

State of Colorado Tourism

May 2022



COLORADO
TOURISM OFFICE

Colorado Tourism Office

The Colorado Tourism Office (CTO) is the Destination Marketing and Management Organization for the state of Colorado.

The CTO is a division of the Colorado Office of Economic Development and International Trade (OEDIT) with a mission to drive traveler spending through promotion and development of compelling, sustainable travel experiences throughout our four-corner state.

U.S. Travel Impact Summary

April 2022

- Impact Summary
- Travel Indicators
- Int'l Arrivals to the U.S.
- Economic Conditions
- Employment
- Workforce
- Travel Sentiment
- Predictive DMO Indicators
- Predictive Industry Indicators
- Economic Forecast
- Domestic Travel Forecast
- International Travel Forecast
- U.S. Hotel Forecast
- Data Sources & Partners

Destination (filter impacts entire page)
Colorado

Cumulative Losses Since January 2020

Colorado, through April 2022

Colorado	
Travel Spending (difference)	(\$12.3B)
Federal Taxes	(\$1,243M)
State Taxes	(\$283M)
Local Taxes	(\$211M)

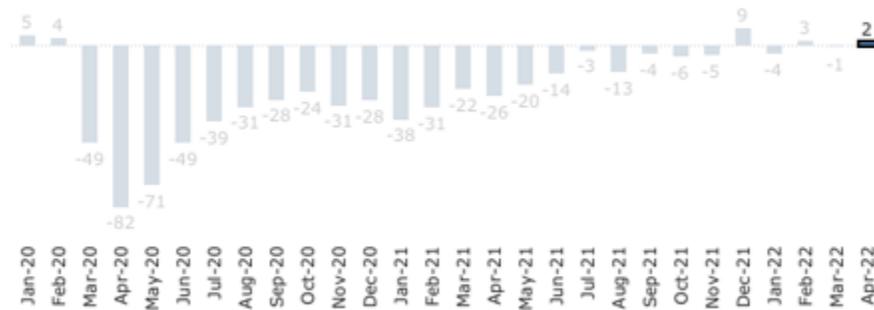
Travel Spending Losses

Colorado

	Travel Spending	Travel Spending (difference)	% Change vs 2019
Jan-21	\$1.2B	(\$0.7B)	-38%
Feb-21	\$1.3B	(\$0.6B)	-31%
Mar-21	\$1.6B	(\$0.5B)	-22%
Apr-21	\$1.5B	(\$0.5B)	-26%
May-21	\$1.7B	(\$0.4B)	-20%
Jun-21	\$1.8B	(\$0.3B)	-14%
Jul-21	\$2.1B	(\$0.1B)	-3%
Aug-21	\$1.9B	(\$0.3B)	-13%
Sep-21	\$1.9B	(\$0.1B)	-4%
Oct-21	\$2.0B	(\$0.1B)	-6%
Nov-21	\$1.8B	(\$0.1B)	-5%
Dec-21	\$2.1B	\$0.2B	9%
Jan-22	\$1.8B	(\$0.1B)	-4%
Feb-22	\$1.9B	\$0.0B	3%
Mar-22	\$2.1B	\$0.0B	-1%
Apr-22	\$2.1B	\$0.0B	2%

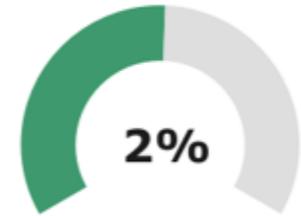
Travel Spending (% change vs. 2019)

Colorado



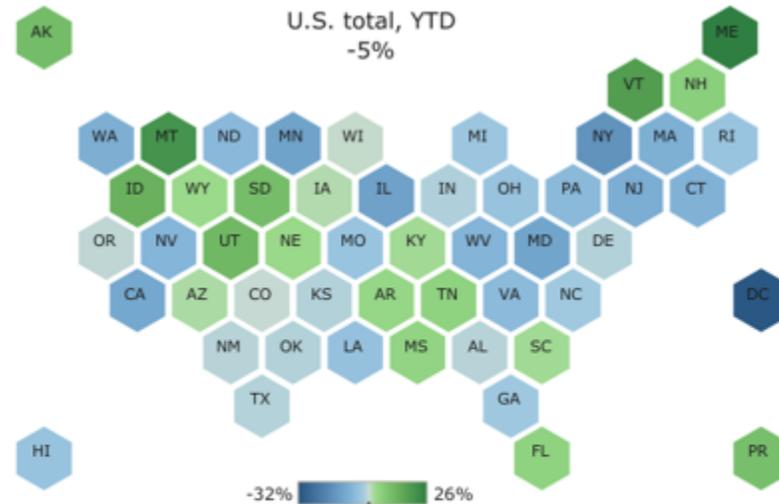
Travel Spending

Colorado
April 2022, % change vs. 2019



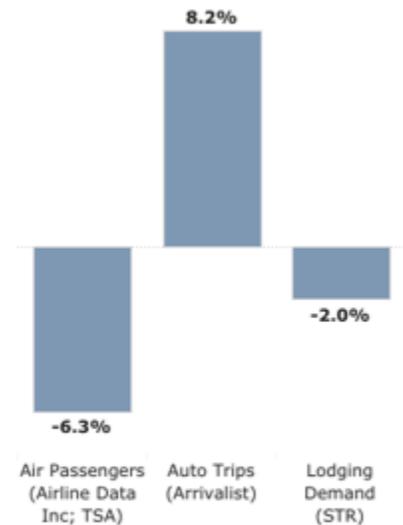
U.S. Travel Spending Year-to-Date by State

YTD through April 2022, % change vs. 2019



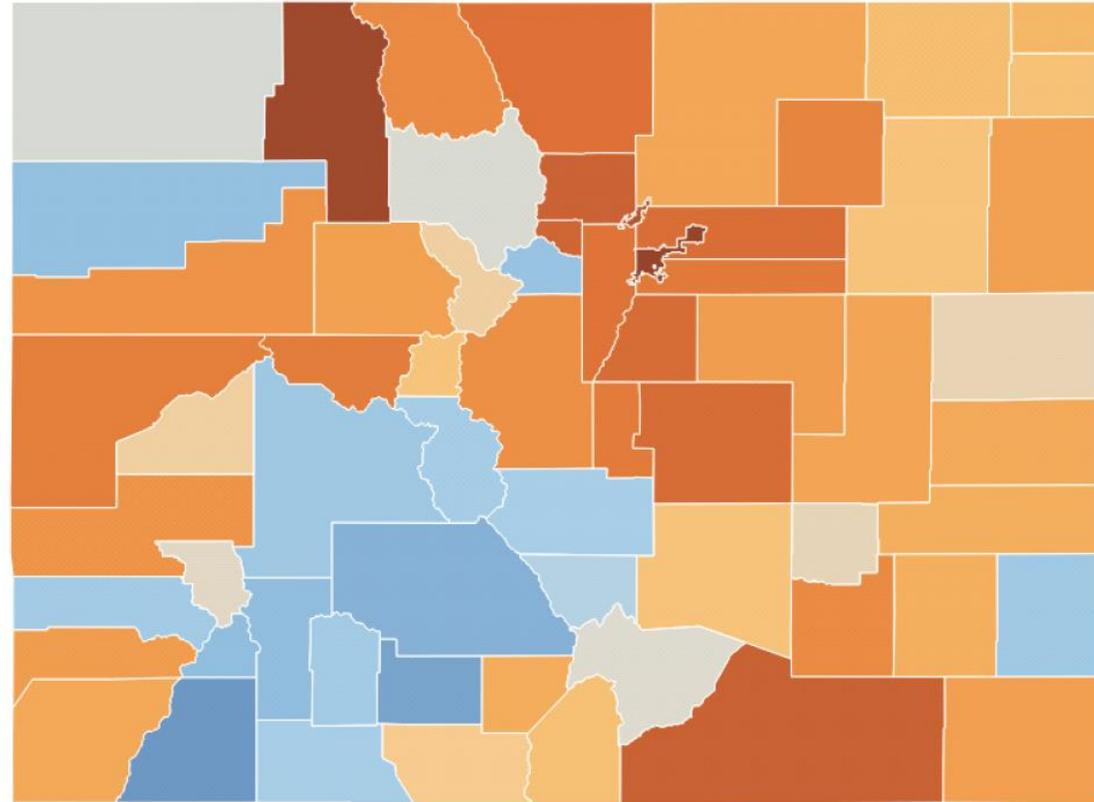
Travel & Tourism Recovery

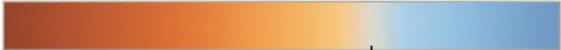
Colorado
April 2022, % change vs. 2019



Source: Tourism Economics (travel spending)

Change In Visitor Spending



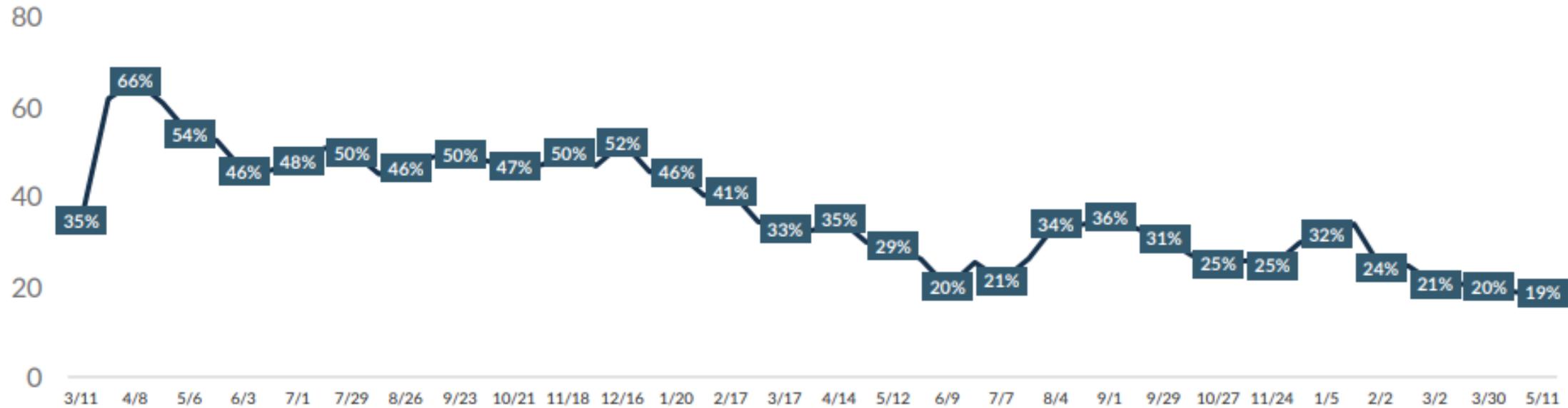
Change in Visitor Spending
-56.4%  28.8%

COVID Industry Recovery Updates



IMPACT ON TRAVEL PLANS

Indicated that Coronavirus Would Greatly Impact their Decision to Travel in the Next Six Months

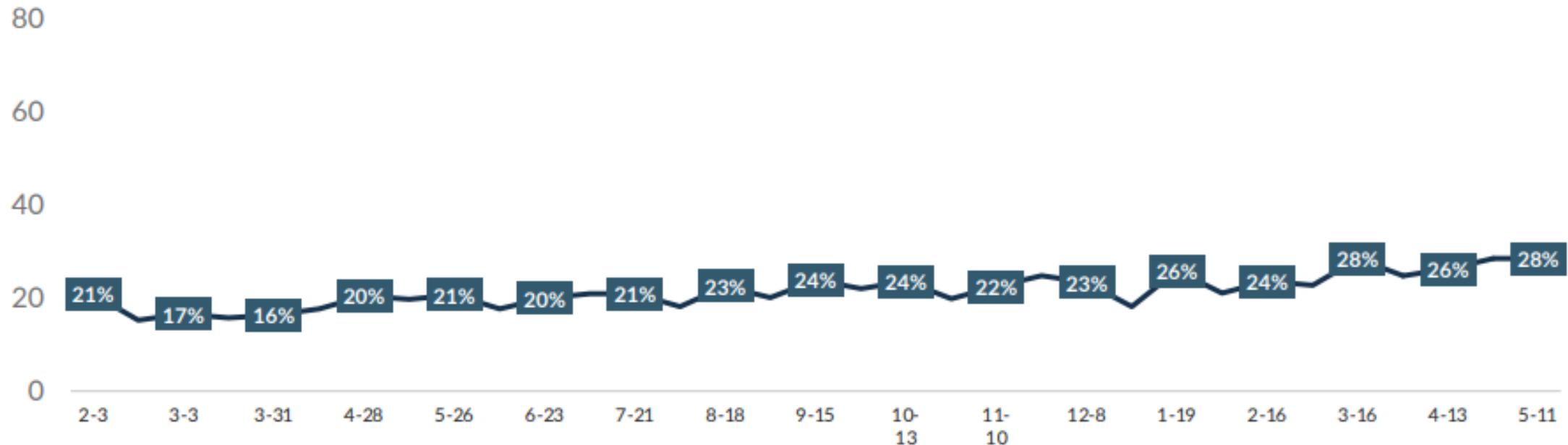


Travel Sentiment Study Wave 61

Longwoods INTERNATIONAL | miles PARTNERSHIP

IMPACT ON TRAVEL PLANS

Indicated that Transportation Costs Would Greatly Impact their Decision to Travel in the Next Six Months

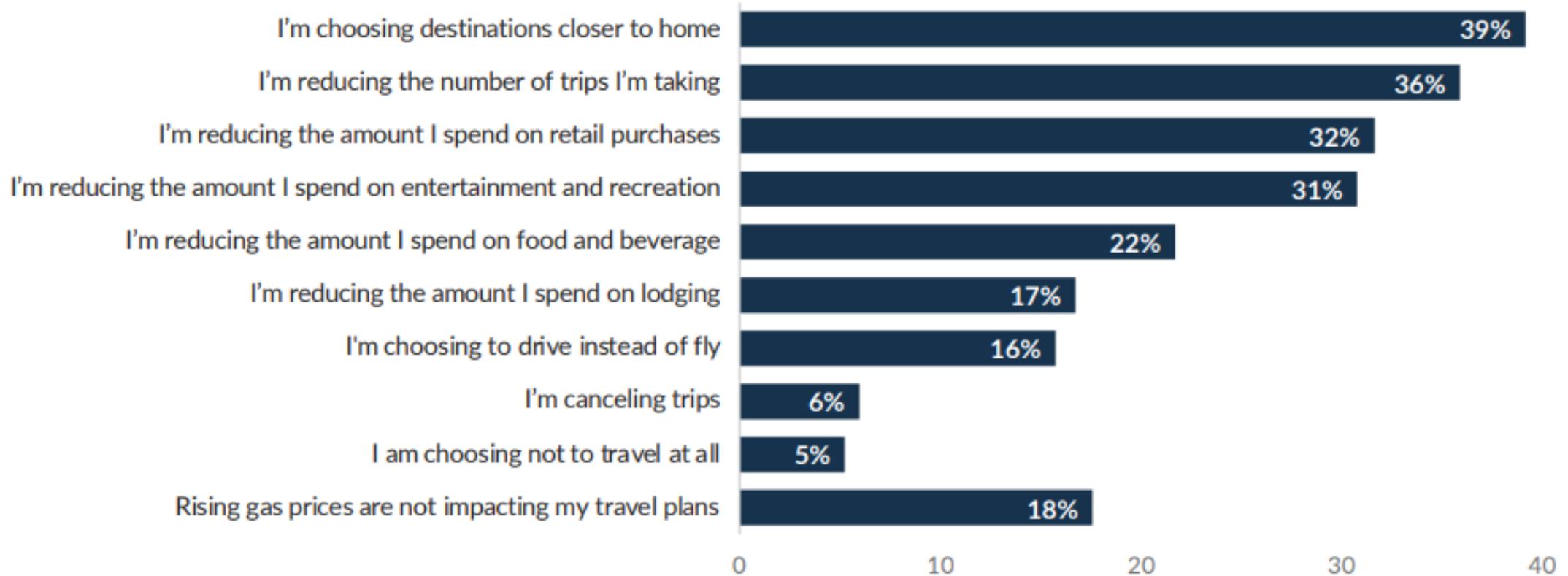


Travel Sentiment Study Wave 61

Longwoods INTERNATIONAL | miles PARTNERSHIP

IMPACT ON TRAVEL PLANS

Impact of Rising Gas Prices on Travel Plans

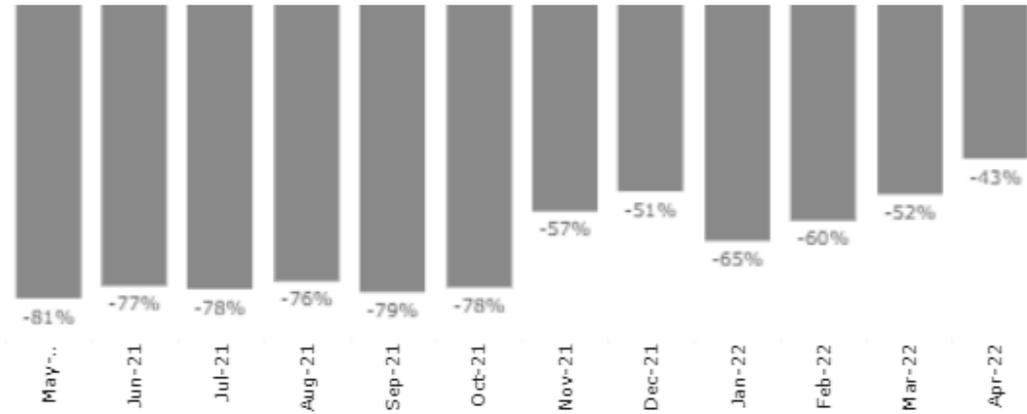


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International Arrivals to the U.S. by Origin

Visitor arrivals from Overseas, compared to same month in 2019

Origin **Overseas**

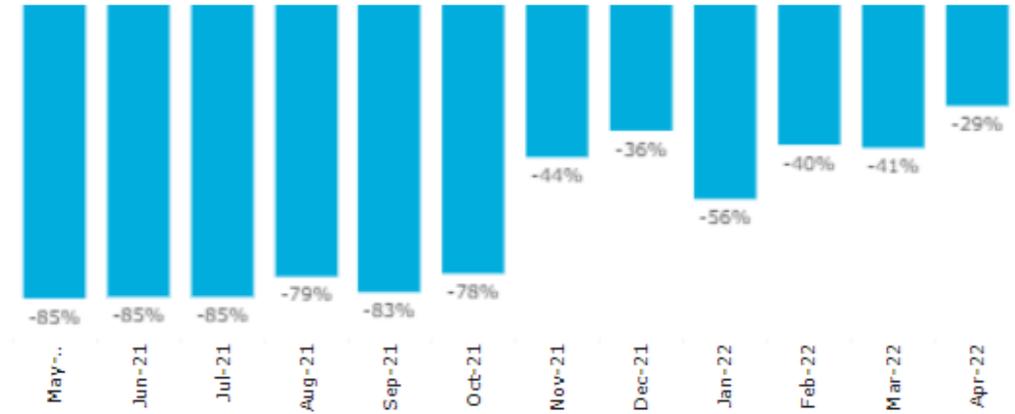


Source: NTTO

Overseas Arrivals by U.S. Destination

Visitor arrivals to Colorado from Overseas, compared to same month in 2019

Destination **Colorado**



Source: NTTO

International Arrivals to the U.S.

Visitor arrivals to United States, compared to same month in 2019

Destination **United States**

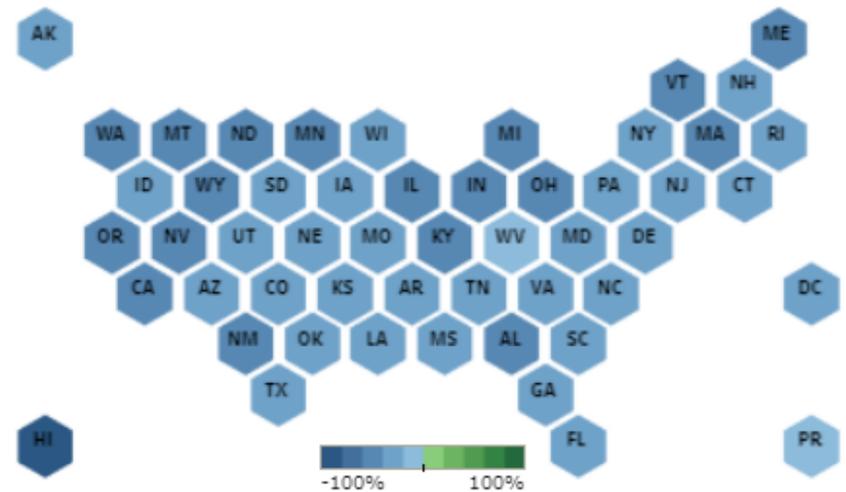
Origin **(Multiple values)**

	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22
Overseas	-78%	-76%	-79%	-78%	-57%	-51%	-65%	-60%	-52%	-43%
Argentina	-77%	-66%	-61%	-38%	-41%	-42%	-55%	-50%	-47%	-45%
Canada (air)	-85%	-76%	-74%	-67%	-61%	-59%	-68%	-66%	-47%	
Canada (total)	-92%	-89%	-86%	-81%	-67%	-61%	-70%	-68%	-53%	
China	-97%	-75%	-86%	-96%	-92%	-89%	-94%	-96%	-91%	-92%
France	-95%	-93%	-92%	-94%	-49%	-34%	-55%	-48%	-44%	-31%
Germany	-93%	-91%	-93%	-93%	-53%	-43%	-60%	-56%	-45%	-33%
India	-87%	-53%	-61%	-82%	-21%	-13%	-41%	-29%	-28%	-17%
Israel	-52%	-47%	-33%	-52%	-18%	-43%	-63%	-36%	-17%	-15%
Japan	-96%	-96%	-97%	-96%	-95%	-96%	-95%	-97%	-95%	-90%
Mexico (air)	22%	36%	33%	53%	9%	-12%	-9%	0%	-6%	-15%
Mexico (total)	-40%	-40%	-39%	-36%	-35%	-40%	-29%	-32%		
South Korea	-93%	-86%	-90%	-89%	-81%	-85%	-85%	-89%	-83%	-73%
Spain	-89%	-89%	-88%	-87%	-46%	-31%	-34%	-29%	-18%	-17%
UK	-96%	-96%	-97%	-97%	-57%	-46%	-62%	-51%	-35%	-32%

Source: NTTO

Overseas Arrivals to the U.S. by State (+PR)

Visitor arrivals for April 2022, compared to same month in 2019



Source: NTTO

A scenic landscape at sunset. The sky is filled with orange and yellow clouds, with the sun low on the horizon. In the background, there are dark, silhouetted mountains. The middle ground shows a dense forest of evergreen trees. The foreground is a meadow with green grass and small purple and yellow wildflowers. The overall mood is peaceful and natural.

— Values-Based Tourism Marketing

Marketing Objectives

Influence measurable visits from **high-value travelers** to all areas of the state, thereby increasing economic impact

Educate visitors and residents on topics related to destination stewardship and responsible travel



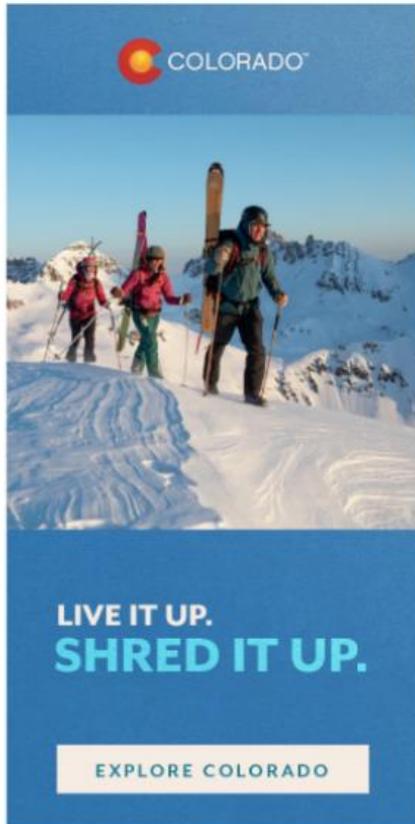
SHINE A LITTLE BRIGHTER

In Colorado, our sun's special. It feels warmer. Looks brighter. And everything around you seems sunnier. Because when you explore our state, you can feel, see and experience the brightness of Colorado first-hand. Even under our twinkling stars. Wherever you go. Whatever you do — Colorado ignites the spark that inspires you to come to life.

From the mountains to the plains and in our vibrant cities, Colorado's four distinct seasons of bluebird skies and almost 300 days of golden sunshine shine a little brighter. In our designated dark sky areas the beauty of the Milky Way shines a little brighter. And with endless diverse adventures from the natural beauty of the great outdoors to the inspiration of rich heritage and culture, Colorado will help you shine a little brighter.

No matter the season. No matter the place.
With so much radiance, everything shines a little brighter.
Everything comes to life.

Shine A Little Brighter



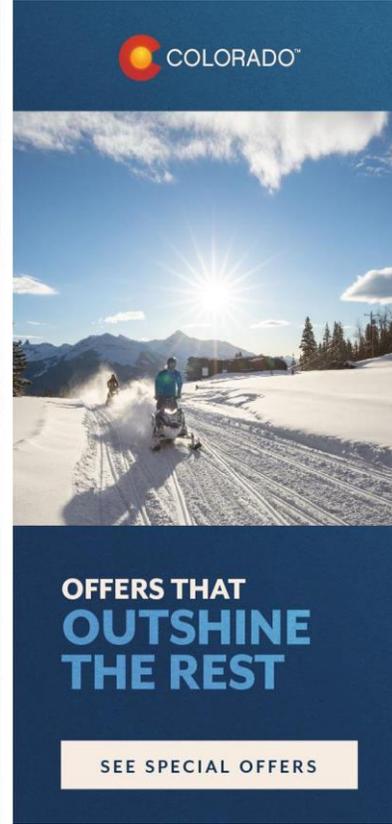
Accomplished Adventurer



Guide



Offers



Do Colorado Right



**BLUE SKIES
GREEN RIDES**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



**REDUCE YOUR
TRAVEL FOOTPRINT**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



**DO COLORADO
RIGHT**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



DO COLORADO RIGHT



**DO
COLORADO
RIGHT**

The Value of Tourism



The Opportunity

- Investments in local tourism are more important than ever before
- We are leaders in communications that enhance sense of place and establish expectations with visitors and residents
- We have an increasing opportunity to collaborate with local organizations to share resources and implement projects that enhance local quality of life





CTO's Destination Stewardship Department

The Role Of DMOs

Destination Marketing and Management Organizations *inspire travel* to and within a destination, *enhance visitor experience*, *protect destination assets* and *improve residential quality of life*.



The Evolution of DMOs



— To Steward Is To Care



Our Destination Stewardship Work *Today*

What is Destination Stewardship?

A transformational, holistic approach that seeks to find harmony between quality of life for residents and a strong visitor economy while protecting our cultural and natural resources

Our Destination Stewardship Work

A holistic approach that seeks to find harmony between quality of life for residents and a strong visitor economy while protecting our cultural and natural resources

STRATEGIC PRIORITIES

Elevate Responsible
Travel & Sustainability

Champion Resilient
Destinations

Advance Inclusiveness
& Collaboration

Our Destination Stewardship Work

A holistic approach that seeks to find harmony between quality of life for residents and a strong visitor economy while protecting our cultural and natural resources

STRATEGIC PRIORITIES



FOCUS AREAS



Our Destination Stewardship Work

A holistic approach that seeks to find harmony between quality of life for residents and a strong visitor economy while protecting our cultural and natural resources

STRATEGIC PRIORITIES



FOCUS AREAS



SAMPLE OF PROGRAMS



Do Colorado Right



**BLUE SKIES
GREEN RIDES**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



**REDUCE YOUR
TRAVEL FOOTPRINT**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



**DO COLORADO
RIGHT**



QUIN GABLE
TRAVEL INFLUENCER

SEE HOW QUIN DOES IT



Collaboration is Key

Lead - Partner - Advocate Framework

LEAD

DMO will be responsible and accountable for the initiative

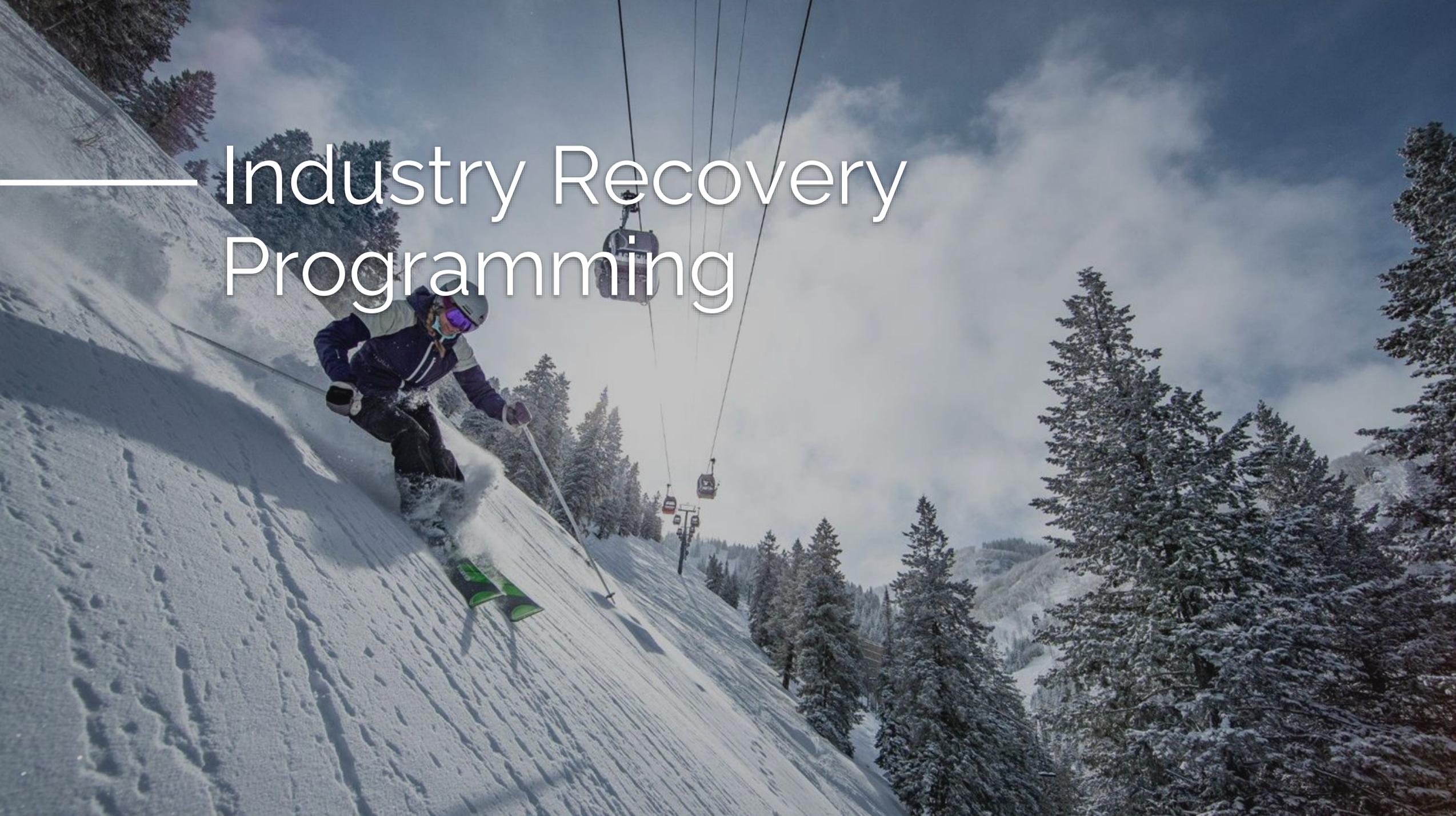
PARTNER

DMO will support the pursuit of the stakeholders' goals

ADVOCATE

DMO will work with, for and through others to achieve a desired outcome

Industry Recovery Programming



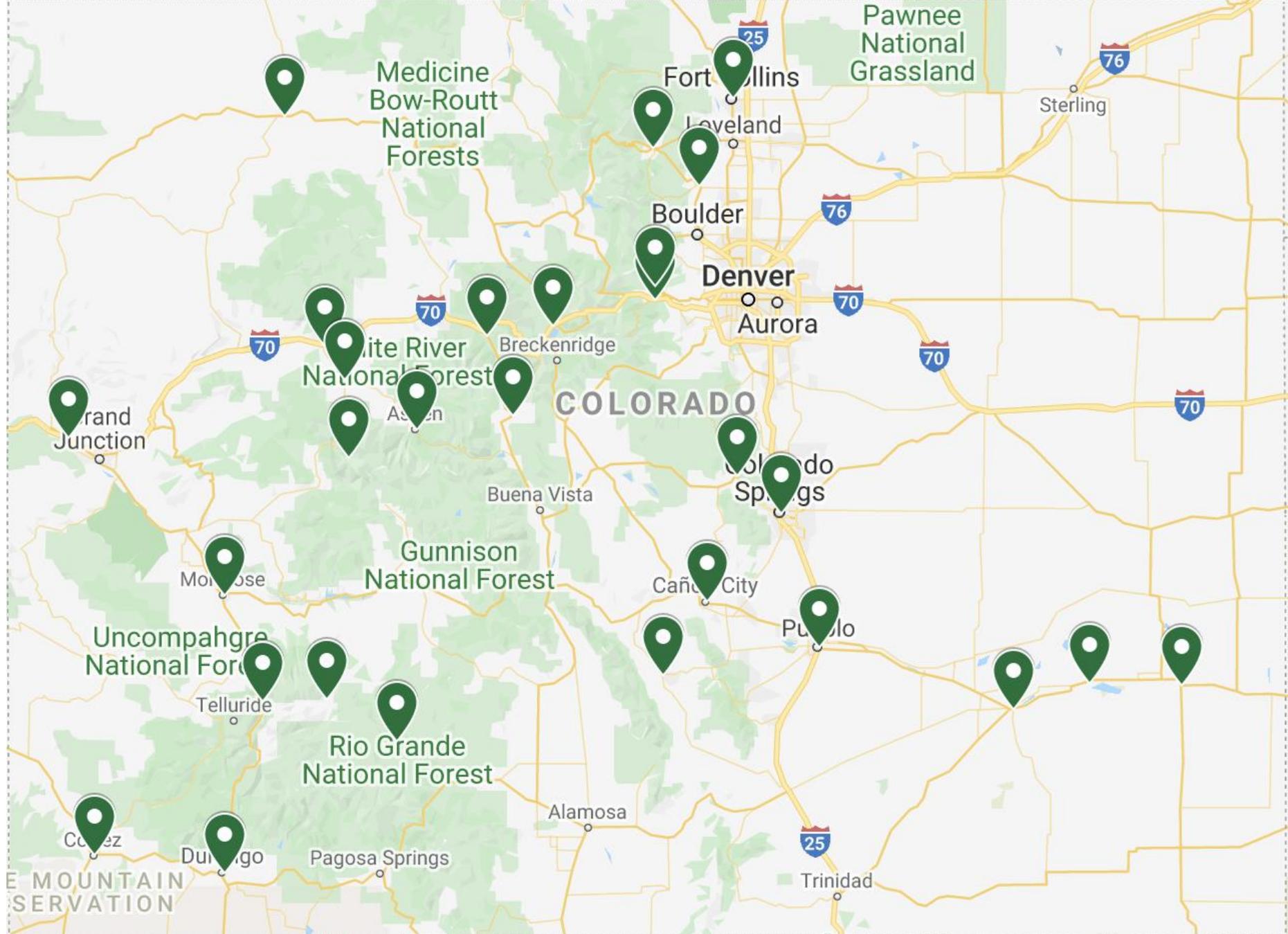
Restart Colorado Tourism Programming

- Restart Destinations Program
 - Recovery assessment
 - Full-day workshop
 - 75 hours of free consulting
 - Direct marketing support
- Restart Industry Associations Program
 - 75 hours of free consulting
 - Direct marketing support



Restart Destinations Program

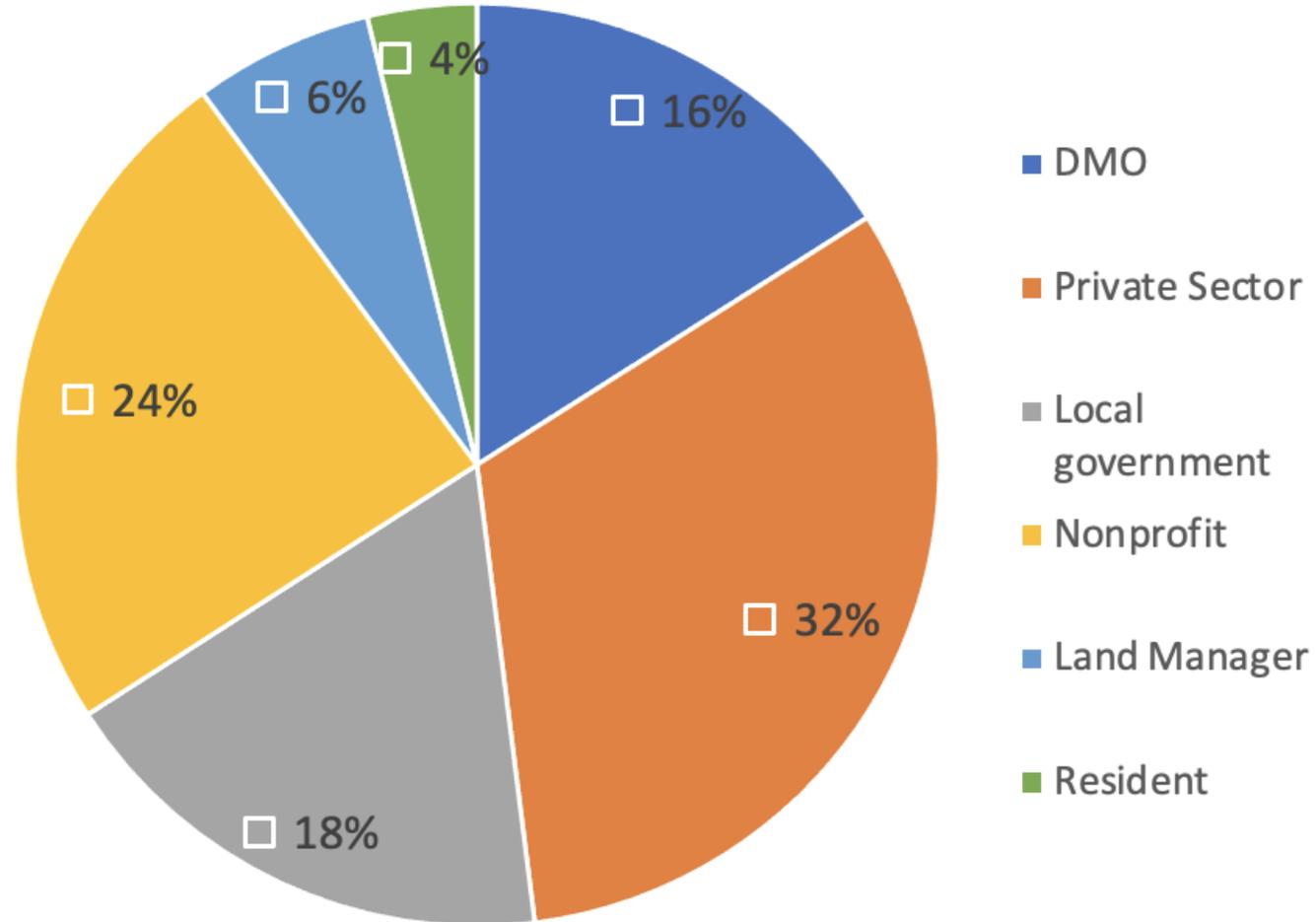
1. Aspen
2. Canyons & Plains
3. City of Central
4. City of Woodland Park
5. Clear Creek County
Tourism Bureau
6. Creede/Mineral County
7. Custer County
8. Fremont County
9. Greater Pueblo Chamber of
Commerce
10. Lake City/Hinsdale County
Marketing Committee
11. Lake County Tourism Panel
12. Marble Crystal River Chamber
13. Mesa Verde Country Tourism
Office
14. Moffat County
15. Prowers County
16. Roaring Fork Valley
17. Town of Lyons
18. Towns of Fruita and Palisade
19. Towns of Minturn and Red Cliff
20. Towns of Silverthorne and
Dillon
21. Visit Colorado Springs
22. Visit Durango
23. Visit Estes Park
24. Visit Fort Collins
25. Visit Glenwood Springs
26. Visit La Junta
27. Visit Montrose
28. Visit Ouray



Restart Industry Associations Program

1. Bicycle Colorado
2. Collegiate Peaks Scenic and Historic Byway
3. Colorado Agritourism Association
4. Colorado Association for Viticulture & Enology (CAVE)
5. Colorado Brewers Guild
6. Colorado Distillers Guild
7. Colorado Restaurant Association
8. Destination Colorado
9. Fort Sedgwick Historical Society
10. Gold Belt Tour Scenic and Historic Byway Association
11. Grand Lake Creative District
12. Grand Mesa Byway Association
13. Museums of the San Luis Valley and Southern Colorado
14. Northwest Colorado Cultural Heritage Program
15. Pikes Peak Outdoor Recreation Alliance
16. Sangre de Cristo National Heritage Area
17. Santa Fe Trail Scenic & Historic Byway
18. Trail of the Ancients Byway Association
19. Western Colorado Adventure Trail (WestCAT)

525 Tourism Stakeholders Engaged

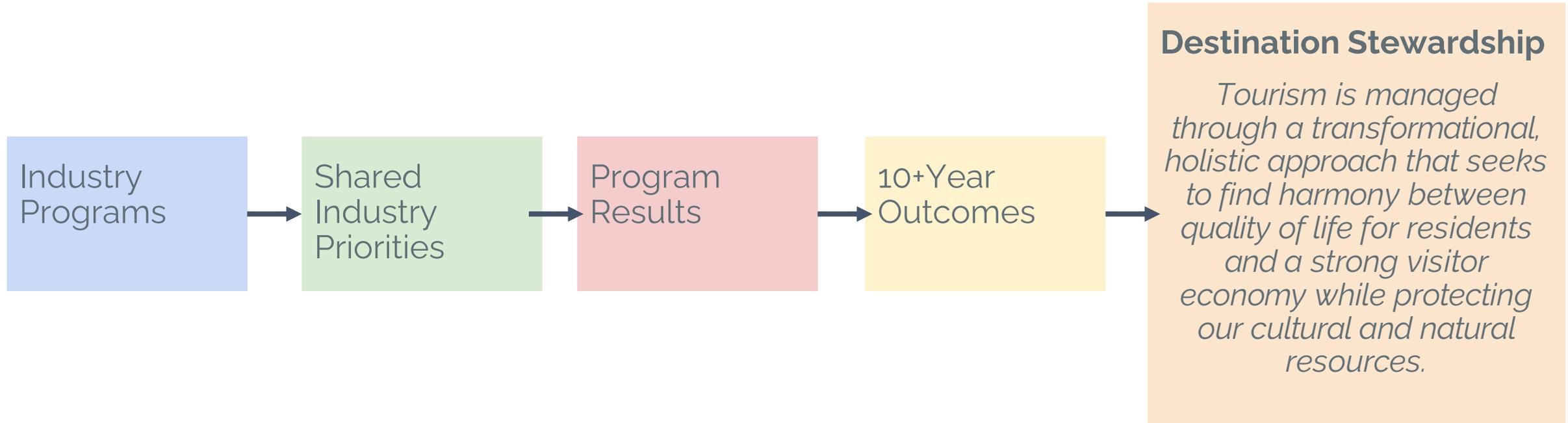


Shared Industry Priorities

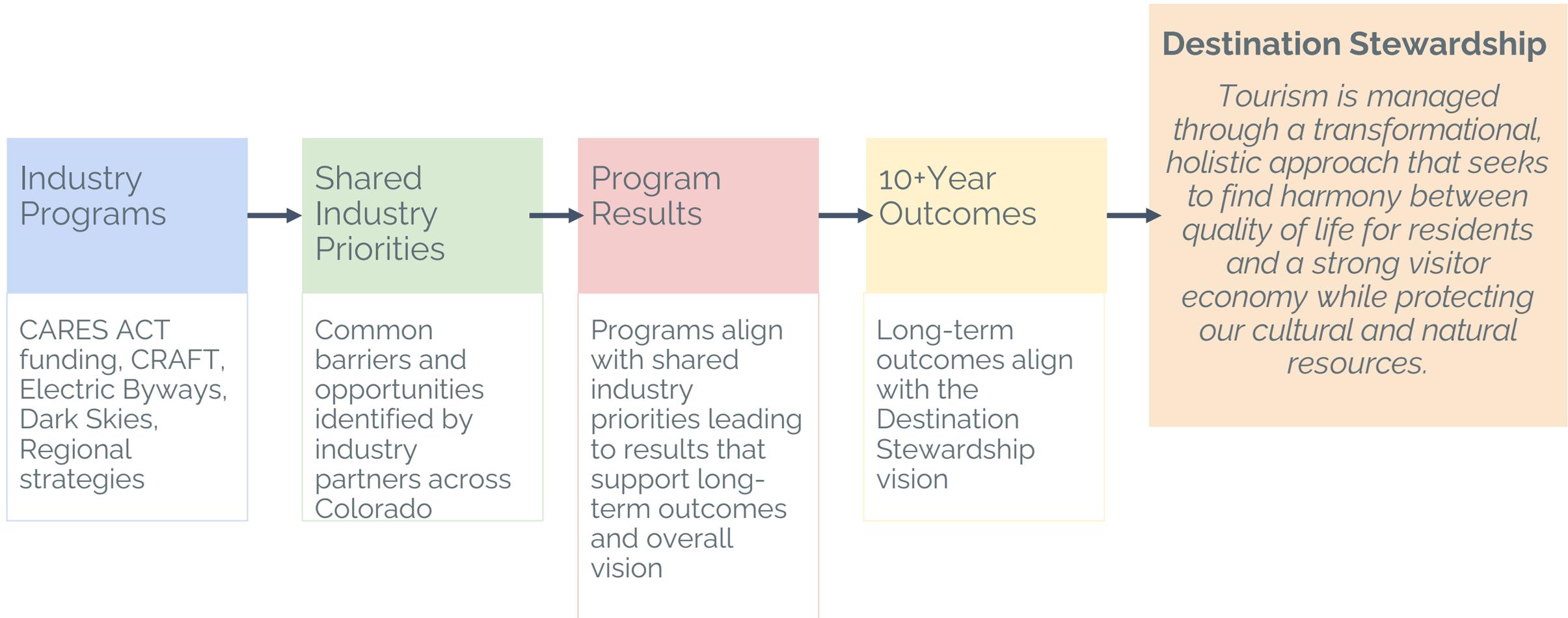
1. Advance tourism workforce
2. Advance off-peak tourism opportunities
3. Champion the value of tourism
4. Develop and enhance visitor experience
5. Encourage responsible and respectful use
6. Foster inclusive travel opportunities
7. Promote local businesses and experiences



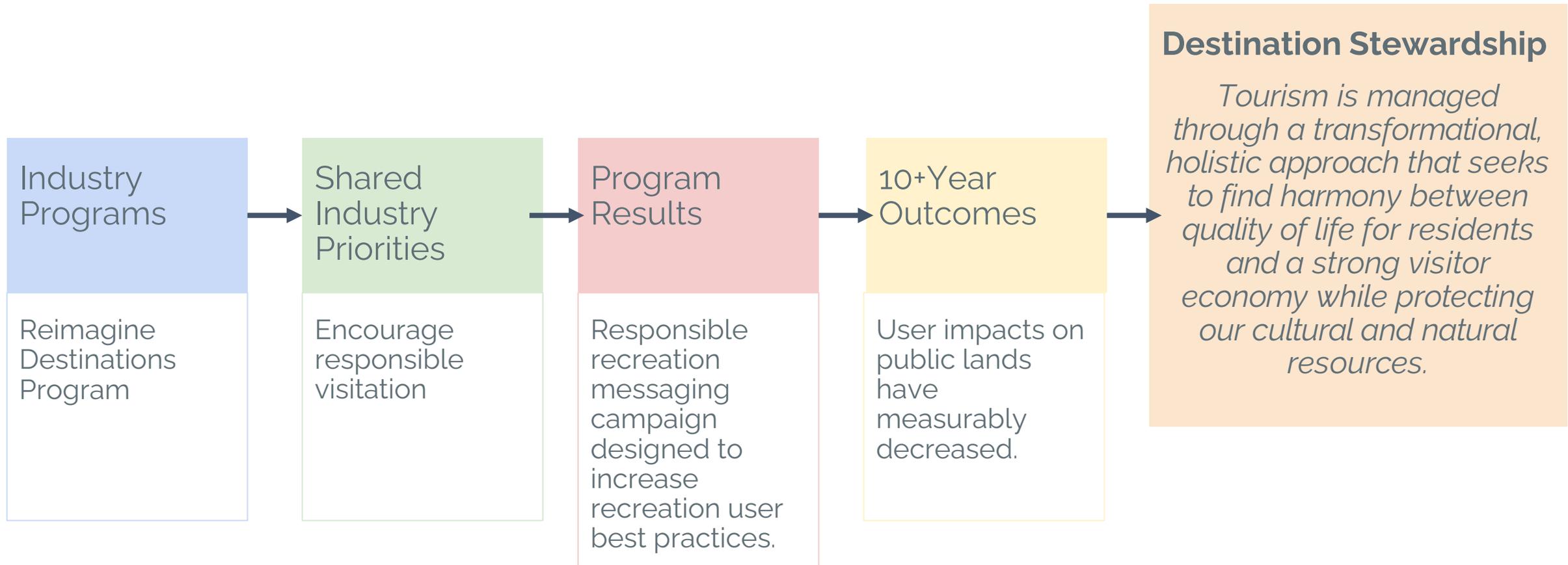
Working Towards the Vision



Working Towards the Vision



Example Execution



Example Results

- Visit Durango climate action plan
- Roaring Fork Valley crisis communications planning
- Rocky Mountain Folk School business plan
- Fremont County tourism workforce development planning



The Opportunity of Tourism

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THANK YOU



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