

CO HAS POSTED A 41% INCREASE IN VISITATION, MORE THAN TWICE THE 20% GROWTH RATE OF US TRAVEL SINCE 2009

Strong economic impact

- Triggered \$20.9 billion in direct spending in 2017; up 6.5%, more than twice the national average.
- A record 84.7 million visitors; 37.9 million overnight visitors
- Generated \$1.28 billion in state and local taxes, up
 5.7%
- While other major destinations lost ground, held share of marketable leisure travelers from at record 3.1%, moving from 13th place in 2015 to 8th in 2017

EARNINGS IMPACT OFTEN UNDERESTIMATED

Major source of CO jobs

- Directly supported more than 171,000 jobs, with a \$6.3 billion payroll
- Accommodation and food services 2nd only to health care/social services; neck and neck with retail (NAICS)

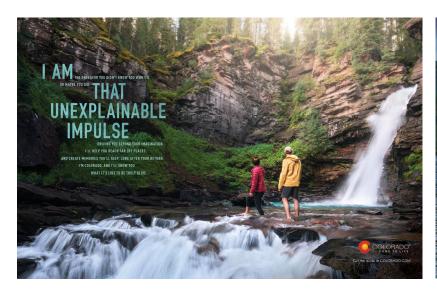
ROOTED IN COLORADO'S OUTDOOR EQUITY

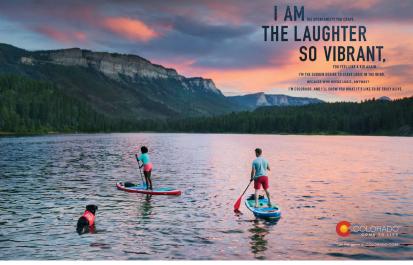
Why the LEAVE NO TRACE partnership matters to CTO



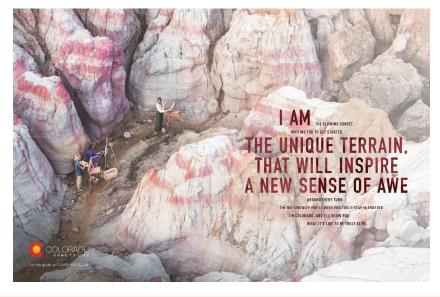


The outdoors is our stage ...











OUTDOOR RECREATION IS OUR CALLING CARD

Summer trip activities

- Top-ranking activity is scenic drives, which rank highly with all ages but especially among visitors age 45+
- Outdoor-focused activities rank highly

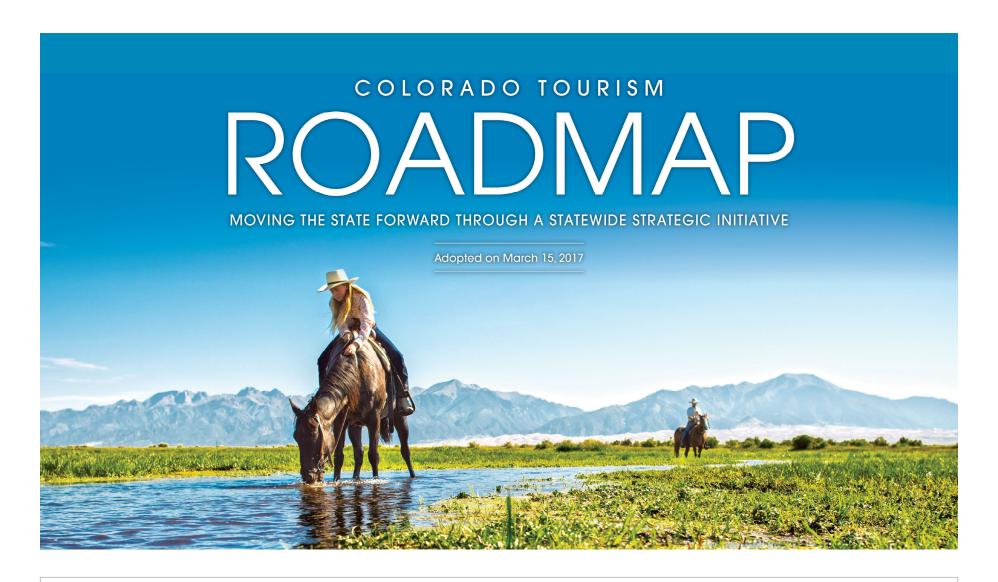
				%
Activity Participation	2015	2016		Change
Scenic drive	53%	52%	50%	-4%
Shopping	49%	44%	44%	-1%
Visiting a state or national park	40%	46%	41%	-10%
Hiking or backpacking	28%	32%	34%	6%
Visiting historical sites	30%	30%	23%	-25%
Visiting a craft brewery	NA	20%	22%	10%
Wildlife watching	29%	27%	21%	-22%
Sightseeing tour	32%	23%	19%	-16%
Visiting a marijuana dispensary	8%	12%	17%	41%
Visiting museums	21%	22%	16%	-27%
Attending a live music event	NA	14%	14%	1%
Taking a scenic train	NA	10%	13%	26%
Visiting a noteworthy bar or nightclub	14%	14%	13%	-10%
Visiting a casino	NA	9%	11%	18%
Hot spring			10%	NA
River rafting	9%	8%	10%	25%
Fishing	14%	9%	10%	11%
Attending a festival or fair	10%	14%	10%	-30%
Mountain climbing	12%	15%	9%	-41%
Camping	8%	13%	9%	-32%
Canoeing or kayaking	3%	7%	8%	14%
Rock climbing	10%	8%	8%	-4%
Attending a major sporting event	NA	7%	8%	8%
Participating in marijuana-related activities	9%	6%	7%	13%
Winery tours	20%	11%	6%	-43%
Mountain Biking			6%	NA
Golfing	3%	8%	5%	-34%
Ziplining	NA	4%	5%	30%
Horseback riding	12%	5%	5%	3%
Attending theater or dance event	6%	8%	4%	-44%
Boating	3%	5%	4%	-15%
Road Biking*	9%	8%	4%	-50%
Bird watching	13%	7%	4%	-50%
Stand up paddle boarding	1070	. 70	2%	NA
Visiting a dude or guest ranch	NA	3%	1%	-51%
Hunting	0%	2%	1%	-43%
i wining	0 70	270	. 70	1070

WINTER VISITATION ESPECIALLY OUTDOOR-FOCUSED

Winter trip activities

- Skiing and snowboarding remain the top activity for winter visitors by far
- Winter park
 visitation, scenic
 drives on rise.

Winter Visitor Participation	2015	2016	2017
Snow skiing or snowboarding	64%	58%	62%
Dining at locally owned restaurants	46%	51%	54%
Shopping	44%	57%	51%
Scenic drive	36%	40%	42%
Visiting a state or national park	27%	28%	31%
Snowmobiling	27%	32%	23%
Visiting a noteworthy bar or nightclub	18%	20%	21%
Hiking or backpacking	20%	20%	20%
Visiting historical sites	20%	19%	20%
Sledding or snow tubing	25%	29%	20%
Wildlife watching	14%	15%	19%
Ice skating	15%	27%	17%
Sightseeing tour	25%	21%	16%
Cross-country skiing/Snowshoeing	17%	17%	15%
Visiting a marijuana store or dispensary	7%	12%	14%
Visiting museums	14%	16%	13%
Mountain climbing	8%	13%	12%
Farm to table dinner	4%	5%	11%
Sleigh rides	14%	15%	11%
Attending a festival or fair	10%	11%	10%



THE COLORADO TOURISM ROADMAP: A strategic plan not just for the Colorado Tourism Office, but for the Colorado tourism industry.



VISION

Colorado is the premier U.S. destination for active, outdoor and unique experiences that make you feel truly alive.

MISSION

Drive traveler spending through promotion and development of compelling, sustainable travel experiences throughout our four-corner state.



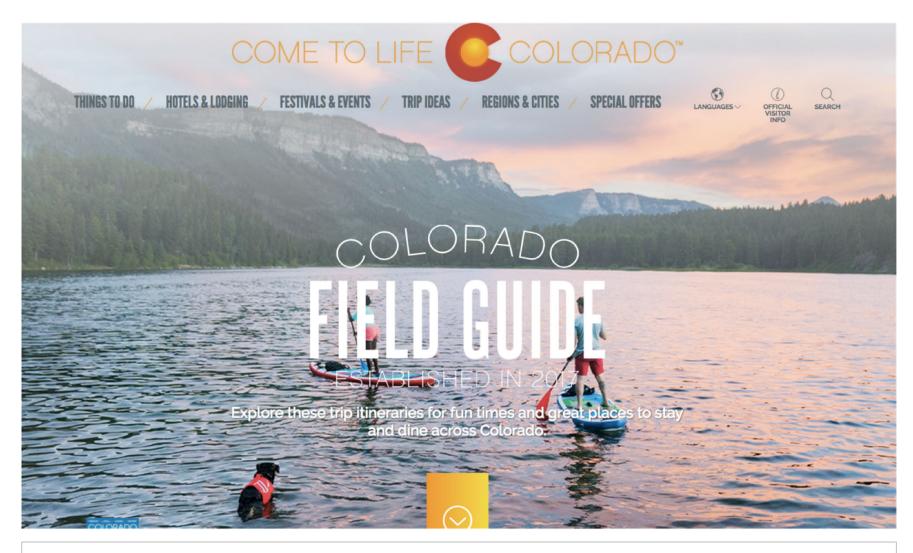


OBJECTIVES:

- ► Embrace thinking that disperses visitors in productive ways.
- ▶ Invite travelers to embrace Coloradans' sustainability ethic while here.
- ► Create alliances with other stakeholders to magnify the impact of sustainable tourism initiatives.

CORE TO THE ROADMAP STRATEGY

Protecting the integrity of Colorado resources



THE COLORADO FIELD GUIDE: An online collection of more than 90 multiday itineraries guiding travelers to less-visited and off-peak destinations.



A first of its kind partnership

PROMOTION OF RESPONSIBLE TOURISM PRACTICES

Signed MOU with Leave No Trace October 16, 2017.

One year task agreement included:

- Development of shared messaging based on the iconic Leave No Trace Seven Principles
- Collaboration on development of best practices with at least three industry sectors
- Shared research priorities



OTHER INITIATIVES: 'Bike friendly' welcome centers, development of EV charging stations network, 'voluntourism' initiative and more.





A low-key, engaging way of serving up valuable information on traveling like local.

Already, three destinations are reprinting at their own expense.





The Colorado Dude & Guest Ranch LNT Edition





Looking at how state partners are integrating Leave No Trace into their operations.





"DRESS IN LAYERS!" ARE WORDS TO LIVE BY.

Our dramatic elevation changes mean we can ski in the mountains and then drop a few thousand feet to bike or drink a craft brew on a sunny patio.

DUDE RANCH PACKING MUSTS:



SUNSCREEN, LIP BALM, A HAT & SUNGLASSES. Remember, you may be a mile or more closer to the aun, and much of Colorade gets 300 days of sunshine every year.



HIKING BOOTS OR OTHER STURDY, ATHLETIC SHOES. You never know when you're going to want to answer the call of a beautiful trail.





LIGHTWEIGHT
FLEECE OR VEST.
Even on our hottest
days, temps are chillier
after sunset, especially
at higher elevations.



REFILLABLE WATER BOTTLE OR HYDRATION SYSTEM (such as a CemelBak). Start drinking water as soon you arrive in our dry, elevated climate. And don't stop.



This is standard gear in Colorado to carry all of the above.



JEANS OR HIKING JEANS OR HIKING PANTS. Relax, denim is acceptable attire nearly everywhere; but hiking pants or leggings are great for a day out exploring our wilds. A pen where livestock is kept when not in the stables.

A mare is a female horse, a gelding is a male horse and a mustang (typically) refers to a wild horse.

DASSO and cattle.



LEARN THE LINGO!

Just another word for a young cowboy or cowgirl.

This is what we call those peaks that rise more than 14,000 feat above sea level. We've got 58 of them, more than any other state in the WRANGLER The cowboy or gal who handles the animals — and will help teach you how to r inental U.S. Hardy hikers aim to "bag" - or summit - all of them. and rope during your stay

CONTINENTAL DIVIDE CORRAL Also known as "the Divide," this ridge runs along the cre of the Rocky Mountains nort or the Rocky Mountains north to south. Rivers and streams west of the Divide flow to the Pacific Ocean, and east of the Divide to the Gulf of Mexico.

MARE VS. GELDING

5.280
Denver is the Mile High City because it sits 5,280 feet (or one mile) above see level. To be precise, the 12th step of the Colorado State Capitol Suilding or the line of purple seats in Coors Fleid will put you exactly at 5280. (Pronounced: fifty-two eighty)

Where you tether your horse til you're done with lunch.

FROM RANGE.
The Rocky Mountain range most visible from Colorado's most populous cities – Deriver.
Colorado Springs, Fort Collins and Boulder – and from much of the Eastern Plains. Much of the under region near these mountains is known as the Front Range as well,

WESTERN SLOPE

to the Grand Mess, the largest flattop mountain in the world. **CENTENNIAL STATE** Colorado's official nickname refers to the year it earned statehood. That happened in

1876, the centennial anni-versary of the United States' declaration of independence HIGH COUNTRY A fancy way to say "the mountains," uttered mostly by local weathercasters. MUD SEASON

FOUR CORNERS

The point where Colorado, New Mexico, Arizona and Utah come together at one point in our extreme southwest corner,

40 miles from the Colorado city of Cortez.

If you are headed to or from the High Country on I-70, you'll likely pass through the 1.7-mile Bisenhower/Johnson Memorial Tunnel. Since 1973, the tunnels have provided

MUU SEASUN
This glorious harbinger of spring is typically alotted on the calendar for late April or May, it occurs when winter's snow starts to melt and rivers swell, making for amazing flabine, theilling whitewater.

COWBOY GEAR, (IF YOU'VE GOT IT!)



COWBOY HAT. You're not fit for ridin' If the sun's in your eyes. A wide-brimmed hat will solve that problem and get your sense of adventure a Wild West kickstert.



COWBOY BOOTS.
Flat soles are better
for riding horses than
hiking shoes and
boots with tread. Plus,
Western boots' height
protects against thorns
and other irritants.



BUTTON UP SHIRTS. You're bound feel like a true comboy or gal, not to mention the sleeves can protect you from the sun and tree











Embedding messages in the Field Guide ...



PICK YOUR GETAWAY



How to Give Back to These Special Places:

Donate to the Rio Grande Headwaters Land Trust who believes that land and water conservation contribute to sustaining the vitality of this agricultural heritage and economy, the exceptional wildlife habitat, the scenic beauty and the area's rural quality of life.







Get that Green Feeling: Most of the activities mentioned below are Actively Green certified.



Cheers for a Cause:

Grab a specialty pint at Goat Patch and choose between two local charities to support.



Travel Like a Local: There are special places and unique vistas around nearly every Colorado corner. You can help ensure these places exist for generations to come by staying on roads and trails, keeping speeds in check. Leaving campsites and picnic spots just as you found them, and following instructional signs while you're out and about in our state.







Get the PDF
More Itineraries

Get out and explore the grand alpine landscapes in Vail, Avon and Edwards with Walking Mountain Science Center, with guided activities ranging from nature walks and backcountry hikes to family outings, bedtime-story walks and science camps.



... And other channels at every opportunity



THINGS TO DO / HOTELS & LODGING / FESTIVALS & EVENTS / TRIP IDEAS / REGIONS & CITIES

LEAVE NO TRACE – CARE FOR COLORADO



Know Before You Go

- Lavie plants, rocks and historical literia as you find them so others experience the jay of
 discovery.
 Consistency of the plants of
 any with a cameria.
 Coderado is beautiful all on its own fluiding structures or campates on public land instruction.
 Coderado is beautiful all on its own fluiding structures or campates on public land instruction.
 Coderado is beautiful all on its own fluiding structures or campates on public land instruction.

- Colorado's low humidity has periss, but can create dry, dangerous conditions. Kiepp camplies small and manageable to avoid spaking widdless.
 When putting out it has water if unit by our inharded the embers. Never let a fire burn the putting of the colorado's dry climate. Always put digarettes out completely and don't lever your buts behind.

- Colorado is home to tens of thousands of furry, scally and feathered creatures. To keep them and you = safe, don't approach them.
 It is not adorable to feed wild animals. You could alter natural behaviors, exposing them

© Leave No Trace Center for Outdoor Ethics



☼ COLORADO PUBLIC LANDS DAY

William Table (pool in May let a proportion of in the exposition of the exposit

LEAVE NO TRACE

Care For Colorado Principles

CARE FOR COLORADO

Care for Colorado – Are You Colo-Ready?

OTHER IDEAS

- CONTINENTAL







WILDFIRE AWARENESS:



02 STICK TO TRAILS

03 LEAVE IT AS YOU FIND IT





- 06 KEEP WILDLIFE WILD



07 SHARE OUR TRAILS & PARKS









OURAY FIRST TO SIGN UP

Sustainable Tourism Workshop, Tools



Sustainable Tourism Toolkit

With the growing number of people visiting and staying in Colorado comes the responsibility to simultar protect our cultural, environmental and economic assets. Sustainability is more than just about being "grenvironment. It is a holistic approach to how tourism can benefit the long-term well-being of a communi. This toolkit is intended to provide broadly spanning resources that address different considerations of to including environmental, social/cultural, economic, and management concerns and opportunities. When community group, a nonprofit organization or a small business owner, this toolkit will help you evaluate y incorporate sustainable thinking and design into your planning and strategies.

Leave No Trace - Care for Colorado principles >>

- 1. Getting Started Why sustainable tourism? Sustainable tourism can lead to higher community engage creation, a stronger connection to local culture and history, and a healthier ecosystem. This section fully of sustainable tourism and why it is imperative that Colorado communities integrate sustainable tourism
- 2. Industry Trends Make sure you're updated on the latest trends! Consumer trends and research can be sustainable product and service preferences. In addition, learn why the "green traveler" should be a part
- 3. Destination-Level Sustainability & Community Engagement A community that works together to consustainability is one that will experience benefits well into the future. In this section, we consider topics spreservation, open spaces and nonprofit collaboration.
- 4. Tour Operators Integrating sustainability into a tour operation is much more than just providing reusal-walks. Sustainable tourism for operators means minimizing negative impacts and maximizing best practice environment, employees, buildings you occupy, transportation methods you chose and guest experiences
- 5. Travelers & Guests Are your clients and guests setup for success? Do you have a towel-reuse program? Is composting and recycling easily accessible? Review best practices and resources to ensure that you are making sustainable actions and behaviors easy for everyone that visits your destination or business.
- 6. Greening Your Space 101: Sustainability for Lodging, Buildings & Events From adopting eco-friendly technologies to participating in regional programs and local partnerships, there are numerous ways to enhance the sustainability of the built environment. Not only do these efforts decrease a community's environmental footprint, but they can also lead to regional job growth and long-term financial benefits.





A Shout-Out for CTO in Travel Weekly

RECOGNITION FOR LEAVE NO TRACE AND COLORADO PARTNERS AS WELL

By Arnie Weissmann 🔰 🕍 | Jul 09, 2018

Reacting to tourism backlash? Or preventing it?

TRAVELOWEEKLY
THE TRAVEL INDUSTRY'S TRUSTED VOICE

'The biggest takeaway is that the (Colorado) tourism office didn't wait for rebellious residents to shout what they didn't want; they reached out and discovered what they did want.'



in

After Dubrovnik, Croatia, imposed restrictions on the cruise industry in response to overcrowding in its walled Old City, Royal Caribbean Cruises Ltd. vice chairman Adam Goldstein reached out to the city's mayor and requested a chance to discuss the issue. As a result of their dialogue, a solution was reached to

- | A+ A-

spread cruise passengers over a seven-day period instead of three.

Goldstein shared his experience with industry executives just prior to the World Travel & Tourism Council Global Summit in April during a roundtable I moderated on the topic of overtourism. Virtuoso CEO Matthew Upchurch responded, "It's an interesting approach to say, 'What do you want? Don't tell me what you don't want.' When everybody focuses on what they don't want, it's always somebody else's responsibility. When it's what I want, it makes me focus."

Last Tuesday, I encountered the yin and yang of these possible responses to overtourism, in stark contrast. First, I interviewed a state tourism official whose proactive outreach short-circuited potential backlash in a destination that relies heavily on tourism.

And just afterward, I viewed a 23-minute video produced by tour operator Responsible Travel that focused on local resentment and anger toward tourism. Its prevailing attitude was summed up by Harold Goodwin, professor emeritus at Manchester Metropolitan University and managing director of the Responsible Tourism Partnership, who said in the video, "We need rebellious tourists and rebellious locals" to effect change.



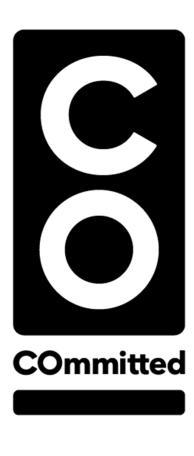


First Zero-Was Governor's Tourism Conference in the U.S.

Let's come together and take small steps to show our commitment to protecting our state, our world and our future.

Steps to a Zero-Waste Gov Con

A FIRST FOR THE COLORADO TOURISM OFFICE



- **Use bins:** Be an active partner in helping us recycle and compost.
- Reduce Your Single-Use: Every conference attendee will receive a Silipint Cup for water and coffee (even adult beverages!)
- **Finish Your Food:** Walking Mountains Science is leading the charge for extra food to be composted or donated to a local food bank.
- Being Paper-Wise: Conference printed materials will be on PrintReleaf paper.
- **Stuff Your Own Bag:** Attendees can choose the items they wish for their registration bag. Unused materials either will be returned to sponsors or recycled.
- Reduce your footprint: Carpool or find other low-impact ways of getting to Gov Con.







Partnership Agreement

Built around: 'development of an education strategy aimed at encouraging guests to be good stewards of the places they visit in Colorado'

- Discussions have included: CHLA, CROA, CDGRA
- Level 1: 'Supporting Company' signs the CTO and Leave No Trace
 Partnership Agreement; embraces identified best practices; incorporates
 CTO/Leave No Trace messaging in guest education, including reservation link; shares video
- Level 2: 'Leave No Trace Colorado Tourism Partner' additionally designates frontline employees to complete Leave No Trace online awareness course; supports at least one concierge or other key employee to participate in annual Leave No Trace training







Partnership Agreement

Built around: 'development of an education strategy aimed at encouraging guests to be good stewards of the places they visit in Colorado'

LEVEL 2 PARTNERS QUALIFY FOR OFFICIAL ENDORSEMENT:

- Recognition on our websites as official Leave No Trace Colorado Tourism Partner
- Recognition in references in CTO channels as appropriate
- Use of official CTO and Leave No Trace Seal of Outdoor Stewardship with endorsement language
- Permission to use the Leave No Trace Care for Colorado Seven Principles in the company's messaging
- Permission to customize the CTO's 'Are You Colo-Ready?' brochure to communicate with targeted audiences







Partnership Agreement

Built around: 'development of an education strategy aimed at encouraging guests to be good stewards of the places they visit in Colorado'

ANNUAL FEE STRUCTURE

• 1-50 employees \$250

• 50-100 employees \$500

• 100+ employees \$800

100 percent of fees go toward development and delivery of Leave No Trace educational programming, training and messaging.



ON RESIDENTS & VISITORS

Measuring the impact







FINDING ONE:

Virtually all residents believe that tourism is at least somewhat important to Colorado.

More than half indicate that tourism impacts them positively, and only one in ten indicate it has a negative impact.



FINDING ONE

There appears to be an opportunity to increase the percentage of Coloradans who feel positively about tourism by educating them on the fact that tourism reduces taxes for residents.

Tourism in Colorado	Total Respondents
Creates traffic	85%
Generates tax revenues for state and local governments	78%
Creates amenities and attractions for Coloradans to enjoy	75%
Creates jobs	74%
Supports business creation	74%
Supports small businesses	73%
Creates impacts on our natural resources	71%
Causes prices to rise	55%
Brings too many people to the state	53%
Reduces taxes for residents	28%



VISITING AT OFF-PEAK TIMES AND OFF THE BEATEN PATH

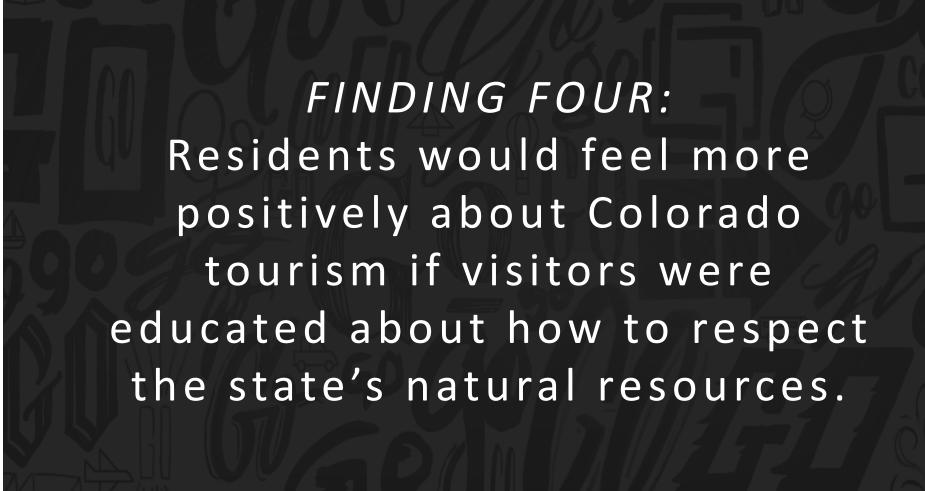
Importance of attracting visitors to the state during seasons with low visitation

84%

Importance of attracting visitors to parts of the state with low visitation

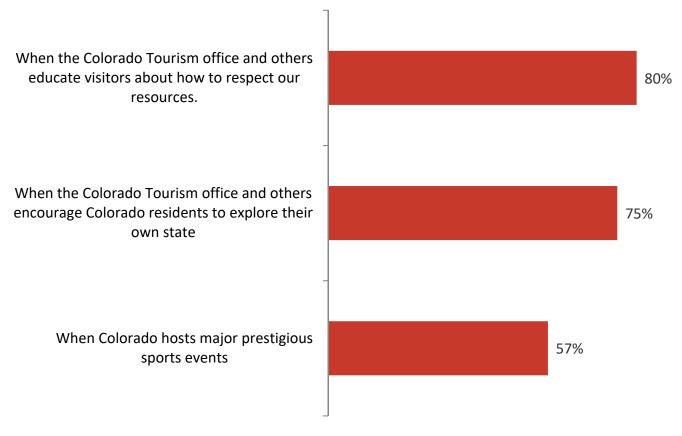
80%





FINDING FOUR

Causes Residents to Feel More Positively About Tourism



FINDING FOUR

The most mentioned ways to make residents feel more positively about Colorado tourism are respect for the natural resources from visitors, promotion of reasonable use of parks and trails, resident-only discounts, advertisements for less popular attractions and seeing more of the economic impact of tourism.

66

If it promoted reasonable use of parks and trails and not to attract as many people as possible.

66

Give natives a price break. Not all on one day either as that creates so many going that one can not enjoy.

66

I would like the taxes from legalized marijuana used to improve our roads.

66

Advertise other tourist spots besides the bigger traditional tourist attractions. Highlight the natural benefits of visiting the state such as clean air/fresh water.

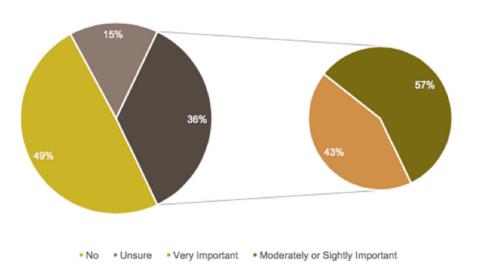
If people learned to respect the

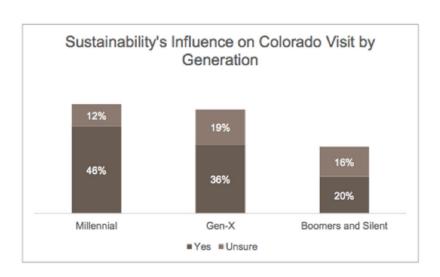
to respect the environment and history, rather than coming here for legalized marijuana.



2018 Winter Advertising Effectiveness Study

Importance of sustainability in visiting a destination





AN AGE DIVIDE: While only 20% of Boomers and Silents say a destination's sustainability practices is important to them, 46% of Millennials and 36% of Gen-X'ers do.





Costs to date

•	'Are You Colo-Ready?' brochure printing		\$3,655
•	Welcome Center logo'd polos		\$11,316
•	IPW FAM leader logo'd vests		\$5,185
•	Welcome Center restroom posters/frames	\$876	
•	Resident Sentiment study	\$9,950	
•	Care for Colorado Video	\$40,481	

All other messaging and promotion was incorporated into existing tactics; video/brochure labor hours incorporated into existing Miles contract work.

\$71,463



TOTAL:

SPREADING THE WORD

What's ahead

THREE CTO TEAM MEMBERS COMPLETED, TWO IN TRAINING

Global Sustainable Tourism Council-certified





BUILDING THE ARMY

A maturing partnership

- Developing Year 2 task agreement
- Focus on sharing of video; partners already posting
- Incorporate into Western Hospitality training; welcome center realignment
- Enlist other Colorado tourism industry sectors; develop recognition for LNT/ CTO Partners
- Share with other states, especially 15 in Western States Tourism Policy Council

BEYOND OUR FOUR CONCERNS

Responsible tourism gaining importance

- Sustainability now identified as a top U.S. Travel Association priority
- Responsible tourism is foundation of stronger tourism partnership with public lands agencies, outdoor recreation industry
- Share framework with other states, especially 15 in Western States Tourism Policy Council





THANK YOU



