



Executive Summary

STUDY PURPOSE AND APPROACH

This study was commissioned by Hill Aevium for the Grand Junction Visitor & Convention Bureau (GJVCB) in 2016 to update a similar study done by The Adams Group, Inc. in 2004. The objective of this study is to document the size and importance of the travel industry to the Mesa County Economy. The principal investigator is Dr. Tucker Hart Adams, Summit Economics, LLC.

The study relies on secondary data available from a wide variety of public and private sources that include an intercept survey conducted by Guest Research Inc. from March 2015 to September 2016, as well as personal interviews conducted by Dr. Tucker Hart Adams in Mesa County in November 2016. It utilizes traditional multiplier analysis to trace the impact of a job or dollar as it works its way through a local economy.

The study looks at the direct, indirect and induced impact of an overnight visitor or a day tripper who is more than 50 miles away from home. A day tripper from Delta (45 miles away) is not a tourist; a day tripper from Ouray (97 miles away) is.

STUDY FINDINGS

1. The internet has become the primary way that visitors search for information before visiting Mesa County
 - In 2015 the GJVCB received 686,165 visits to their web site from 535,204 unique IP addresses
 - 12,120 tourists visited the GJVCB office, including visitors from 40 foreign countries
2. 10.8% of the jobs in Mesa County are in the Accommodations and Food Service sectors
3. Survey results show that 53% of visitors were from outside Colorado
 - 56% came from the 8-state Mountain Region
 - 4% were from outside the U.S.
4. Most survey respondents (95%) were leisure travelers. They came to:
 - Vacation (44%)
 - Visit friends/relatives (16%)
 - Stopped on their way to another destination (11%)
 - Business (5%)



Executive Summary

5. Most visitors stayed overnight (71%)
 - Day visitors (17%)
 - Passing through (7%)
 - Stayed 1-2 nights (58%)

6. Most people (70%) stayed in hotels/motels/B&B's
 - 15% stayed with friends/family

7. Most tourists traveled by personal car (71%)
 - Rental car (12%)
 - Plane (7%)
 - RV/camper (5%)
 - Train (2%)
 - Motor coach (1%)

8. Shopping has declined in importance as a tourist activity
 - 38% of leisure travelers plan to do some shopping versus 58% in 2004
 - 53% planned to spend more than \$100 on things other than lodging and meals

9. Tourists plan to visit
 - Colorado National Monument (35%)
 - Wineries (34.4%)
 - Museums/Arts/Cultural Activities (14.6%)
 - Concerts/Festivals/Special Events (13%)
 - Public Lands (11.9%)
 - Mountain Bike (7.4%)

10. There are over 3,000 hotels rooms in Mesa County
 - Internet bookings are increasing, reducing profitability
 - Business travel has declined
 - Most visitors stayed within the Grand Junction city limits (68%)

11. The average tourist is:
 - Well off – 43% have an annual income greater than \$100,000
 - Older – 31% are retired
 - Well educated – 75% are college graduates

12. About 25% of restaurant sales are to tourists
 - This varies by type of restaurant, location and season
 - The decline in business travel has reduced business lunches



Executive Summary

13. Regional sports events are important tourist attractions
14. The travel industry in Mesa County provides more than:
 - 4,836 direct jobs and 5,566 total jobs
 - \$139.88 million in wages and salaries
 - \$12.8 million in sales tax revenues
 - \$1.416 million in lodging taxes
15. The tourist industry provides amenities such as restaurants, attractions, cultural events and golf courses that appeal to the retirement community.
16. Colorado Mesa University and local hospitals and health care providers bring tourists to Mesa County.