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**PAGOSA SPRINGS  
SUMMER VISITOR SURVEY 2007**

*Summary of Results – November 2007*

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*Prepared for  
The Town of Pagosa Springs*

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## INTRODUCTION

A survey research program was launched this past summer among visitors to Pagosa Springs in order to analyze vacation patterns, visitor origins, and the quality of experience while in town. The study was commissioned by the Town of Pagosa Springs Tourism Committee and was comprised of two phases. The primary phase consisted of a brief intercept survey where visitors were asked about details of their trip, advertisement recall, demographic questions and whether they were willing to participate in a more in-depth follow up survey. that would either be mailed or emailed to them. The secondary phase consisted of a more in-depth survey that was mailed or emailed to households after their visit. The longer follow-up survey further probed the visitors' trip planning process, ratings of the town and their actual experience, and additional characteristics of the visitors.

The intercept surveys were conducted throughout the summer on a variety of days, which included weekdays, weekends, holidays, days of special events, and non-event days. These surveys were conducted throughout the downtown area including the Visitor's Center and Riverfront Park. As an incentive, respondents who completed the interviews were entered into a drawing for three \$100 gift certificates at a local supermarket (in Pagosa Springs or their hometown). A total of 743 intercept surveys were completed over the course of the summer (from June 16 to September 10, 2007).

The second phase of the program consisted of the mail/email follow up surveys that were lengthier and probed in considerably more depth vacation and experiential issues related to their trip to Pagosa Springs. A total of 65 surveys were returned, representing a low overall response rate. Most respondents elected to participate in the web version (54 surveys completed) as compared to the mail version (11 surveys completed). As a supplement to this, an email invite was then sent to people who had either stayed at a lodging property in Pagosa Springs or had requested visitor information through the Chamber's website. A total of 254 additional surveys were completed through this process resulting in a total of 319 follow up surveys.

In general, the following analysis is based on the intercept survey. The follow-up data is presented as a supplement to the intercept data in order to offer more detail in areas such as experience ratings, and trip-planning decisions.

Throughout this report, comparisons are made between first-time and previous visitors to Pagosa Springs because often there are differences in the profile, behavioral patterns, motivations, etc. of those who have visited the area before compared to those who have not. Another "segmentation" of the data presented compares "visitor type" - whether the person is a day visitor (not from the local area and not staying overnight in Pagosa) or overnight visitor (staying at least one night in Pagosa Springs). When appropriate, overnight visitors are further segmented by Colorado and out-of-state overnight visitors. Again, variances in behavior and profile are presented to better understand the patterns of these sub-markets within the overall visitor population.

Further segmentations of the visitor data include a breakdown by geographic market of Pagosa's primary regional markets (Colorado, New Mexico, Arizona, and Texas) as outlined in the Town Tourism Committee and Area Chamber of Commerce's 2007 Media Rationale. Also based on the Media Rationale are segmentations of the data by age to show characteristics of Pagosa's primary target audiences in the 36 to 54 year and 21 to 35 year age ranges.

Comparisons are also made throughout this report to the community survey that was conducted in Pagosa Springs in 2004. While the 2004 survey included both visitors and locals, for the purposes of this report, only visitor responses to the 2004 intercept survey are used for comparisons.

Examples of the survey instruments with a summary of responses are attached to this report. Additional data tables and complete sets of comments were provided to the Town under separate cover.

## **SUMMARY OF KEY FINDINGS AND OBSERVATIONS**

Pagosa Springs visitors are likely to be over 55 years (51 percent), with an average age of 53 years and most likely to be "empty-nest" households (couples or singles with children no longer living at home). In comparison to 2004, respondents were older – a current average of 53 years compared to 50 years.

Empty-nesters made up 41 percent of visitors in 2004, compared to 55 percent this year. Taken together, the age and household measures suggest that Pagosa's visitors are changing in a manner that will be increasingly problematic as the Town works to position itself.

It is interesting to compare the profile of first-time visitors to those who have visited Pagosa Springs in the past. The data indicate that 37 percent of visitors are on their first visit to Pagosa Springs, up from 31 percent in 2004. Examining this data by state, we find that Texas, Arizona, and California are particularly likely to be first-time visitors. We believe these increases are healthy.

Overall, the largest proportion of visitors to Pagosa Springs is from Texas (21 percent of visitors), followed by New Mexico (17 percent), and Colorado (15 percent). The secondary markets include Arizona (8 percent), California (6 percent), Oklahoma (4 percent), and Kansas (3 percent).

In comparison to the visitor distribution in 2004, there was a noticeable shift this year among the top three states. In 2004, 30 percent of visitors to Pagosa Springs were from Colorado (compared to 15 percent this year), while 15 percent of visitors were from Texas (compared to 21 percent this year), and 10 percent were from New Mexico (compared to 17 percent in 2007).

Respondents were asked about their awareness of advertisements for Pagosa Springs prior to their trip and which methods of advertisement they recalled. Overall, 49 percent of all respondents recalled seeing or hearing an advertisement about Pagosa Springs prior to their

trip. This shows a significant improvement over 2004 when 27 percent of visitors recalled seeing or hearing an ad for Pagosa prior to their trip, indicating that visibility is improving.

Brochures, magazines, and the Internet are the most identified sources of ad awareness. There are differences in household awareness by type of advertising identified. These findings are important, reinforcing the importance of the Internet in reaching younger audiences.

The follow-up survey also asked respondents' awareness of the new advertising campaign currently used for Pagosa Springs "What's your rush?" To date, the campaign shows only 6 percent of respondents overall indicated they were aware of the campaign, but awareness was slightly higher among previous visitors to Pagosa Springs, empty-nesters, and respondents between the ages of 55 and 64 (9 percent of each segment indicating awareness).

The proportions spent by the Town on each media type were evaluated. Overall, the budgeted amounts correspond closely with the percentages of respondents identifying that type of ad. While newsprint and billboards had the lowest index scores, the difference was rather small and therefore indicates relatively efficient usage of the budget. Brochures, guides, and directories and Magazines had higher scores, but Internet was by far the most significant source of ad recall in terms of the amount of visitors in comparison to the cost.

Visitors were also asked if they consulted Pagosa Springs' website prior to their visit. Overall, 20 percent of respondents indicated that they did consult the website. In regards to visitor type, first-time visitors were more likely to visit the website than repeat visitors (23 percent compared to 18 percent) and overnight visitors more than day visitors (27 percent compared to 5 percent).

## RESPONDENT PROFILE

The series of tables below presents the overall demographic profile of respondents to this year's survey in addition to cross tabulations by first-time visitors vs. repeat visitors, visitor type, and geographic origin.

**Overall Demographic Profile:** Pagosa Springs visitors are likely to be over 55 years (51 percent), with an average age of 53 years and most likely to be "empty-nest" households (couples or singles with children no longer living at home). More than half of respondents (55 percent) indicated that they have grown children no longer living at home, in comparison to 29 percent who have children still living at home, and 16 percent with no children (10 percent couples, and 6 percent singles).

In comparison to 2004, visitors this year are slightly older and more likely to be empty-nesters. The average age of visitors in 2004 was 50 years (in comparison to 53 years in 2007), with the most significant shift in the proportion of respondents over the age of 55 (37 percent of respondents in 2004, compared to 51 percent of respondents this year). Empty-nesters made up 41 percent of visitors in 2004, compared to 55 percent this year.

**First-Time vs. Previous Visitor:** It is interesting to compare the profile of first-time visitors to those who have visited Pagosa Springs in the past. As shown in the following table, the data show that 37 percent of visitors are on their first visit to Pagosa Springs, up from 31 percent in 2004. First-time visitors are younger (average age of 51) and slightly more likely to have children living at home (34 percent) compared to previous visitors (26 percent). Previous visitors are more likely to be older (average age of 55) with children no longer at home (59 percent of previous visitors are empty nesters, compared to 48 percent of first-time visitors). We are particularly interested in the origins of first-time visitors because this measure indicates success in marketing. One goal of the marketing effort should be to expose and attract new visitors. The "first-time" survey question measures this performance.

**Visitor Type Comparison:** Day visitors to Pagosa Springs are slightly older than their overnight counterparts and are more likely to be empty-nesters. The average age of day visitors is 54 years old in comparison to overnight visitors from Colorado (51 years) and overnight visitors from outside Colorado (53 years). While all visitor types are made up by a large proportion of empty nesters (61 percent of day visitors; 47 percent of Colorado overnight visitors; 54 percent of Out-of-state overnight visitors), Colorado overnight visitors are more likely than other respondents to have children still living in their household.

**Geographic Origin:** When looking at visitor profiles by geographic origin and specifically of Pagosa's top markets (by state), visitors from Colorado and New Mexico tend to be younger than the overall average, while visitors from Arizona and Texas tend to be older. In comparison to the average age of respondents overall (53 years), the average age of visitors from Colorado is 48, followed by New Mexico at 49, Texas at 56, and Arizona at 58. Based on these average ages, it is no surprise that visitors from Colorado and New Mexico are more likely to still have

children living at home, while visitors from Texas and Arizona are more likely to be empty-nesters.

TABLE 1  
RESPONDENT PROFILE  
COMPARISON BY NUMBER OF PREVIOUS VISITS AND VISITOR TYPE

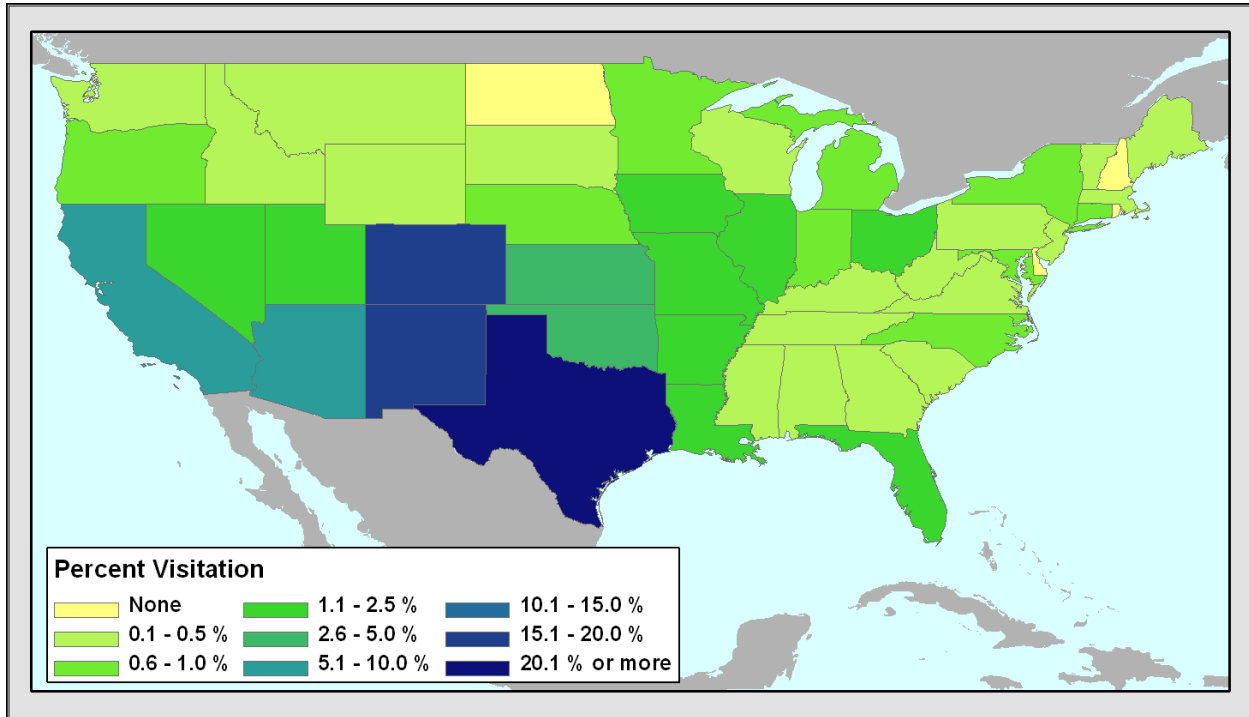
	Overall	First-time visitor	Previous Visitor	Day visitors	CO overnight visitors	Out-of-state overnight visitors
<b>Age of respondent</b>						
under 18	1%	0%	2%	0%	1%	2%
18-24	3%	5%	2%	2%	3%	5%
25-34	7%	7%	7%	5%	10%	7%
35-44	14%	18%	12%	13%	19%	13%
45-54	24%	29%	22%	28%	19%	21%
55-64	26%	25%	26%	23%	29%	28%
65-74	20%	12%	24%	22%	18%	20%
75 or older	5%	3%	6%	6%	1%	5%
<i>Average</i>	<i>53.3 yrs.</i>	<i>50.5 yrs.</i>	<i>54.9 yrs.</i>	<i>54.4 yrs.</i>	<i>51.4 yrs.</i>	<i>53.1 yrs.</i>
<b>Family Status</b>						
Single, no children	6%	6%	6%	4%	6%	7%
Couple, no children	10%	12%	9%	11%	11%	10%
Household with children living at home	29%	34%	26%	24%	36%	29%
Household with grown children no longer at home	55%	48%	59%	61%	47%	54%

## VISITOR ORIGIN

Overall, the largest proportion of visitors to Pagosa Springs is from Texas (21 percent of visitors), followed by New Mexico (17 percent), and Colorado (15 percent). The secondary markets include Arizona (8 percent), California (6 percent), Oklahoma (4 percent), and Kansas (3 percent).

In comparison to the visitor distribution in 2004, there was a noticeable shift this year among the top three states. In 2004, 30 percent of visitors to Pagosa Springs were from Colorado (compared to 15 percent this year), while 15 percent of visitors were from Texas (compared to 21 percent this year), and 10 percent were from New Mexico (compared to 17 percent in 2007).

FIGURE 1  
 PAGOSA SPRINGS VISITOR DISTRIBUTION BY STATE OF PRIMARY RESIDENCE



Among first-time visitors, Texas dominates the market, making up 20 percent of Pagosa’s first-time visitors. New Mexico, Colorado, and Arizona also made up a significant proportion of the first-visitors with between 9 and 10 percent from each state. Previous visitors were more concentrated among the top three states, evidence of strong repeat visitation from New Mexico (22 percent), Texas (21 percent), and Colorado (18 percent).

When looking at the home states of day (not from the local area and not staying the night in Pagosa) vs. overnight visitors (staying at least one night in Pagosa), there is also notable penetration in the Texas market, with 21 percent of day visitors and 21 percent of overnight visitors from Texas. As expected, Colorado and New Mexico also make up a noticeable portion of day visitors to Pagosa Springs (16 percent and 14 percent, respectively), followed by Arizona with 9 percent of day visitors. Similarly, overnight visitors were mostly from New Mexico (18 percent), Colorado (14 percent), Arizona (8 percent), and California (7 percent).

TABLE 2  
VISITOR ORIGIN BY STATE

	Overall	First-time visitors	Previous visitors	Day visitors	Overnight visitors
<b>STATE OF RESIDENCE</b>					
Texas	21%	20%	21%	21%	21%
New Mexico	17%	10%	22%	14%	18%
Colorado	15%	9%	18%	16%	14%
Arizona	8%	9%	7%	9%	8%
California	6%	7%	4%	4%	7%
Oklahoma	4%	2%	6%	6%	3%
Kansas	3%	2%	3%	5%	2%
Missouri	2%	3%	1%	1%	2%
Ohio	2%	4%	1%	1%	2%
Utah	2%	2%	2%	2%	2%
Louisiana	2%	1%	2%	1%	2%
Florida	2%	2%	1%	1%	2%

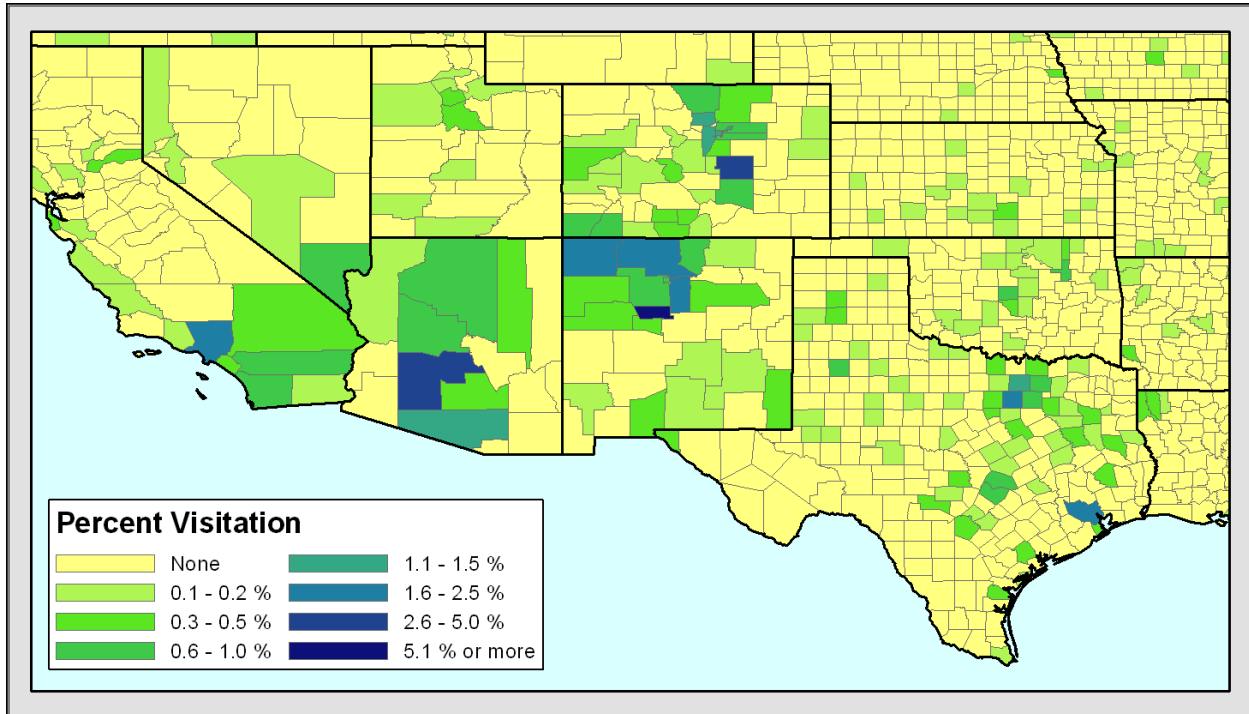
TABLE 3  
VISITOR TYPE OF TOP STATES

	First-time visitors	Previous visitors	TOTAL	Day visitors	Overnight visitors	TOTAL
<b>STATE OF RESIDENCE</b>						
Texas	36%	64%	100%	31%	69%	100%
New Mexico	21%	79%	100%	26%	74%	100%
Colorado	23%	77%	100%	35%	65%	100%
Arizona	44%	56%	100%	35%	65%	100%
California	47%	53%	100%	23%	77%	100%
Oklahoma	13%	87%	100%	43%	57%	100%
Kansas	27%	73%	100%	56%	44%	100%
Missouri	62%	39%	100%	23%	77%	100%
Ohio	75%	25%	100%	25%	75%	100%
Utah	33%	67%	100%	42%	58%	100%
Louisiana	27%	73%	100%	18%	82%	100%
Florida	40%	60%	100%	18%	82%	100%

When looking at visitor origin by household composition, the data show that a large percentage of empty-nesters come from Texas (26 percent of empty nesters), while households with children living at home were primarily from New Mexico (23 percent) and Colorado (19 percent). Of the households with no children living at home, singles were primarily from Texas (19 percent), New Mexico (19 percent), and Colorado (17 percent), while couples were primarily from Colorado (20 percent) and New Mexico (19 percent).

The origins of visitors by county are illustrated in the following figure. It shows specifically the draw of Pagosa Springs from areas in Texas, New Mexico, Colorado, Arizona, and California, which are further probed in the next section of visitor origin by Designated Market Area (DMA).

FIGURE 2  
 PAGOSA SPRINGS VISITOR DISTRIBUTION BY COUNTY OF PRIMARY RESIDENCE



When looking more closely at these areas by Designated Market Area (DMA) to examine the relative draw from major metropolitan areas, Albuquerque, Santa Fe, Denver, Dallas, and Phoenix were the primary markets followed by Colorado Springs, Los Angeles, and Houston. By this measure, Pagosa Springs is primarily a regional draw with 62 percent of its visitors originating in the southwest. This represents both opportunities and challenges in terms of marketing.

When looking at the origin of certain visitor types, there is a higher concentration of repeat visitors from the Albuquerque/Santa Fe and Denver markets than new visitors. First-time visitors are more likely from areas other than the top 12, compared to 38 percent of overall visitors and 31 percent of previous visitors). This is a positive indication that new visitors in a wide variety of areas are hearing about Pagosa Springs as a vacation spot. When looking specifically at first-time visitors who stayed overnight in Pagosa Springs, the largest proportion were from the Albuquerque/Santa Fe, Denver, and Dallas/Fort Worth areas. The Los Angeles market also had a relatively high percentage of first-time overnight visitors (5 percent), compared to 3 percent of overall visitors who were from the Los Angeles area.

TABLE 4  
VISITOR ORIGIN BY DESIGNATED MARKET AREA, BY VISITOR TYPE

	Overall	First-time visitor	Previous Visitor	First-time visitor		Previous visitor	
				Day visitor	Overnight visitor	Day visitor	Overnight visitor
<b>TOP DESIGNATED MARKET AREAS</b>							
Albuquerque - Santa Fe -- AZ, CO, NM	18.8%	10.4%	<b>24.6%</b>	6.6%	12.6%	24.0%	22.8%
Denver -- CO, MT, NE, NV, SD, WY	9.6%	6.2%	11.6%	2.6%	8.2%	12.4%	11.0%
Dallas - Fort Worth -- TX	7.4%	7.9%	6.9%	7.9%	<b>8.2%</b>	9.1%	6.0%
Phoenix -- AZ, CA	6.7%	<b>8.7 %</b>	5.4%	10.5%	7.5%	5.8%	5.7%
Colorado Springs - Pueblo -- CO	3.5%	2.5%	3.8%	2.6%	2.5%	6.6%	2.5%
Los Angeles -- CA	3.2%	<b>4.1%</b>	2.4%	2.6%	<b>5.0%</b>	1.7%	2.8%
Houston -- TX	2.9%	3.7%	2.6%	5.3%	2.5%	1.7%	3.2%
Oklahoma City -- OK	2.2%	1.2%	2.8%	1.3%	1.3%	5.0%	1.8%
Austin -- TX	1.9%	0.8%	2.4%	2.6%		2.5%	2.5%
Wichita - Hutchinson -- KS, NE, OK	2.0%	0.8%	2.1%	2.6%		3.3%	1.8%
Tulsa -- KS, OK	1.7%	0.4%	2.6%	1.3%		3.3%	2.5%
Salt Lake City -- CO, ID, NV, UT	1.7%	1.7%	1.9%	3.9%	0.6%	1.7%	2.1%
Other DMAs	38.4%	<b>51.6%</b>	30.9%	50.2%	51.6%	22.9%	35.3%
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

\*Designated Market Areas (DMA) (also known as Area of Dominant Influence, ADI) are non-overlapping areas consisting of groups of counties surrounding a city in which broadcast stations based in that city reach.

TABLE 5  
VISITOR TYPE OF TOP DESIGNATED MARKET AREAS

	First-time visitor	Previous Visitor	TOTAL
<b>TOP DESIGNATED MARKET AREAS</b>			
Albuquerque - Santa Fe -- AZ, CO, NM	19%	81%	100%
Denver -- CO, MT, NE, NV, SD, WY	23%	77%	100%
Dallas - Fort Worth -- TX	40%	60%	100%
Phoenix -- AZ, CA	48%	52%	100%
Colorado Springs - Pueblo -- CO	27%	73%	100%
Los Angeles -- CA	50%	50%	100%
Houston -- TX	45%	55%	100%
Oklahoma City -- OK	20%	80%	100%
Austin -- TX	17%	83%	100%
Wichita Falls & Lawton -- OK, TX	--	100%	100%
Tulsa -- KS, OK	8%	92%	100%
Salt Lake City -- CO, ID, NV, UT	33%	67%	100%

Empty-nesters are also less concentrated in the top markets than other respondents, with 44 percent of respondents from areas outside the top 12 markets, most likely representing retirees and the touring market who have more time and resources to travel longer distances and for larger periods of time. Other visitors are relatively more concentrated in the top markets (as shown in the following table), particularly households with children from Albuquerque/Santa Fe and couples without children from Denver and Phoenix.

TABLE 6  
VISITOR ORIGIN BY DESIGNATED MARKET AREA

	Overall	Single, no children	Couple, no children	Children at home	Empty-nester
<b>TOP DESIGNATED MARKET AREAS</b>					
Albuquerque - Santa Fe -- AZ, CO, NM	18.8%	22.0%	19.1%	<b>26.7%</b>	<b>14.2%</b>
Denver -- CO, MT, NE, NV, SD, WY	9.6%	9.8%	<b>14.7%</b>	10.4%	8.4%
Dallas - Fort Worth -- TX	7.4%	9.8%	5.9%	5.0%	8.4%
Phoenix -- AZ, CA	6.7%	4.9%	<b>10.3%</b>	4.5%	7.4%
Colorado Springs - Pueblo -- CO	3.5%	4.9%	2.9%	5.4%	2.2%
Los Angeles -- CA	3.2%	7.3%	1.5%	4.5%	2.5%
Houston -- TX	2.9%	2.4%	1.5%	2.0%	3.8%
Oklahoma City -- OK	2.2%		2.9%	2.5%	2.2%
Wichita - Hutchinson -- KS, NE, OK	2.0%		1.5%	2.0%	2.5%
Austin -- TX	1.9%	4.9%	1.5%	2.0%	1.6%
Tulsa -- KS, OK	1.7%	2.4%	2.9%	1.0%	1.9%
Salt Lake City -- CO, ID, NV, UT	1.7%		2.9%	3.0%	1.1%
Other DMAs	38.4%	31.6%	32.4%	31.0%	<b>43.8%</b>
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%

\*Designated Market Areas (DMA) (also known as Area of Dominant Influence, ADI) are non-overlapping areas consisting of groups of counties surrounding a city in which broadcast stations based in that city reach.

## ADVERTISING AND WEB SITE

### Advertisement Awareness

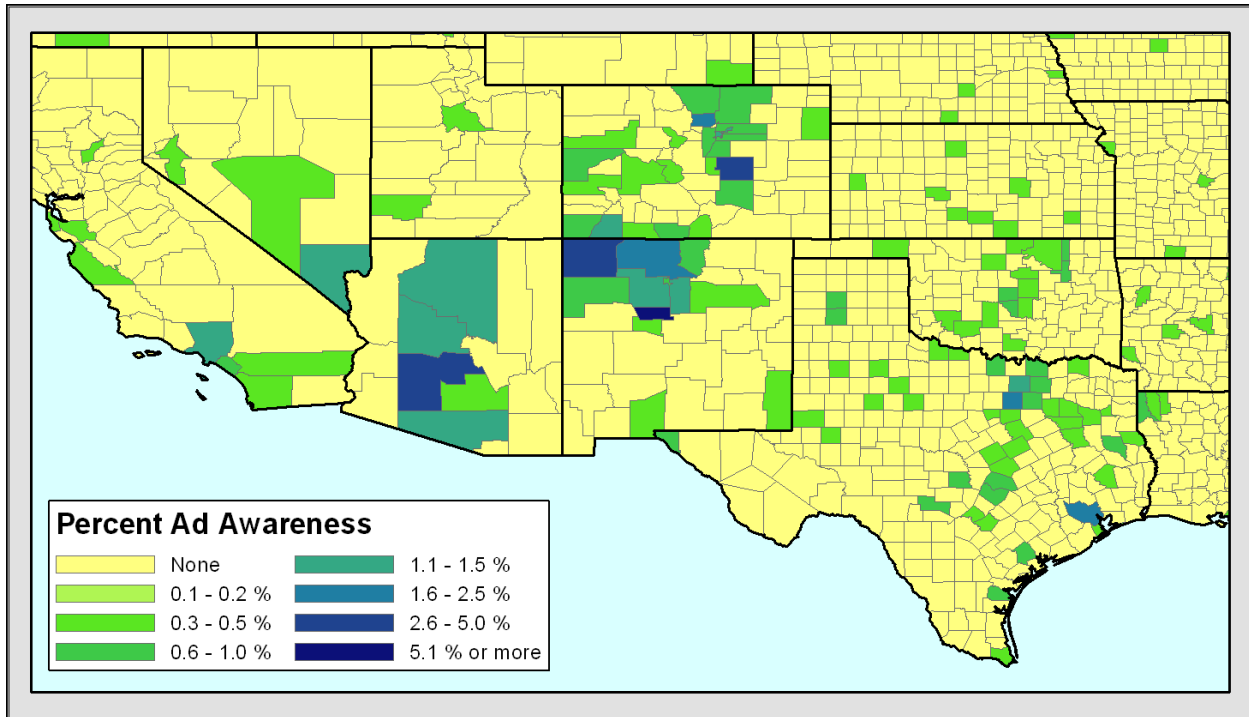
Respondents were asked about their awareness of advertisements for Pagosa Springs prior to their trip and which methods of advertisement they recalled. Overall, 49 percent of all respondents recalled seeing or hearing an advertisement about Pagosa Springs prior to their trip. This shows a significant improvement over 2004 when 27 percent of visitors recalled seeing or hearing an ad for Pagosa prior to their trip.

Awareness and ad recall was higher among empty-nesters (55 percent), day visitors (52 percent), and as expected, previous visitors (56 percent). The data show that 38 percent of first-time visitors recalled seeing or hearing ads prior to their visit and 46 percent of overnight visitors recalled ads.

When looking specifically at awareness of ads among Pagosa’s main geographic markets, visitors from Colorado and Texas were the most likely to have seen or heard advertisements, with 56 percent of Colorado visitors and 53 percent of Texas visitors indicating that they had seen or heard an advertisement prior to their trip. While ad awareness was lower among visitors from New Mexico and Arizona, both states were at consistent levels with the overall average (49 percent and 48 percent, respectively).

As shown in the following map, respondents who were aware of advertisements were primarily concentrated in Arizona, northern New Mexico, and the Colorado Front Range. While Texas has a high percentage of visitors who were aware of Pagosa’s advertisements, they are more spread out throughout the entire state rather than concentrated in metro areas.

FIGURE 3  
 PAGOSA SPRINGS AD AWARENESS BY COUNTY OF PRIMARY RESIDENCE



The following table shows ad awareness among respondents from each of the top 12 states. The top four states, by total visitation, (Texas, New Mexico, Colorado, and Arizona) have similar levels of awareness (between 48 and 56 percent of respondents recalled seeing an ad prior to their trip). The states with the highest level of ad awareness were Louisiana, Oklahoma, Colorado and Texas.

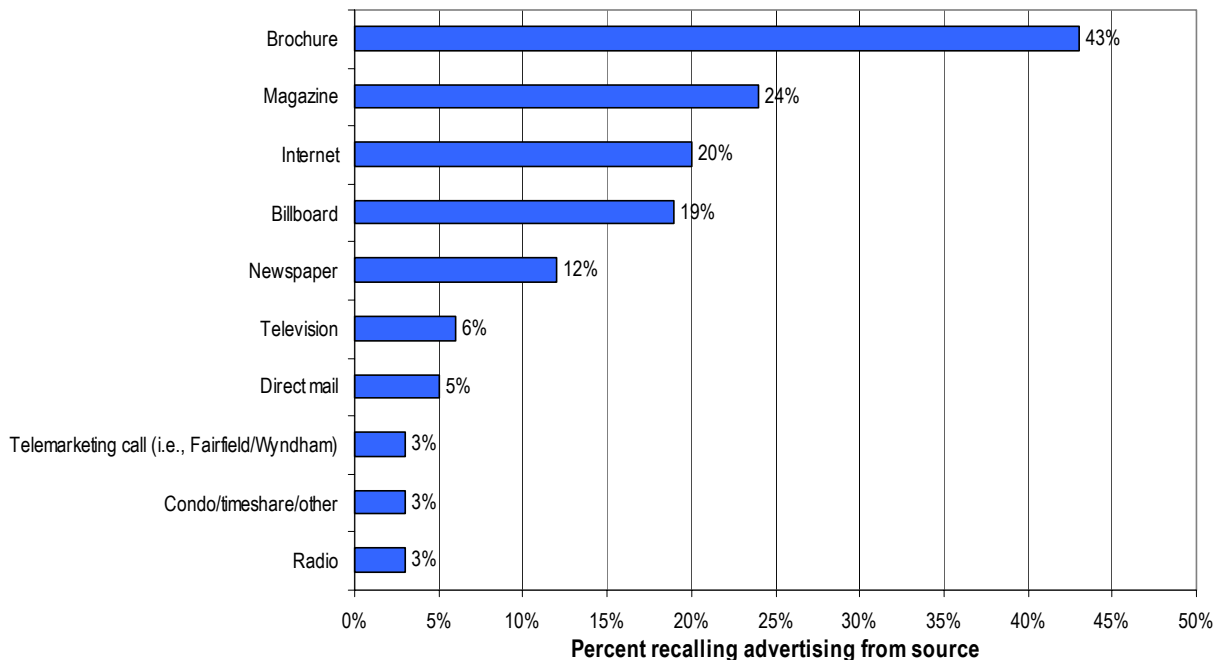
TABLE 7  
AD AWARENESS BY STATE

STATE OF RESIDENCE	Prior to this trip, do you recall seeing or hearing any advertisements about Pagosa Springs?		
	Yes	No	TOTAL
Texas	53%	47%	100%
New Mexico	49%	51%	100%
Colorado	56%	44%	100%
Arizona	48%	52%	100%
California	34%	66%	100%
Oklahoma	67%	33%	100%
Kansas	44%	56%	100%
Missouri	33%	67%	100%
Ohio	25%	75%	100%
Utah	17%	83%	100%
Louisiana	73%	27%	100%
Florida	27%	73%	100%

**Source of Advertisements**

Of the respondents who indicated they had seen or heard an ad for Pagosa Springs before their visit, brochures were the most mentioned method (by 43 percent of overall respondents), followed by magazines (24 percent), Internet (20 percent), billboards (19 percent), and newspapers (12 percent). Sources cited less frequently were television (6 percent), direct mail (5 percent), radio (3 percent), condos/timeshares (3 percent), and telemarketing calls (3 percent).

FIGURE 4  
SOURCE OF ADVERTISEMENT



In comparison to 2004, recall of brochures increased (29 percent in 2004, compared to 43 percent this year) along with billboards (9 percent in 2004, compared to 19 percent currently). Recall of Internet ads remained the same at 20 percent, while recall of newspaper ads declined from 20 percent in 2004 to 12 percent this year.

First time-visitors were more likely to have seen an ad on the Internet than previous visitors (30 percent, compared to 15 percent), while previous visitors were more likely to have seen or heard an ad or article in a magazine, billboard, or newspaper. When comparing day and overnight visitors, day visitors were more likely to have awareness of brochures, while overnight visitors indicated that they had seen ads/articles on the Internet more than the overall average.

Analysis of advertisement sources by family status indicated that brochures were a particularly effective method of reaching empty-nesters, while the Internet was relatively effective for reaching other households. Similarly, respondents between the age of 21 and 35 indicated that the Internet and billboards were the main sources of where they had seen or heard about Pagosa prior to their trip (33 percent of respondents in this age group indicated each of these).

Ad source data by state origin of respondents was consistent with overall responses with the exception of the following sources which were cited more frequently in the states listed:

<b>Source:</b>	<b>Cited more frequently by respondents in:</b>	<b>Compared to Overall Response Average:</b>
Brochure	Texas (52 percent) and Arizona (44 percent)	43 percent
Internet	New Mexico (24 percent)	20 percent
Billboard	Texas (27 percent) and New Mexico (24 percent)	19 percent
Newspaper	Colorado (30 percent)	12 percent

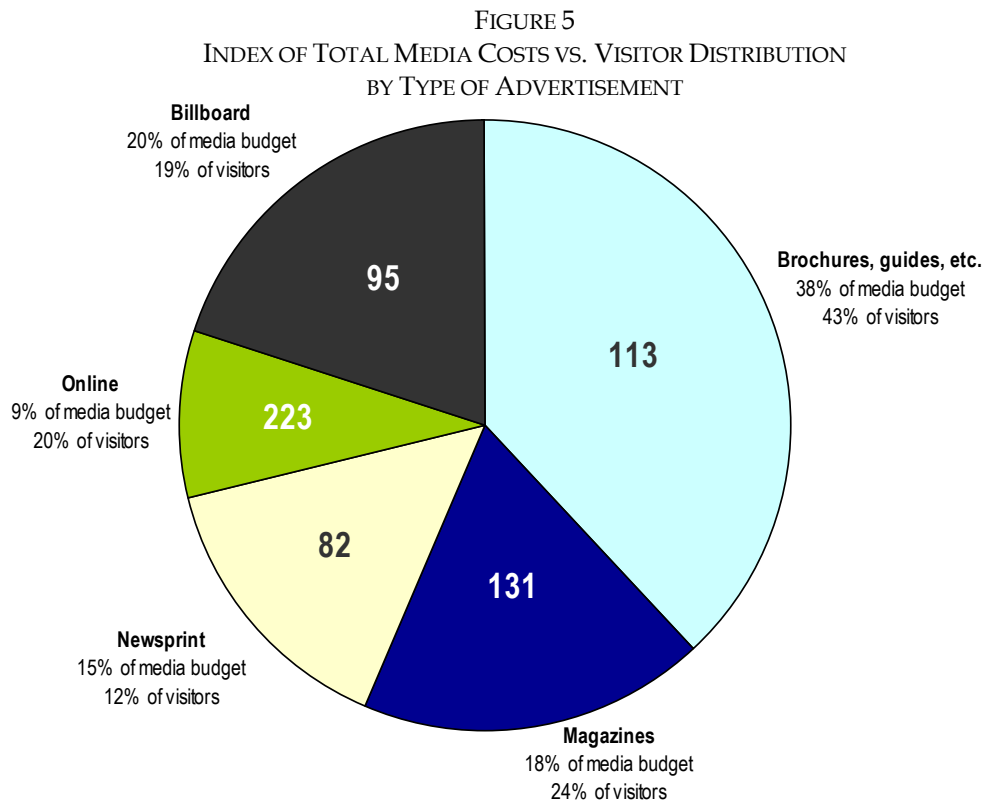
The follow-up survey also asked respondents' awareness of the new advertising campaign currently used for Pagosa Springs "What's your rush?" Only 6 percent of respondents overall indicated they were aware of the campaign, but awareness was slightly higher among previous visitors to Pagosa Springs, empty-nesters, and respondents between the ages of 55 and 64 (9 percent of each segment indicating awareness). Of the open-ended comments provided, respondents indicated the advertising campaign was an accurate statement of Pagosa's atmosphere, but was not always memorable (a sampling of comments is shown below).

- Accurate representation of laid back resort / spa / golf activities.*
- Did not influence our stay, but, was catchy.*
- Nice catch phrase*
- Okay, but I didn't remember it until it was asked.*

The following chart depicts the approximate percent breakdown of the Town's tourism media budget. Brochures, guides, and directories make up the largest proportion of the media budget (38 percent), followed by billboards (20 percent), magazines (18 percent), newsprint (15 percent), and Online (9 percent). Also listed in the chart are the proportions of Pagosa visitors who recalled seeing advertisements or articles for each of the sources, along with an index calculation based on the proportion of visitors per media type to the proportion of budget spent per media type (index scores greater than 100 indicate more visitors recalled the media type

than was proportionately spent on it and scores less than 100 indicate more is being spent proportionately on the media type than is generating visitors).

The proportions spent on each media type overall are relatively congruent with the percent of visitors who recalled each of these advertisement types. While newsprint and billboards had lower index scores, the difference was rather small and therefore indicates relatively efficient usage of the budget. Brochures, guides, and directories and Magazines had higher scores, but Internet was by far the most significant source of ad recall in terms of the amount of visitors in comparison to the cost.



## Website

Visitors were also asked if they consulted Pagosa Springs’ website prior to their visit. Overall, 20 percent of respondents indicated that they did consult the website. In regards to visitor type, first-time visitors were more likely to visit the website than repeat visitors (23 percent compared to 18 percent) and overnight visitors more than day visitors (27 percent compared to 5 percent).

Based on the responses of ad awareness from the Internet among singles, couples, and households with children, it is no surprise that these household types yielded higher levels of Website visitation prior to their visit than empty-nesters. Households with children at home were the most likely to have visited Pagosa’s website (28 percent of respondents), followed by 23 percent of couples with no children, 21 percent of singles, and 14 percent of empty-nesters. Pagosa’s primary target audiences had similar levels of website visitation as the overall average.

Specifically, 24 percent of 36-54 year-olds had visited Pagosa’s website before their trip and 23 percent of 21-35 year-olds had visited the website.

Usage of Pagosa’s website was highest among visitors from Arizona (26 percent of visitors had visited the website prior to their trip), Colorado (23 percent), and New Mexico (21 percent). Visitors from Texas were substantially less likely to have used the website (14 percent), which is consistent with the usage level of empty-nesters overall, which make up a large proportion of visitors from Texas.

The follow-up survey asked respondents who had visited Pagosa’s website to rate it overall. Ratings of the site were favorable, with 70 percent rating the site “very good” or “excellent,” and only 4 percent indicating that it was “poor.”

**VACATION PATTERNS**

Table 6 below shows vacation patterns of respondents overall and specifically broken out by first-time and previous visitors. The average size of each travel party was 3.6 people, although 48 percent indicated that they were traveling with only one other person. The majority of respondents were overnight visitors in the area (68 percent). The average trip length was almost 14 days, with 71 percent of respondents indicating that they would be away from home for six or more nights on their current trip. On average, respondents stayed in Pagosa Springs for approximately five nights during their trip, with 55 percent of respondents staying there two nights or less (including visitors who indicated “0” nights in Pagosa, day visitors).

*First-Time vs. Previous Visitor:* As shown in the following table, the average travel party size for first-time and repeat visitors was consistent with overall visitors (between 3.6 and 3.8). While first-time visitors tended to take longer trips (15.2 nights, compared to 12.7 nights), repeat visitors stayed in Pagosa Springs slightly longer during their trip (5 nights for repeat visitors compared to 4.7 nights for first-time visitors).

TABLE 8  
VACATION PATTERNS

	Overall	First-time Visitor	Previous Visitor
<b>Number of people in travel party</b>			
By yourself	5%	3%	7%
2 people	48%	47%	47%
3-5 people	35%	38%	34%
6-10 people	8%	7%	9%
More than 10 people	4%	4%	3%
Average	3.6	3.8	3.6
<b>Are there children under 18 in your party?</b>	31%	33%	30%
<b>Number of people in travel party aged 7 or under</b>			
None	80%	77%	80%
One or more	20%	23%	20%
Average	0.4	0.3	0.4
<b>Number of people in travel party aged 8-12</b>			
None	84%	83%	84%
One or more	16%	17%	16%
Average	0.3	0.3	0.2

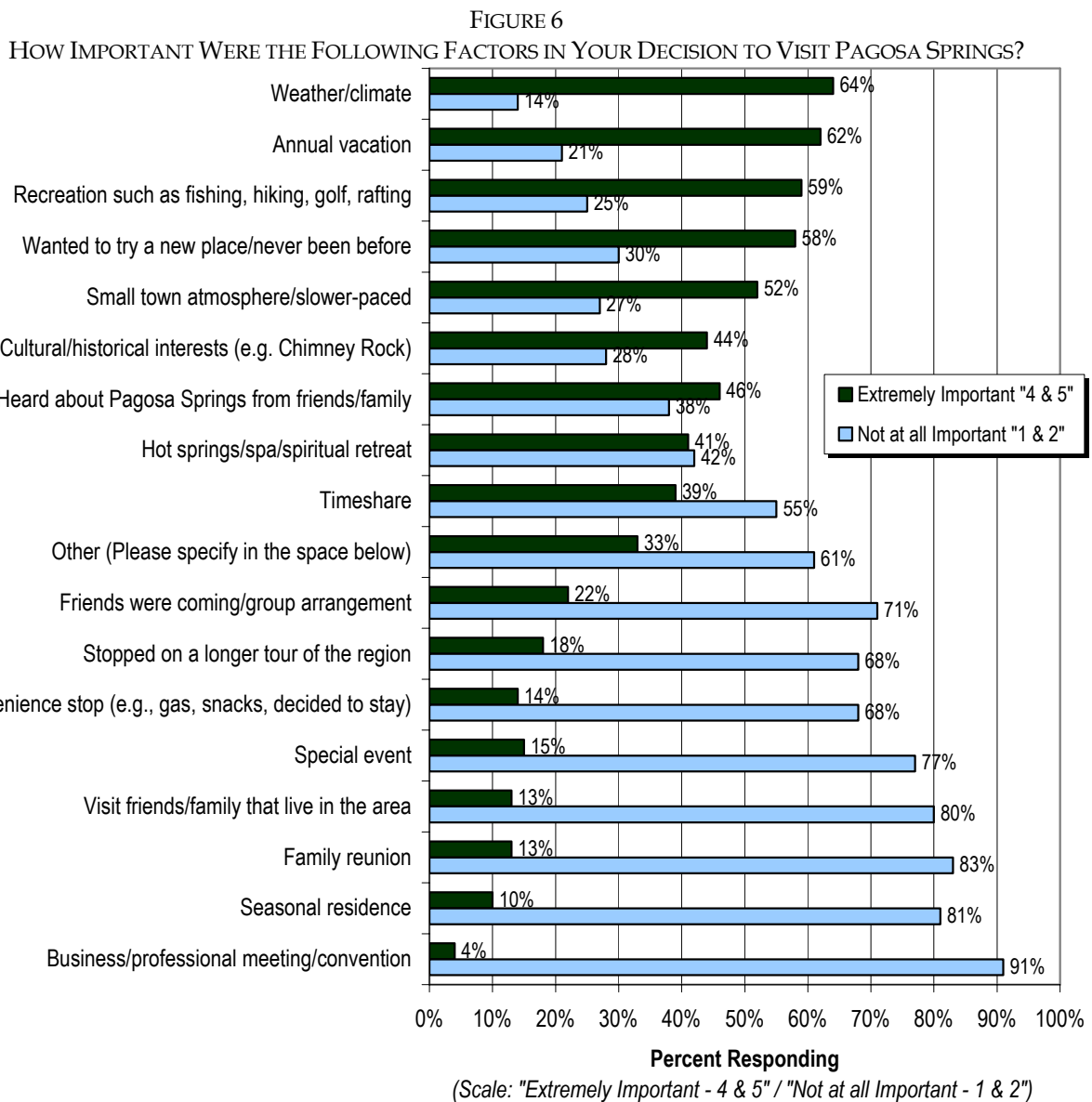
<b>Number of people in travel party aged 13-17</b>			
None	86%	86%	86%
One or more	14%	14%	14%
<i>Average</i>	0.2	0.2	0.3
<b>Visitor Type</b>			
Staying overnight in the area	68%	66%	69%
Visiting the Pagosa Springs area just for the day	32%	34%	31%
<b>If from outside Colorado, how did you travel to Colorado? (Follow-up survey)</b>			
Private vehicle	66%	--	--
Airline	22%	--	--
Rental vehicle	5%	--	--
RV	4%	--	--
Train	1%	--	--
Other	2%	--	--
<b>IF from Colorado, or once you arrived in Colorado, what was your primary method of travel to Pagosa Springs? (Follow-up survey)</b>			
Private vehicle	70%	--	--
Rental vehicle	25%	--	--
RV	3%	--	--
Other	1%	--	--
<b>Number of nights away from home</b>			
None	2%	--	3%
1-2 nights	10%	6%	13%
3-5 nights	17%	13%	19%
6-10 nights	38%	45%	34%
More than 10 nights	33%	36%	31%
<i>Average</i>	13.7	15.2	12.7
<b>Number of nights in the Pagosa Springs area this trip</b>			
None	32%	34%	31%
1-2 nights	23%	22%	24%
3-5 nights	17%	16%	17%
6-10 nights	20%	22%	19%
More than 10 nights	8%	6%	9%
<i>Average</i>	4.8	4.7	5
<b>Accommodations Type (Follow-up survey)</b>			
Timeshare	43%	--	--
Hotel/motel	21%	--	--
Stayed with family/friends	7%	--	--
Rented condominium	7%	--	--
Rented home/duplex	6%	--	--
Tent campground	4%	--	--
RV Park	4%	--	--
Guest ranch	4%	--	--
Own accommodations	2%	--	--
Bed and Breakfast	2%	--	--
Other	6%	--	--

A follow-up question asked visitors where they spent the night before they arrived in and after they left Pagosa Springs. The responses varied, though some common destinations emerged repeatedly, suggesting possible partnerships or packages with these locations. Some of the most common other areas were Denver, Colorado Springs, Durango, Albuquerque, and Santa Fe. The full list of responses to this question is included in the appendix of this report.

The majority of visitors from outside Colorado (approximately 66 percent) drove their own car to Pagosa Springs. Among out of state visitors, about 22 percent arrived in Colorado by airplane and 5 percent by rental vehicle, and 4 percent by RV. Timeshares were the most identified accommodations type among visitors, indicated by 43 percent of overnight visitors, followed by hotel/motel (21 percent), stayed with friends/family (7 percent), and rented a condominium (7 percent). Fairfield and Wyndham particularly stood out among the open-ended comments of the property or accommodations which respondents indicated they stayed at.

**REASONS FOR VISITING PAGOSA SPRINGS**

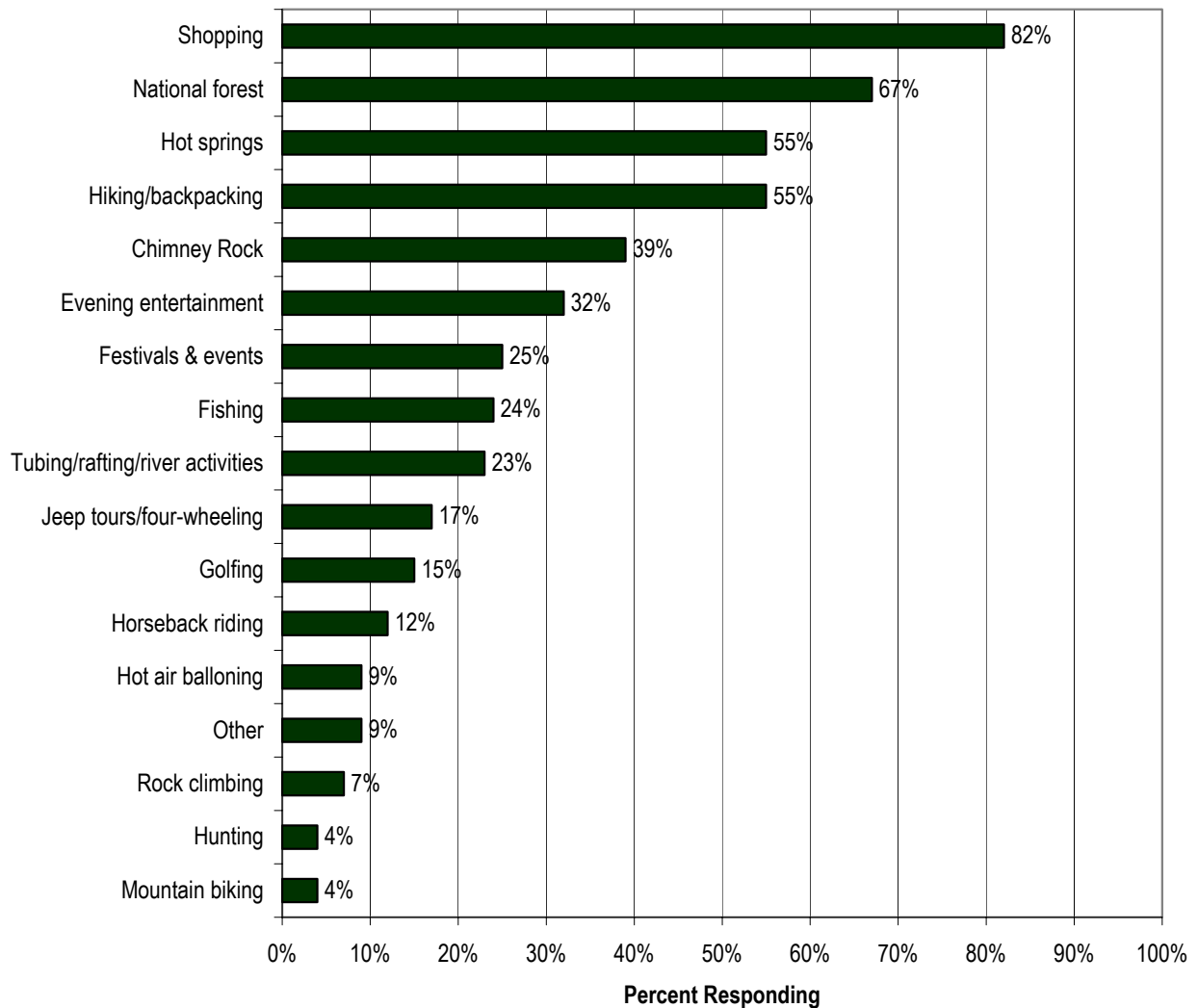
In an effort to identify the reasons behind visitors’ decisions to come to Pagosa Springs, respondents to the follow-up survey were asked to rate the importance of various factors in terms of how influential those factors were in the overall trip decision. As shown in the figure below, the more important factors overall were weather/ climate (64 percent of respondents rating it as a 4 or 5 on a 5-point scale, with 5 being “extremely important” and 1 “not important at all”), annual vacation (62 percent), recreation (such as fishing, hiking, golfing, and rafting) (59 percent), “wanted to try a new place/never been before (58 percent), and small-town atmosphere/slower-paced (52 percent), all of which potentially overlap to a certain degree and point to the fact that the surrounding natural environment and atmosphere of Pagosa Springs are the primary drivers for visiting.



**ACTIVITIES**

Respondents were asked in which activities they had participated while in Pagosa Springs. The participation levels in different activities are presented in the following figure, with shopping, National Forest, hot springs, and hiking/backpacking showing the highest percentages of participation (55-82 percent).

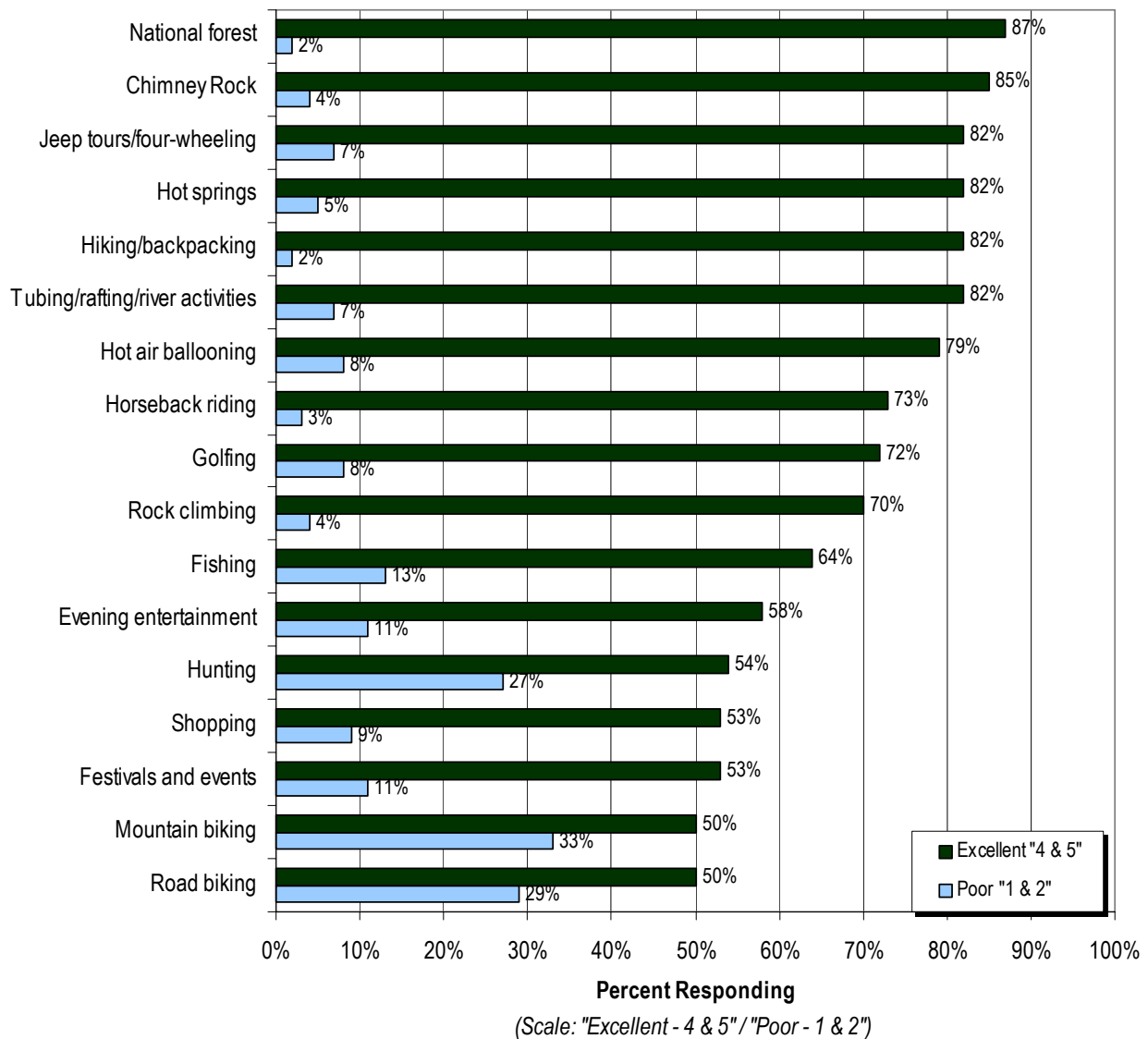
FIGURE 7  
IN WHICH ACTIVITIES DID YOU PARTICIPATE WHILE IN PAGOSA SPRINGS?



Respondents were then asked to rate their experience with each activity that they participated in. Most activities were rated relatively high, especially outdoor activities such as the National forest, Chimney Rock, jeep tours/four-wheeling, hot springs, hiking/backpacking, and tubing/rafting/river activities. When looking at these ratings relative to the participation rates described above, most activities with high participation rates were also rated positively,

particularly in regards to the National Forest. However, the satisfaction of shopping was relatively low (53 percent of respondents rated it as “excellent”) in comparison to the percentage of visitors who indicated they shopped while in Pagosa Springs (82 percent). This indicates a potential opportunity to expand and improve an aspect of the visitor experience of which already has a high level of participation. The segments of visitors who rated shopping the lowest include households with children (49 percent rating shopping as a 4 or 5) and visitors between the ages of 55 and 64 (47 percent), creating a potential opportunity for increased retail options to reach these segments. When looking at shopping ratings by various visitor types, day and overnight visitors were both consistent to the overall respondents (53 percent), but previous visitors were more likely to rate the shopping higher than first-time visitors (56 percent, compared to 51 percent).

FIGURE 8  
RATINGS OF ACTIVITIES IN WHICH YOU PARTICIPATED



**DAILY EXPENDITURES**

On the mailback and web followup surveys, day and overnight visitors were asked to estimate their party’s total expenditures per day during their stay in Pagosa Springs. For purposes of this report, these figures have been divided through by party size, so the results can be reported in terms of average per capita daily spending.

Visitors were asked about their specific spending on lodging, rental vehicles, dining, shopping, recreation/entertainment, and local transportation. Taking into account expenditures in all categories, visitors on average spent approximately \$150 per person per day while in Pagosa Springs.

TABLE 9  
AVERAGE EXPENDITURES

	<b>Average Expenditures</b>
Accommodations (nightly room rate)	\$91
Rental vehicle (daily rate)	\$45
Dining (per person per day)	\$39
Shopping (per person per day)	\$36
Recreation/entertainment (per person per day)	\$44
Local transportation (per person per day)	\$16
<b>TOTAL (per person per day)*</b>	<b>\$150</b>

\*Categories do not sum to total because accommodations and rental vehicle rates were divided by party size for "TOTAL" calculation.

**EXPERIENCE RATINGS**

As shown in the figure on the following page, ratings of visitors’ experience while in Pagosa Springs were quite positive overall.

Respondents were asked whether they “went into any stores during their stay in Pagosa Springs.” Ninety-one percent of respondents (including overnight and day visitors) went into at least one store while in Pagosa Springs. Ratings of the shopping experience were generally positive, in contrast to the low rating of shopping previously mentioned in the activities section. Customer service at shops was rated the highest (82 percent of respondents rating it as “excellent,” a 4 or 5 on a 5-point scale), followed closely by the “overall shopping experience” (74 percent) and quality of shops (73 percent). Rated slightly lower were the value for price paid (65 percent) and the variety of shops (63 percent, consistent with the rating of 64 percent in 2004).

Ratings of the dining experience were favorable, with food quality (81 percent), customer service (81 percent), and overall dining experience (79 percent) rated the highest. Similar to the shopping ratings, the value for price paid (69 percent) and the variety of restaurants to choose from (68 percent) were rated lower than the other dining categories.

Comments offered about visitors' shopping and dining experiences offer suggestions for extending evening shop and restaurant hours and increasing the variety of shops and restaurants available. A sampling of comments is included below.

*Not enough shops.*

*Only found 1 really small movie theater, for summer event outside theaters are an option*

*Shopping required driving to different stores, so we didn't.*

*Shops closed very early*

*The shops need to stay open later. Our event lasted until late afternoon and the shops were closed when we got out.*

*Would like a little more entertainment for the evenings. We found nothing except to go out and eat.*

Ratings of lodging properties were also favorable overall, with the "friendliness of lodging employees" rated the highest (86 percent). Also rated quite positively were the overall satisfaction with lodging (82 percent), overall quality of lodging (82 percent), and cleanliness/housekeeping (81 percent).

In regards to visitors' pedestrian experience while in town, "overall experience" (97 percent) and "overall sense of safety" (91 percent) were rated very positively.

Visitors were also asked about their experience finding parking in Town. The majority of respondents (94 percent) indicated that their ability to find a parking space downtown was about as expected or easier than expected. When asked how the parking affected their overall downtown experience, 27 percent of respondents said that it had a positive impact on their experience and 67 percent said it had no impact (positive or negative) on their overall experience. Most comments offered in regard to parking were positive, but included some suggestions for improvement. The following is a sampling of comments.

*During a busier season I am sure that you need more parking downtown.*

*Found it much better than most cities*

*I have a disability and need more handicapped parking. I wanted to go downtown to shop or go to the hot springs. I could not do it because of the parking problems.*

*Improved signage would be most helpful.*

*no, but would have liked sidewalk connection between businesses so I would not have to drive.*

*The parking areas are nicely located near businesses.*

*Very easy access*

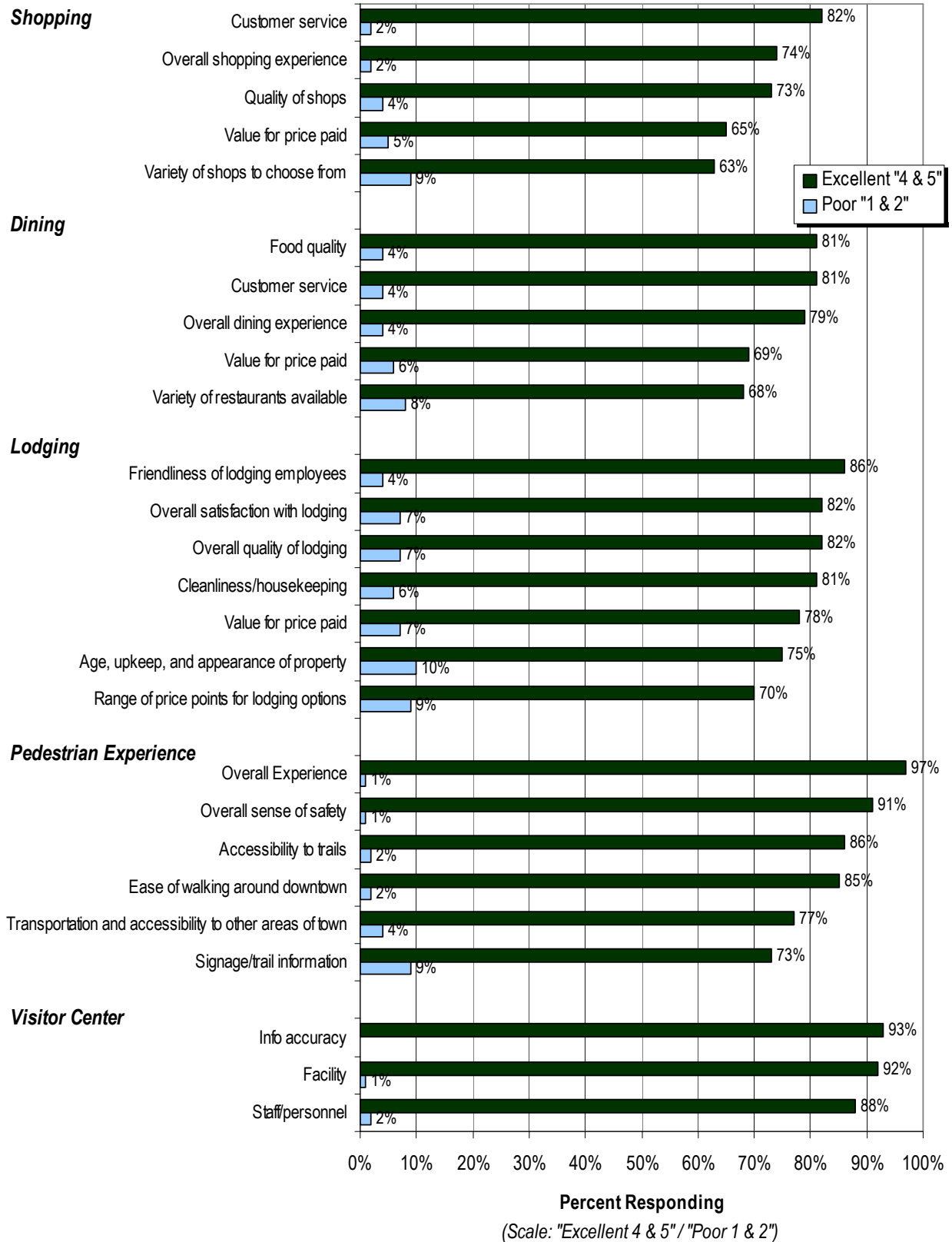
*We didn't have any problems.*

*We have always been able to find a parking space. Sometimes it wasn't close, but walking is not an issue for us.*

*Yes, need better parking, and run a small bus to the parking area. Weekend not much of a problem*

Visitors who had been to the Visitor Center in Pagosa Springs were asked to rate their experience there. Overall information accuracy was rated the highest (93 percent), followed by the facility (92 percent), and staff/personnel (88 percent).

FIGURE 9  
EXPERIENCE RATINGS



## **MOST MEMORABLE EXPERIENCE**

Respondents were given the opportunity to describe their “most memorable experience in Pagosa Springs.” This question drew a significant number of responses, which have been included as an attachment to this document. Of the most notable experiences and places listed, the natural setting, mountains, scenic views, and beauty were the most commonly listed; the hot springs, Chimney Rock, and hiking were of particular recollection. Other experiences and attributes of Pagosa Springs mentioned were rafting, hot air balloon rides, and the small-town atmosphere. These results are worthy of consideration as Pagosa Springs refines advertising and messaging and looks to visitor descriptions “in their own words” to promote the experience.