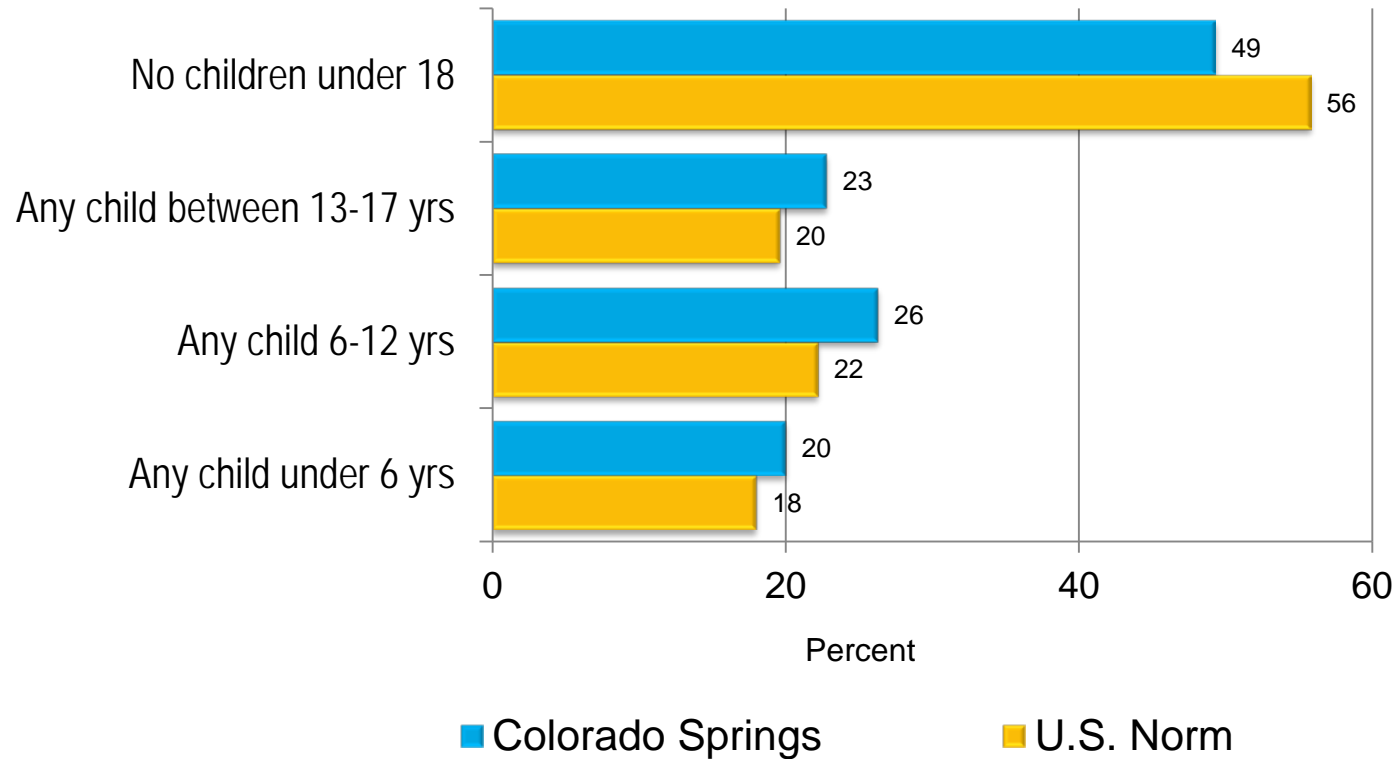
Base: Adult Overnight Person-Trips



Children in Household



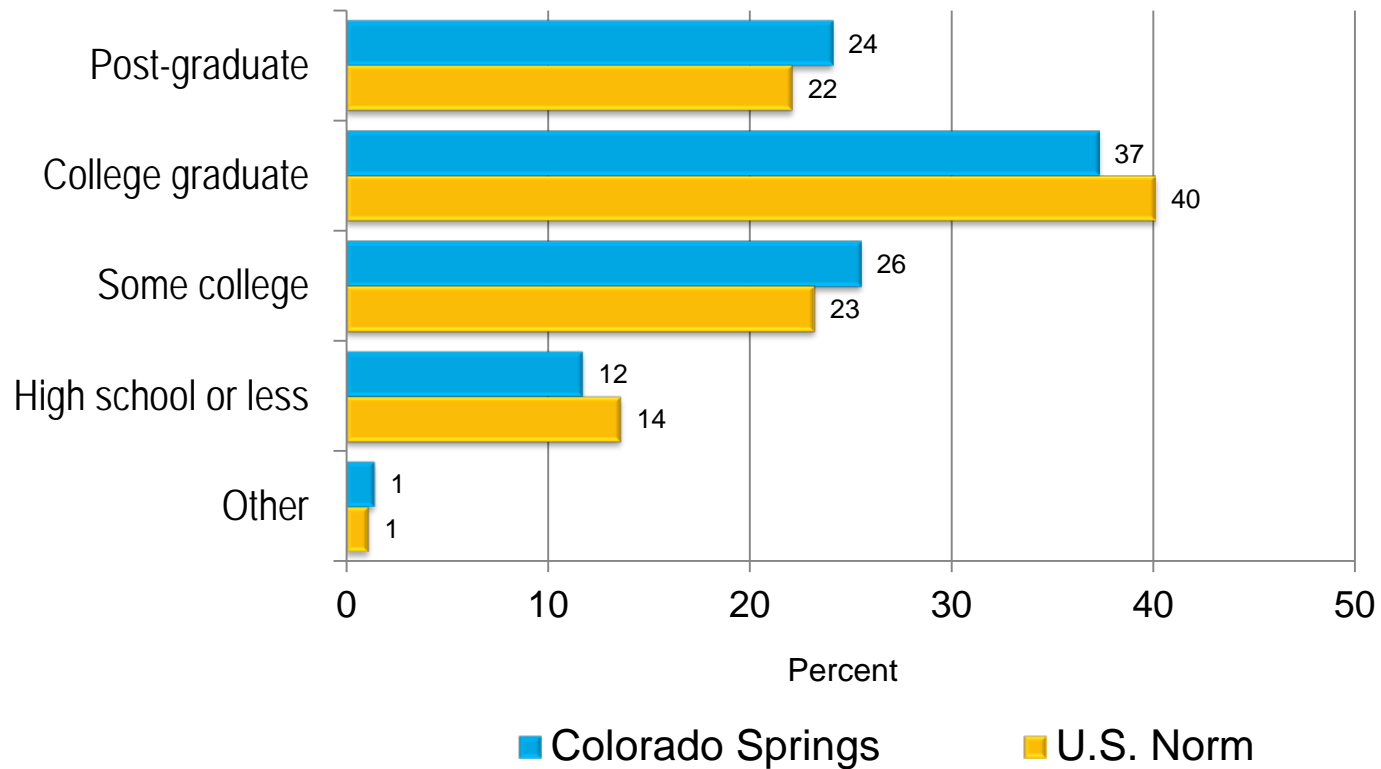
Base: Adult Overnight Person Trips



Education



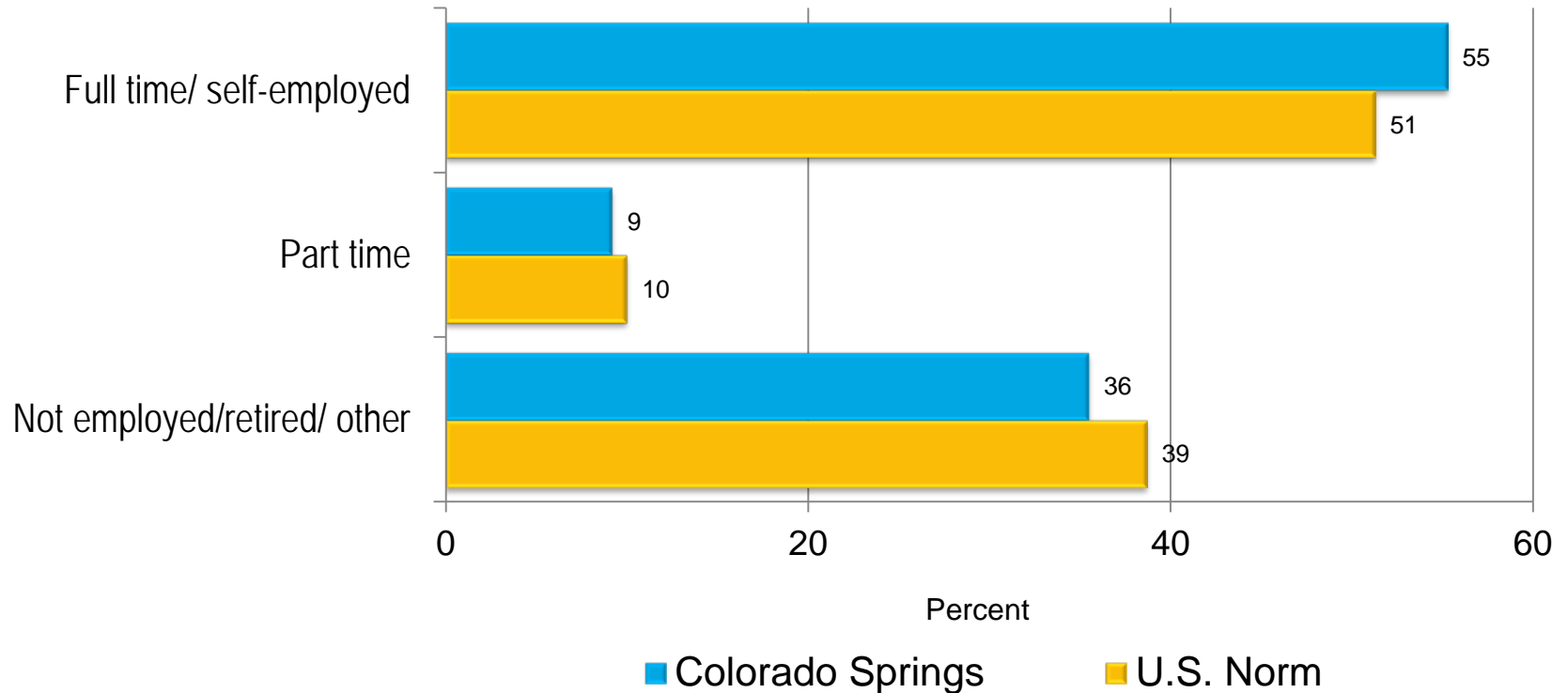
Base: Adult Overnight Person-Trips



Employment



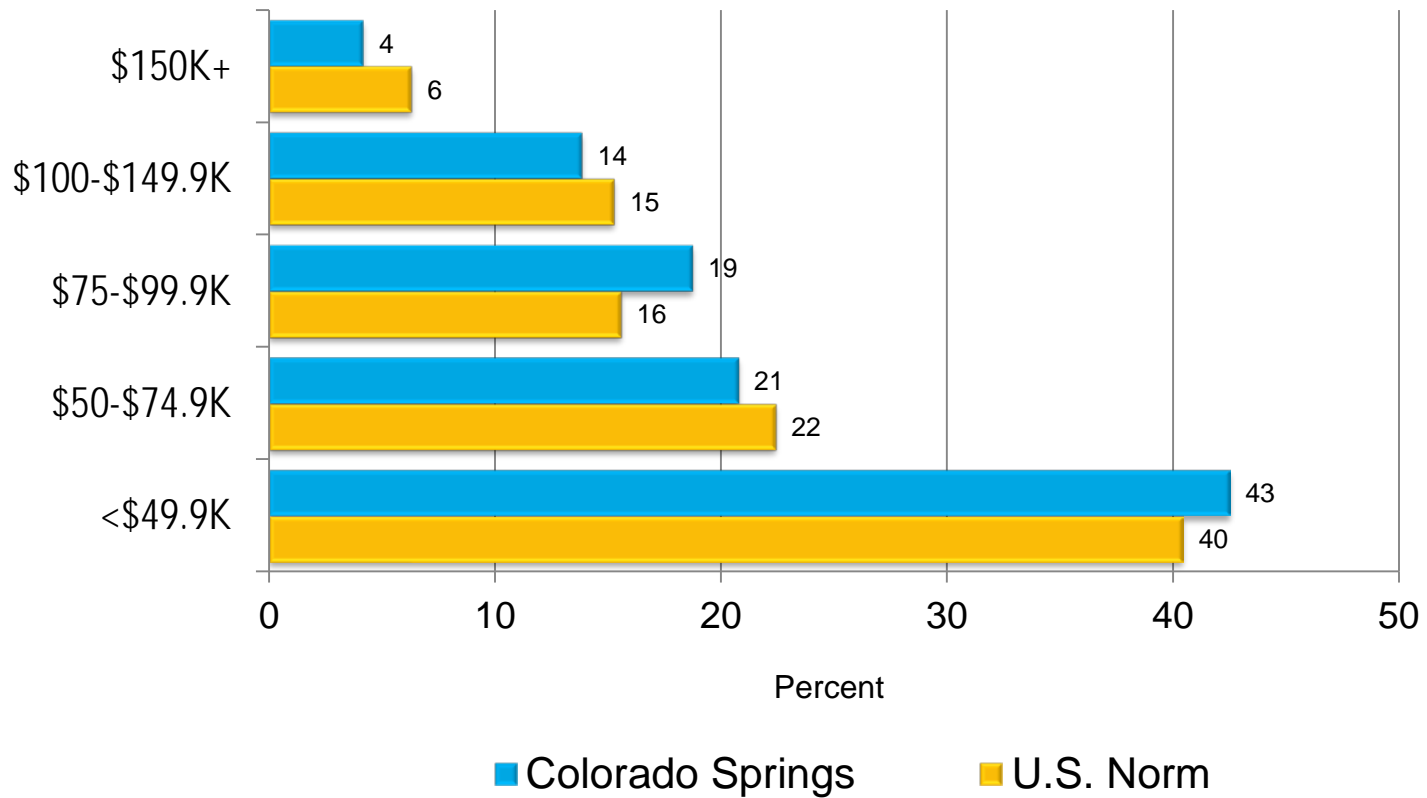
Base: Adult Overnight Person-Trips



Household Income



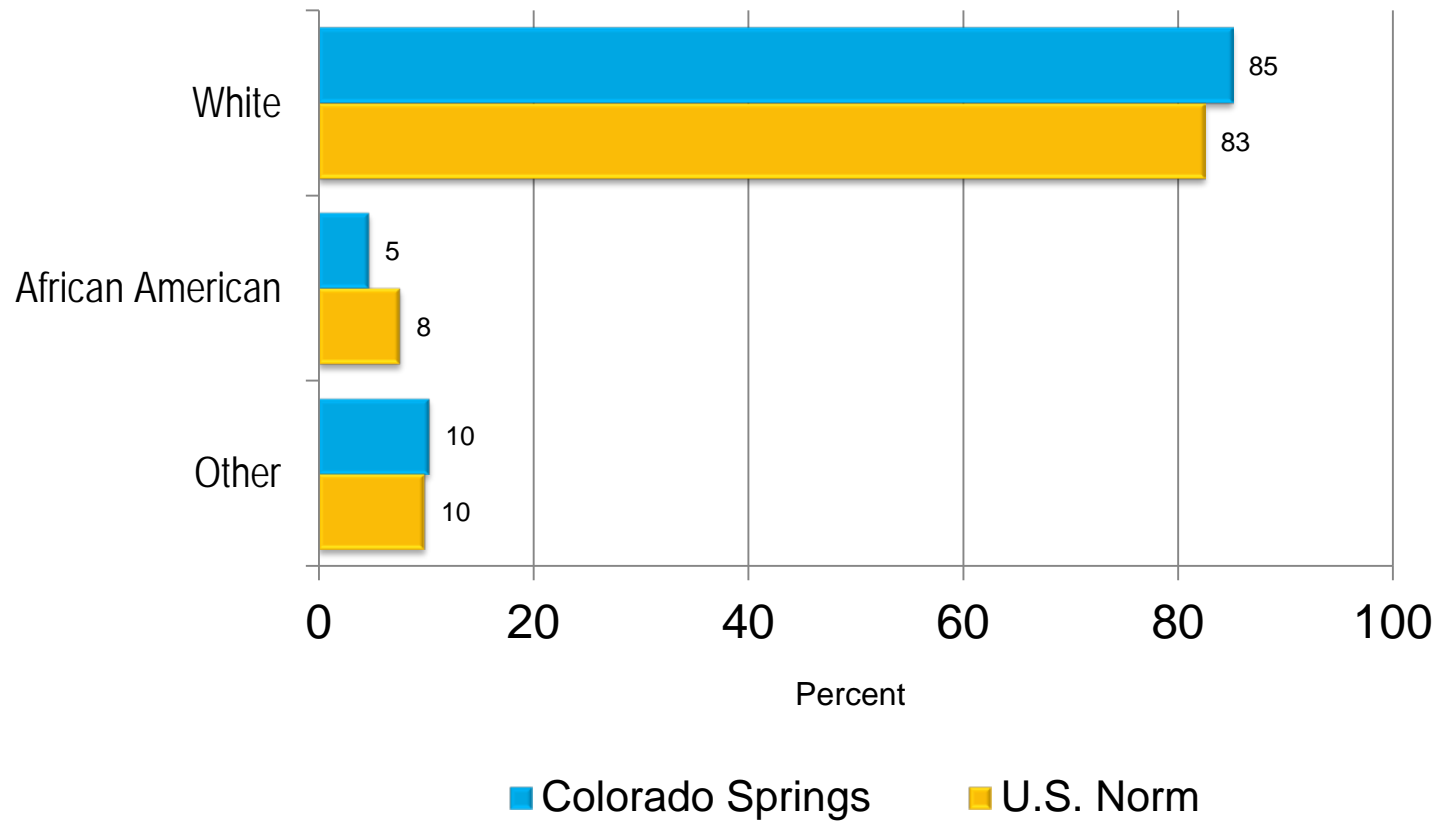
Base: Adult Overnight Person-Trips



Race



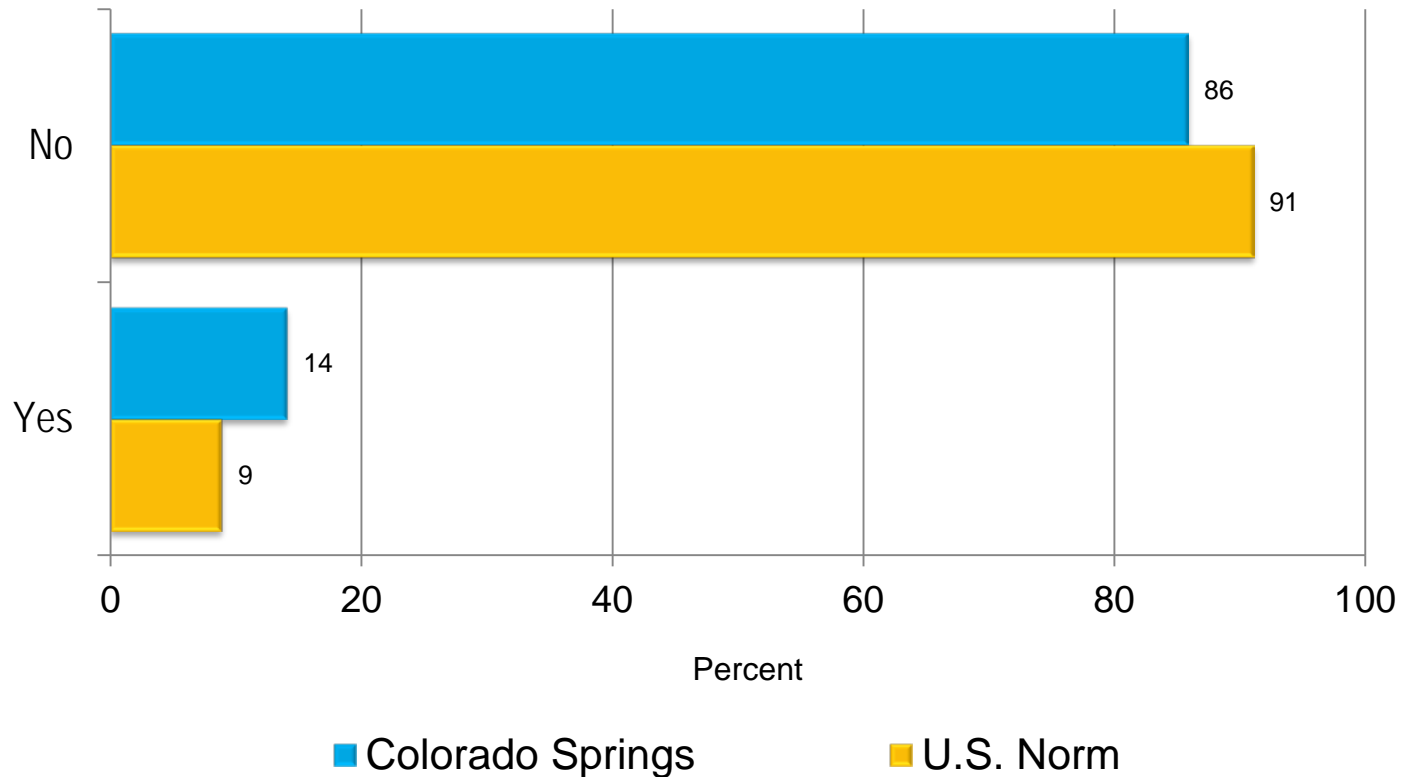
Base: Adult Overnight Person-Trips



Hispanic Background



Base: Adult Overnight Person-Trips





Day Trip Detail

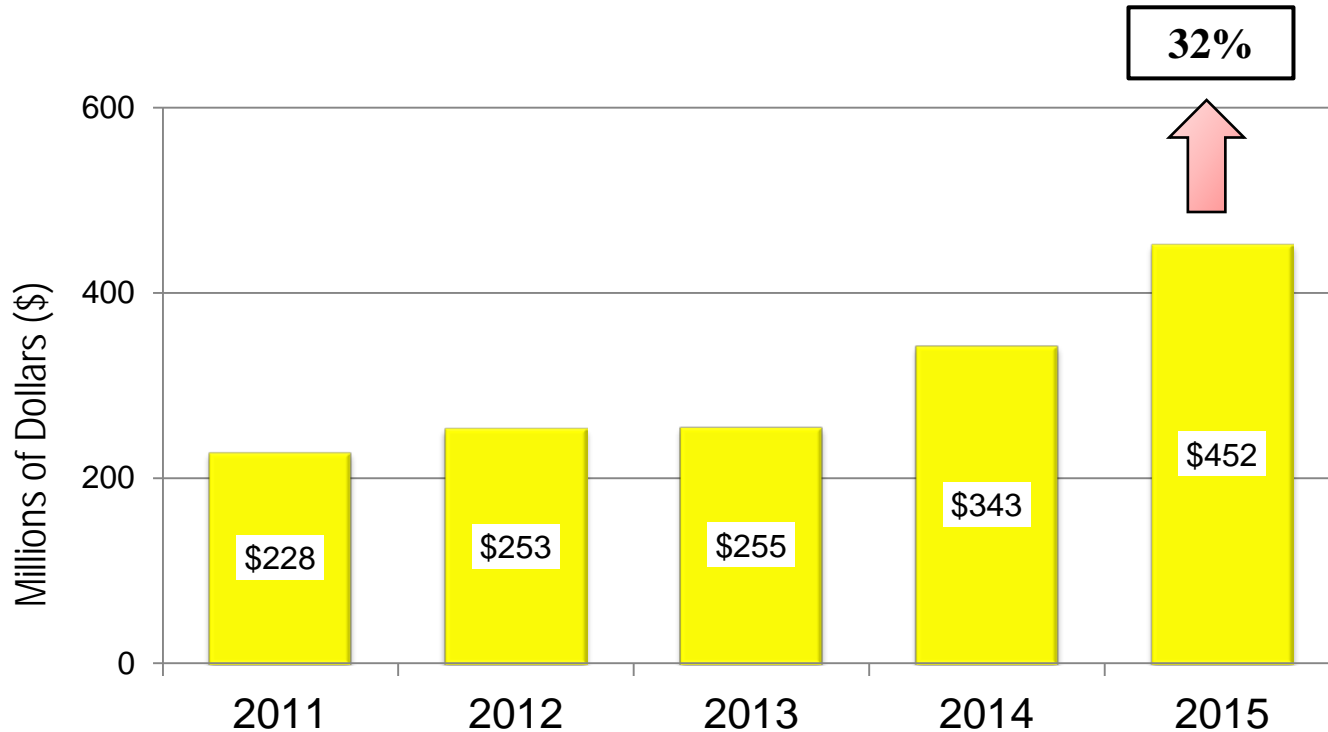


Day Trip Expenditures

Total Domestic Spending in Colorado Springs on Day Trips – 2011-2015



Base: Total Day Person-Trips to Colorado Springs

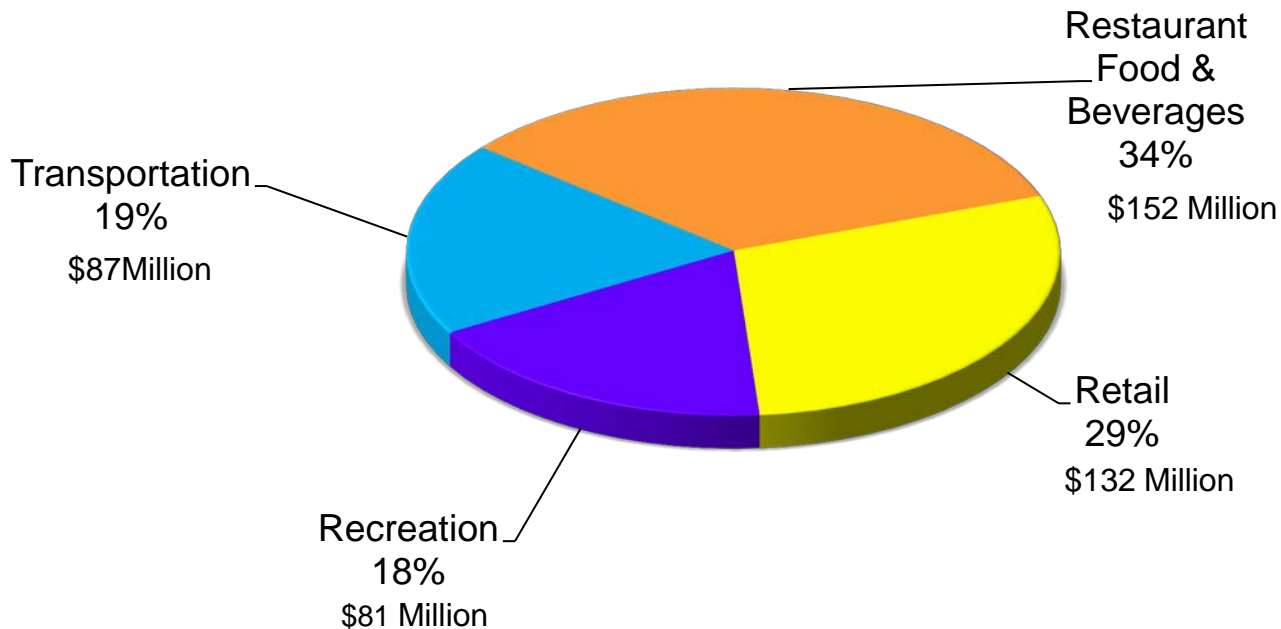


Total Domestic Spending in Colorado Springs on Day Trips – by Sector



Total Spending = \$452 Million

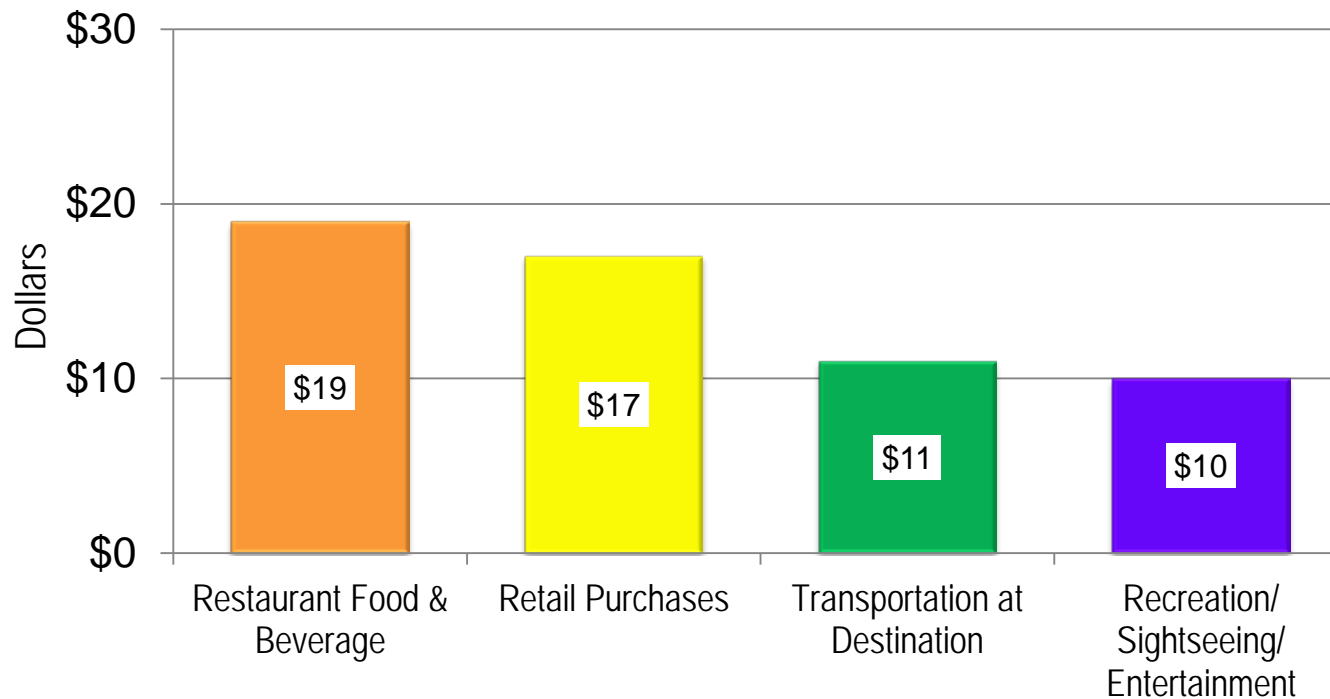
+32% vs. 2014



Average Per Person Expenditures on Day Trips – By Sector



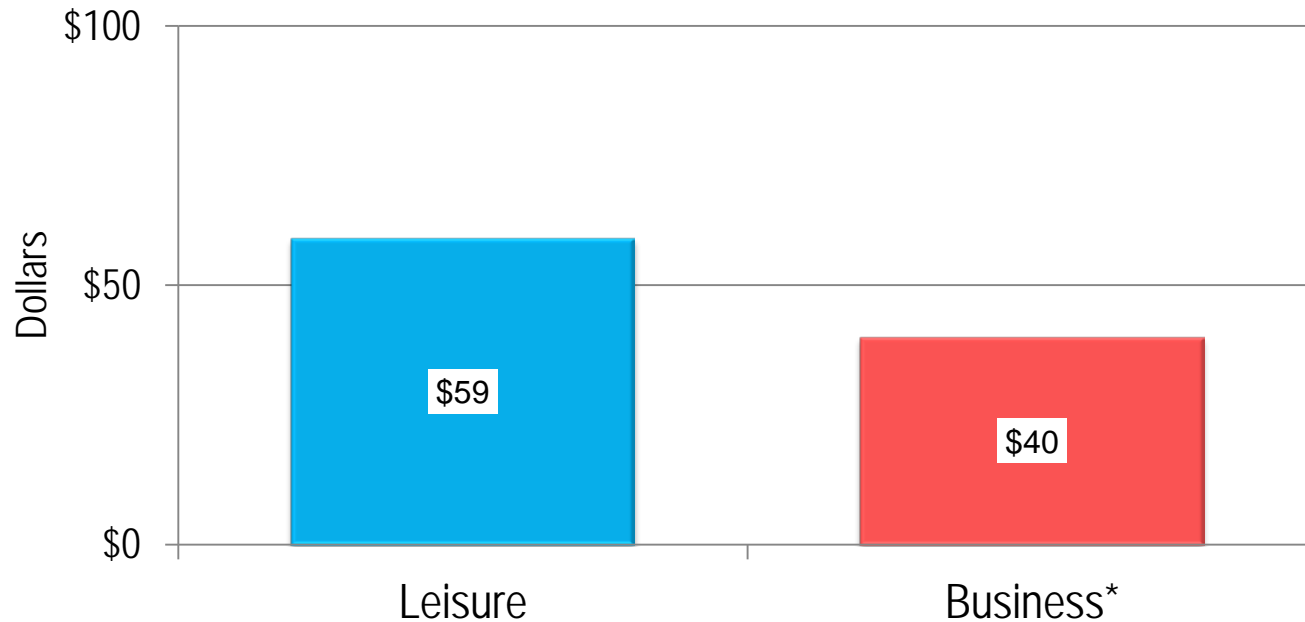
Base: Total Day Person-Trips to Colorado Springs



Average Per Person Expenditures on Day Trips – by Trip Purpose



Base: Total Day Person-Trips to Colorado Springs

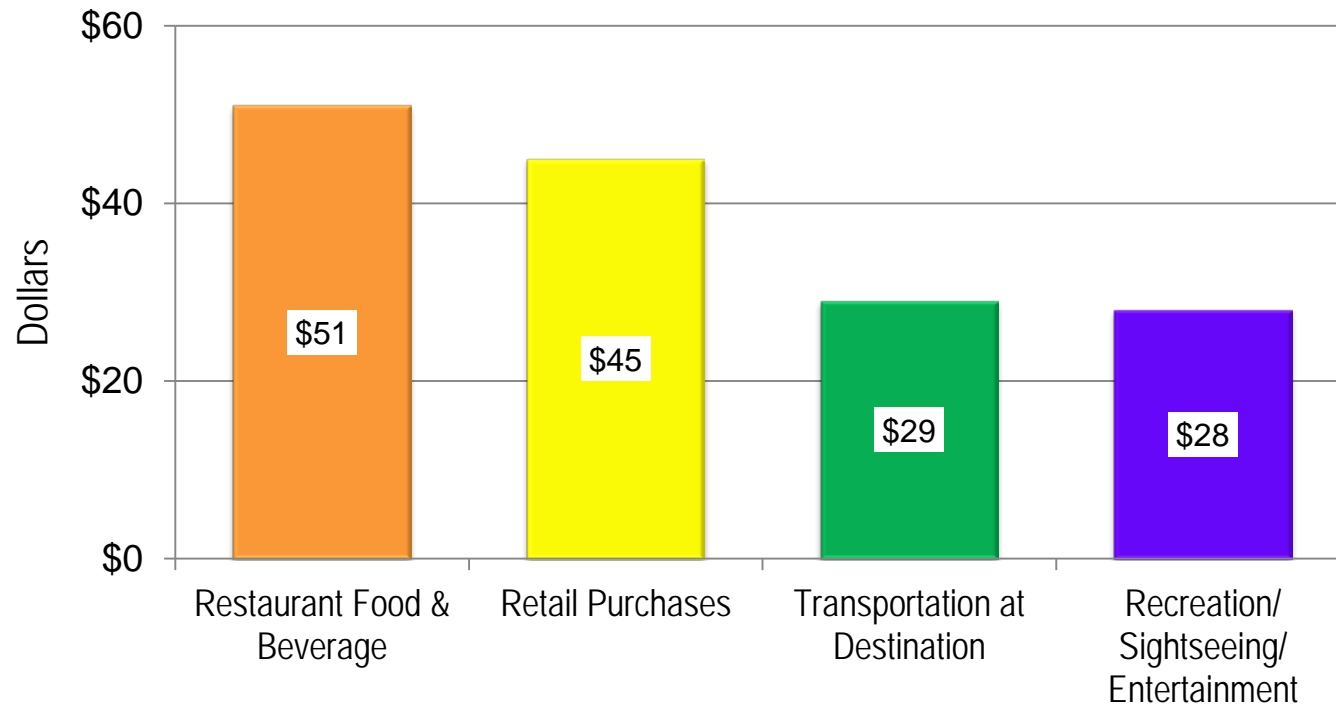


* Caution: extremely small base

Average Per Party Expenditures on Day Trips – By Sector



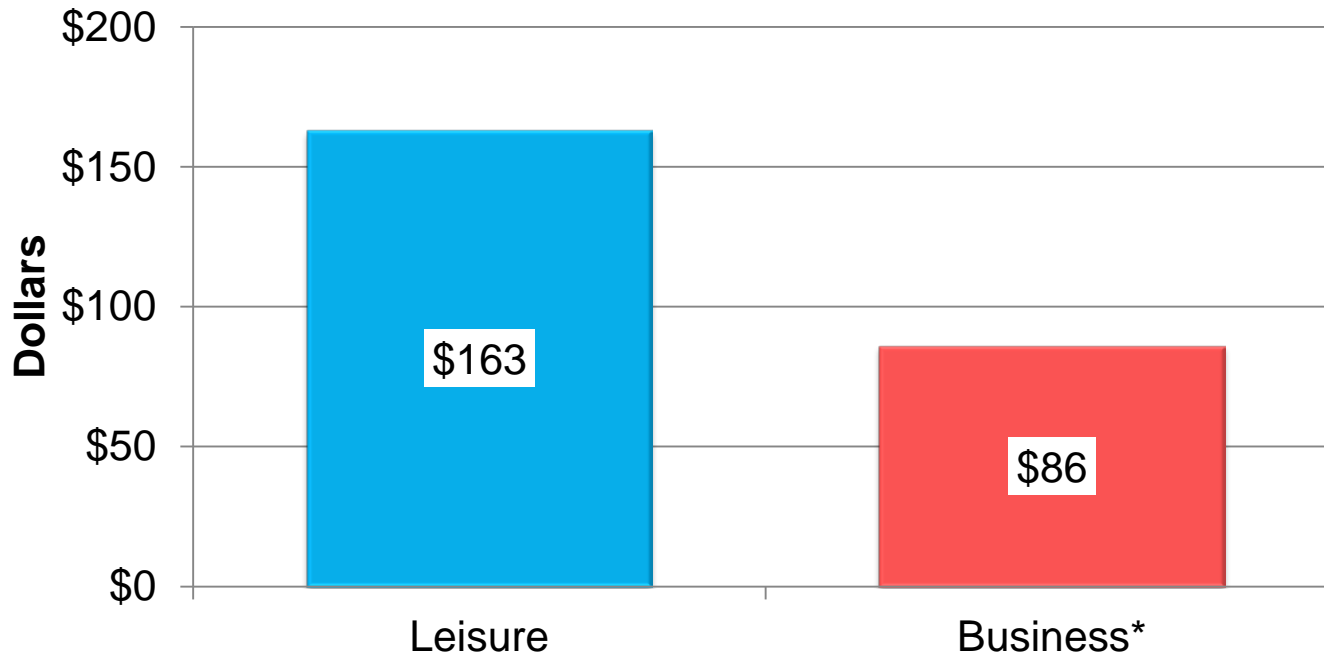
Base: Total Day Person-Trips to Colorado Springs



Average Per Party Expenditures on Day Trip – by Trip Purpose



Base: Total Day Person-Trips to Colorado Springs



* Caution: extremely small base



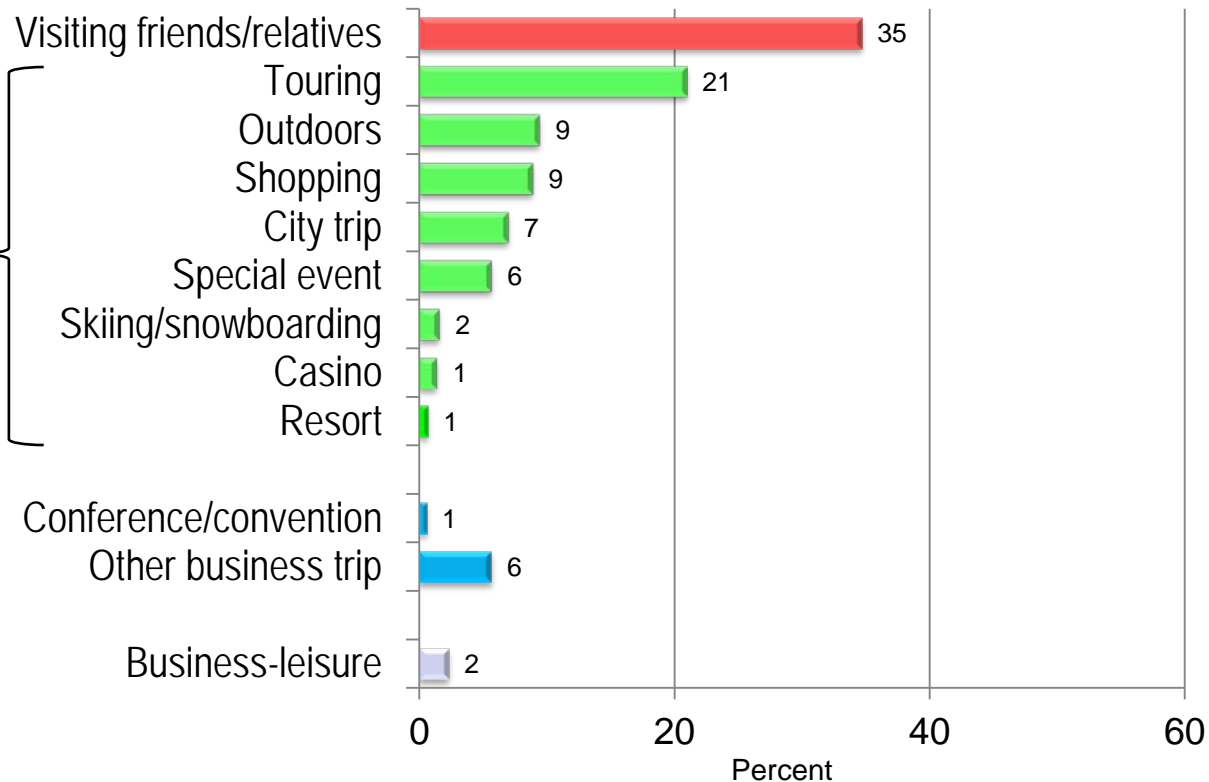
Day Trip Characteristics

Main Purpose of Trip



Base: Adult Day Trips to Colorado Springs

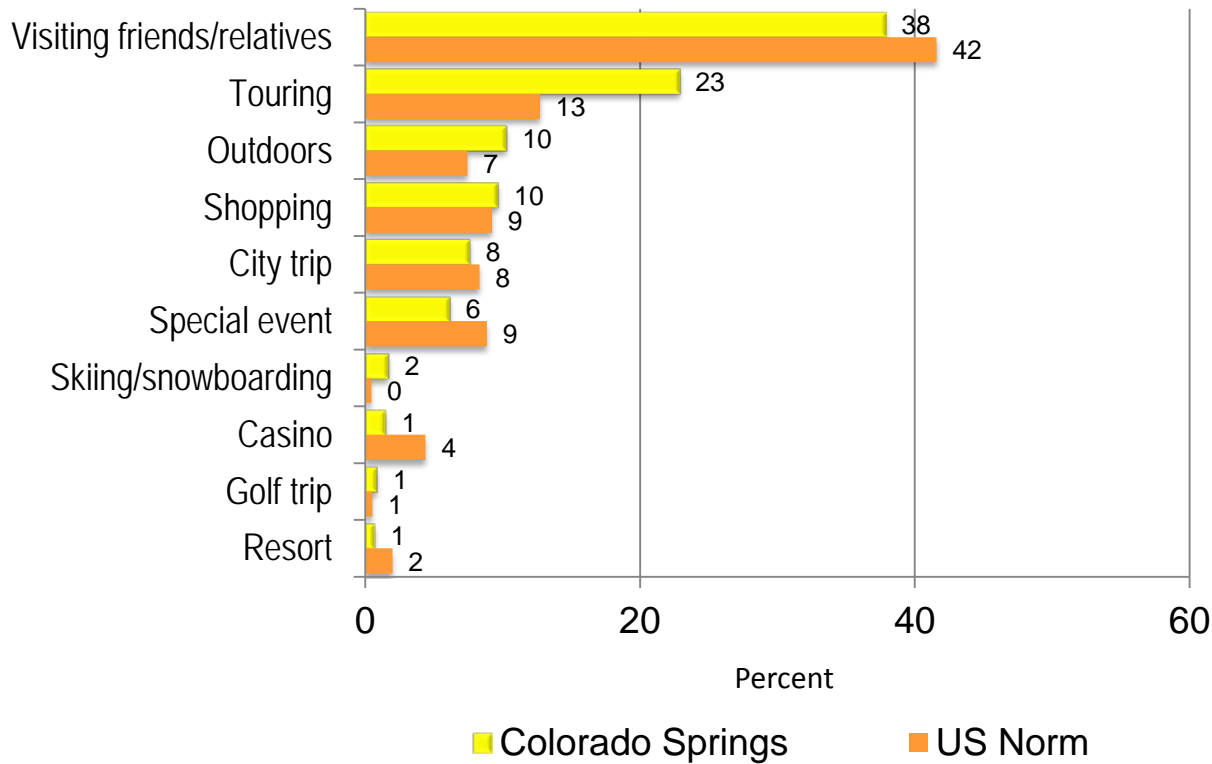
**Marketable
Trips
55%**



Main Purpose of Leisure Trip — Colorado Springs vs. US Norm



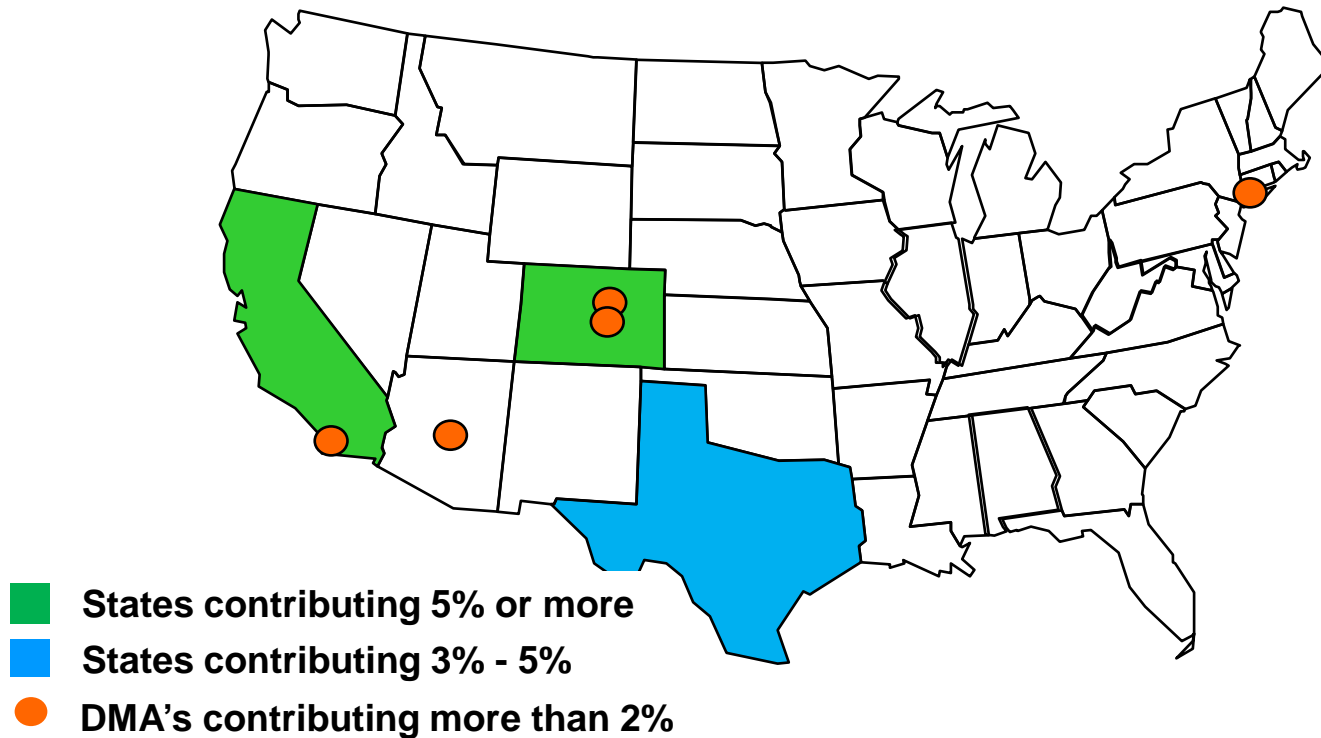
Base: Adult Day Leisure Trips



Sources of Business



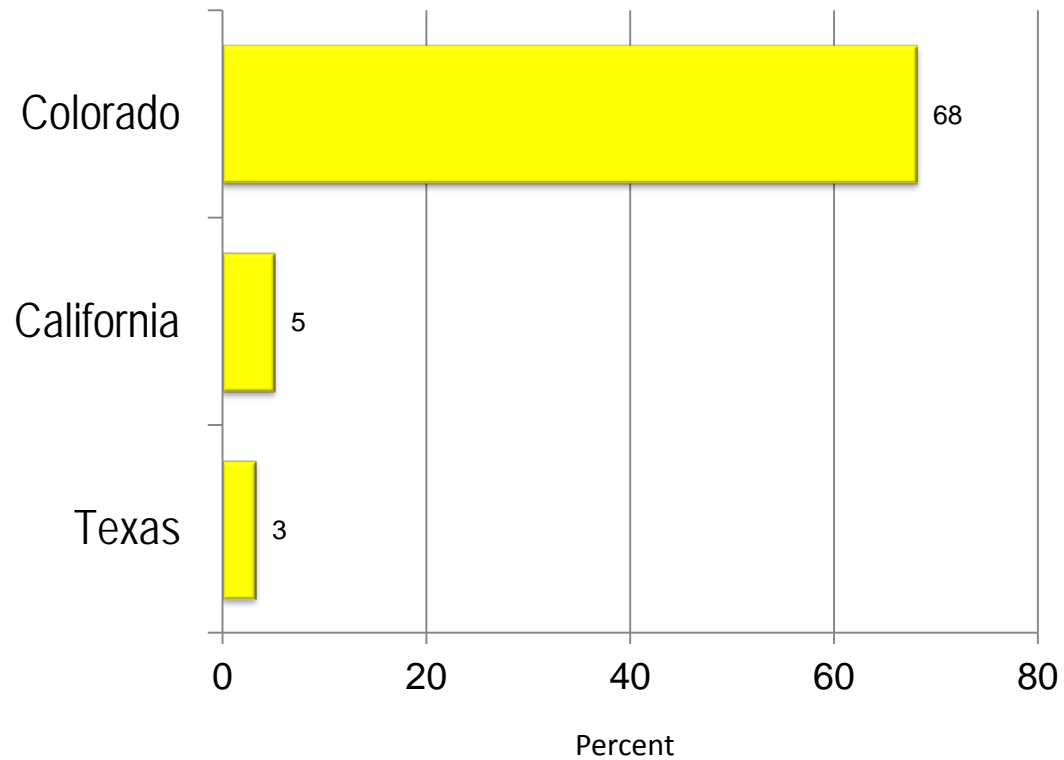
Base: Adult Day Person-Trips to Colorado Springs



State Origin Of Trip



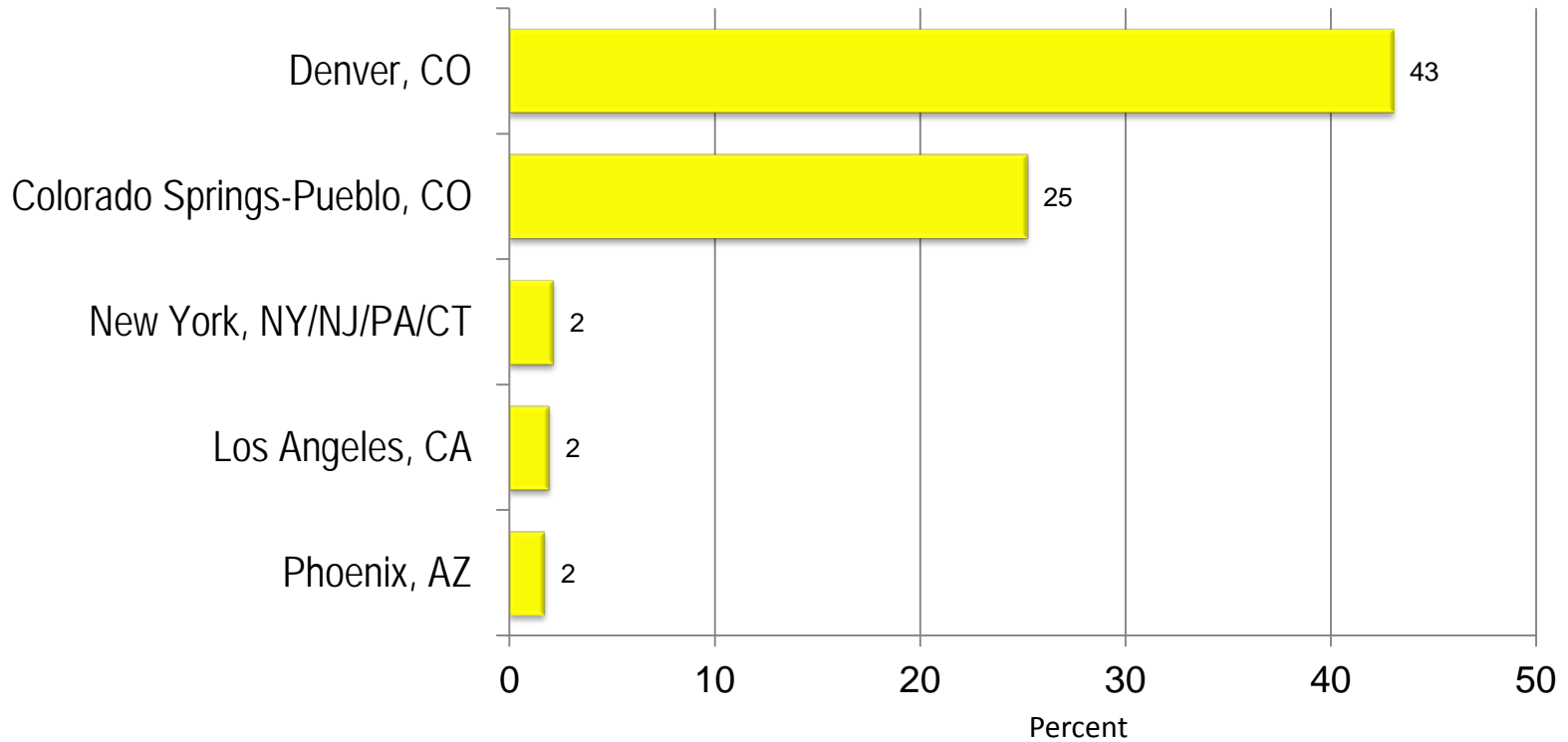
Base: Adult Day Person-Trips to Colorado Springs



DMA Origin Of Trip



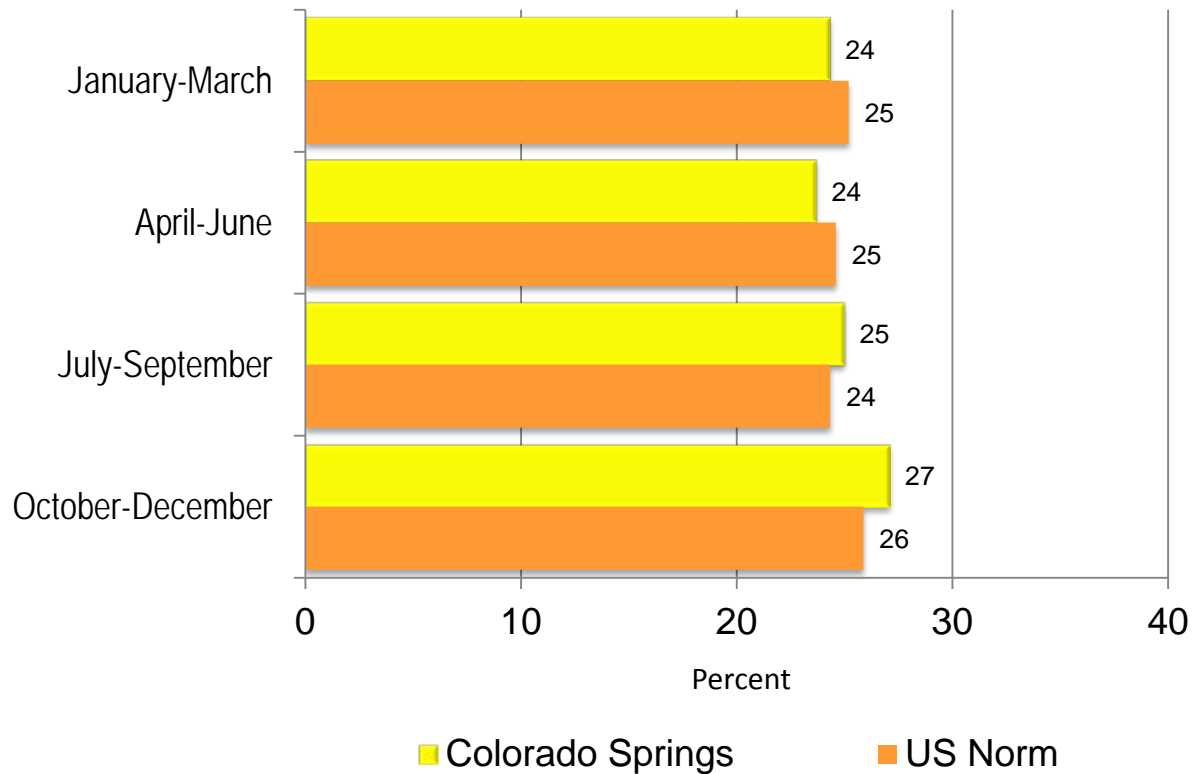
Base: Adult Day Person-Trips to Colorado Springs



Season of Trip



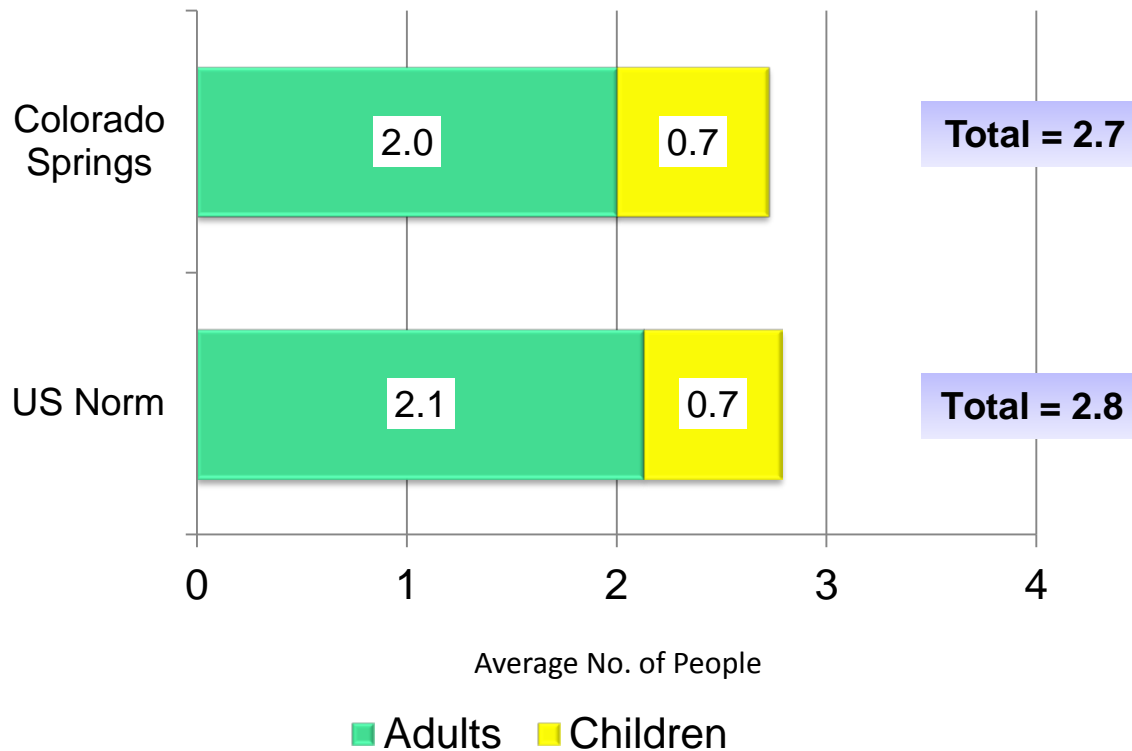
Base: Adult Day Person-Trips



Size of Travel Party



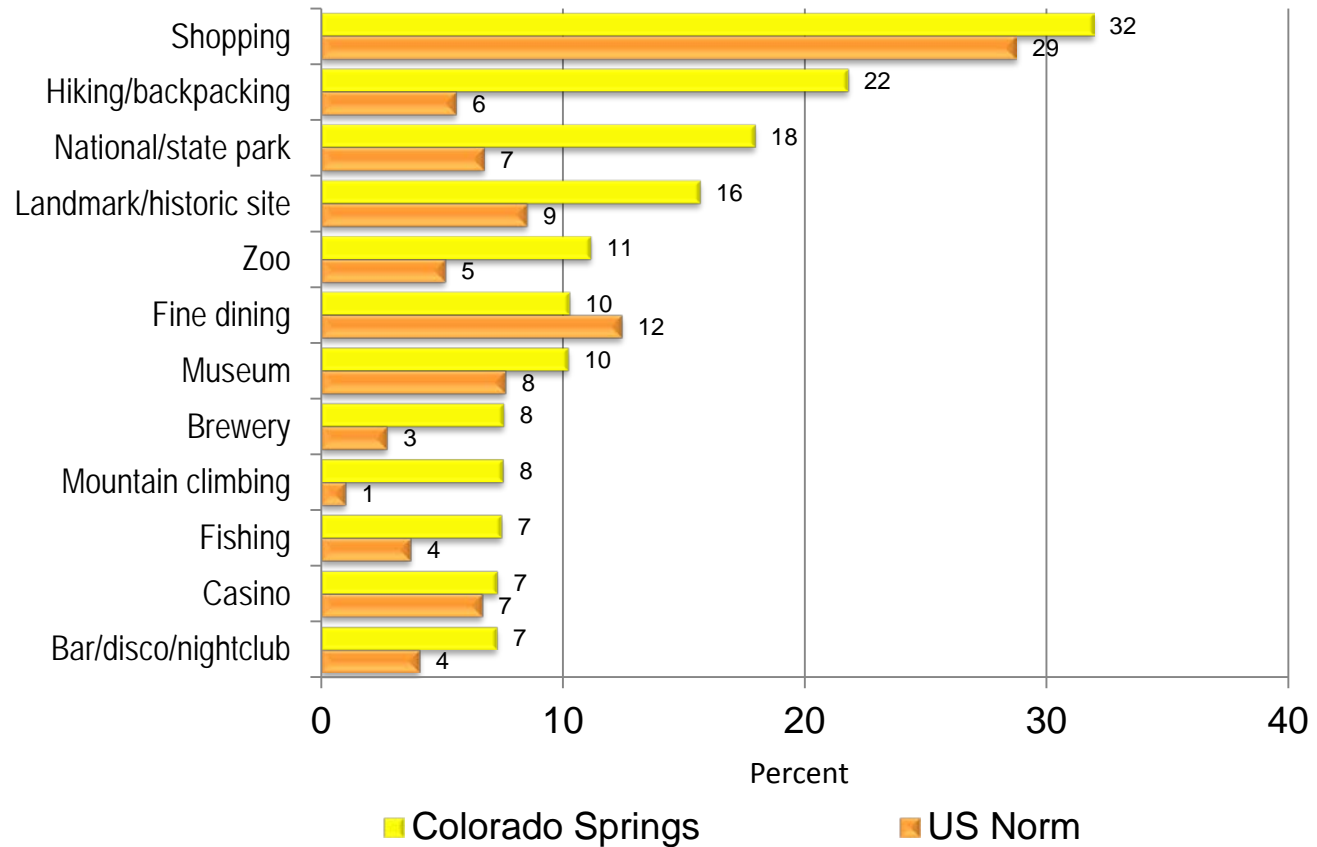
Base: Adult Day Person-Trips



Activities and Experiences



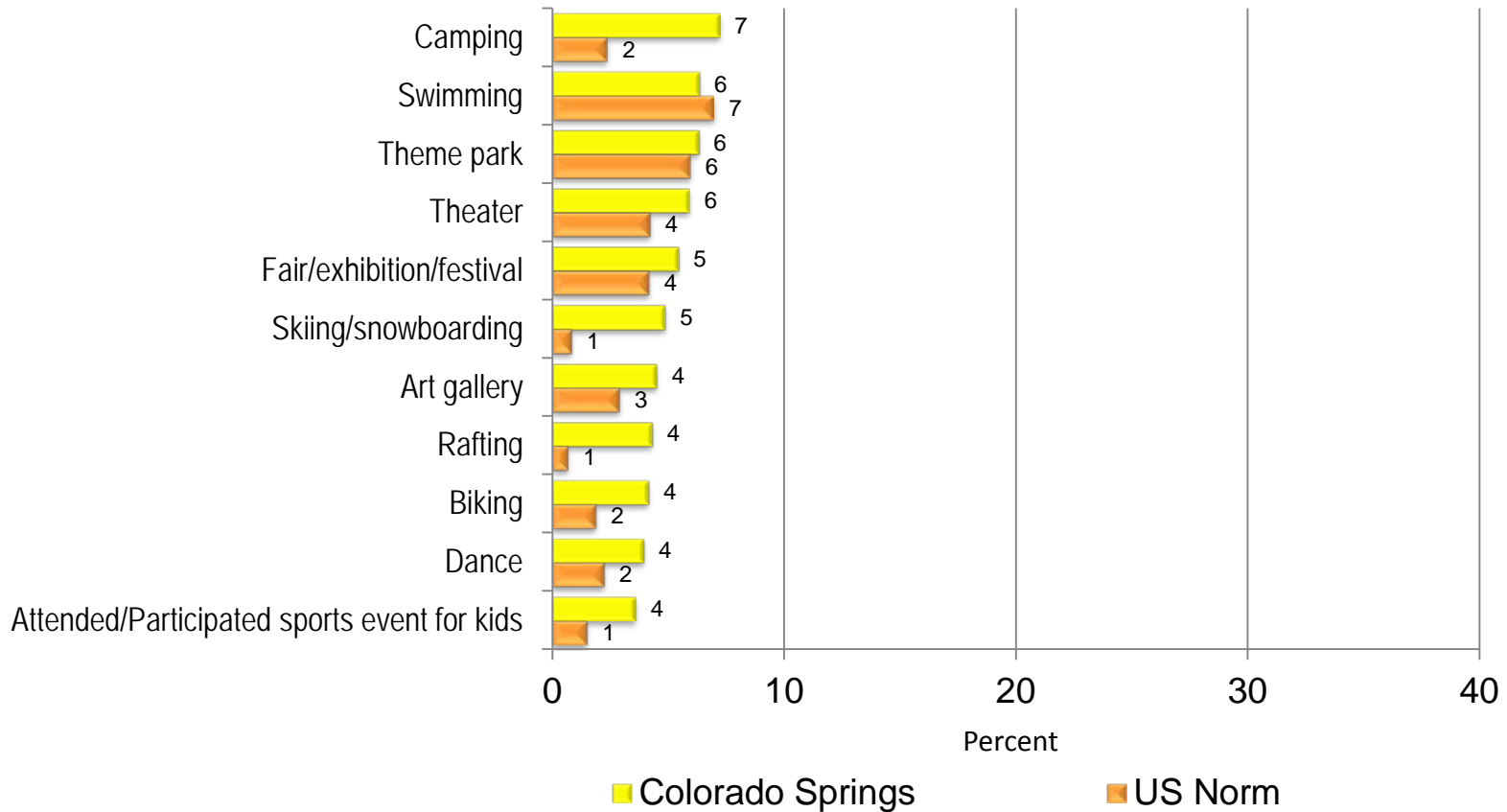
Base: Adult Day Person-Trips



Activities and Experiences (Cont'd)



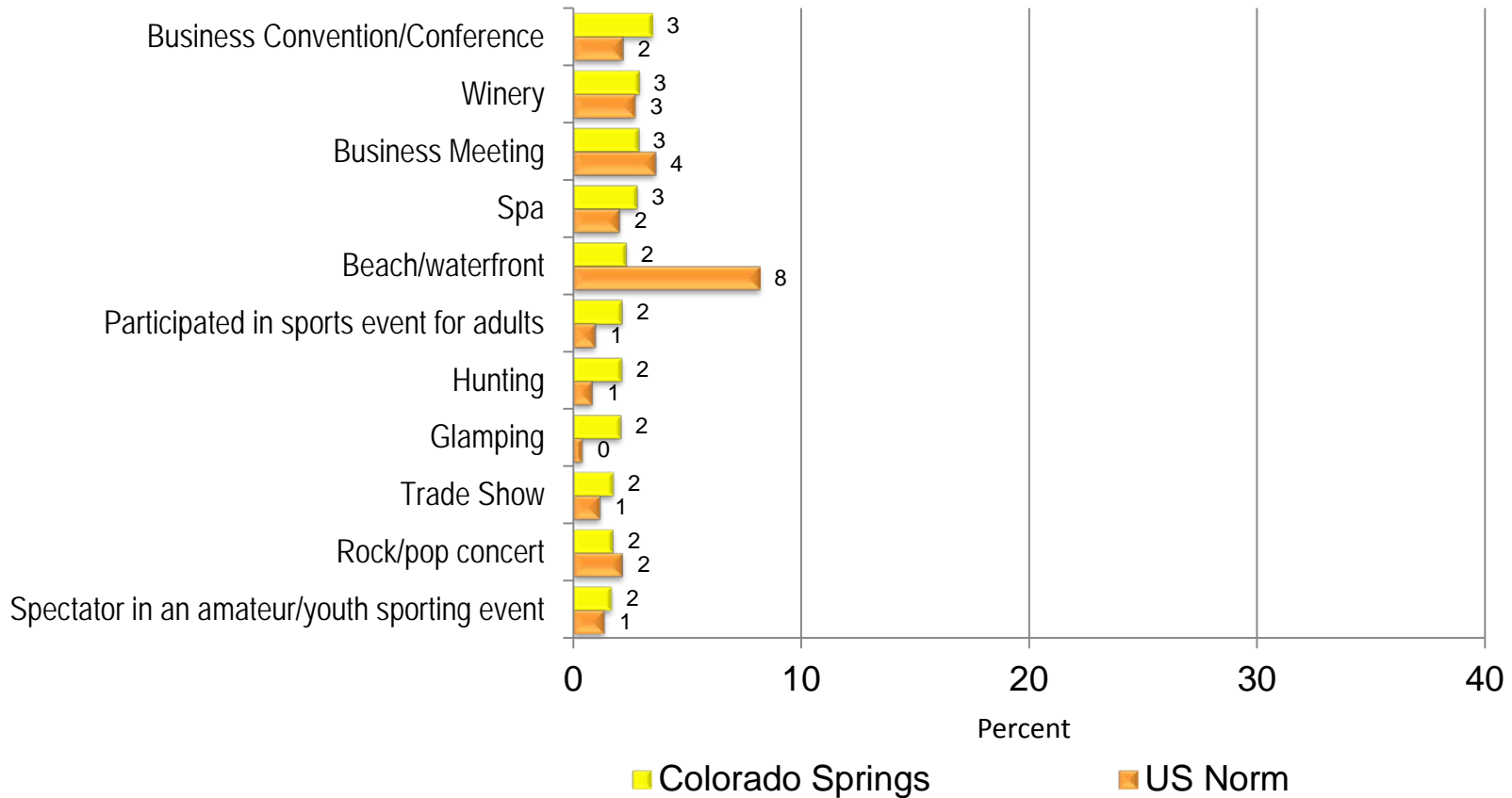
Base: Adult Day Person-Trips



Activities and Experiences (Cont'd)



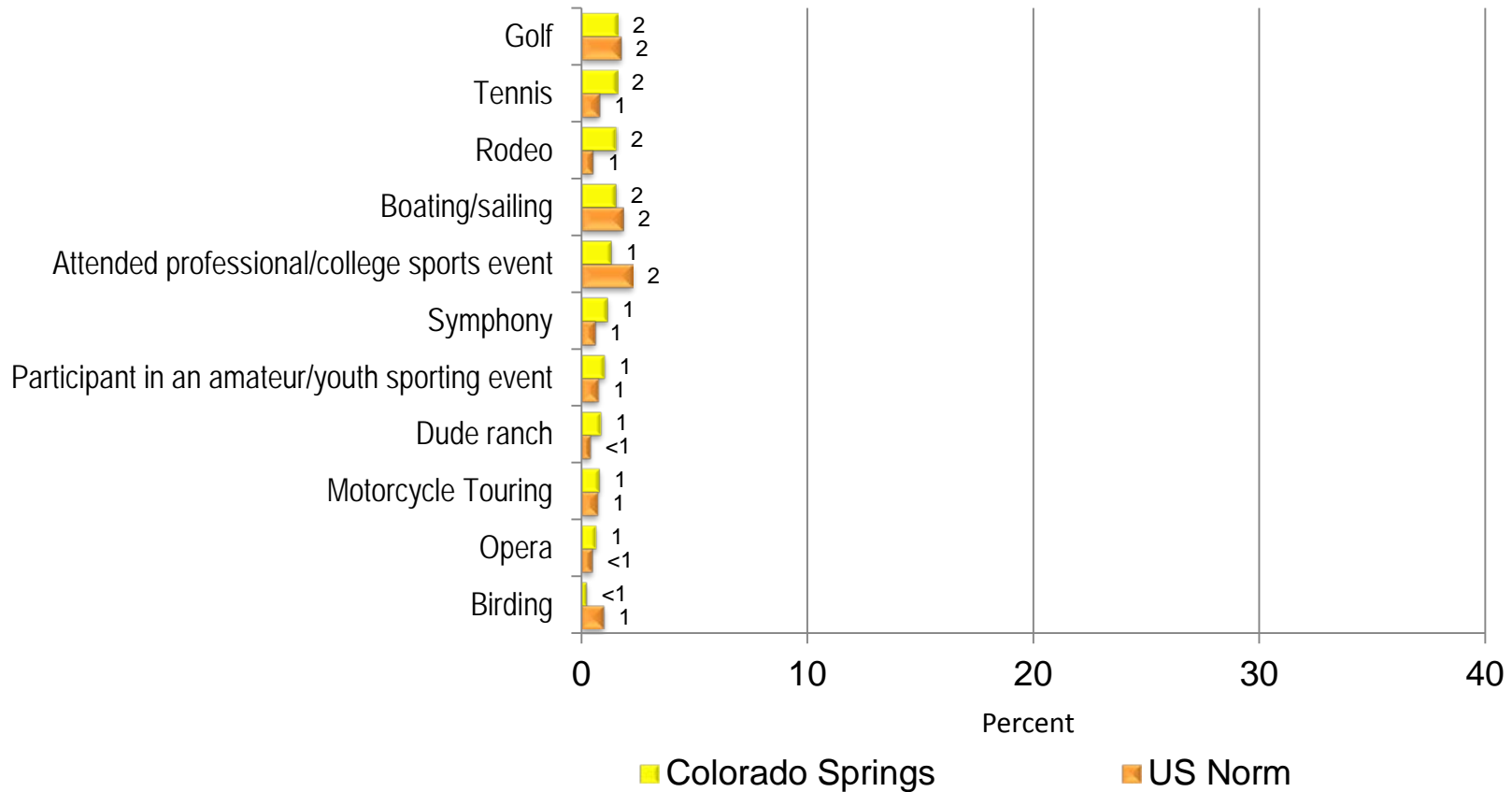
Base: Adult Day Person-Trips



Activities and Experiences (Cont'd)



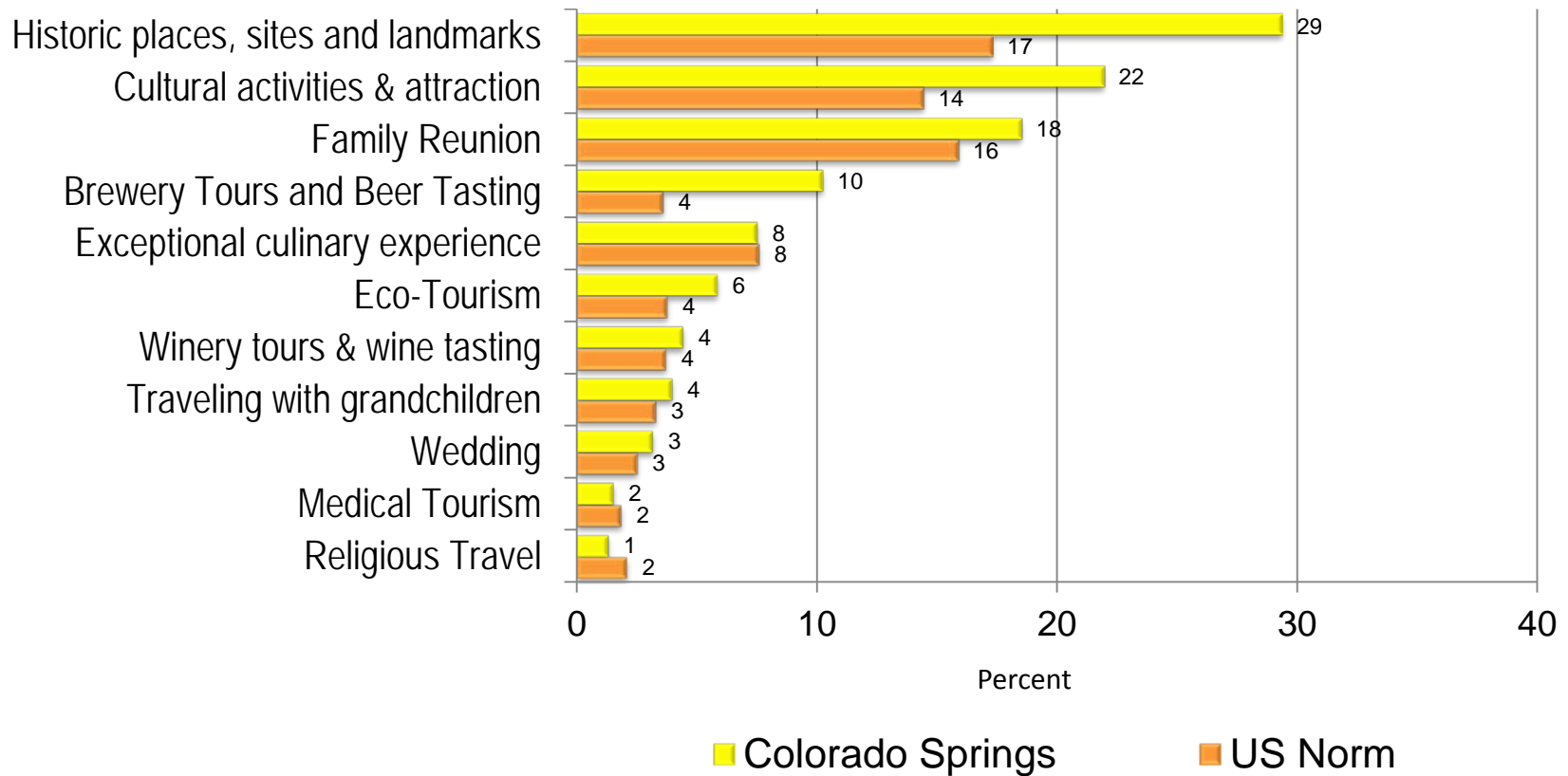
Base: Adult Day Person-Trips



Activities of Special Interest



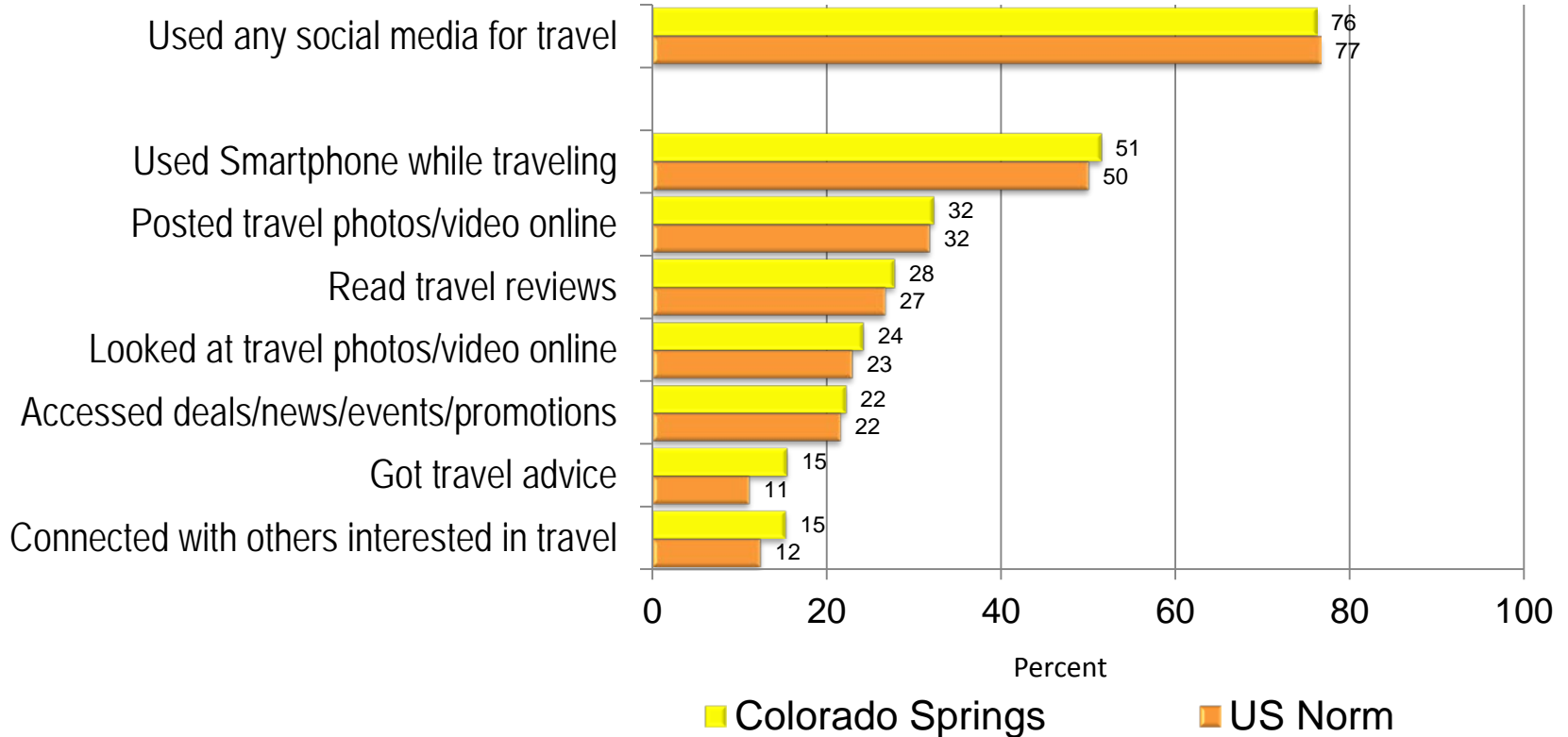
Base: Adult Day Person-Trips



Use of Social Media for Travel



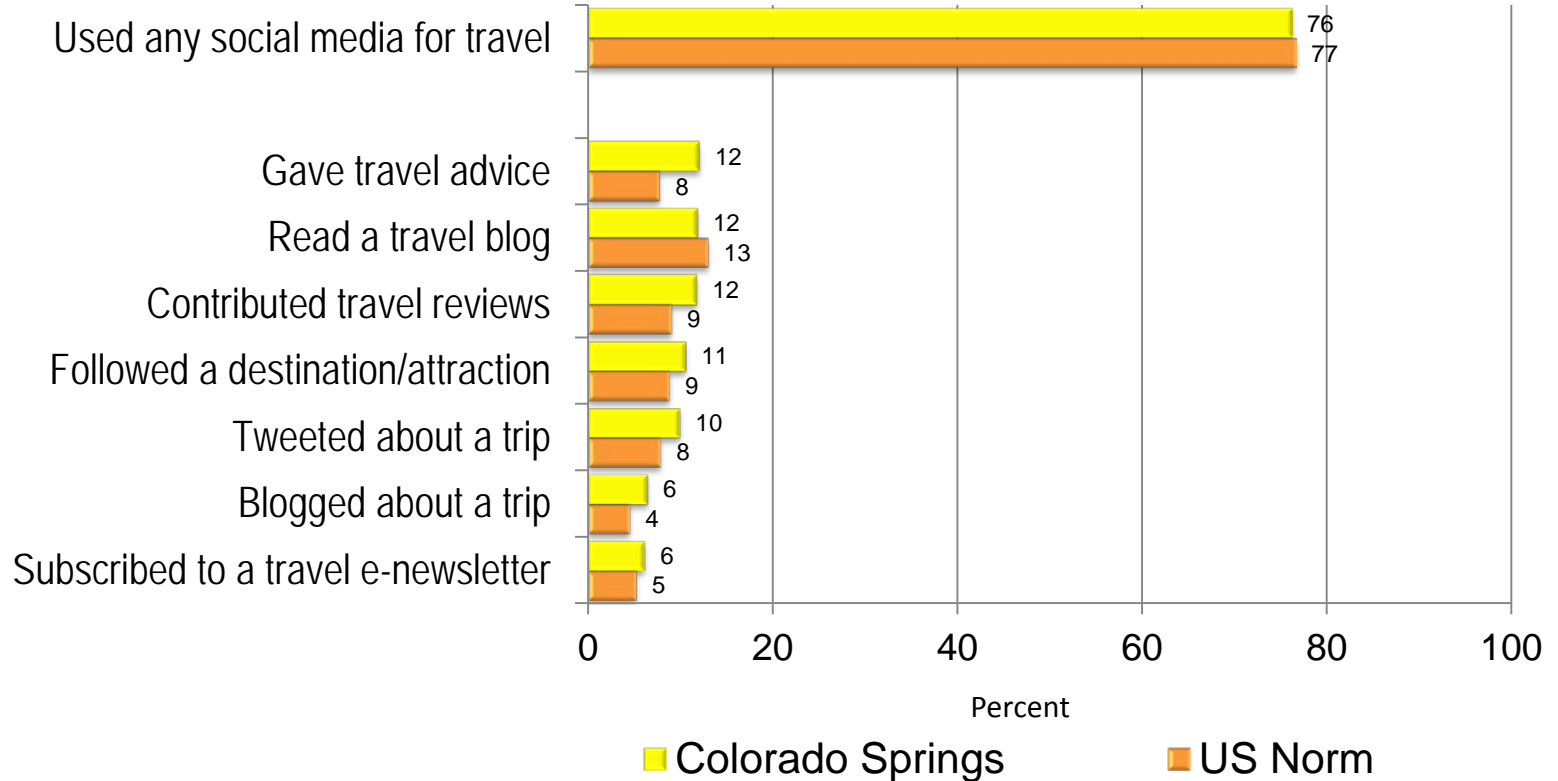
Base: Adult Day Person-Trips



Use of Social Media for Travel (Cont'd)



Base: Adult Day Person-Trips



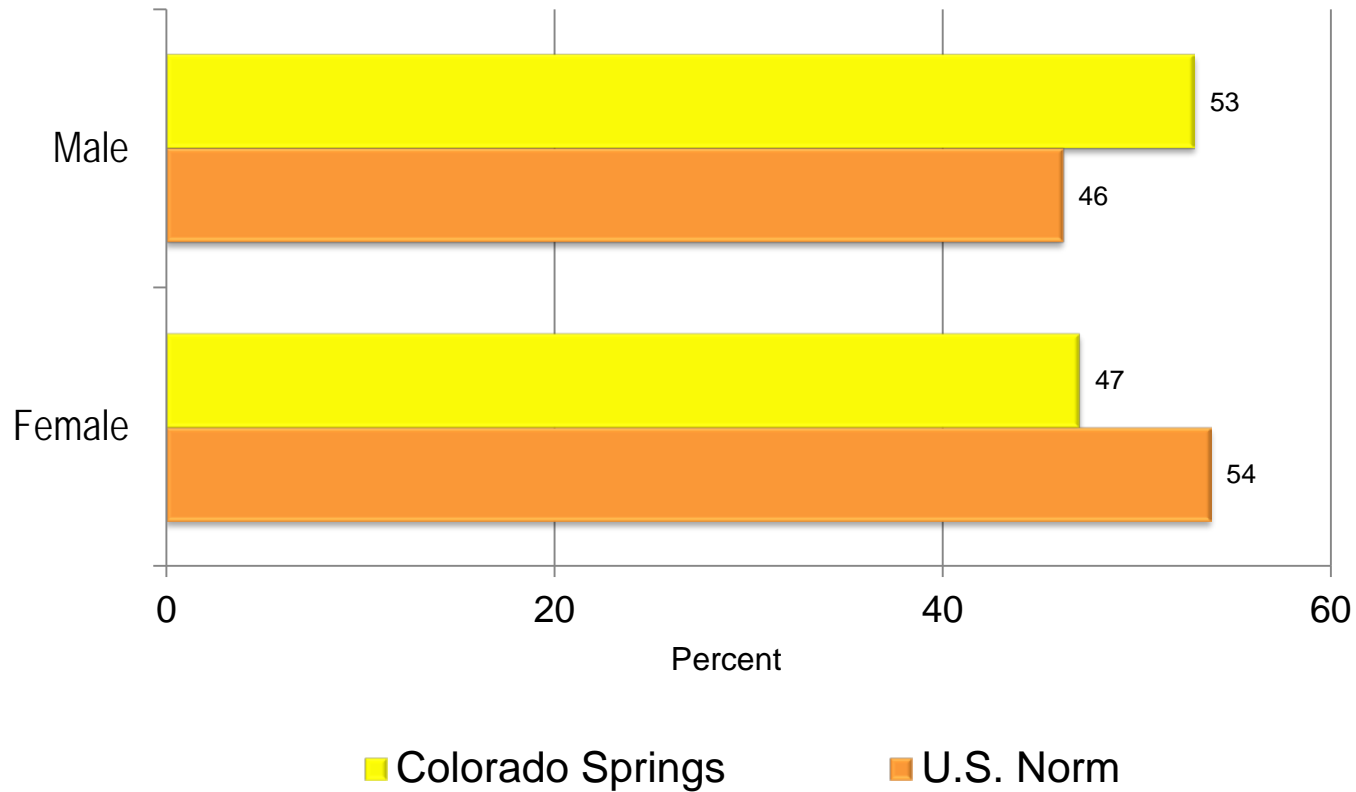


Demographic Profile of Day Visitors

Gender



Base: Adult Day Person-Trips



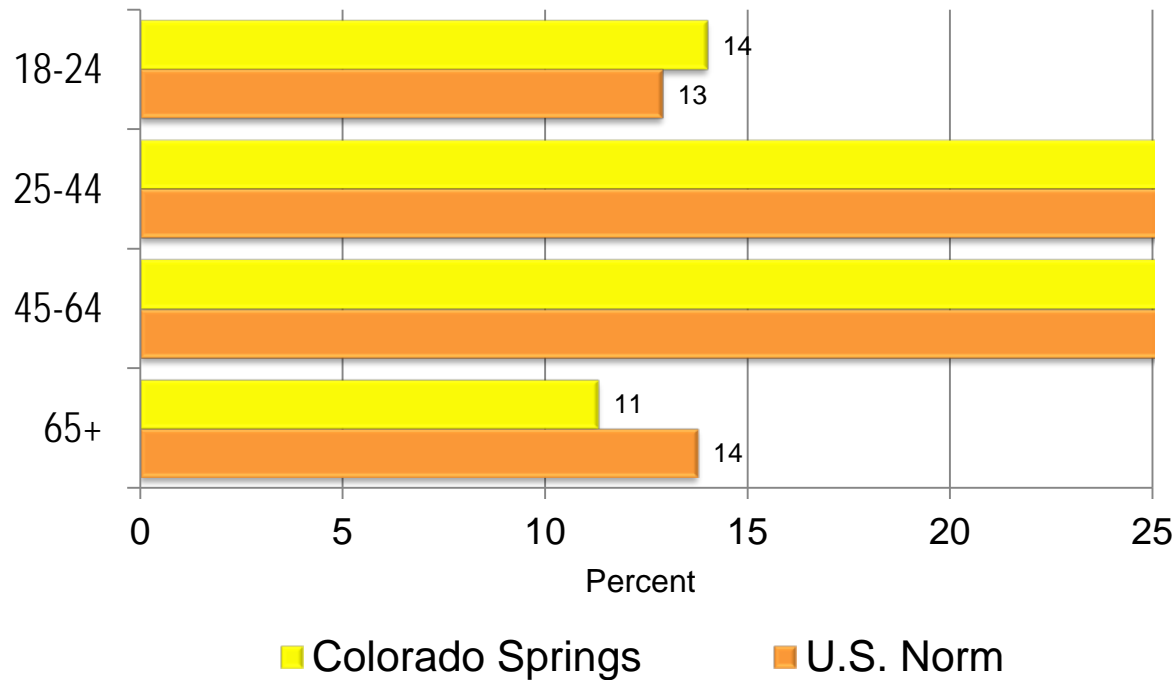
Age



Base: Adult Day Person-Trips

Average Colorado Springs = 42.6

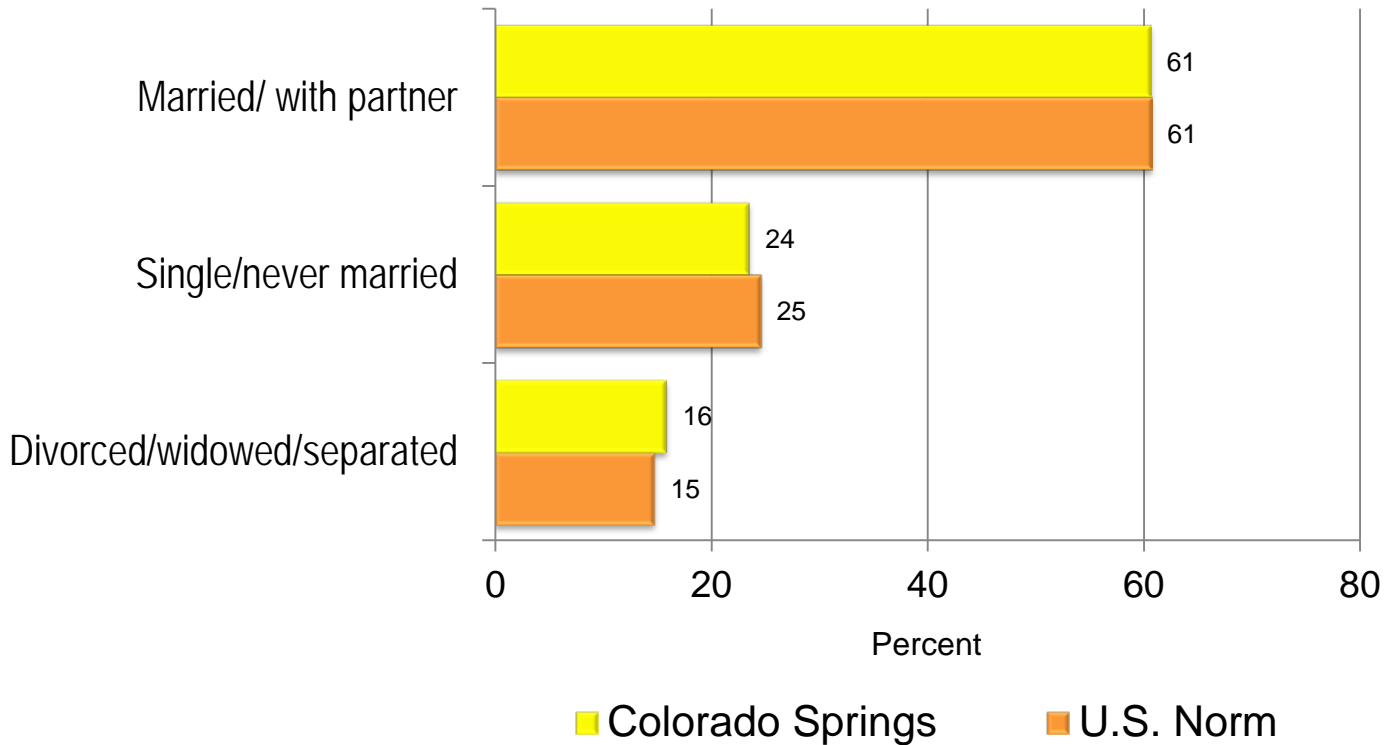
Average U.S. Norm = 44.3



Marital Status



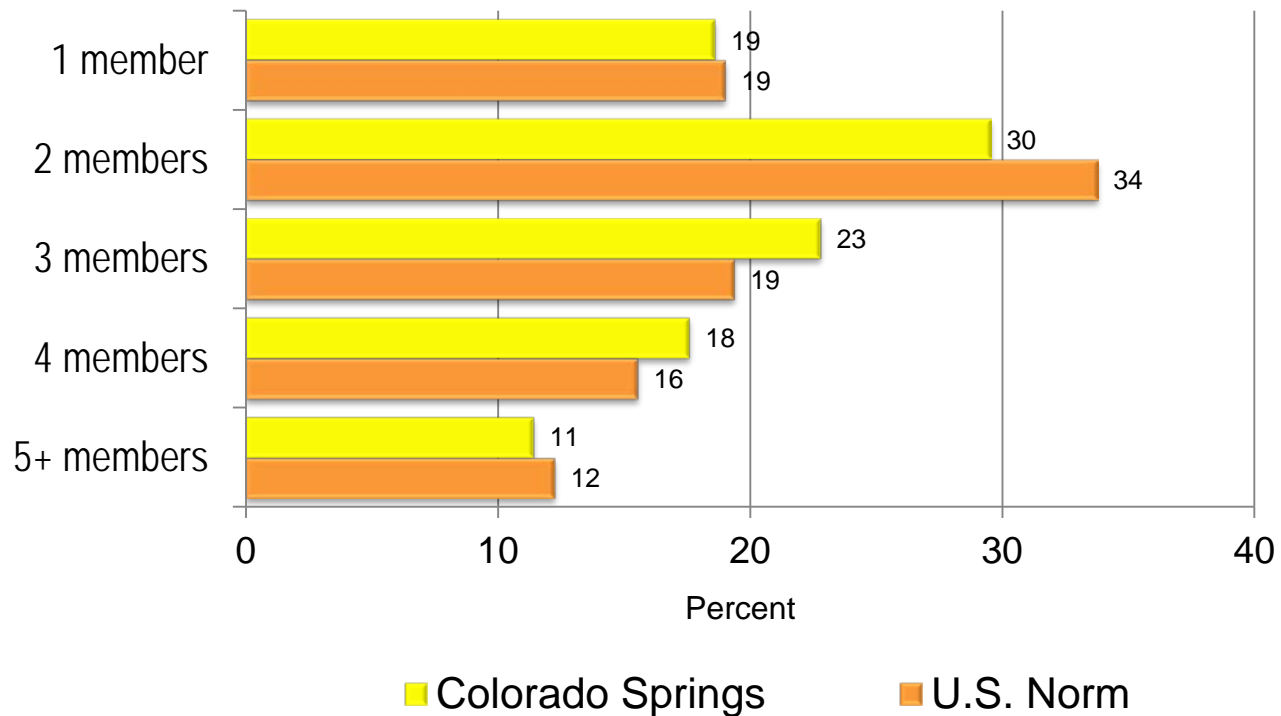
Base: Adult Day Person-Trips



Household Size



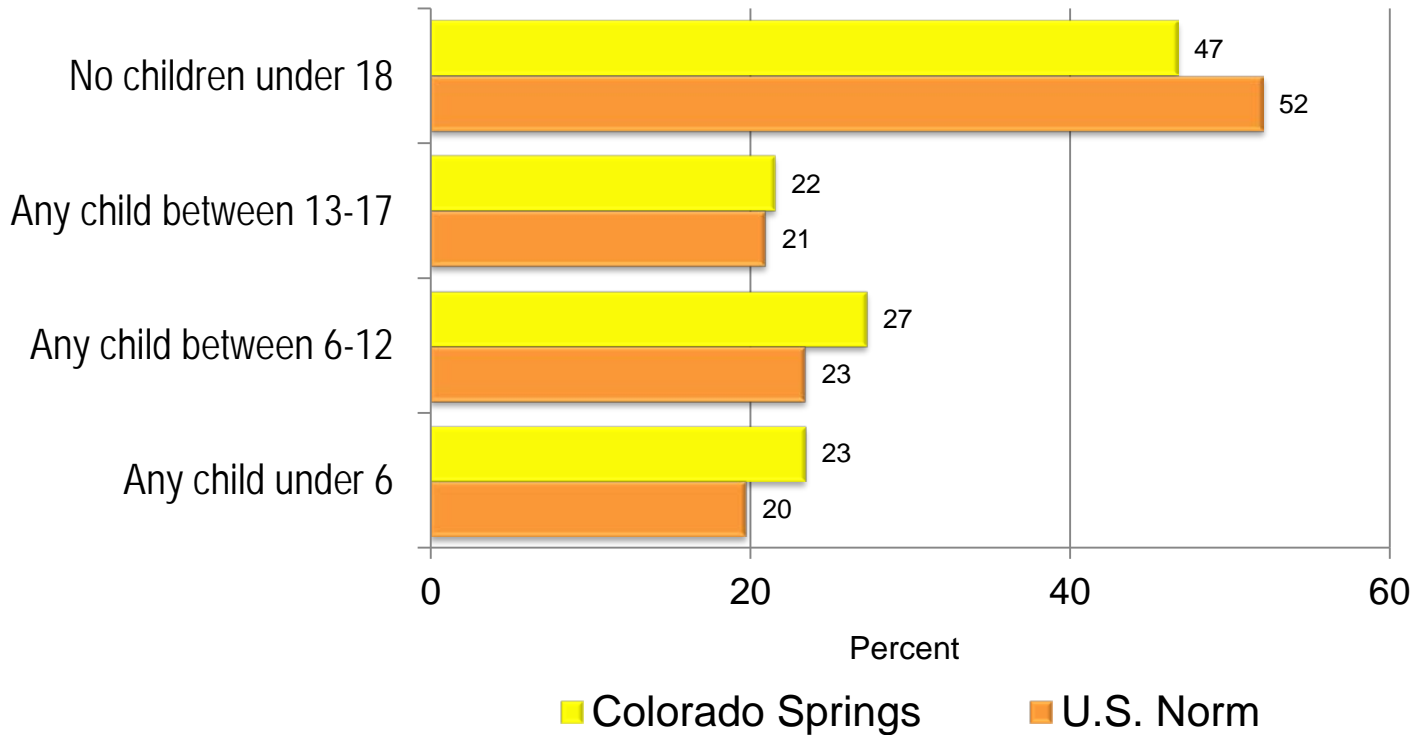
Base: Adult Day Person-Trips



Children in Household



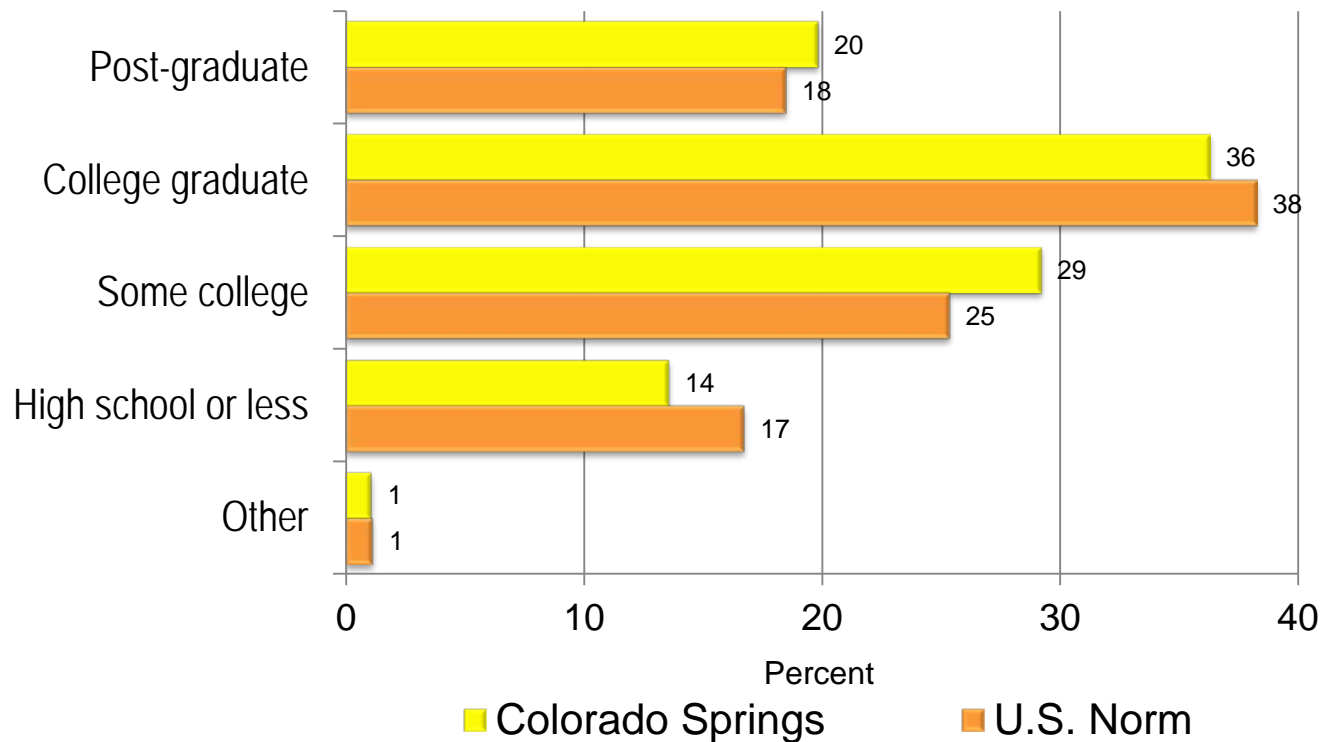
Base: Adult Day Person-Trips



Education



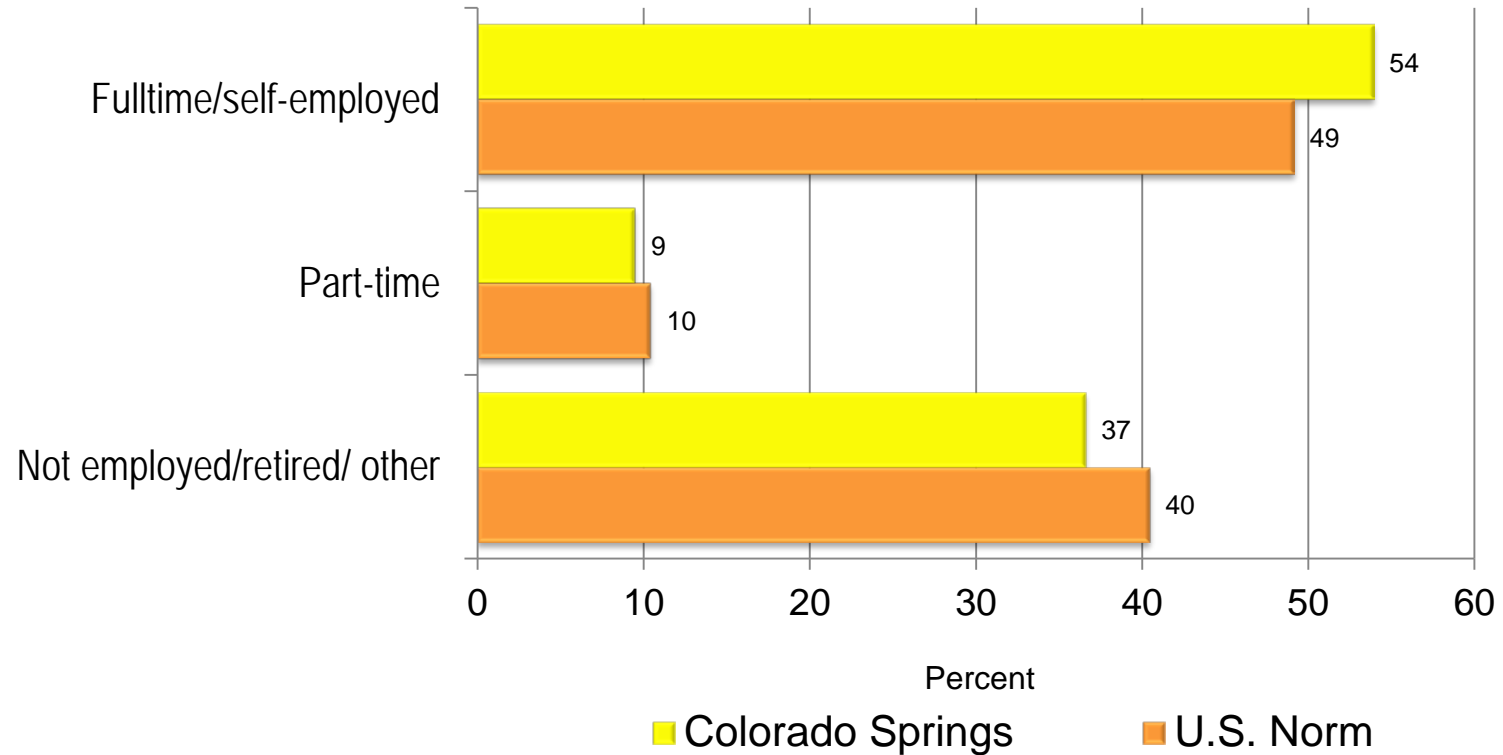
Base: Adult Day Person-Trips



Employment



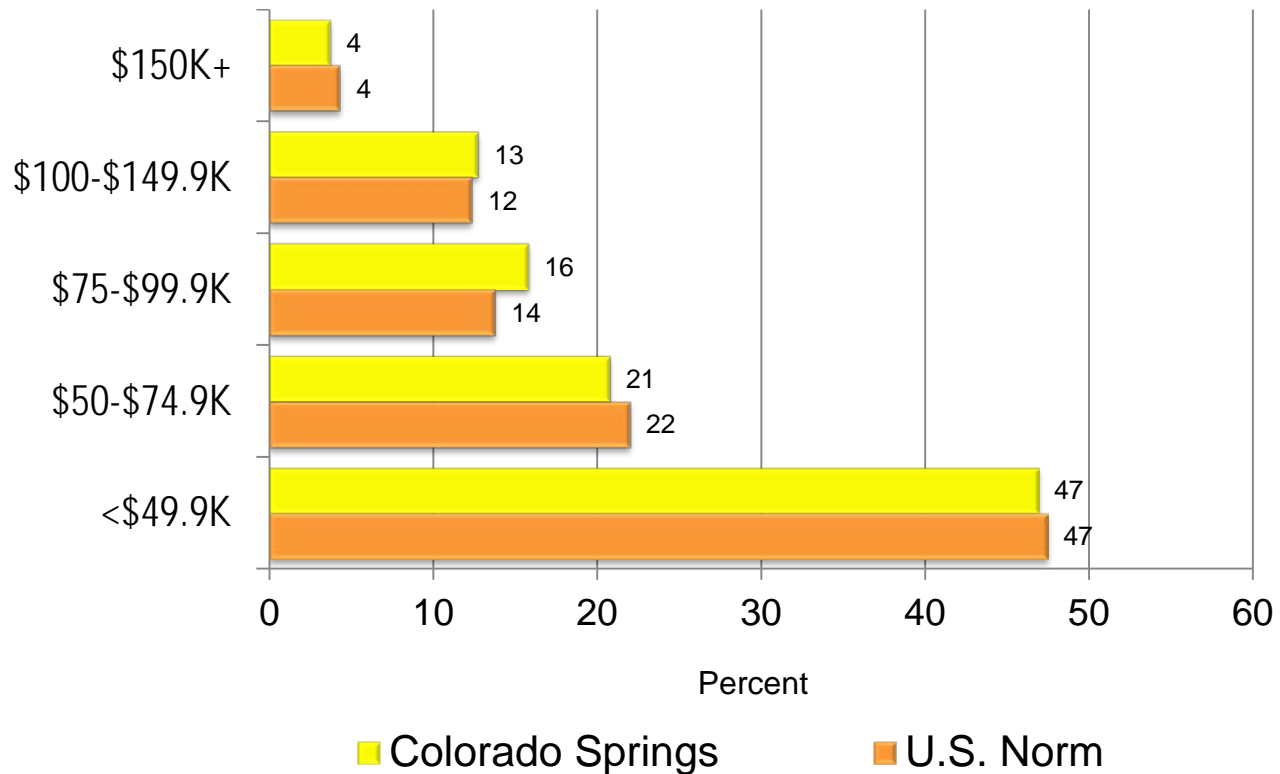
Base: Adult Day Person-Trips



Household Income



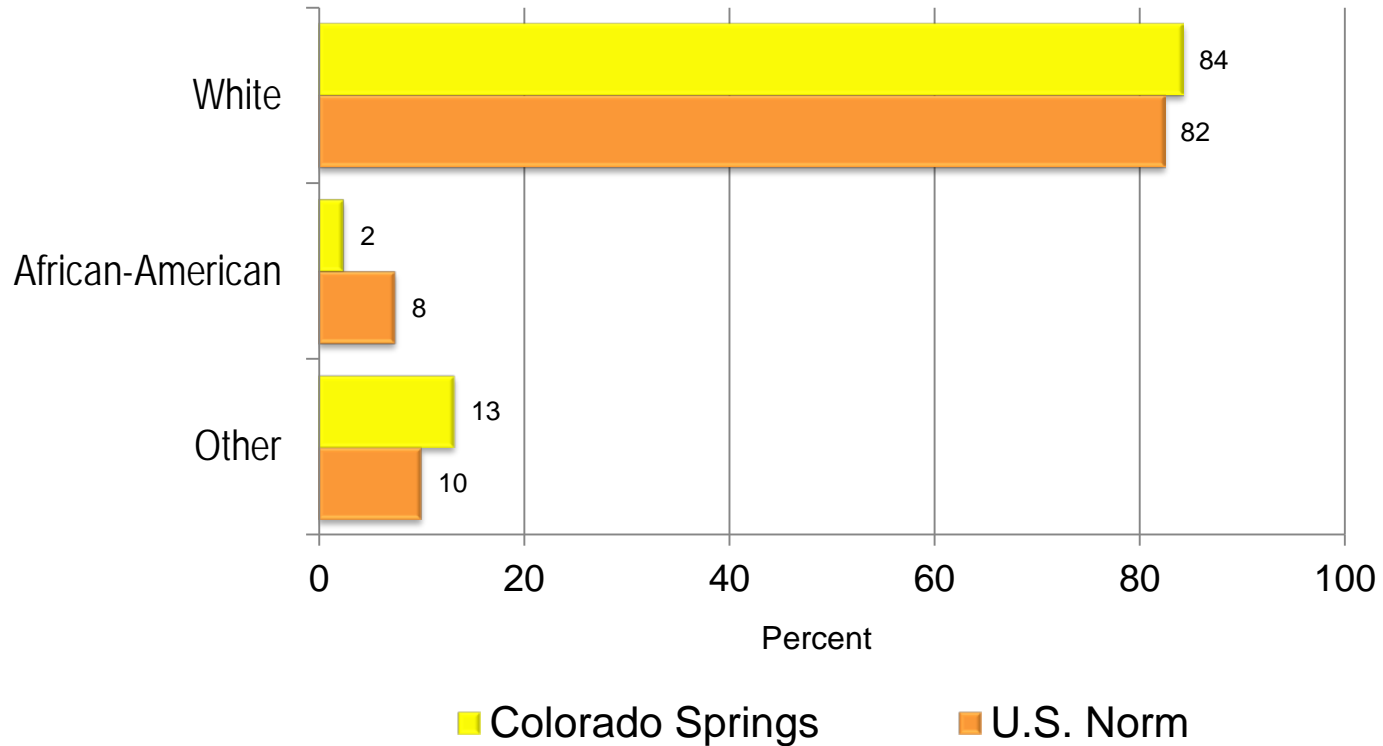
Base: Adult Day Person-Trips



Race



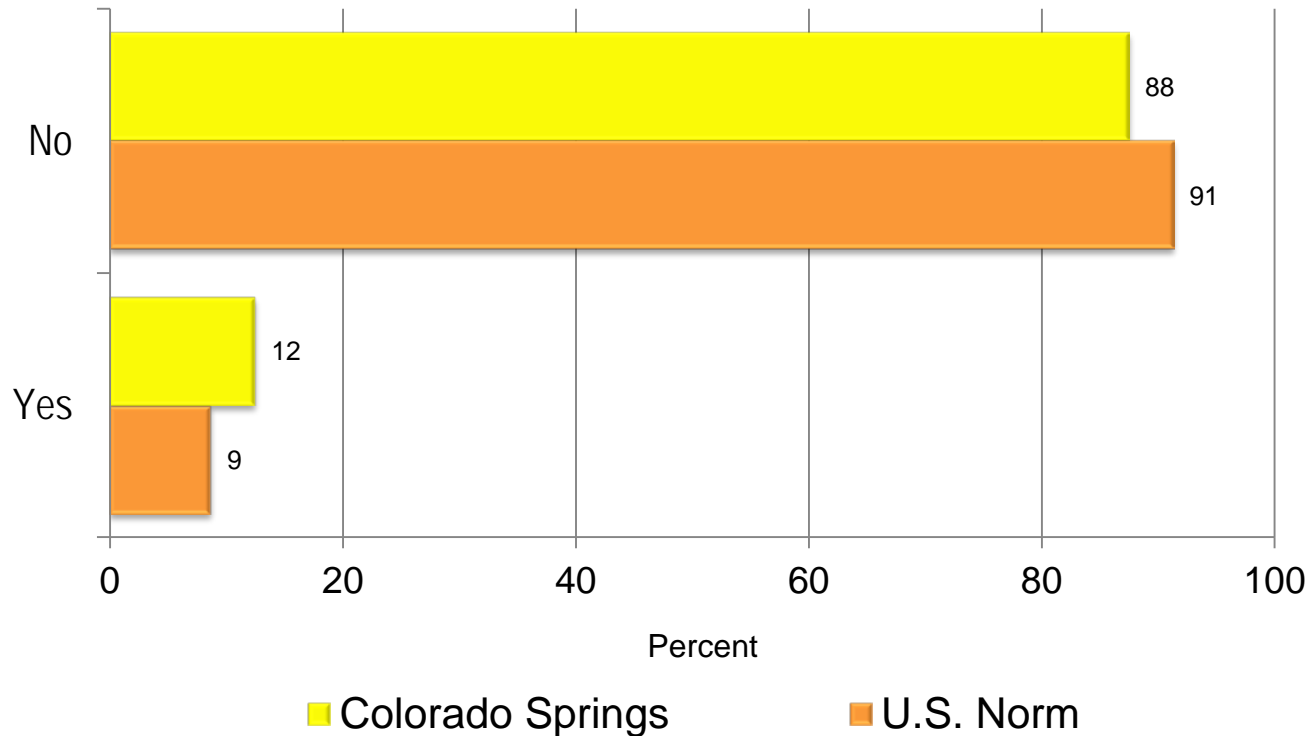
Base: Adult Day Person-Trips



Hispanic Background



Base: Adult Day Person-Trips



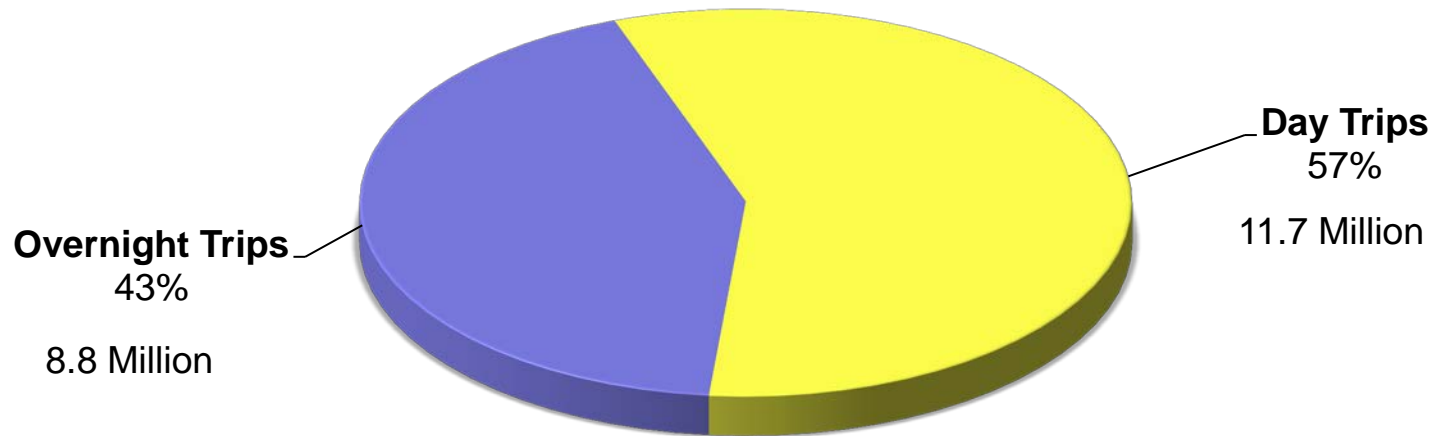


Size & Structure of Colorado Springs/ Pikes Peak Region Domestic Travel Market

Total Size of Combined Colorado Springs/Pikes Peak Region Domestic Travel Market in 2015



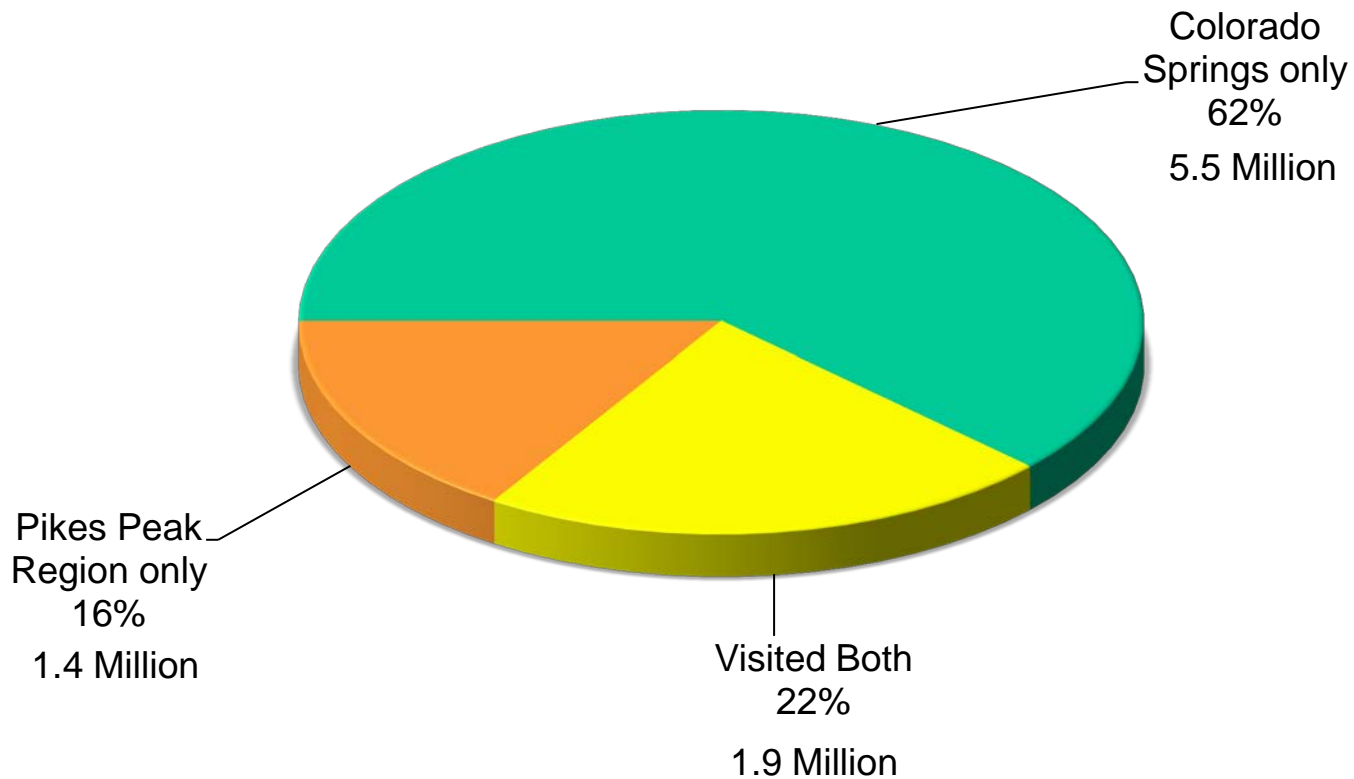
Total Person-Trips = 20.5 Million



Structure of Regional Overnight Travel Market



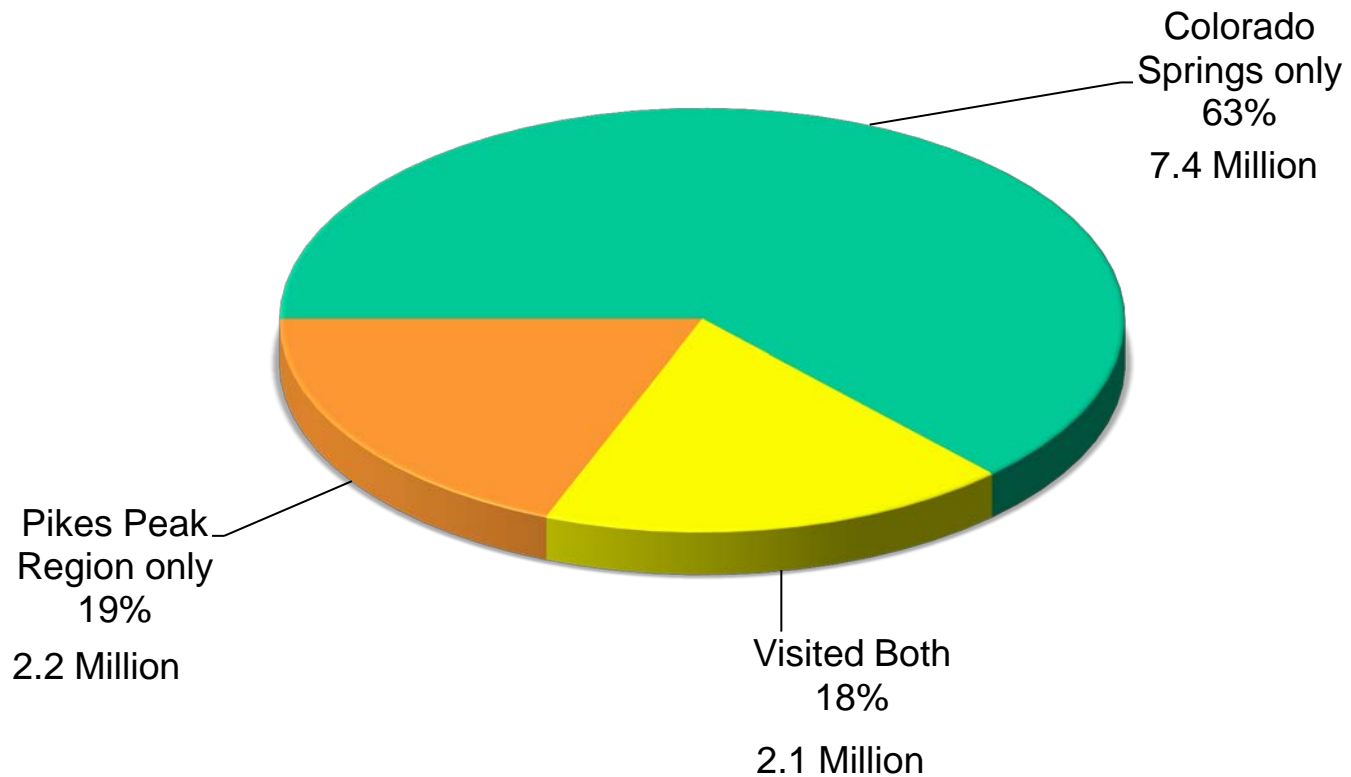
Total Overnight Person-Trips = 8.8 Million



Structure of Regional Day Travel Market



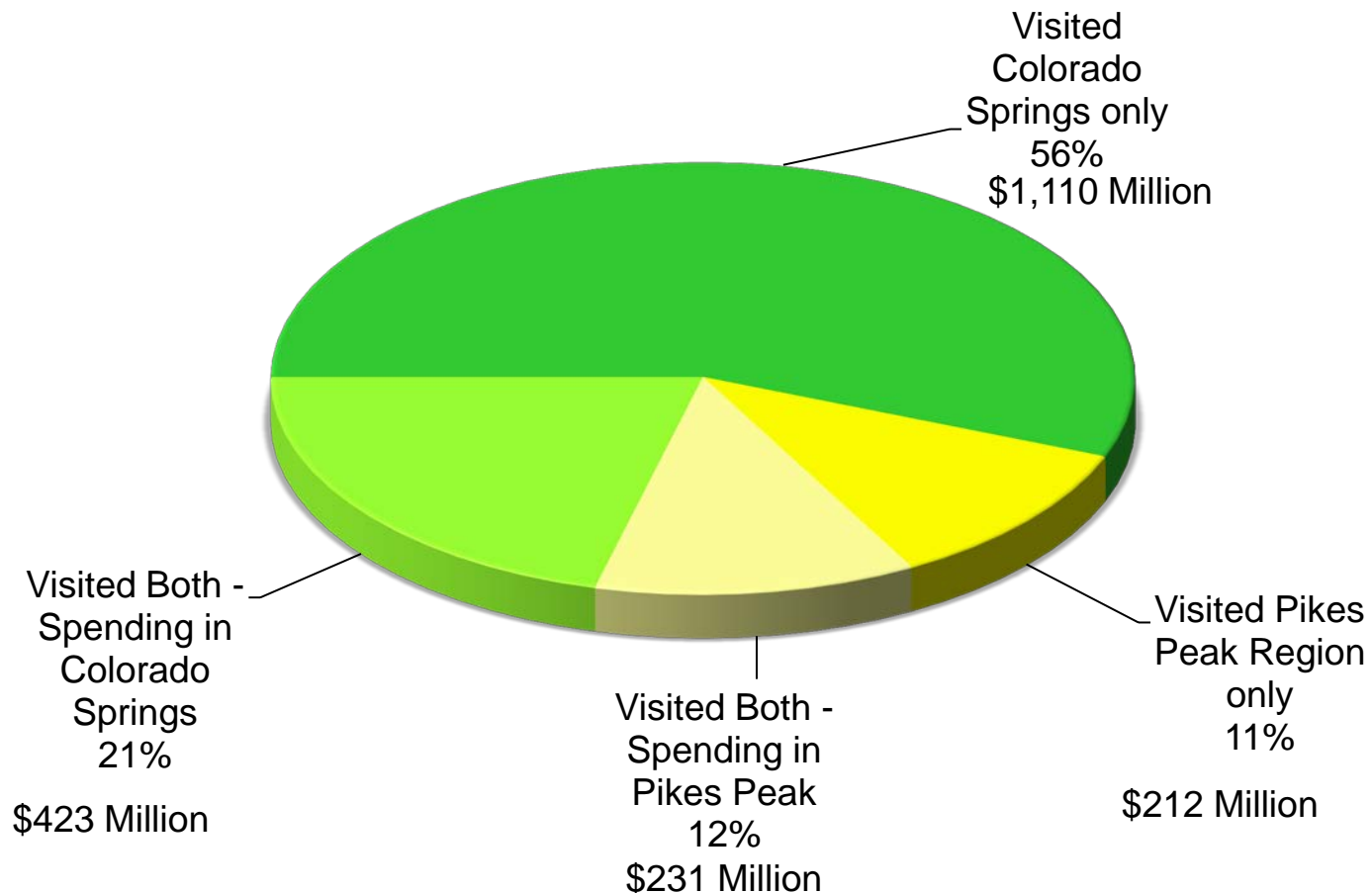
Total Day Person-Trips = 11.7 Million



Total Spending on Overnight/Day Trips in Colorado Springs/Pikes Peak Region



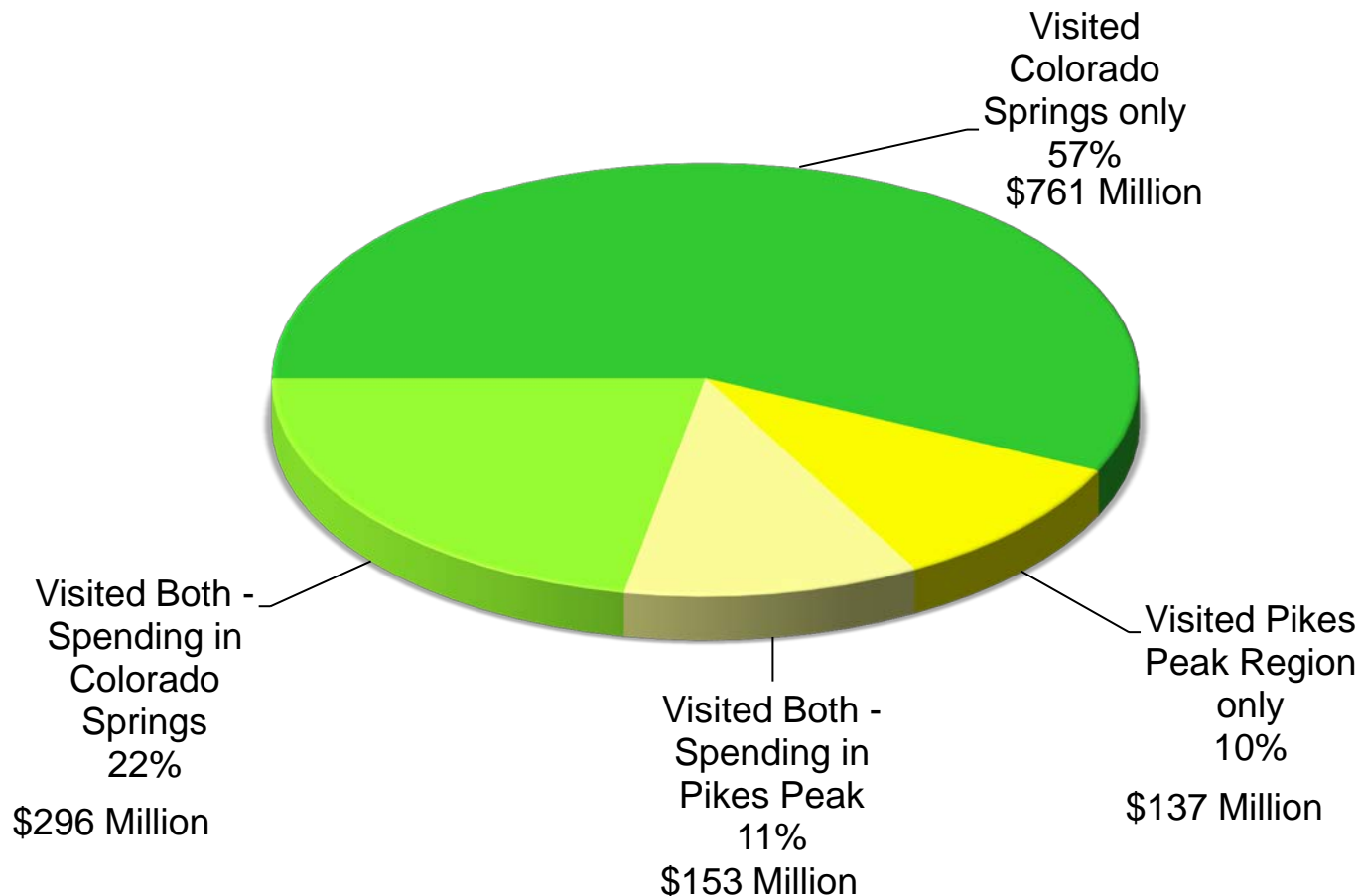
Total Spending = \$1.976 Billion



Spending on Overnight Trips in Colorado Springs/Pikes Peak Region



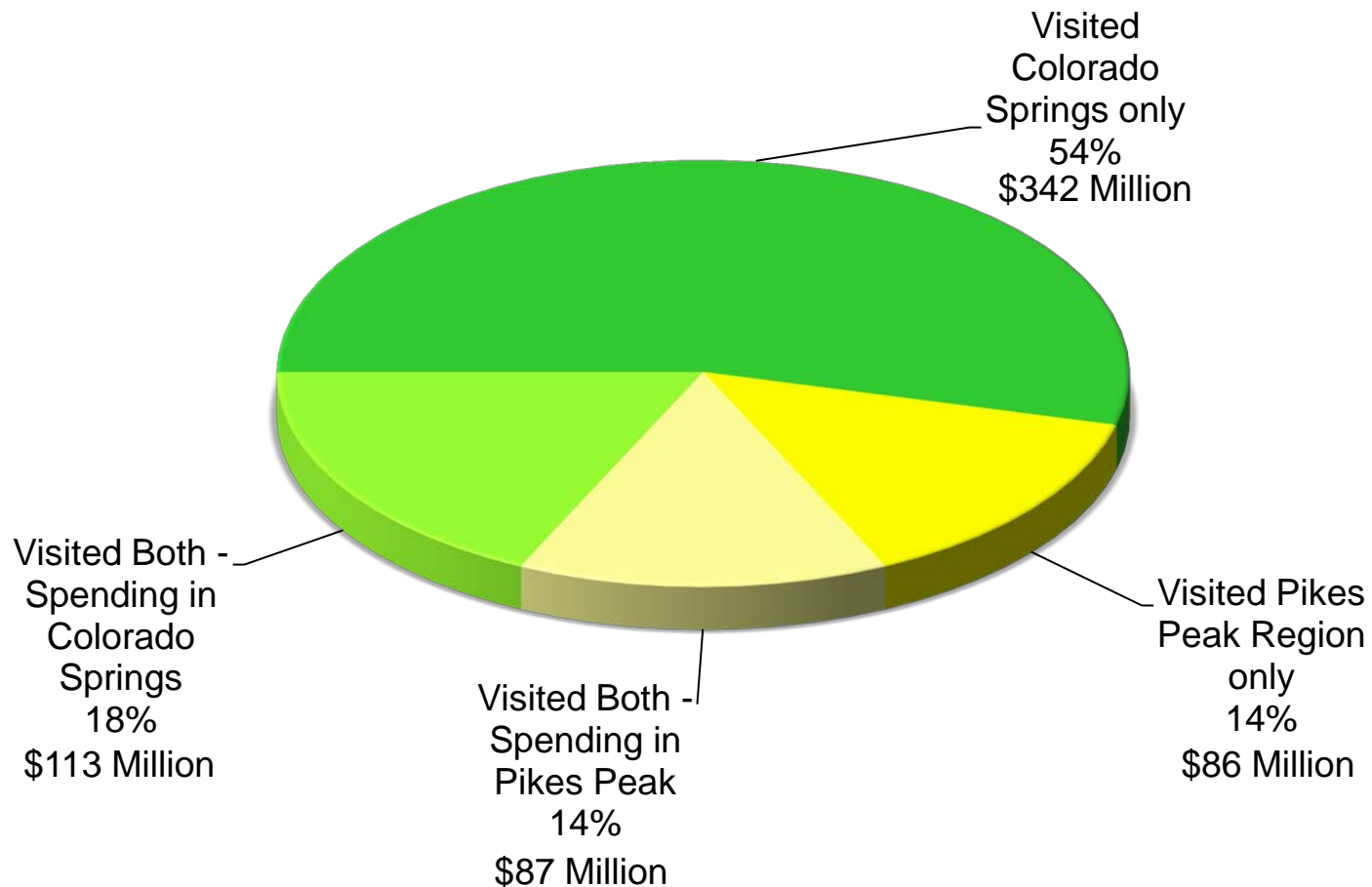
Total Spending = \$1.348 Billion



Spending on Day Trips in Colorado Springs/Pikes Peak Region



Total Spending = \$628 Million





Appendix A: Key Terms Defined

Key Terms Defined



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

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

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

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