Longwoods: Travel Clients
Longwoods engaged to conduct visitor research for 2019 travel year:

**Purposes**

- Estimate visitor volume and expenditures
- Provide intelligence on:
  - competitive environment
  - sources of business
  - traveler profile
  - trip characteristics
  - product delivery
Main focus is overnight travel

- Quarterly random samples of U.S. adult population
- Consumer online panel
- Profiles of representative sample of 300,000+ overnight and day trips each year
- Overview survey, then a custom follow-up
  - 2,356 Denver visitors completed the survey
  - 1,355 completed detailed follow-up
    - 860 overnight
    - 495 day
Total Visitors to Denver 2019 – Day & Overnight

Denver Day Trips
Overnight trips

MILLIONS OF TRIPS

0 5 10 15 20 25 30 35

'08 '09 '10 '11 '12 '13 '14 '15 '16 '17 18 19

6.7 6.9 7.3 7.8 8.3 8.8 10.2 12 14.2 14.1 14.2 15.4 16.4 17.3 17.4 17.3 14.1 14.2 31.4 31.9

18.9 19 20 21 21.9 22.8 25.6 28.4 31.5 31.7 31.4 12.2 12.1 12.7 13.2 13.6 14 15.4 16.4 14.2 14.3 14.2

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Overnight Trips to Denver

MILLIONS OF TRIPS

2%

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'19

VISIT DENVER
The Convention & Visitors Bureau
Total Travel Spending in Denver – Day & Overnight

Total Spending = $7.0 Billion

Overnight Visitors (86%) $6.0 Billion
Day Visitors (14%) $970 Million

Overnight Visitor Spending – Up 8% year over year
Overnight Leisure Trips to Denver

MILLIONS OF TRIPS

'92 '93 '94 '95 '96 '97 '98 '99 '00 '01 '02 '03 '04 '05 '06 '07 '08 '09 '10 '11 '12 '13 '14 '15 '16 '17 '18 '19

6.1 5.7 5.3 5.2 5.9 6.4 7.0 6.4 6.9 8.0 8.1 7.8 7.9 7.9 9.1 9.6 9.7 10.1 10.9 11.0 11.3 11.7 13.0 13.8 14.7 15.0 14.9 15.3

3%
Structure of Denver’s Overnight Leisure Travel Market

![Graph showing the structure of Denver’s overnight leisure travel market from year 1992 to 2019. The graph compares marketable trips and visits to friends/relatives, with a series of bars indicating the number of millions of trips per year. The graph shows a steady increase in both categories over the years, with a notable increase in 2019.]
Length of Stay – Overnight Leisure Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Avg. Number of Nights</th>
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Top Sources of Overnight Leisure Trips

Feeder Cities

Los Angeles
Albuquerque-Santa Fe*
Dallas-Ft. Worth*
New York
San Francisco*
Chicago*

* = Advertising markets
Top Sources of Overnight Leisure Trips

Feeder States
- California
- Texas
- Florida
- Illinois
- Arizona
- Nebraska
- New Mexico
- Kansas
- Minnesota
- New York
Leisure Tourism Growth (Since 2006)

Source: Longwoods International 2019
Overnight Business Trips to Denver

![Graph showing millions of trips from 1994 to 2019]
Average Daily Expenditures – Per Overnight Visitor

Business

- 2015: $149
- 2016: $145
- 2017: $154
- 2018: $146
- 2019: $147

Marketable

- 2015: $136
- 2016: $142
- 2017: $171
- 2018: $166
- 2019: $171

VFR

- 2015: $71
- 2016: $69
- 2017: $70
- 2018: $82
- 2019: $83
Denver’s Product – “Would Really Enjoy Visiting Again”

PERCENT WHO STRONGLY AGREE

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<td>82%</td>
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Another Record-Breaking Year!

Tourism is important to Denver’s economy!

Continuing to set new records

Outpacing national trends... Leisure visits up 68% vs. 24% nationally since 2006

How? Successful marketing and product delivers on the promise

KEEP UP THE GOOD WORK!
Travel Spending by Sector – Overnight Visitors

Total Spending = $6.0 Billion

- **Accommodation (32%)**
  - $1,942 Million
- **Eating/Drinking (19%)**
  - $1,152 Million
- **Transportation (29%)**
  - $1,704 Million
- **Retail (11%)**
  - $674 Million
- **Recreation (9%)**
  - $537 Million
Total Travel Spending in 2019 - Overnight Trips

Record Spending: $6.0 Billion
Up 8% year over year
Total Expenditures in 2019 - Overnight Trips

Total Spending Up 8%

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<td>'19</td>
<td>4.9</td>
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BILLIONS OF DOLLARS
Contributions to Expenditures/Visitor Volumes

Base: Overnight Visitors

Visit to Friends/Relatives:
- Expenditures: 34%
- Visitors: 44%

Marketable Leisure:
- Expenditures: 48%
- Visitors: 42%

Business:
- Expenditures: 18%
- Visitors: 14%
Denver’s Overnight Business Trips – 2018 vs. 2017

- **Convention/Conference**
  - 2018: 945
  - 2019: 959
  - Increase: 1%

- **Other Business**
  - 2018: 1,451
  - 2019: 1,413
  - Decrease: 3%
Day Trips to Denver

MILLIONS OF TRIPS

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Out-of-State Leisure Visitors

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Attractions Visited in Denver

Paid Admissions
- Denver Zoo
- Buffalo Bill Museum & Grave
- Colorado Rockies
- Denver Botanic Gardens
- Denver Art Museum
- Denver Museum of Nature & Science/IMAX
- Colorado Railroad Museum
- Denver Broncos
- Lakeside Amusement Park
- Downtown Aquarium

Top 3 Free Admissions
- Red Rocks Park & Amphitheatre
- Coors Brewery
- Colorado State Capitol
Top Shopping/Entertainment Areas Visited in Denver

Base: Leisure Visitors

16th Street Mall
Denver Union Station
LoDo “Lower Downtown” Historic District
Cherry Creek
Denver Pavilions
Larimer Square
Denver Premium Outlets
Outlets at Castle Rock
FlatIron Crossing Mall
Park Meadows Retail Resort
Belmar
Shops at Northfield/Stapleton
Denver’s Source of Business

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

Base: Overnight Leisure Trips
THANK YOU!

VISIT DENVER
The Convention & Visitors Bureau

Longwoods INTERNATIONAL