

— State Of Colorado Tourism



2020 Statewide Economic Impact

<u>Category</u>	<u>2019</u>	<u>2020</u>	<u>% change</u>
Travel Spending	\$24.2B	\$15.4B	-36%
Tourism Employment	188,000	149,000	-21%
State and Federal Tax Revenue	\$3.1B	\$2.2B	-29%

*Source: Dean Runyan Associates, The Economic Impact of Travel in Colorado, 2011-2020

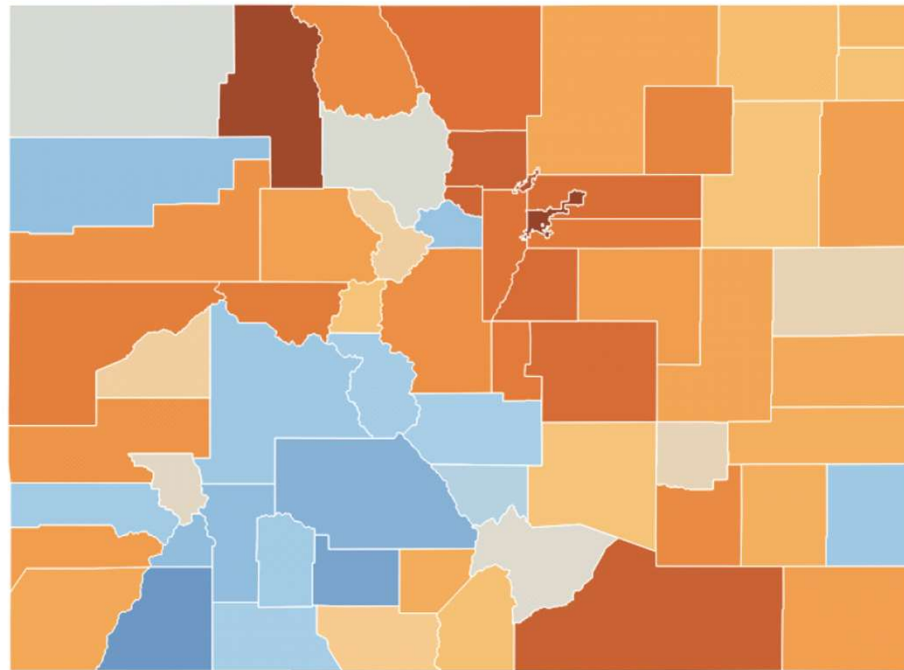
State & Local Tax Impacts



Local Lodging	\$100	9.8%
State Income	\$117	11.4%
Local Sales	\$437	42.5%
State Sales	\$262	25.5%
State Gasoline	\$60	5.8%
Other Local*	\$51	5.0%
Total:	\$1,027	100.0%

(\$Millions*)

Change In Visitor Spending



Change in Visitor Spending
-56.4% 28.8%

COVID Recovery Updates



U.S. Travel Impact Summary

December 2021

Data Sources & Partners
Impact Summary
Travel Indicators
Int'l Arrivals to the U.S.
Economic Conditions
Employment
Workforce
Travel Sentiment
Covid-19 Vaccination
Predictive DMO Indicators
Predictive Industry Indicators
Economic Forecast
Domestic Travel Forecast
International Travel Forecast
U.S. Hotel Forecast

Destination (filter impacts entire page)
Colorado

Cumulative Losses Since January 2020

Colorado, through December 2021

	Colorado
Travel Spending (difference)	(\$11.6B)
Federal Taxes	(\$1,218M)
State Taxes	(\$277M)
Local Taxes	(\$207M)

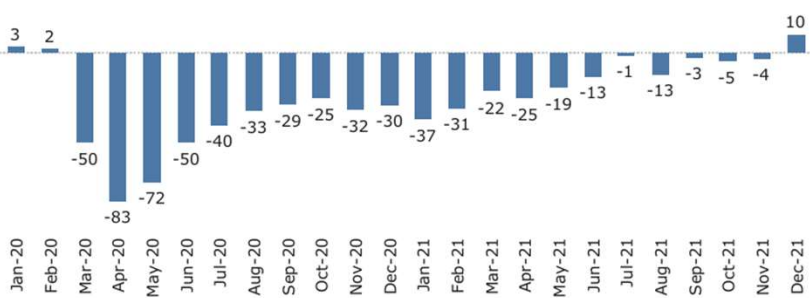
Travel Spending Losses

Colorado

	Travel Spending	Travel Spending (difference)	% Change vs 2019
Jan-21	\$1.1B	(\$0.6B)	-37%
Feb-21	\$1.2B	(\$0.5B)	-31%
Mar-21	\$1.5B	(\$0.4B)	-22%
Apr-21	\$1.4B	(\$0.5B)	-25%
May-21	\$1.6B	(\$0.4B)	-19%
Jun-21	\$1.7B	(\$0.3B)	-13%
Jul-21	\$2.0B	\$0.0B	-1%
Aug-21	\$1.8B	(\$0.3B)	-13%
Sep-21	\$1.8B	(\$0.1B)	-3%
Oct-21	\$1.9B	(\$0.1B)	-5%
Nov-21	\$1.7B	(\$0.1B)	-4%
Dec-21	\$2.0B	\$0.2B	10%

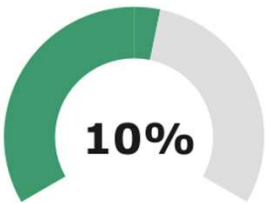
Travel Spending (% change vs. 2019)

Colorado



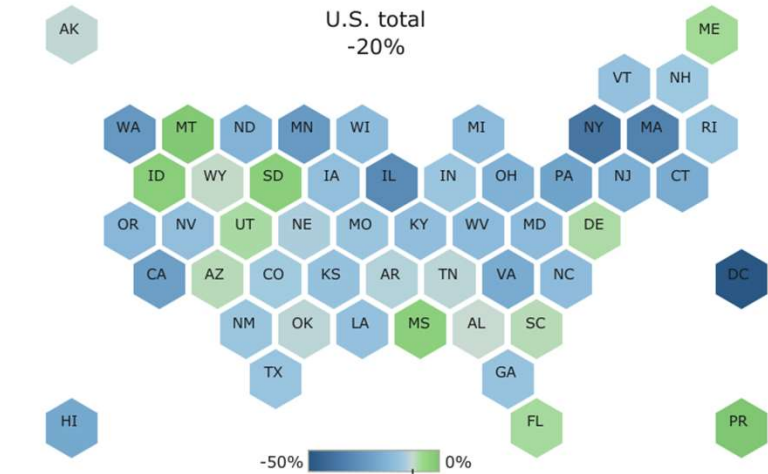
Travel Spending

Colorado
December 2021, % change vs. 2019



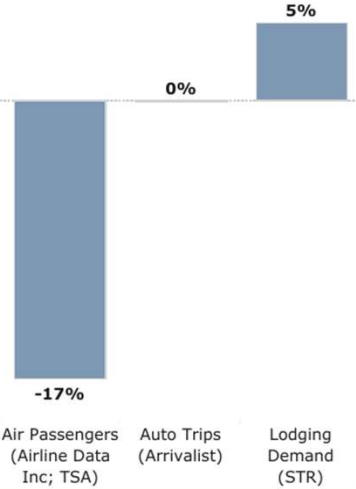
U.S. Travel Spending Year-to-Date by State

YTD through December 2021, % change vs. 2019



Travel & Tourism Recovery

Colorado
December 2021, % change vs. 2019



Source: Tourism Economics (travel spending)

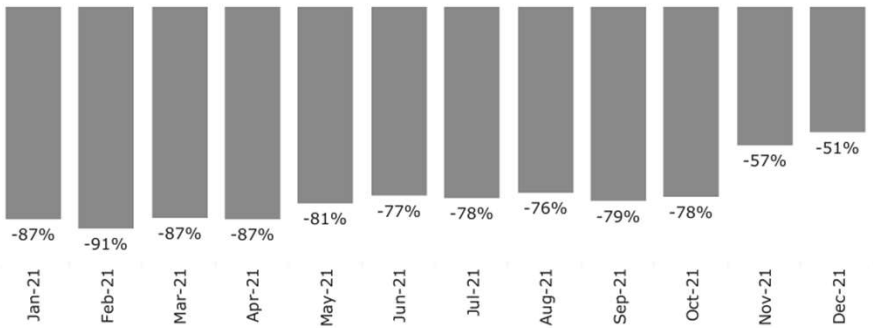
International Arrivals to the U.S.

December 2021

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International Arrivals to the U.S. by Origin

Visitor arrivals from Overseas, compared to same month in 2019



Source: NTTO

Overseas Arrivals by U.S. Destination

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



Source: Tourism Economics (NTTO/OAG)

International Arrivals to the U.S.

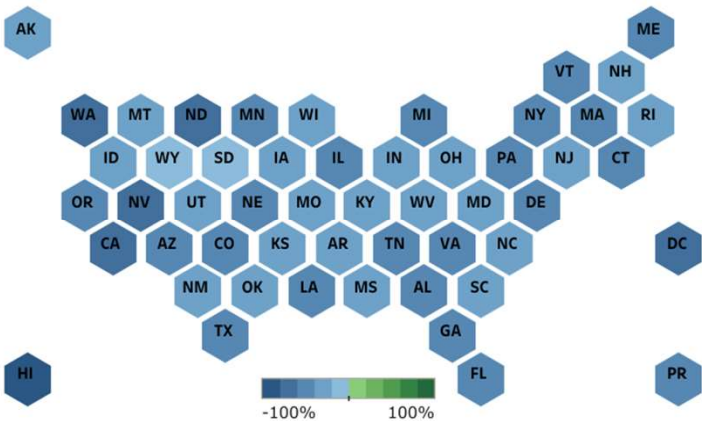
Visitor arrivals to Colorado, compared to same month in 2019

	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Overseas	-82%	-86%	-83%	-82%	-82%	-77%	-82%	-76%	-43%	
Argentina	-61%	-75%	-66%	-51%	-77%	-66%	-69%	-42%	-33%	
France	-89%	-97%	-96%	-97%	-94%	-93%	-92%	-93%	-37%	
Germany	-94%	-95%	-95%	-95%	-94%	-91%	-91%	-87%	-34%	
India	-71%	-77%	-91%	-94%	-86%	-52%	-83%	-79%	-39%	
Israel	-68%	-69%	-53%	-45%	-36%	-16%	-31%	-50%	-19%	
Japan	-95%	-96%	-96%	-96%	-94%	-92%	-96%	-95%	-88%	
Mexico (air)	25%	11%	123%	74%	47%	83%	113%	127%	78%	
Russia	-3%	-92%	-74%	-69%	-62%	-70%	-61%	-72%	-63%	
Spain	-81%	-89%	-85%	-87%	-81%	-78%	-79%	-72%	-30%	
UK	-97%	-98%	-97%	-97%	-94%	-94%	-96%	-96%	-47%	

Source: Tourism Economics (NTTO/OAG)

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

Visitor arrivals for November 2021, compared to same month in 2019



Source: Tourism Economics (NTTO/OAG)

CTO's Destination Stewardship Department

Updated February 2022



COLORADO
TOURISM OFFICE

The Evolution of DMOs



The Evolution of DMOs



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



- [Sizzle Reel](#)

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

Restart Colorado Tourism Program Status Update

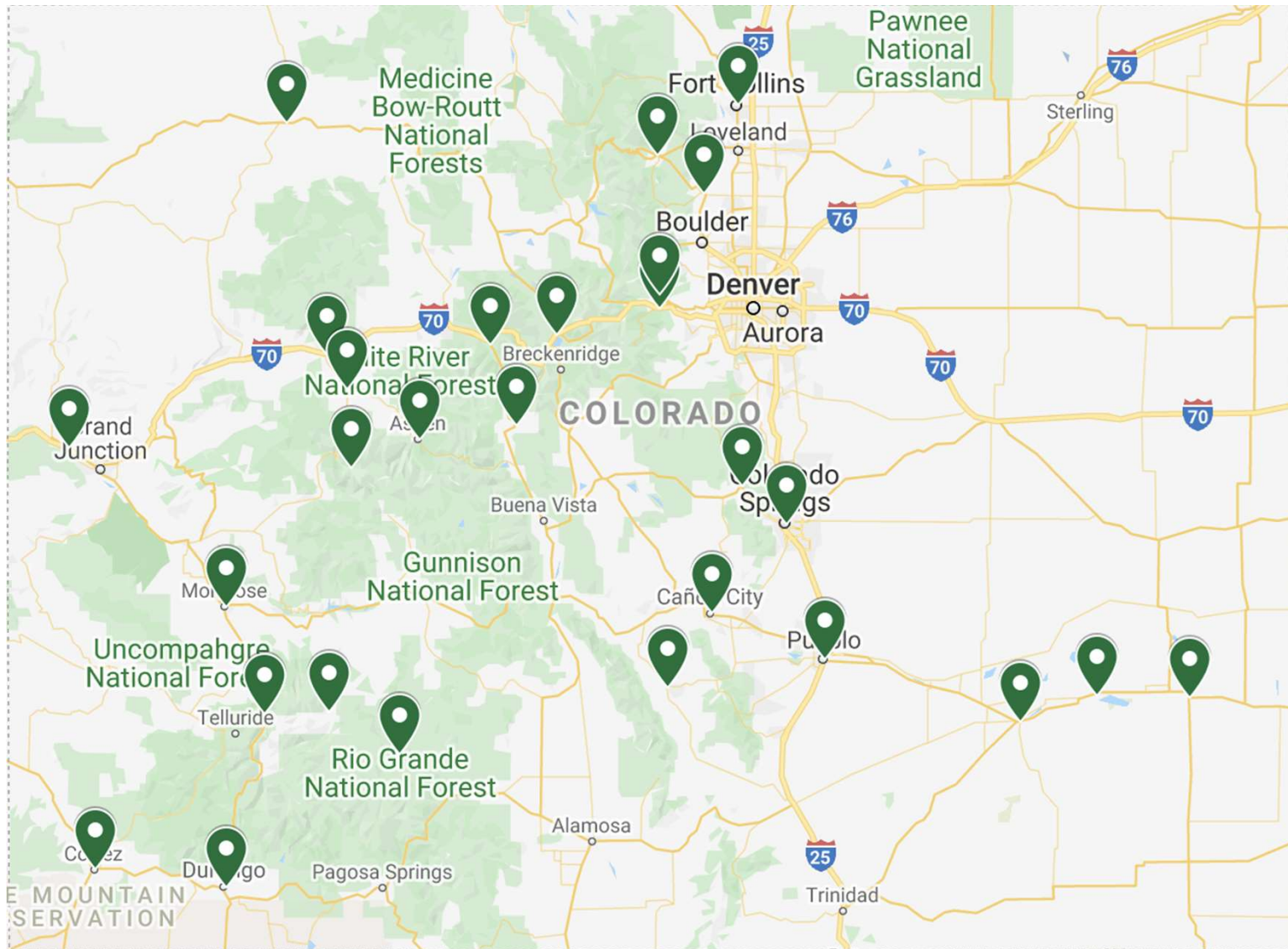
February 24, 2022



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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)

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



Status Update

1. 28 recovery assessments conducted
2. 28 workshops delivered
3. 25 workshop summary reports finalized
4. 37 scopes of work finalized

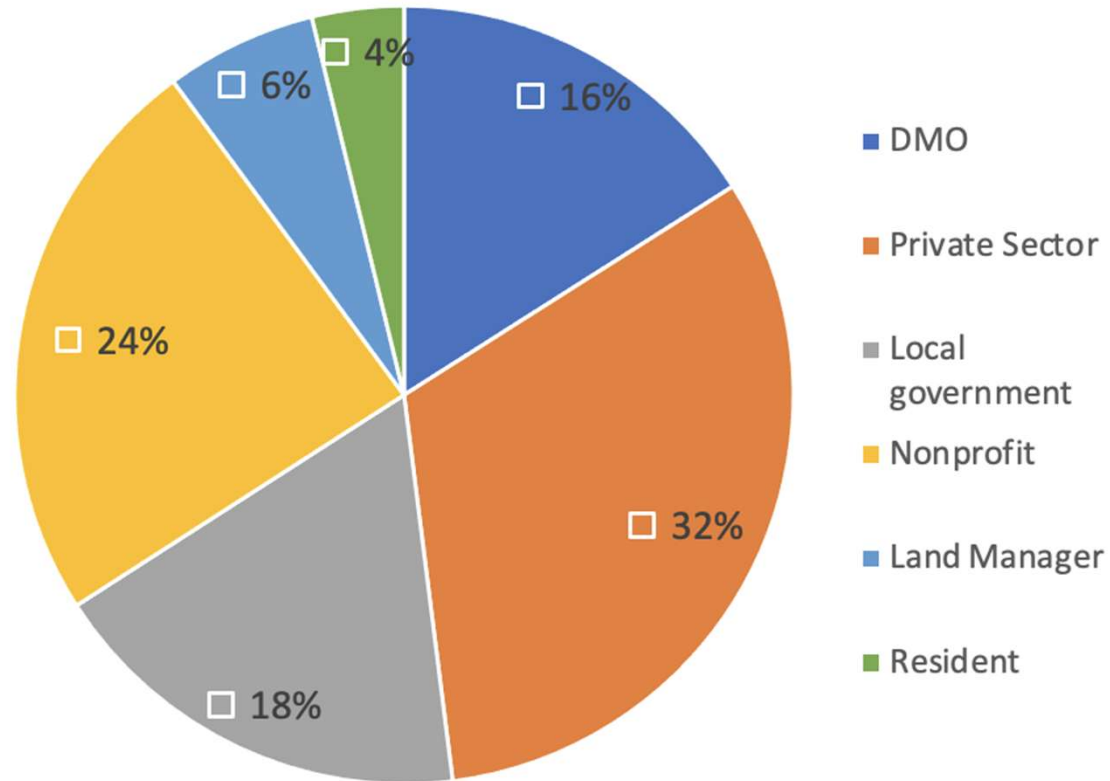


Workshops By The Numbers

- 27 in-person workshops
 - October 7 - December 14
 - 68 days
 - 1,632 hours
 - 0.397 workshops/day
- 1 virtual workshop



Tourism Stakeholders By Sector



Shared Industry Priorities

1. Advance tourism workforce
2. Champion the value of tourism
3. Develop and enhance visitor experience
4. Disperse visitation to less-visited areas
5. Diversify and sustain tourism funding
6. Encourage responsible visitation
7. Expand off-peak tourism opportunities
8. Foster inclusive travel opportunities
9. Promote local businesses and experiences



Lake City/Hinsdale County

- Identified winter tourism promotion
- Completed website updates
 - added winter experiences
 - updated business hours
- County has approved rebranding the snowmobile trails as more inclusive and accessible
- Exploring an eat local campaign and Localhood stories with CRAFT Mentor





SCALING UP A SLIPPERY SLOPE

ICE CLIMBERS TAKE TO LAKE CITY, CO FOR ANNUAL FESTIVAL

FOX WEATHER **SUNRISE**

WINTER ALERT

WINTER STORM WARNINGS STRETCH FROM BUFFALO, NY TO BANGOR, ME



Roaring Fork Valley Destination Alliance

- Aspen, Snowmass, Basalt, Carbondale, and Glenwood Springs
- Hosting 5 meetings this year
- Focused on:
 - Crisis communications
 - Responsible & respectful use
 - Champion the value of tourism
- Press release is going out soon



Next Steps

- Finalize remaining summary reports
- Approve remaining scopes of work
- Review lessons learned from delivery
- Award Tourism Management Grants
- Deliver 47 technical assistance projects
- Open applications for Reimagine
- Launch RFP for Reimagine consultants
- Launch RFP for Direct Marketing
- Publish results on OEDIT website





THANK YOU



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