



# VISIT DENVER

## Board of Directors Retreat

August 24, 2023

Devil's Thumb Ranch





# **VISIT DENVER**

Board of Directors Retreat

**2022 Resident Survey  
Summary Review &  
2023 Leisure & Convention  
Intercept Perception Study**

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RRC Associates



# DENVER CONVENTION & LEISURE 2023 RESEARCH





# RESEARCH GOALS

- The primary goal of the research is to gauge convention & leisure traveler sentiment towards Denver as a destination, including amenities, transportation, cleanliness and public safety.
- A secondary goal is to compare how Denver rates in 2023 relative to pre-Covid sentiments measured in 2019.





# RESEARCH METHODS

## 1 Convention Attendee Surveys

Convention goers were interviewed at the Colorado Convention Center and in the lobby areas of the three main convention hotels in Downtown Denver. Events covered include School Nutrition, AVMA, Cetera and the American Bar Association.



**467**

**Convention surveys completed  
July 10 to August 5**

## 2 Leisure Traveler Surveys

Visitors in Denver for leisure were surveyed on weekends from mid July through early August in the Dairy Block, Larimer Square and various high traffic areas of Lower Downtown.



**452**

**Leisure surveys completed  
July 14 to August 5**

**919**

**Total  
Surveys Completed**

# HIGHLIGHTS OF 2022 DENVER RESIDENT RESEARCH

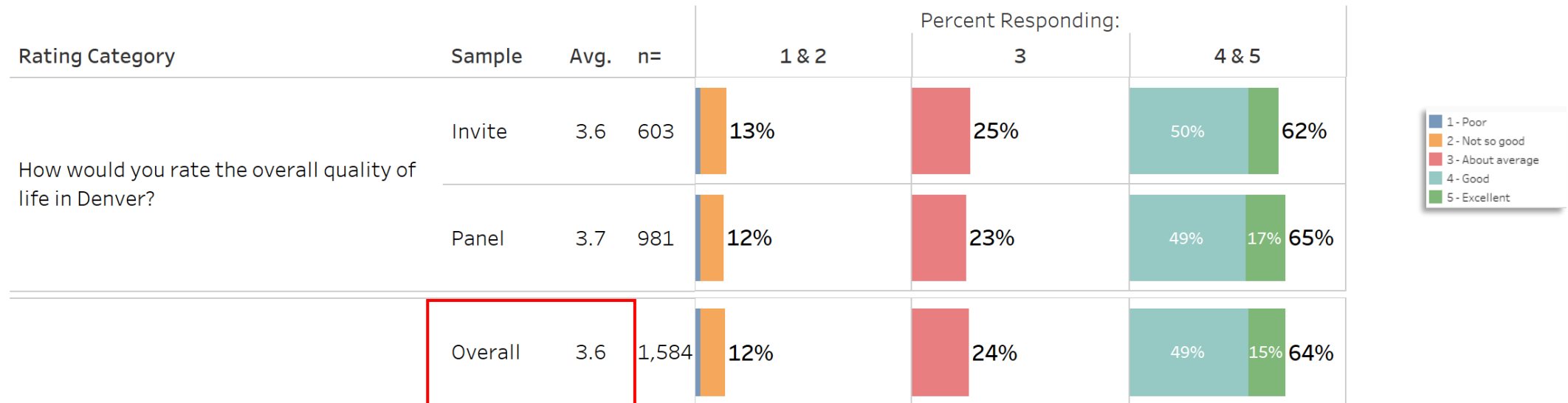




# PERCEPTION OF QUALITY LIFE IN DENVER

Residents rate the quality of life as “good” with nearly two thirds rating it as above average

Q 2: How would you rate the overall quality of life in Denver?





# TOURISM IMPACTS IN DENVER

**Residents are extremely positive on visitor impacts for the city. They clearly understand the Importance of tourism to the local economy.**

- 1 - Strongly disagree
- 2 - Disagree
- 3 - Neutral
- 4 - Agree
- 5 - Strongly agree

Q 19: How much do you agree or disagree that...?

	Overall	Invite	Panel
Visitors to Denver benefit our local economy by spending at local businesses like restaurants, cultural attractions, and sports and music venues.	n=1,377 <b>4.1</b>	n=554 <b>4.2</b>	n=823 <b>4.0</b>
Home-sharing via services like Airbnb or VRBO provides residents with a way to grow their income.	n=1,281 <b>3.8</b>	n=517 <b>3.7</b>	n=764 <b>3.9</b>
Tourism creates jobs with good benefits and a career path.	n=1,327 <b>3.7</b>	n=520 <b>3.7</b>	n=807 <b>3.7</b>
Most jobs in the tourism industry are low-paying.	n=1,182 <b>3.6</b>	n=456 <b>3.6</b>	n=726 <b>3.6</b>
Without the taxes visitors pay, residents would have to pay more taxes for the same basic programs and services.	n=1,209 <b>3.5</b>	n=467 <b>3.5</b>	n=742 <b>3.6</b>
The growth in tourism is causing prices to rise, making things less affordable for residents.	n=1,315 <b>3.2</b>	n=506 <b>2.7</b>	n=809 <b>3.5</b>
Denver is overcrowded and congested because of visitors.	n=1,373 <b>2.8</b>	n=543 <b>2.3</b>	n=830 <b>3.1</b>
People home-sharing via services like Airbnb or VRBO has negatively impacted my neighborhood.	n=1,164 <b>2.8</b>	n=462 <b>2.8</b>	n=702 <b>2.8</b>
Tourism has caused an increase in crime and social problems, including substance abuse and homelessness.	n=1,243 <b>2.7</b>	n=483 <b>2.3</b>	n=760 <b>2.9</b>
Visitors in Denver disrupt my quality of life.	n=1,372 <b>2.4</b>	n=554 <b>2.2</b>	n=818 <b>2.6</b>

\*Ratings categories are sorted in descending order by the average rating.  
Source: RRC Associates







# RATING THE QUALITY OF DENVER ATTRACTIONS

**Denverites are quite happy with the city's attractions for visitors.**



Q 17: Overall, how would you rate the quality of Denver attractions for visitors coming in from out of town?

Rating Category	Sample	Avg.	n=	Percent Responding:		
				1 & 2	3	4 & 5
Overall, how would you rate the quality of Denver attractions for visitors coming in from out of town?	Invite	3.8	561	5%	24%	55% 71%
	Panel	4.0	848	3%	22%	46% 29% 75%
	Overall	3.9	1,409	4%	23%	49% 24% 73%



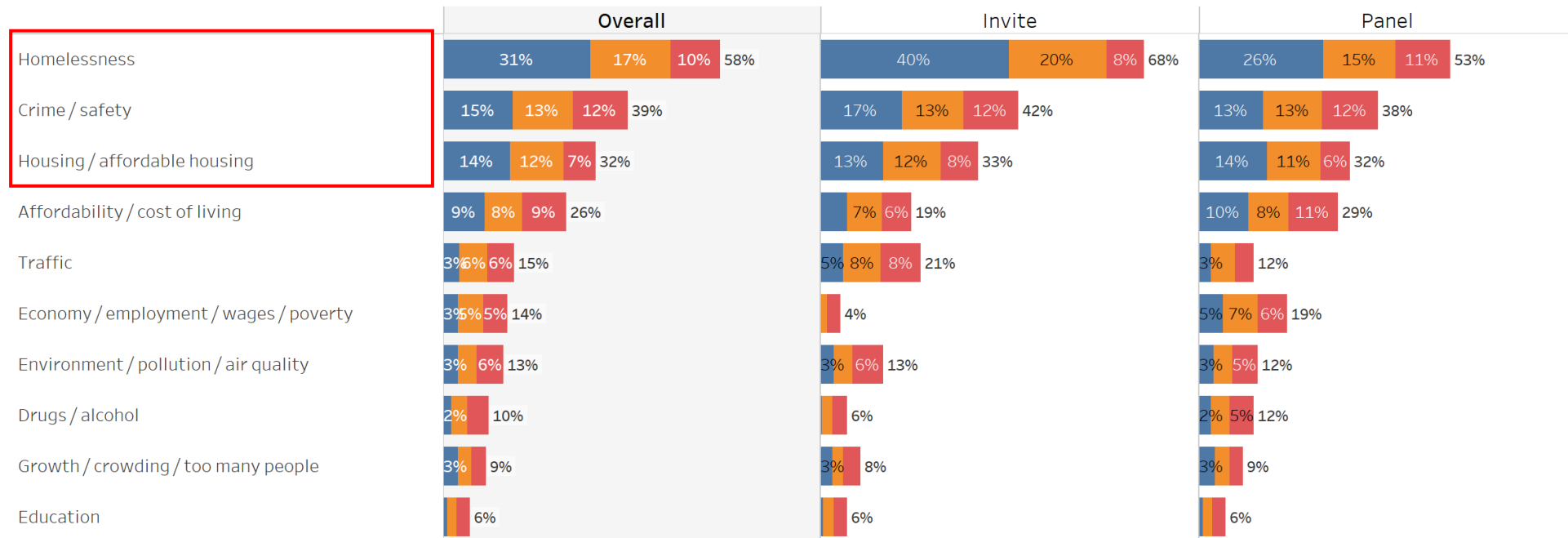
# MOST IMPORTANT ISSUES FACING DENVER

## OPEN-ENDED RESPONSES

**For local residents, homelessness is the dominant issue followed by crime/safety and the cost of housing.**

Q 4: What do you feel are the 3 most important issues currently facing Denver?  
Top 10

■ 1st Most important issue  
■ 2nd Most important issue  
■ 3rd Most important issue



Total responses: n = 1588  
Source: RRC Associates

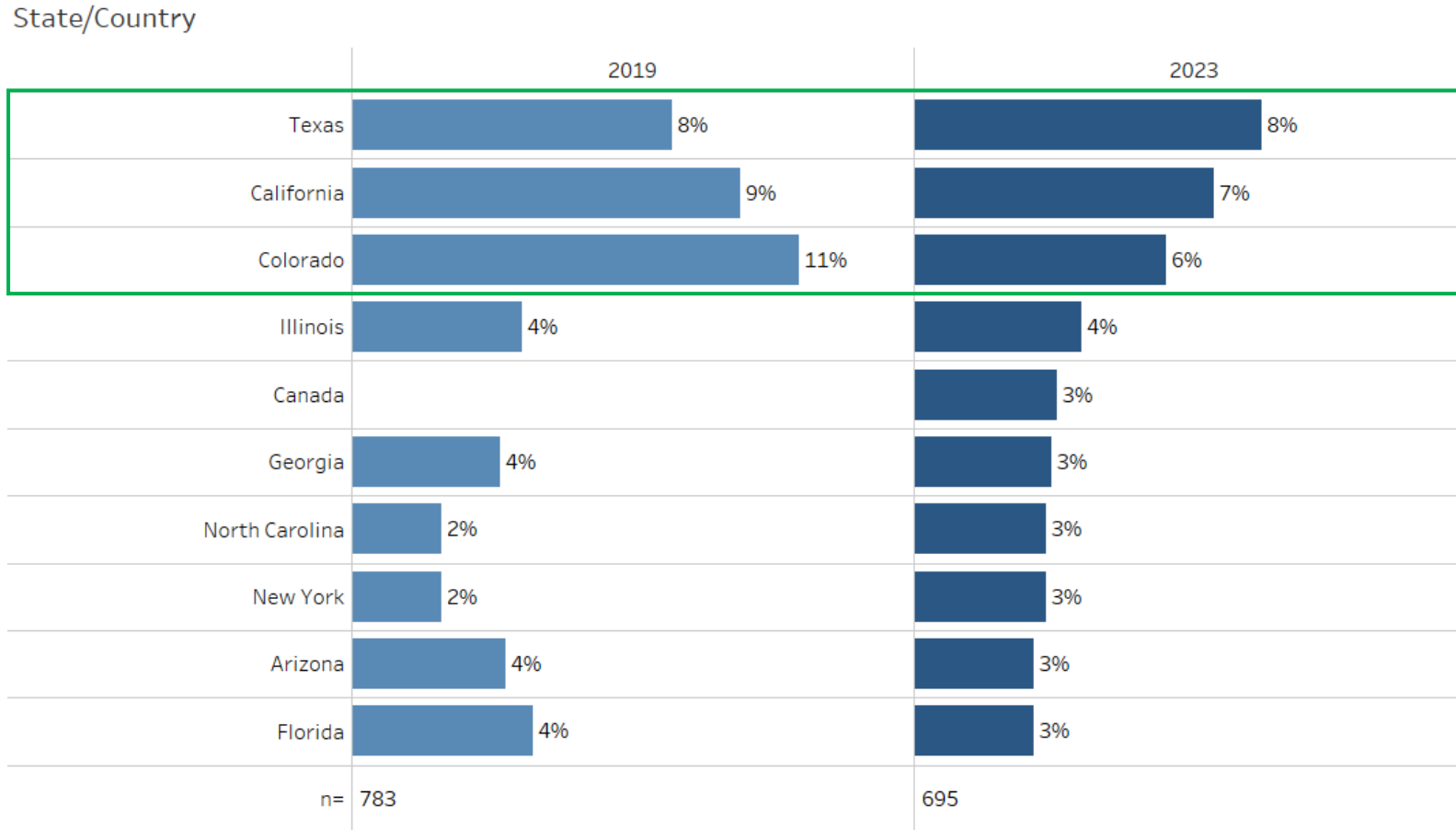


# TRIP CHARACTERISTICS



# MARKET OF ORIGIN

Consistent with 2019 numbers, the top states of origin include Texas and California. In-state dropped from 11% to 6%, which can be considered a positive since out-of-state visitors stay longer and spend more than Colorado residents.



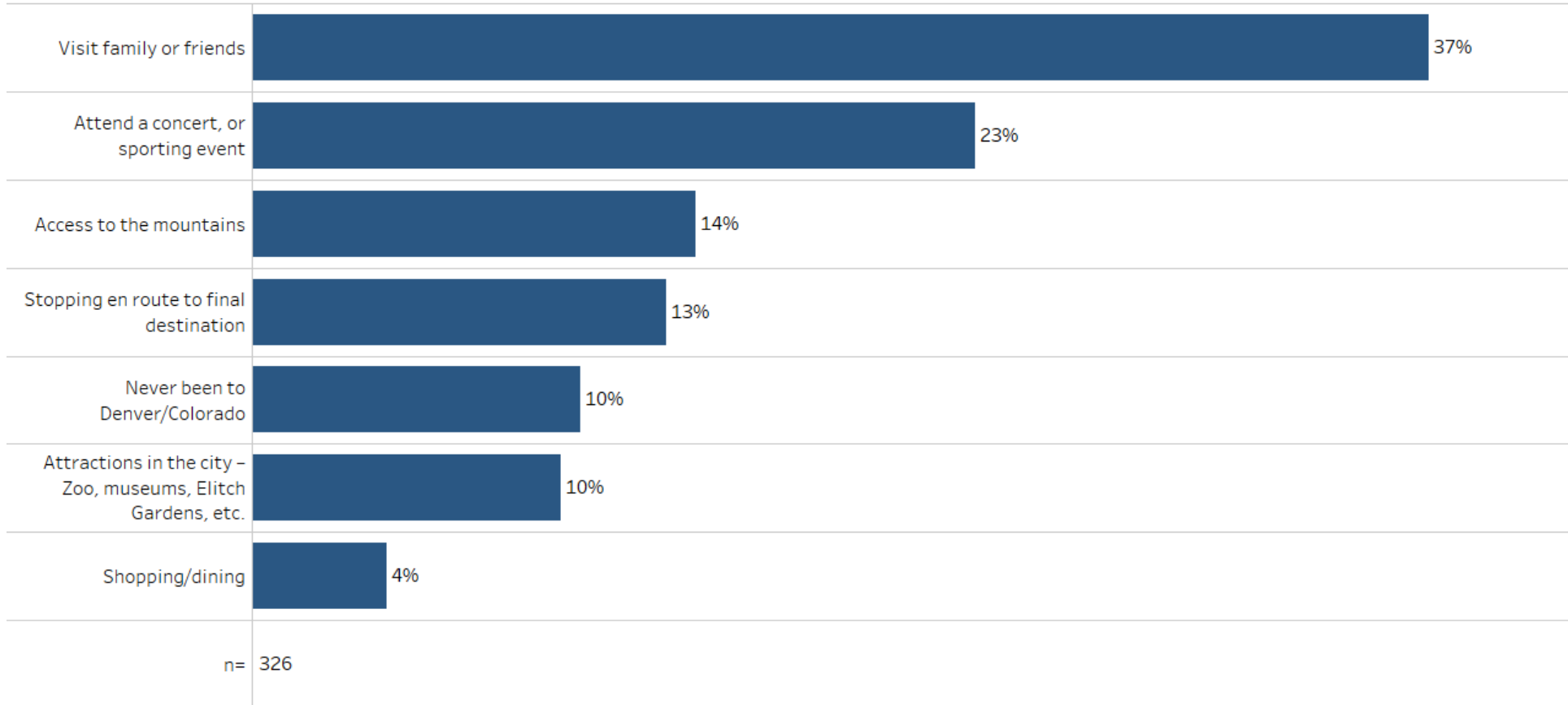
Source: RRC

States & Countries not included here are included in percent calculations



## Visiting family/friends is the top reason for leisure travel to Denver followed by attending a concert or sporting event.

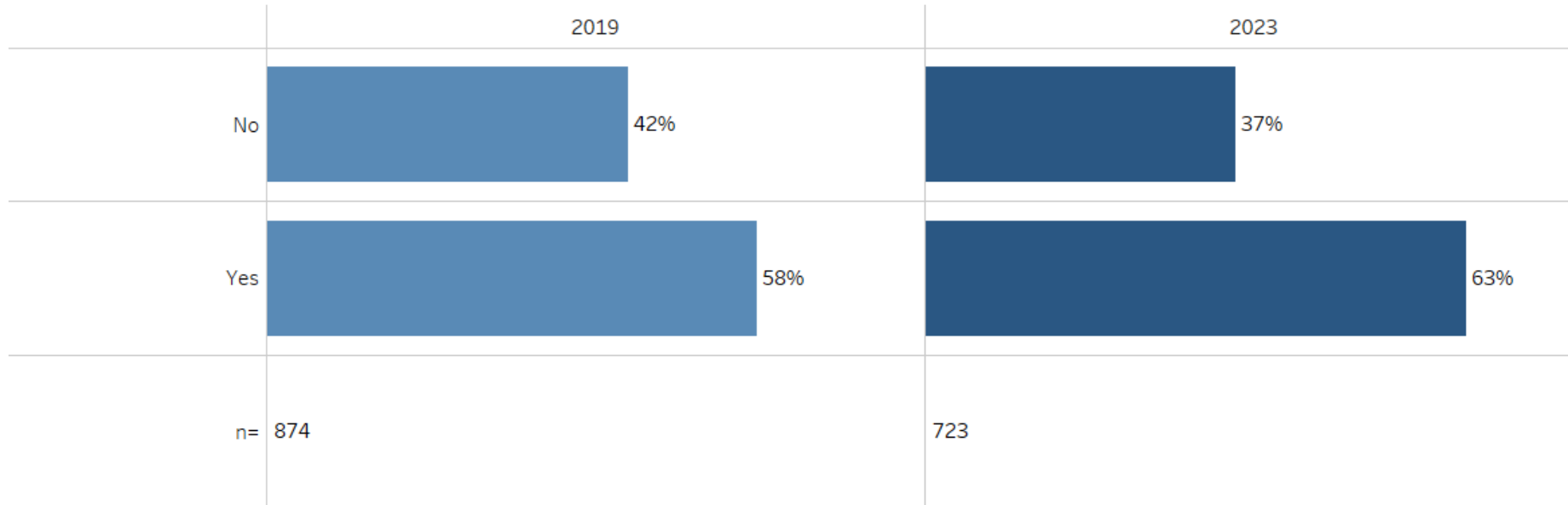
What prompted you to choose Denver as your destination? (Mark all that apply)



Source: RRC

As in 2019, most visitors to Denver have visited the city before.

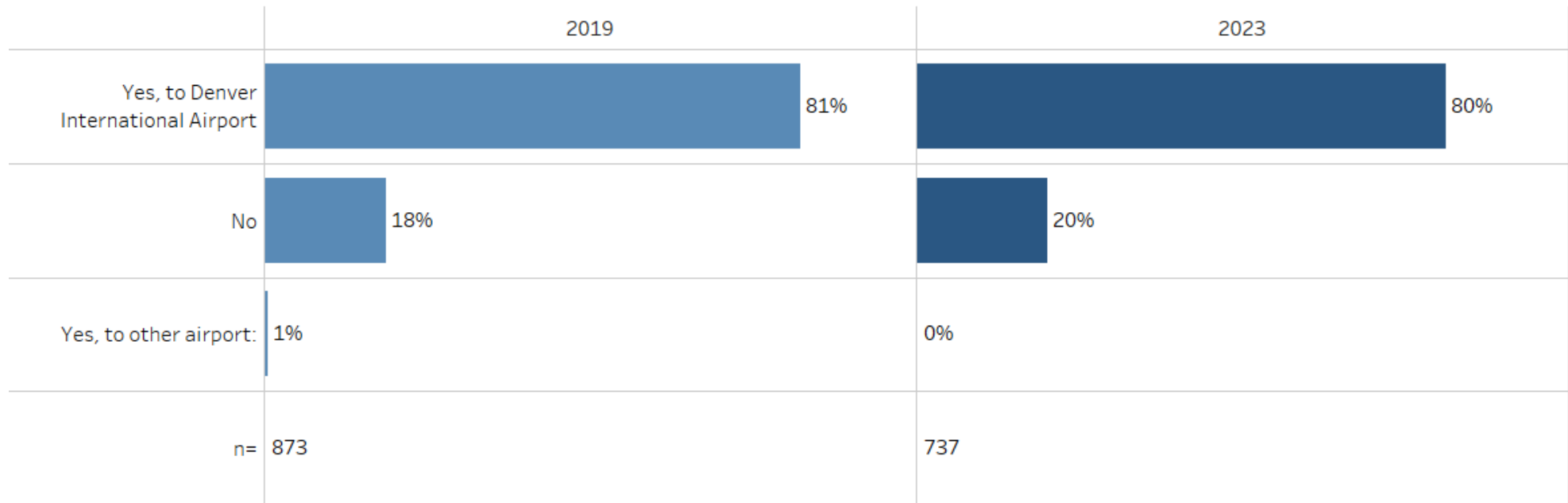
Had you been to Denver before this trip?



Source: RRC

**DEN is clearly an invaluable asset to the Denver market. The airport was the dominant point of entry to the city in 2023, consistent with 2019.**

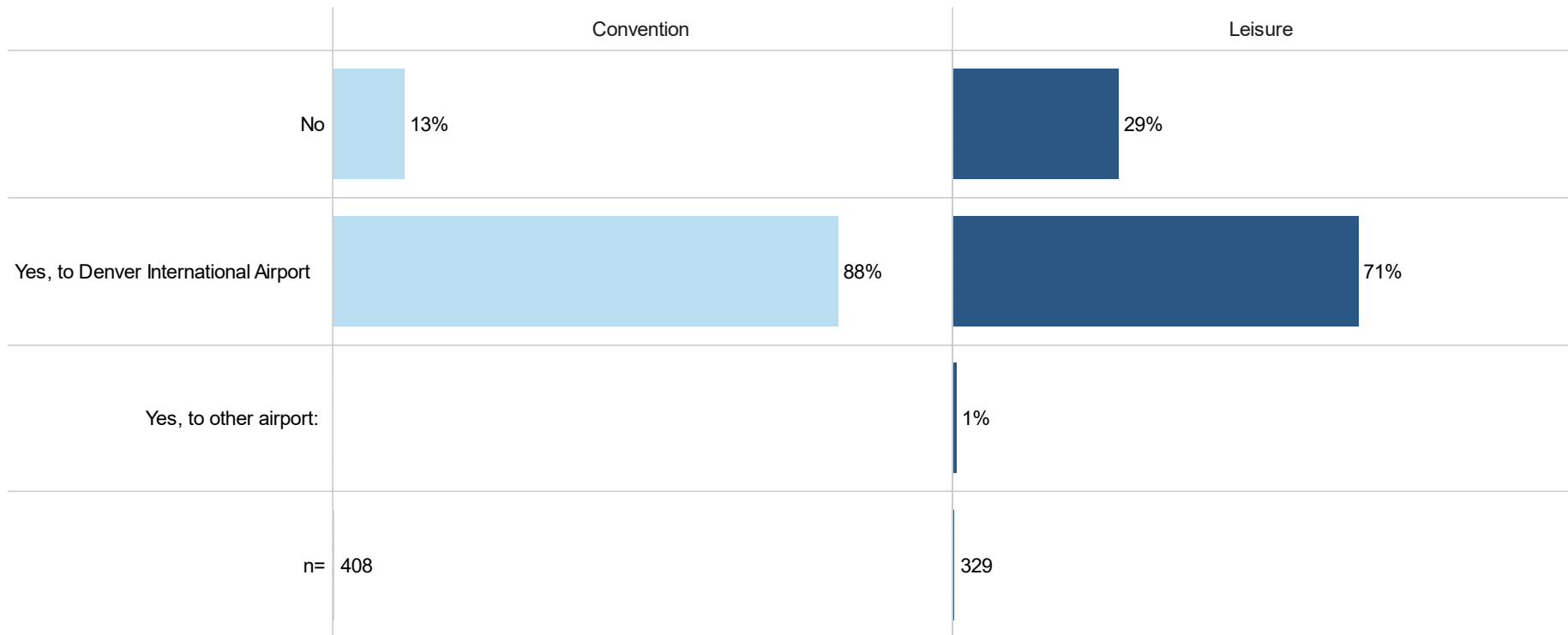
Did you fly as part of your travel to Denver?



Source: RRC

**Predictably, leisure travelers were less likely to fly than convention goers. But even with this discrepancy most leisure travelers arrived via DEN (71%).**

Did you fly as part of your travel to Denver?

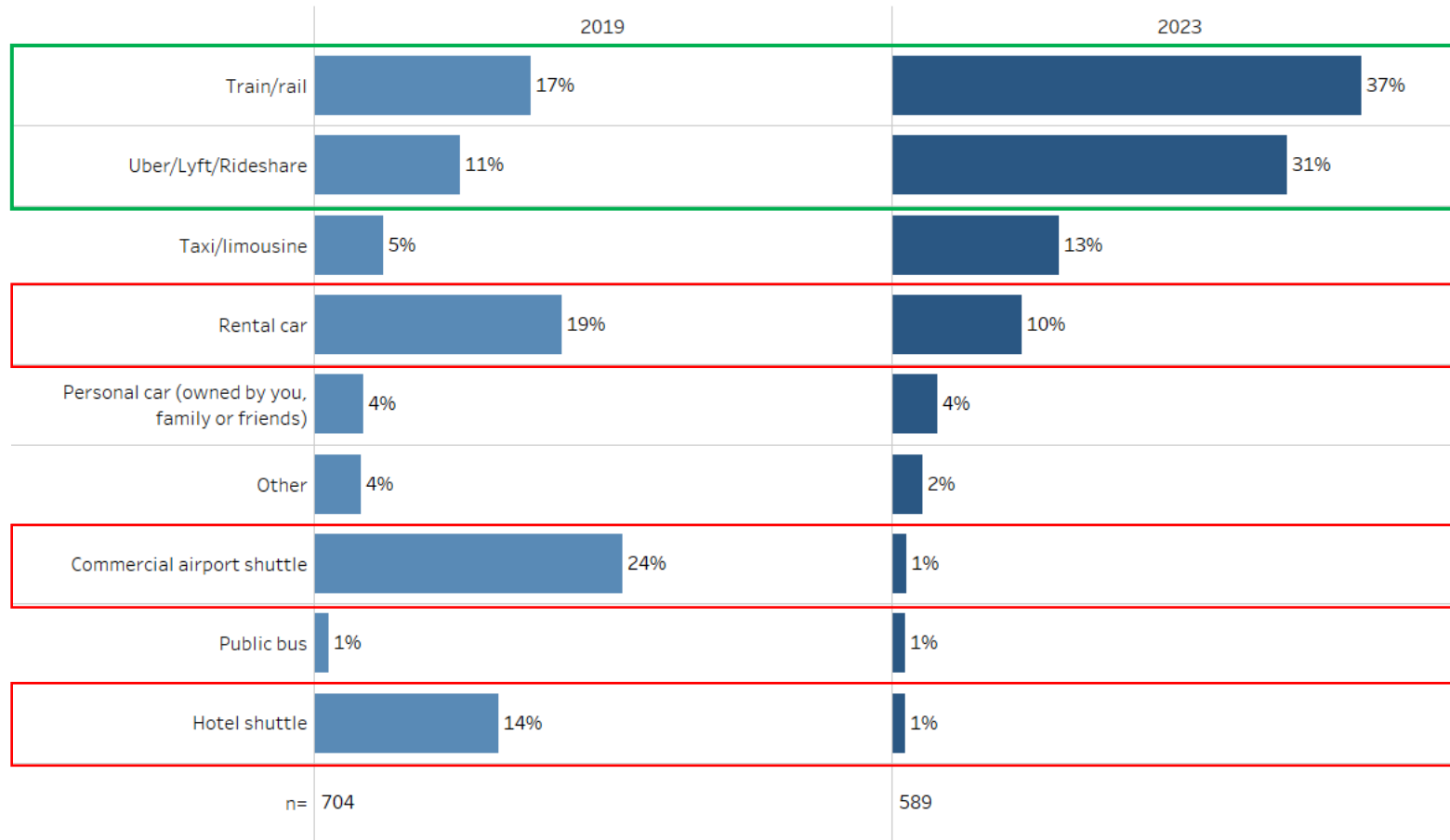


Source: RRC



**The A Line saw a sharp increase in ridership among visitors heading downtown from DEN. Uber and Lyft usage almost tripled. These increases came at the expense of shuttles and rental cars – both dropping sharply from 2019.**

What was the primary mode of transportation you used to get from the Airport to downtown Denver? (That is, the mode used to travel the longest distance.) - Selected Choice

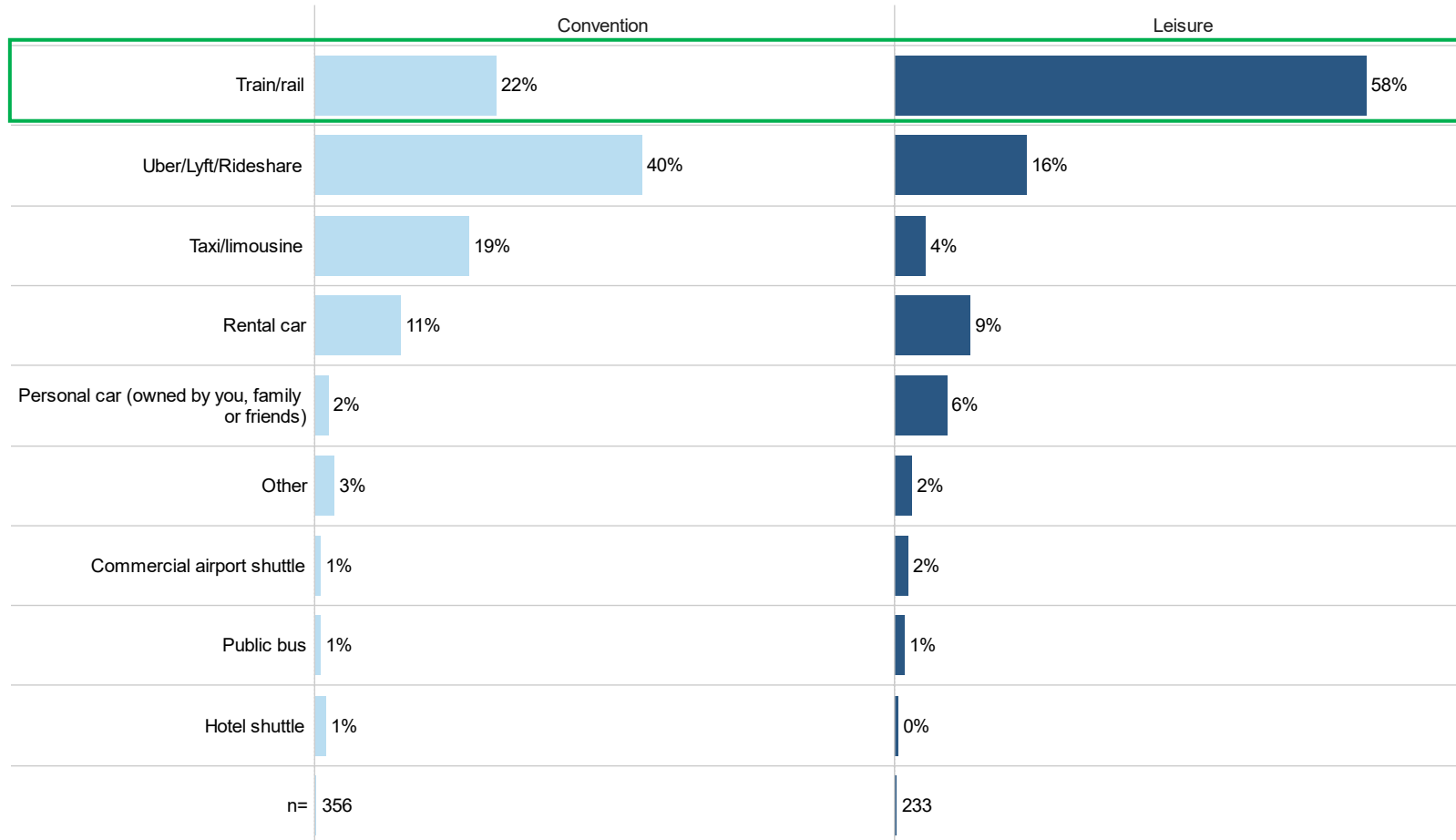


Source: RRC



## Leisure travelers were far more likely to use the train to get from DEN to downtown. Business travelers preferred rideshare and taxis/limos.

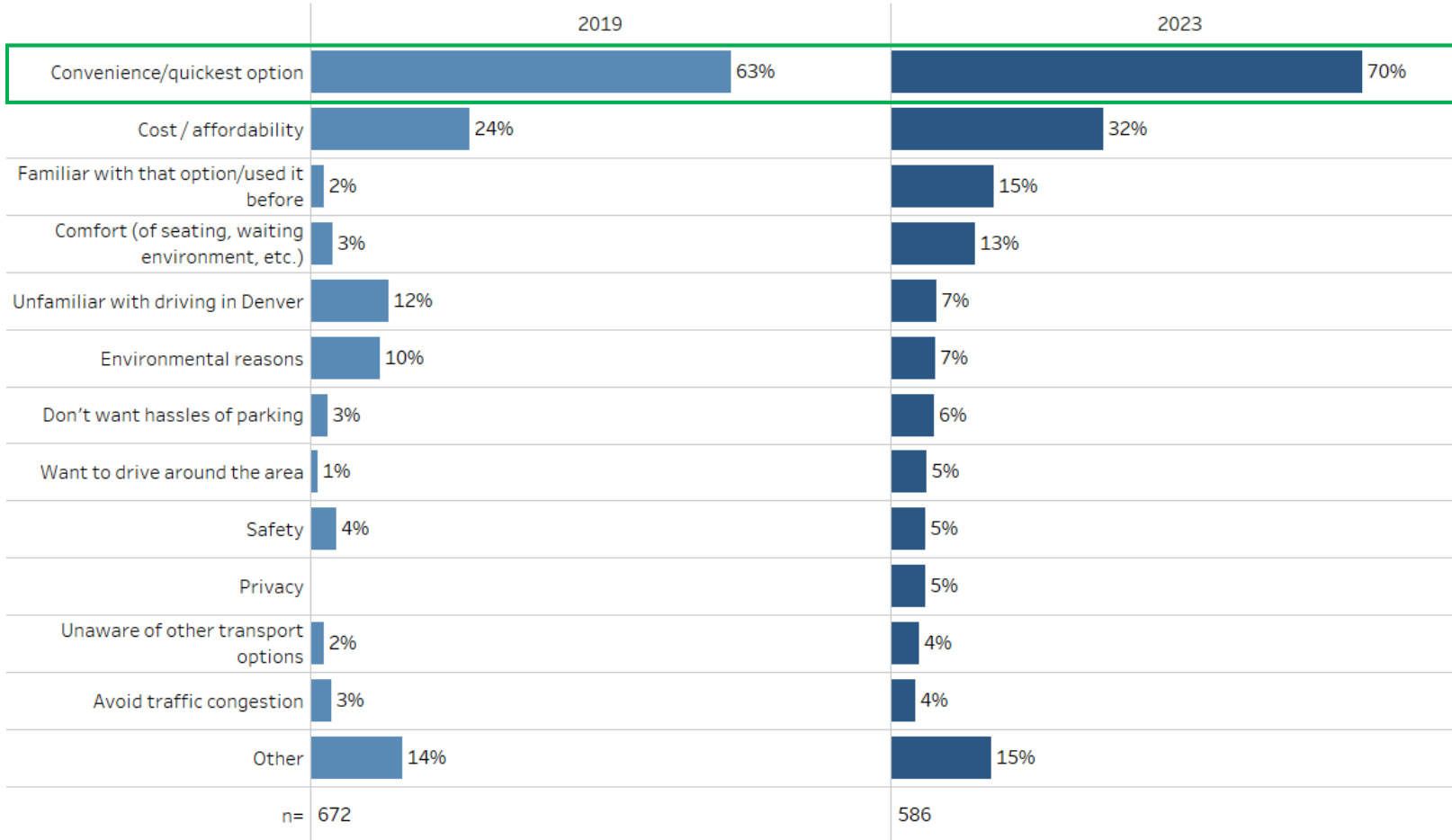
What was the primary mode of transportation you used to get from the Airport to downtown Denver? (That is, the mode used to travel the longest distance.) - Selected Choice



Source: RRC

## Convenience is still the dominant factor in choosing a mode of transportation, followed by cost.

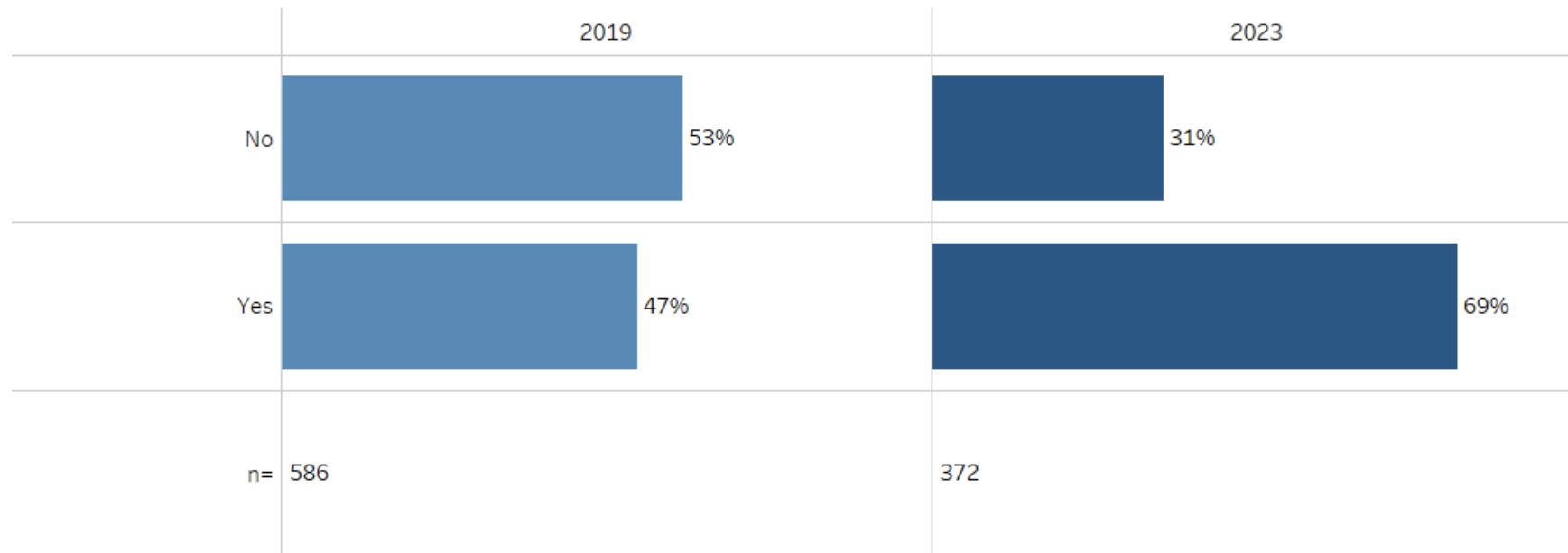
Why did you use that mode? (CHECK ALL THAT APPLY)



Source: RRC

Consistent with the jump in ridership, awareness of the train as an option rose significantly in 2023. Note the survey was fielded during RTD's Zero Fare promotion which was highly publicized.

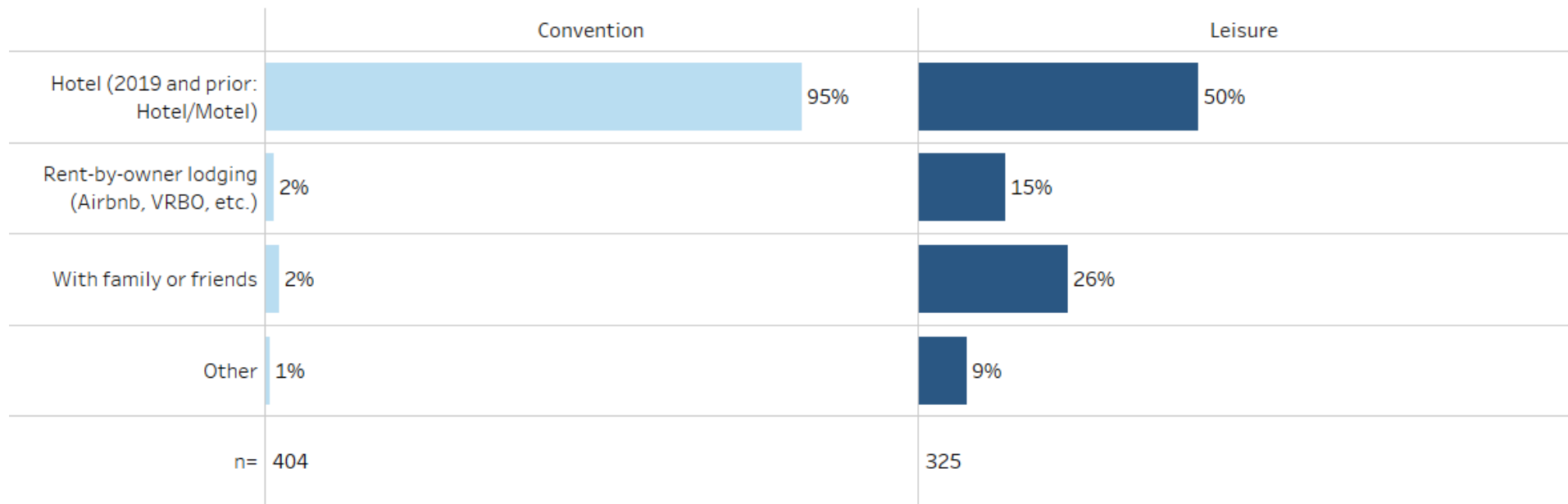
Were you aware that rail service is available between Denver International Airport and downtown?



Source: RRC

**Predictably, convention goers were nearly unanimous in choosing hotels while leisure travelers were split evenly between hotels and other lodging choices.**

What type of lodging are you staying in?



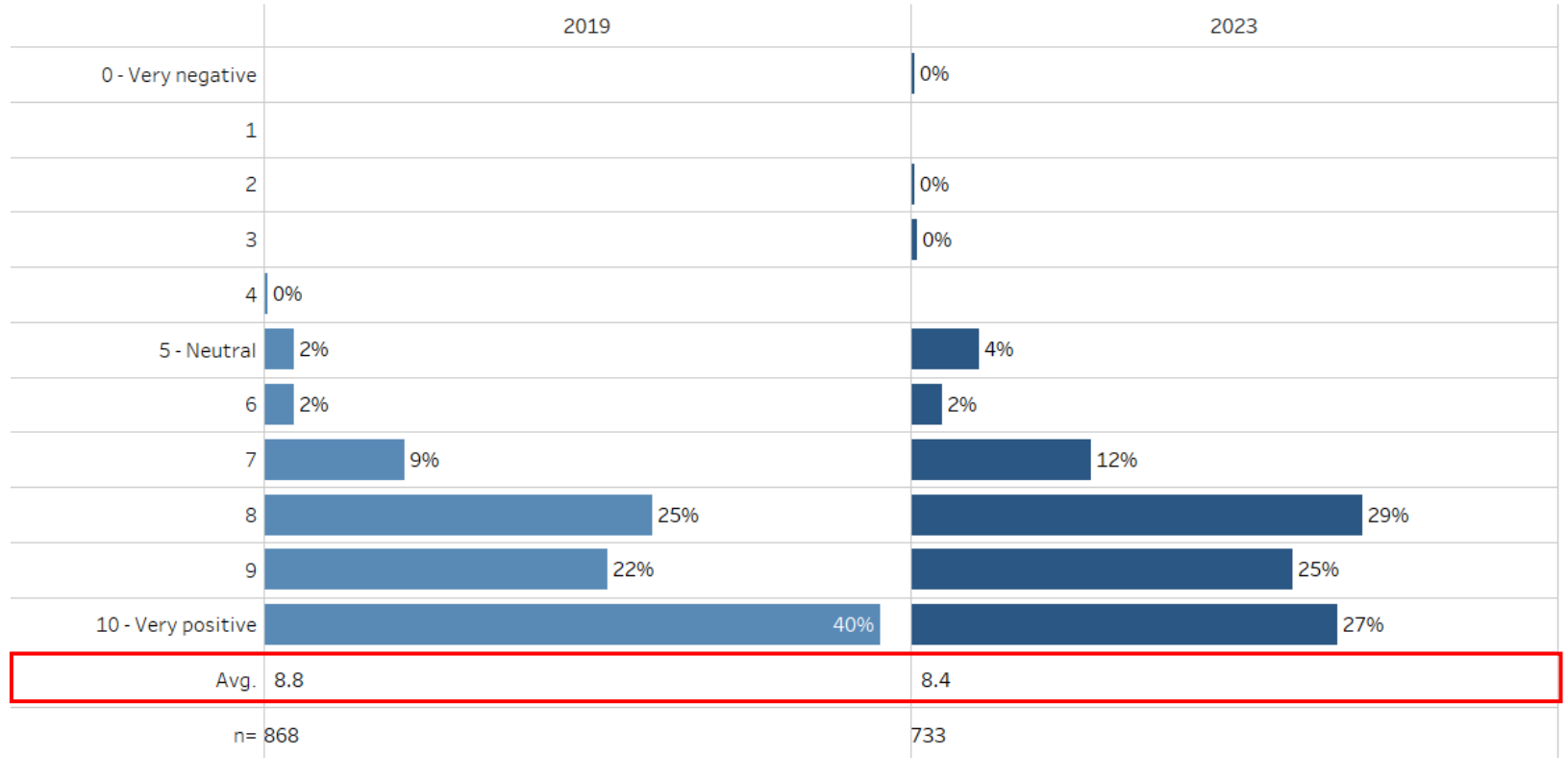
Source: RRC

# RATING DENVER



## Following trends in other rating questions, Denver's experience score came in at 8.4

Using a scale from 0 to 10 where 0 is "very negative" and 10 is "very positive": Has your experience with Denver been mostly:



While strong, this is below the 8.8 rating from 2019

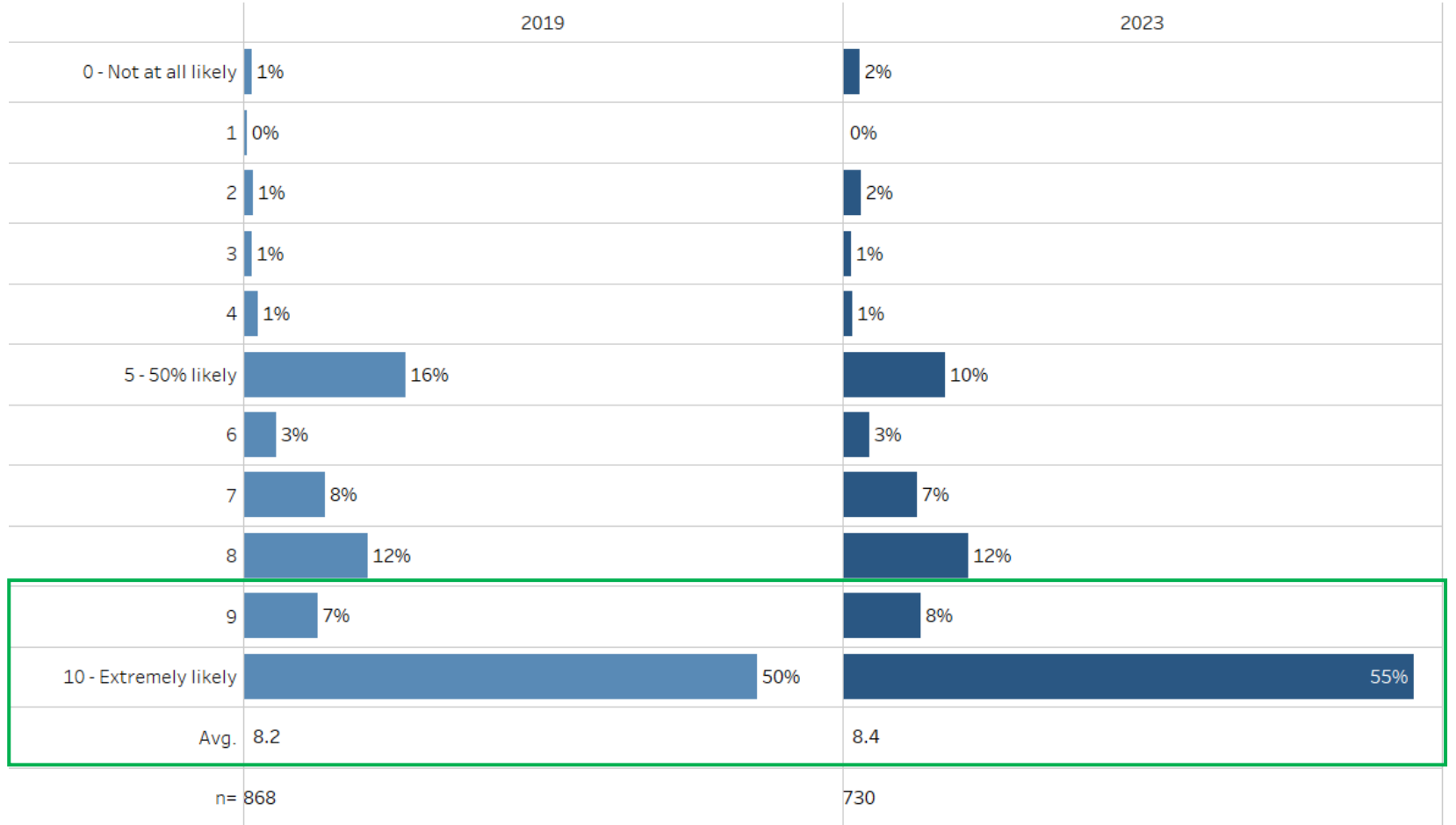


Source: RRC

# RATING DENVER

**Likelihood to return to Denver rose from 2019 to 2023 with nearly two thirds of visitors rating the probability at either 9 or 10.**

Using a scale where 0 is "not at all likely" and 10 is "extremely likely": How likely are you to return to Denver in the future?



Source: RRC



# RATINGS OF DENVER

**Leisure visitors are most likely to come back but 58% of business travelers also said they are very likely to return to Denver.**

Using a scale where 0 is "not at all likely" and 10 is "extremely likely": How likely are you to return to Denver in the future?

	Convention	Leisure	Overall
0 - Not at all likely	3%	0%	2%
1	0%		0%
2	3%	0%	2%
3	1%	0%	1%
4	1%	1%	1%
5 - 50% likely	12%	7%	10%
6	3%	2%	3%
7	7%	7%	7%
8	11%	13%	12%
9	6%	9%	8%
10 - Extremely likely	52%	59%	55%
Avg.	8.1	8.8	8.4
n=	405	325	730

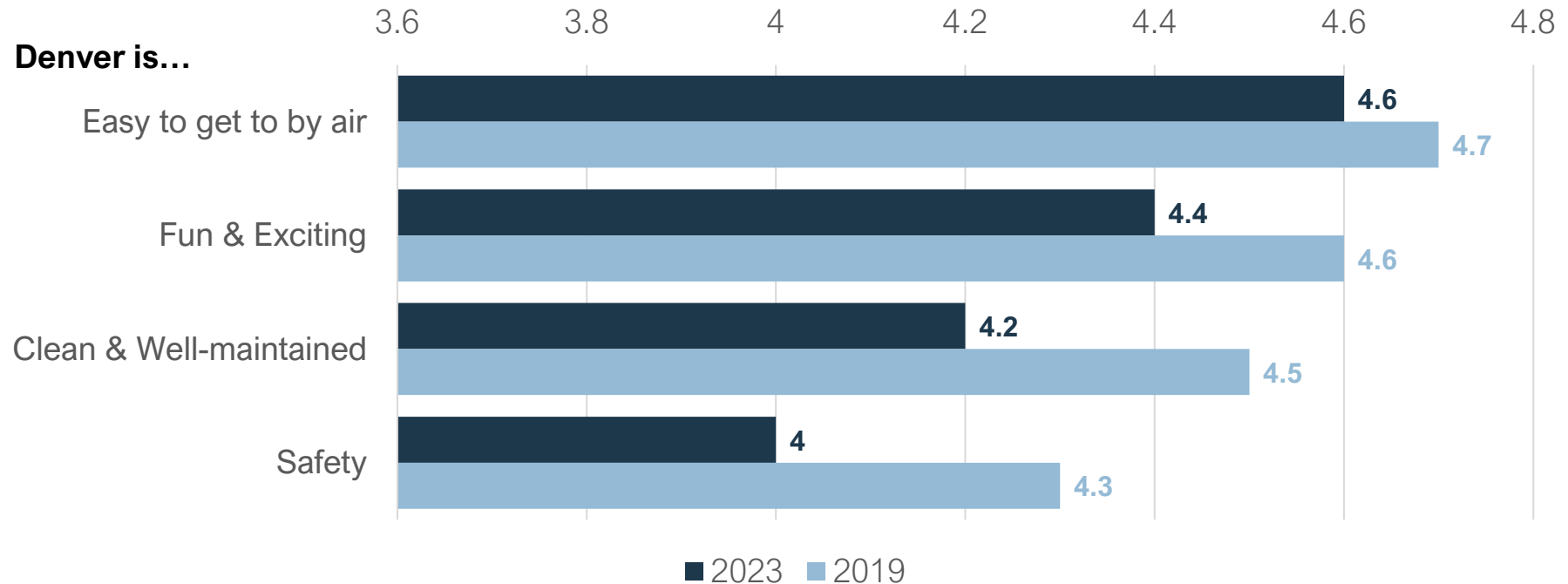
# RATINGS OF DENVER

**The Denver Experience compared to expectations is net positive for both groups but lower among convention travelers than tourists**

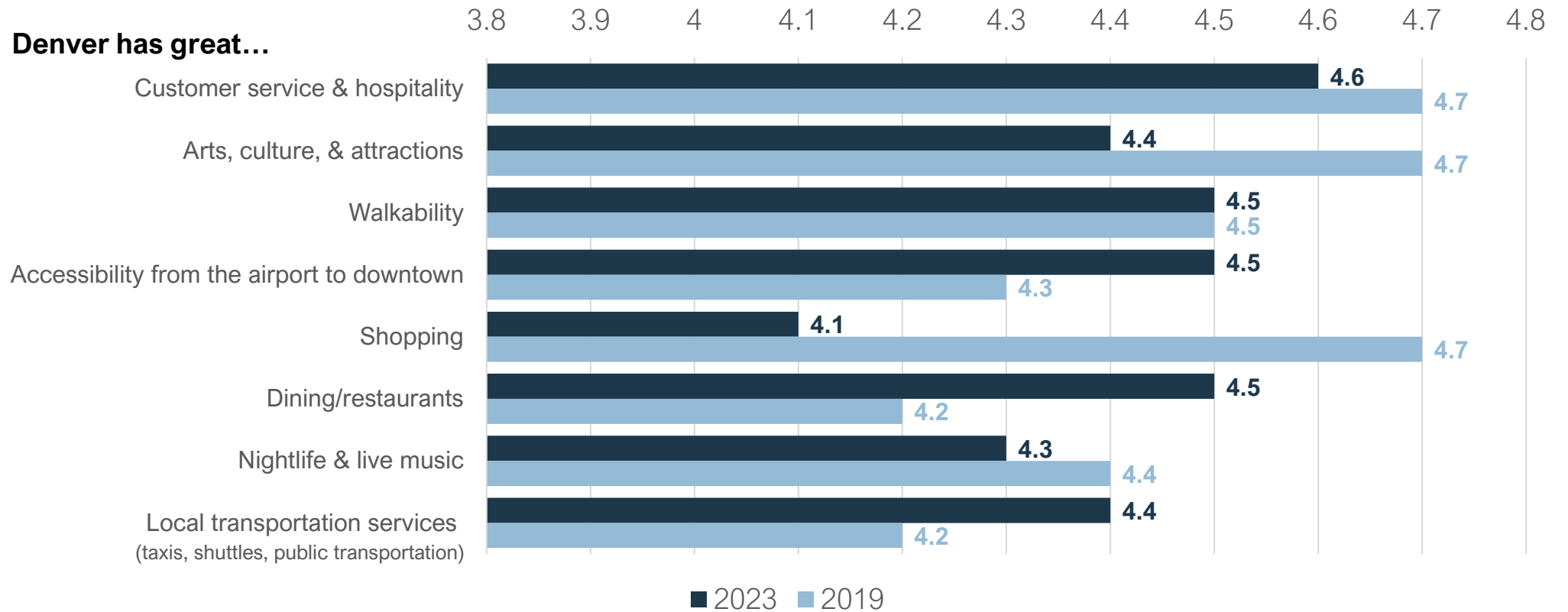
Using a scale from 0 to 10 where 0 is “much worse”, 5 is “same”, and 10 is “much better”: How has Denver compared to your expectations?

	Convention	Leisure	Overall
0 - Much Worse	1%		0%
1	0%	0%	0%
2	1%		0%
3	2%	0%	1%
4	3%	2%	2%
5 - Same	33%	21%	28%
6	6%	7%	6%
7	11%	12%	12%
8	16%	26%	20%
9	12%	12%	12%
10 - Much better	16%	19%	18%
Avg.	6.9	7.5	7.2
n=	405	326	731

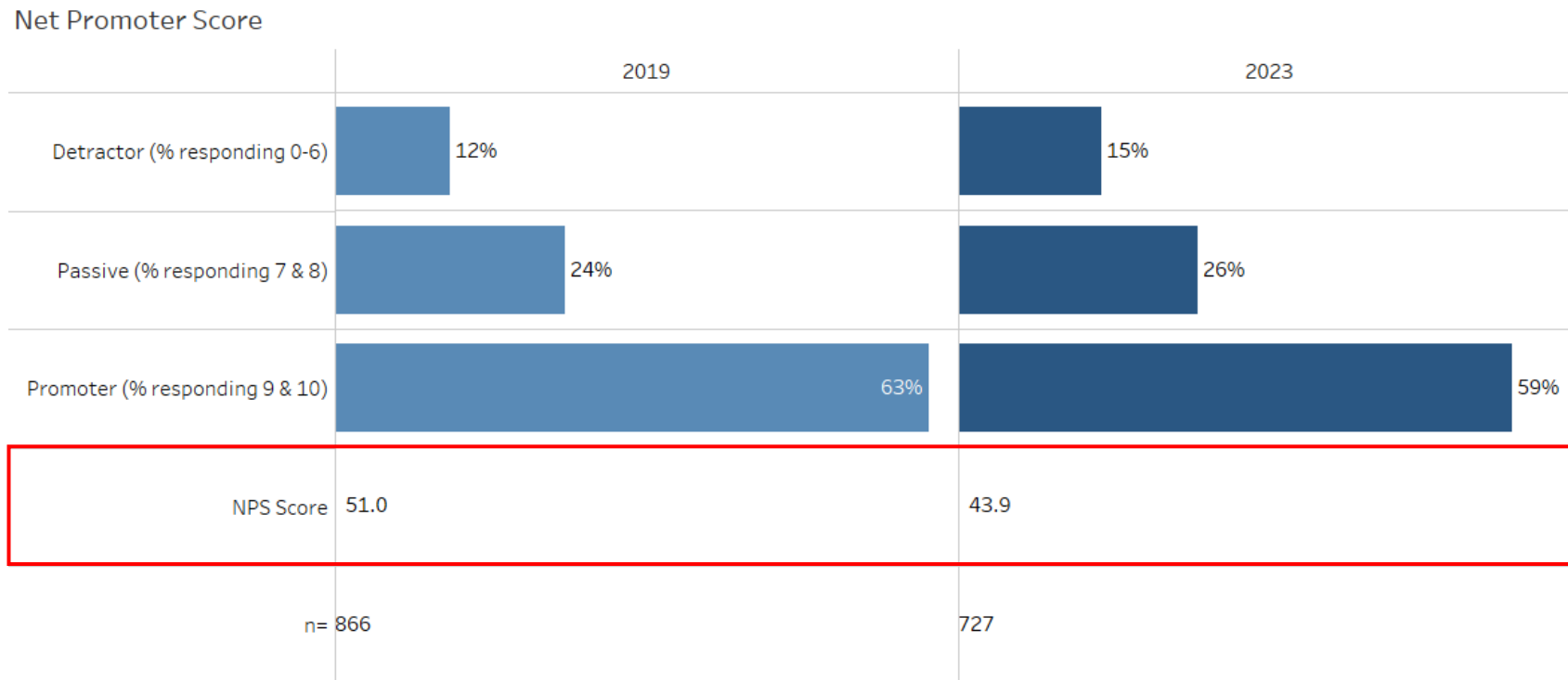
Denver maintained its high marks for excellent air service from on the strength of DEN but ratings dropped for cleanliness, public safety and fun & exciting.



Overall ratings of amenities remained strong in 2023 with improved scores for dining. However, the biggest change was in shopping which dropped from 4.7 to 4.1.



## Overall Net Promoter Score dropped from 2019 to 2023



Source: RRC

**Convention goers rated Denver significantly lower than those visiting for leisure. As in other ratings, the lower NPS may stem from that segment spending all or most of their time downtown.**

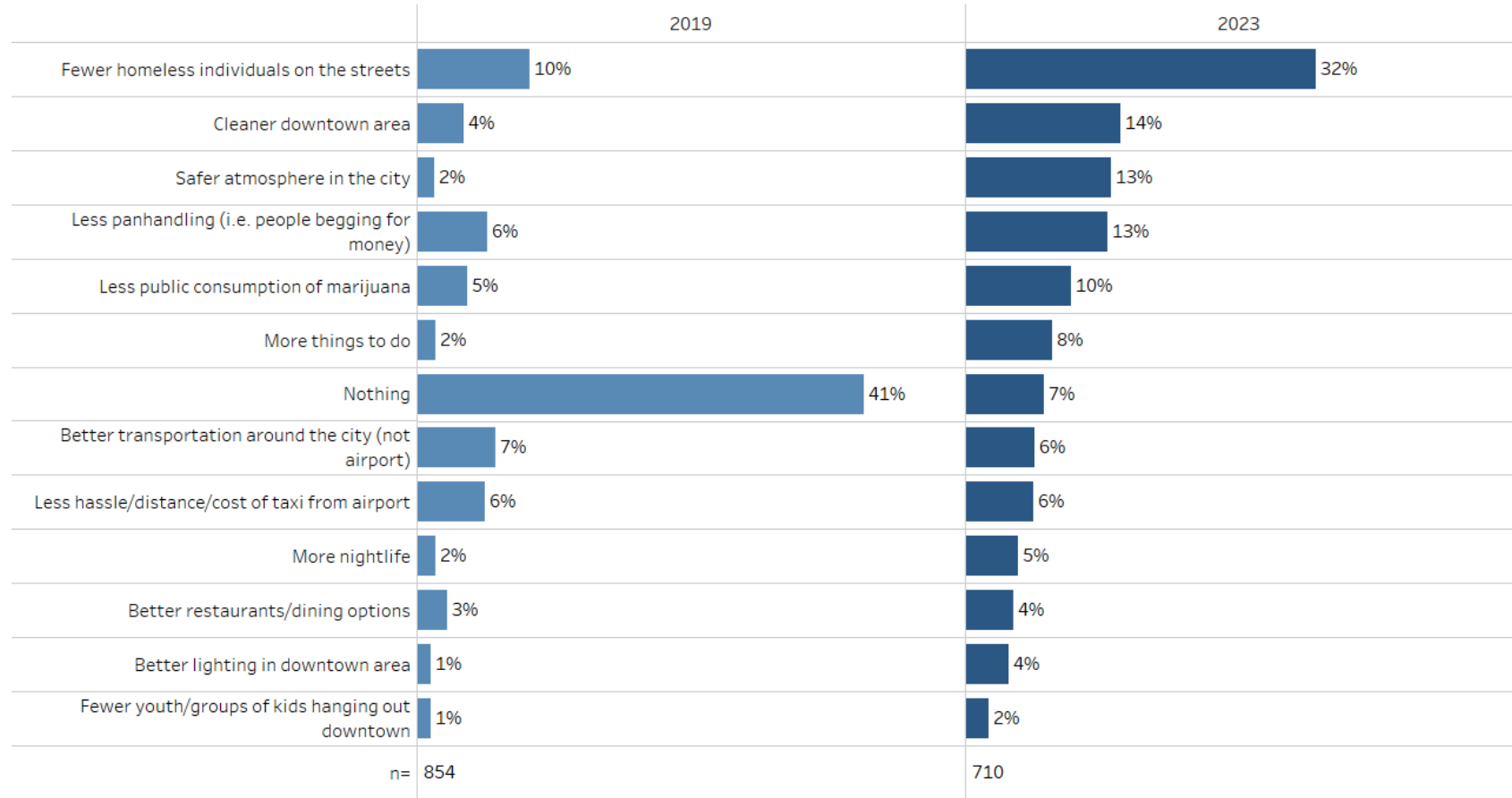
Net Promoter Score

	Convention	Leisure	Overall
Detractor (% responding 0-6)	20%	9%	15%
Passive (% responding 7 & 8)	25%	26%	26%
Promoter (% responding 9 & 10)	55%	65%	59%
NPS Score	34.7	55.4	43.9
n=	404	323	727

# IMPROVING THE EXPERIENCE

**Cleanliness, safety and homeless issues all increased sharply in number of responses when asked about ways to improve Denver as a destination.**

From your perspective, what would improve Denver as a visitor destination? (mark all that apply)



Source: RRC



# IMPROVEMENTS FOR DENVER

**Convention goers are far more vocal in their opinions about the need to address homelessness and clean up the streets in downtown Denver**

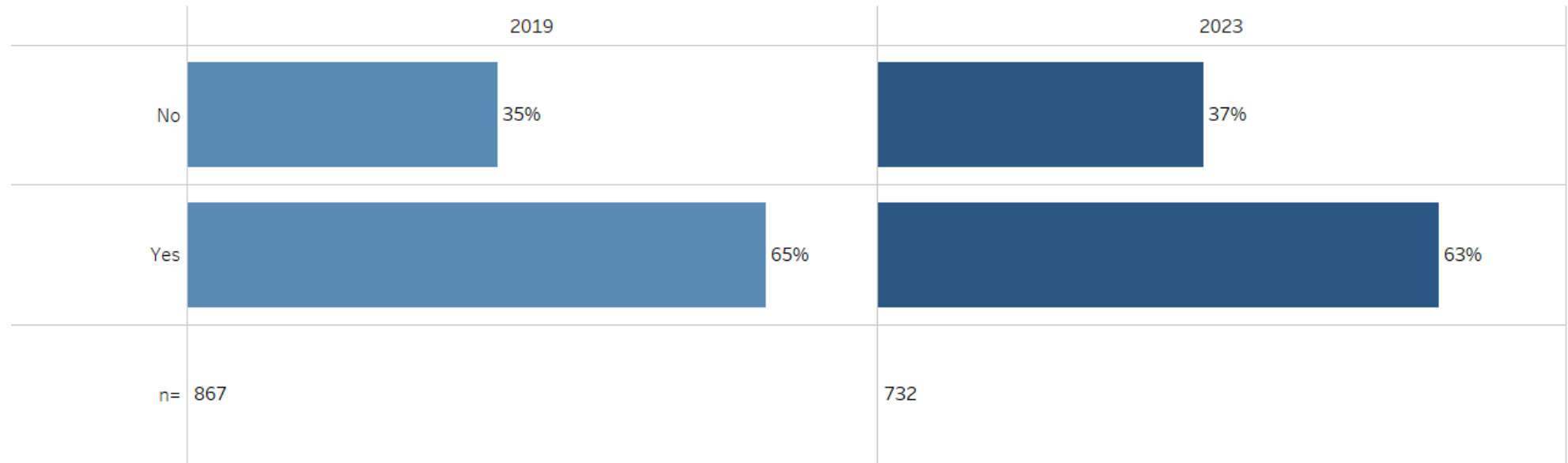
From your perspective, what would improve Denver as a visitor destination? (mark all that apply)

	Convention	Leisure	Overall
Fewer homeless individuals on the streets	38%	26%	32%
Don't know/not relevant	18%	32%	24%
Cleaner downtown area	19%	9%	14%
Safer atmosphere in the city	16%	10%	13%
Less panhandling (i.e. people begging for money)	16%	9%	13%
Less public consumption of marijuana	10%	10%	10%
More things to do	9%	7%	8%
Better transportation around the city (not airport)	6%	7%	6%
Less hassle/distance/cost of taxi from airport	8%	4%	6%
Better lighting in downtown area	4%	4%	4%
Fewer youth/groups of kids hanging out downtown	3%	1%	2%
Nothing	7%	8%	7%
Other	21%	25%	23%
n=	384	313	697



**Most people noticed people loitering or panhandling in the downtown area. Numbers were relatively stable from 2019 to 2023.**

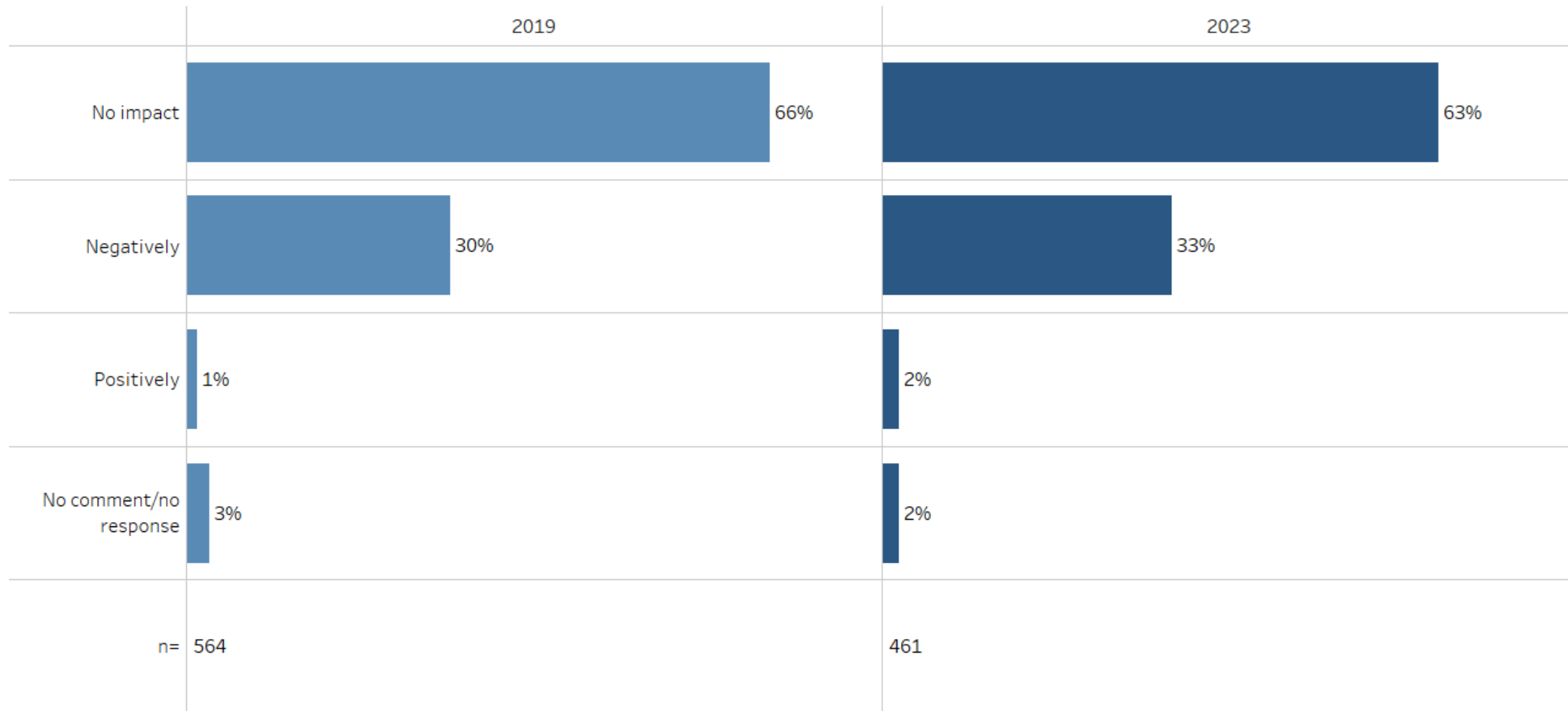
During your stay, have you seen any persons loitering or panhandling?



Source: RRC

**About one third of respondents reported that loitering and panhandling had a negative impact on their perception of the city.**

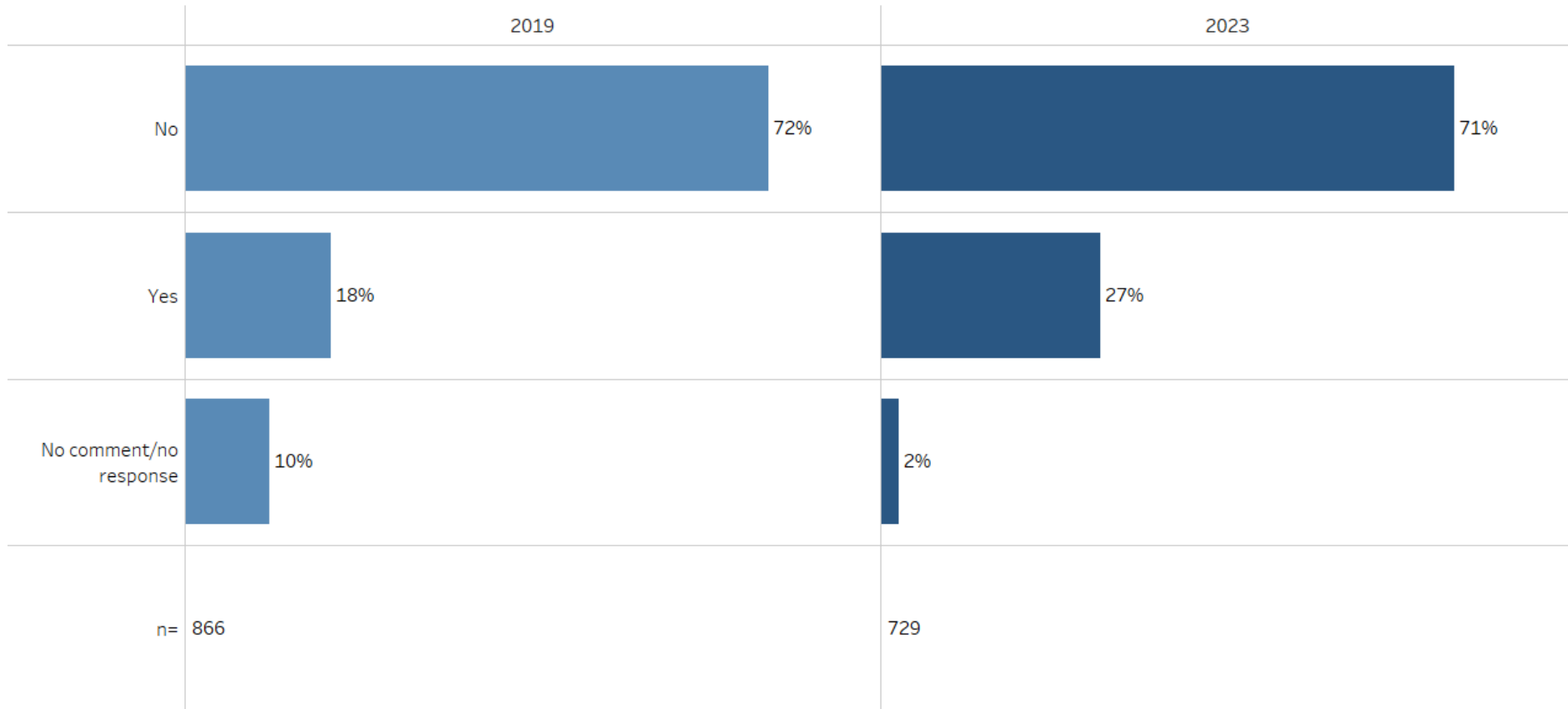
Did this impact your perceptions of Denver positively, negatively, or have no impact?



Source: RRC

**The number of people reporting unsafe behavior on the street increased from 18% to 27% since before the pandemic.**

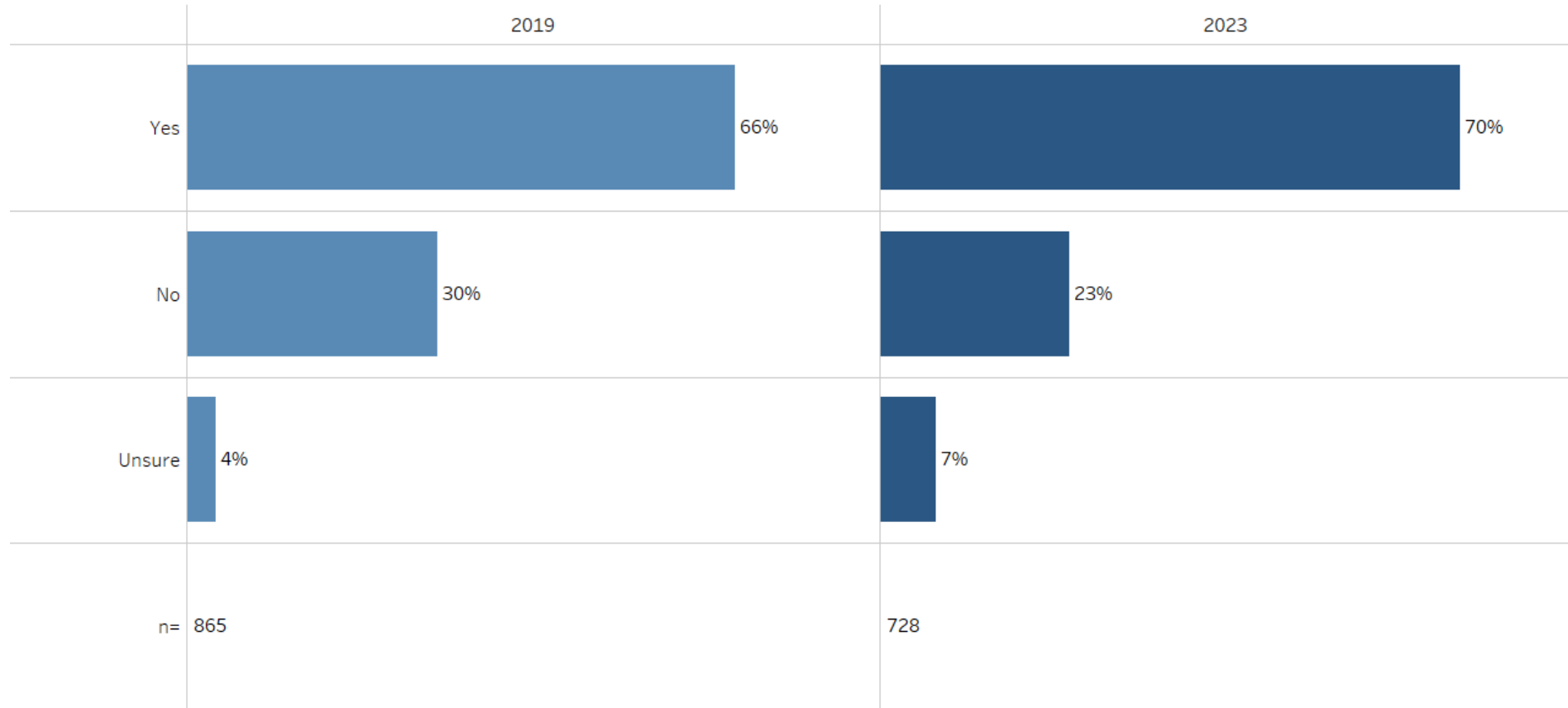
Have you noticed any behavior by people on the street that made you feel unsafe or uncomfortable in any way?



Source: RRC

## People noticing police and security personnel on the streets inched up slightly to 70% from 66% in 2019.

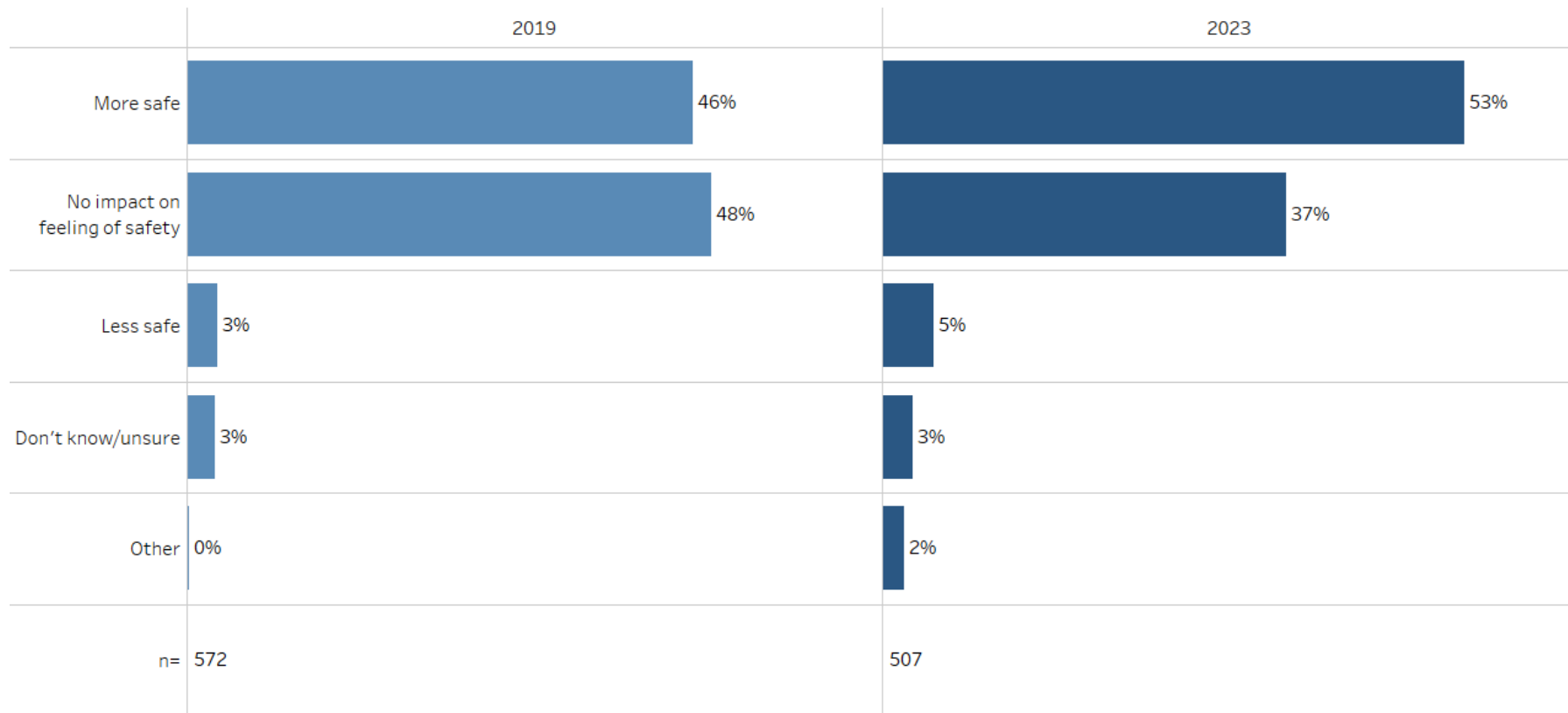
Have you seen any police or uniformed security personnel on the streets of downtown Denver during your stay?



Source: RRC

**Just over half of respondents report that police presence makes them feel safer. The number saying it has no impact dropped by 11%.**

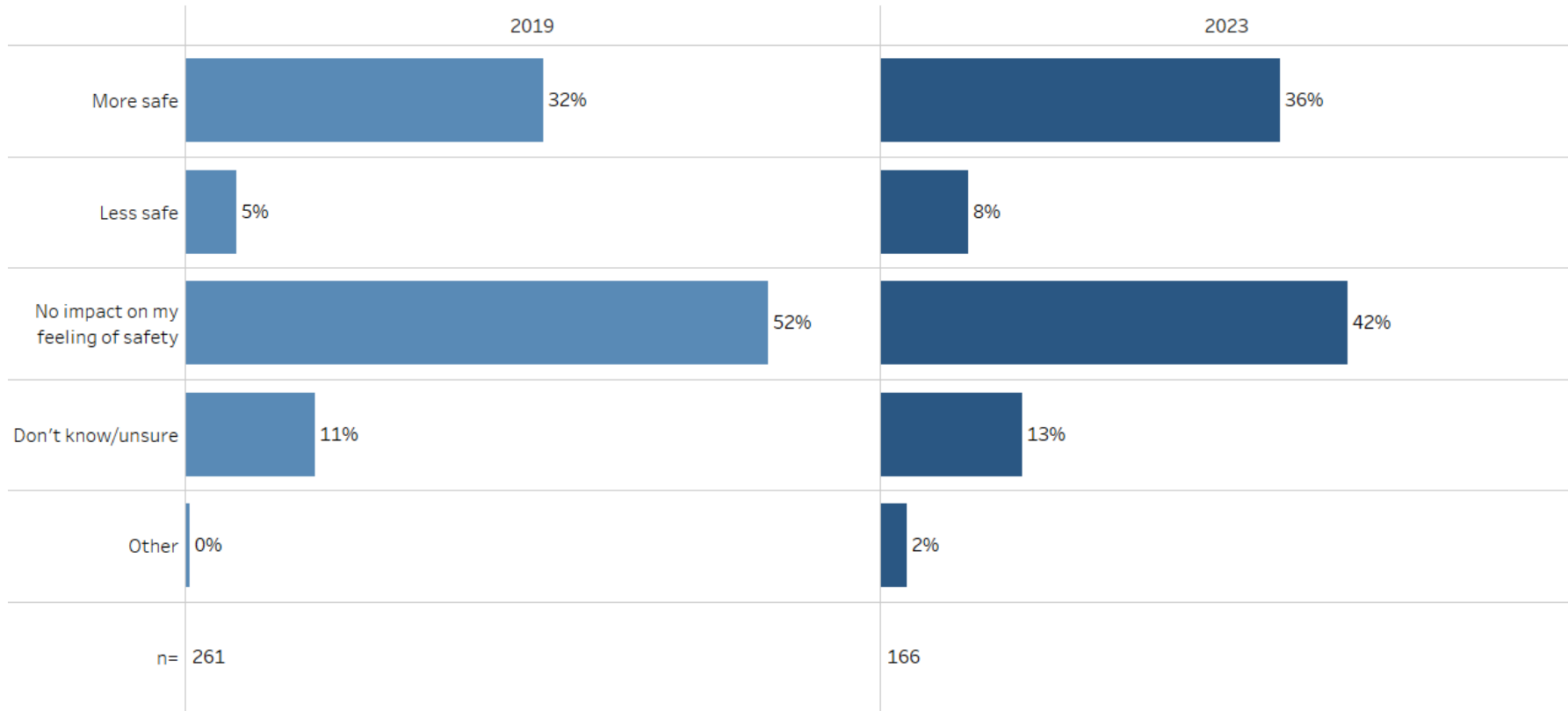
Has seeing police or security personnel made you feel more safe, less safe, or has it had no impact on your feeling of safety in downtown Denver?



Source: RRC

**Of those who did not see any police presence, 36% said it would have made them feel safer while 8% said they would feel less safe. Both numbers were up from 2019.**

Would you feel more safe or less safe if you had seen police or security officers on the streets of downtown Denver? - Selected Choice



Source: RRC



# KEY FINDINGS



# KEY FINDINGS



**The strategic importance of DEN cannot be overstated.** Air travel remains the dominant mode of reaching Denver for both business and leisure travelers. Overall, nearly 90% of convention respondents and over 70% of leisure visitors arrived by air.



**Good news for RTD! Choosing the “A Line” has grown sharply.** With 37% mode share, it is now the most popular way to get downtown from DEN and seems to have essentially replaced hotel and commercial shuttles.



**Convention travelers are most likely to stay in hotels while those traveling for pleasure choose family or friends a quarter of the time and Airbnb/VRBO about 15% of the time.** However, leisure travelers still opt for hotels 50% of the time.





# KEY FINDINGS



**The overall Denver experience rates highly at 8.4 out of 10.** Though strong, it is a slight drop from 2019 when visitors rated Denver at 8.8. The percentage of those planning to return went up from 57% to 63% in 2023.



**The city receives high marks for ease of access by air and for being “fun & exciting”.** Ratings for cleanliness and public safety dipped though from 2019 to 2023.



**Net Promoter Scores for Denver dropped from 2019.** Business travelers were particularly tough in rating the city as a destination. One reason may be that convention goers often confine their visit to downtown and are less likely to visit attractions across the Metro area.



# KEY FINDINGS



**On ways to improve Denver as a destination, dealing with homelessness was the top answer** followed by cleaning up downtown, improving safety and reducing panhandling. Business travelers felt the most strongly about these issues.



The number of people who witnessed street behavior that made them feel unsafe rose to 27% from 18% in 2019.



**As the resident research showed last year, public safety, homelessness and the cleanliness of downtown are growing concerns** for travelers to the city. Addressing these interrelated issues is clearly an issue for Denver leaders and should continue to be a top priority.



# THANK YOU!



## RRC

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