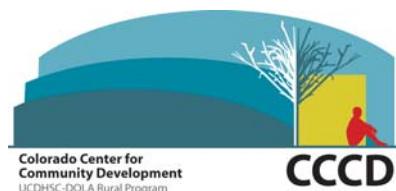


Colorado Scenic Byways Market Niche Study



Santa Fe Trail

June 2008



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Executive Summary

This supplemental report provides a review of key findings from data collected on the Santa Fe Trail Scenic and Historic Byway in the summer of 2007. Eight additional supplemental reports provide analysis and key findings for each of the following byways included in this study:

- Colorado River Headwaters
- Dinosaur Diamond
- Frontier Pathways
- Gold Belt Tour
- Grand Mesa
- San Juan Skyway
- Top of the Rockies
- Trail of the Ancients

Aggregate results of study findings, as well as a review of the survey instrument and methodology appears separately in *Colorado Scenic Byways Market Niche Study: Report of Comprehensive Results*.

Santa Fe Trail Survey Results

Surveys were conducted on the Santa Fe Trail Scenic Byway June 6-10, 2007. One-hundred-eighty-two (182) surveys were administered at the following seven locations:

- Colorado Welcome Center, Trinidad
- Santa Fe Trail Days Festival, Trinidad
- Bent's Old Fort National Historic Site, La Junta
- Boggsville Historic Site, Las Animas
- Kit Carson Museum, Las Animas
- Big Timbers Museum, Lamar
- Colorado Welcome Center, Lamar

Approximately 67% of surveys were conducted on weekdays, and 33% on the weekend. Some of the key findings include:

- Respondents reported the smallest travel parties, an average travel party of 2.6 persons.
- Santa Fe Trail had the 2nd lowest proportion of respondents traveling with children under the age of 18, only about 27% of those surveyed
- Similarly, the Santa Fe Trail had the second lowest % of persons estimated to be age 35 to 50, the group most likely to be traveling with children.
- Santa Fe Trail had the highest % of travelers age 67 and above, roughly 30% of those surveyed.

- Respondents averaged trips of 1,689 miles and 8.5 days or 1,300 miles and 5 days at the median.
- Thirty-five percent (35%) originated from Colorado, including 22% who originated from the Front Range.
- Fifty-seven percent (57%) originated within 499 miles of the byway.
- Fifty-seven percent (57%) reported a destination on the byway.
- Roughly four of ten reported visiting the byway at least annually.

About the Byway

The Santa Fe Trail Scenic and Historic Byway follows roughly the same route as the historic Santa Fe Trail. From the Kansas border the byway runs west through Lamar, and Las Animas on U.S. Highway 50. At La Junta, the byway turns southwest on U.S. Highway 350, joining Interstate 25 at Trinidad and continuing south into New Mexico.

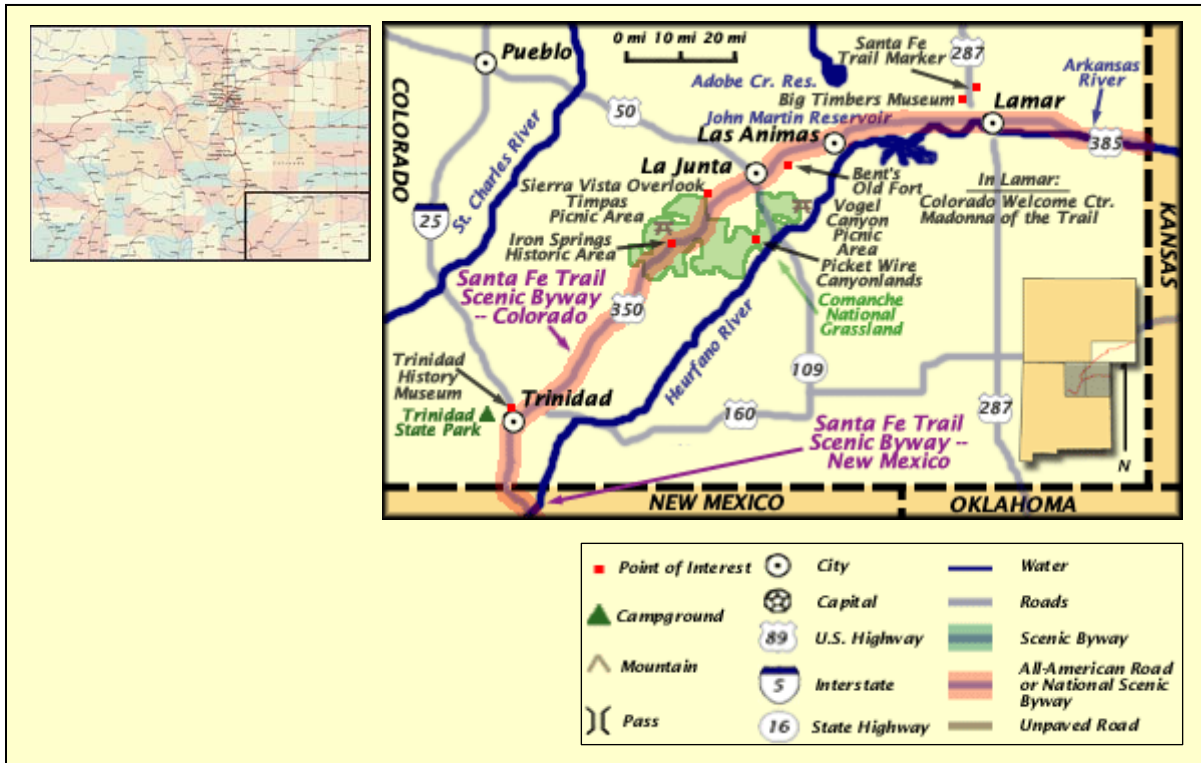
In addition to magnificent vistas of the wide open plains, the Santa Fe Trail Scenic Byway is rich in history. At Boggsville, visitors can tour a series of restored historic structures that comprised an agrarian community from the mid-1800s. Bent's Old Fort National Historic Site, near Las Animas, is a massive adobe fort that once served as a center of commerce, a meeting place and shelter from weather and hostile forces. Several museums in Lamar, Las Animas and La Junta offer additional opportunities to explore the region's cultural heritage and include the Big Timbers Museum in Lamar, the Kit Carson Museum in Las Animas, and the Koshare Indian Museum and Otero Museum in La Junta.

Comanche National Grassland lies just to the east of the byway between La Junta and Trinidad. The grasslands occupy over 440,000 acres of land filled with golden prairie, juniper canyonlands, breathtaking sunsets and spectacular wildlife viewing. The grasslands are home to a wide variety of wildlife including the Golden Eagle, Swift Fox and Lesser Prairie Chicken. Comanche National Grasslands is also home to one of the largest documented dinosaur trackways in North America, with over 1,300 visible tracks. In addition, visitors can examine ancient rock art dating back 1,500 years, walk sections of the original Santa Fe Trail, and view abandoned homesteads dating back to the mid 1800s.

Trinidad is the largest town along the Colorado portion of the byway. The Trinidad History Museum, located in Trinidad's historic downtown, includes the Santa Fe Trail Museum and two historic mansion homes chronicling the lives of two prominent Trinidad families during the late 19th century. The Santa Fe Trail Museum displays historic photographs, commercial goods, and family heirlooms from Trail days through Trinidad's heyday at the turn of the century.

From Trinidad, the byway joins Interstate 25 passing over Raton Pass, a National Historic Landmark, before continuing south into New Mexico.

Figure 1: Santa Fe Trail Scenic Byway and Surrounding Areas



Characteristics of the Byway Traveler

Age and Gender

Fifty-two percent (52%) of survey respondents were male, and 48% female. Respondents reported the number of persons traveling with them. On the Santa Fe Trail, respondents reported traveling with an additional 225 persons, for a total of 407 respondents and respondent travel party members. Of this total, approximately 50% were female and 50% male.

In addition to gender, surveyors recorded an estimate of respondent age according to the following age classifications: under 20, 20 to 34, 35 to 50, 51 to 66 and 67 and above. Approximately 30% were estimated to fall in the 35 to 50 age group, and approximately 30% in the 67 and above age group. Roughly 23% were estimated to be in the 51 to 66 age group, 15% in the 20 to 34 age group, and 21% in the under 20 age group (see Figure 2). Of all byways surveyed, the Santa Fe Trail had the highest proportion of older respondents in the 67 and above age group, 30% compared to 12% of respondents across all byways. Male respondents exceeded female respondents in each age group, except the 51 to 66 group, where women outnumbered men (see Figure 3).

Figure 2: Age of Survey Respondent

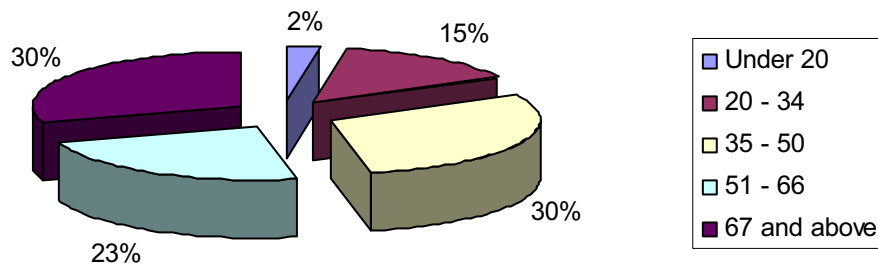
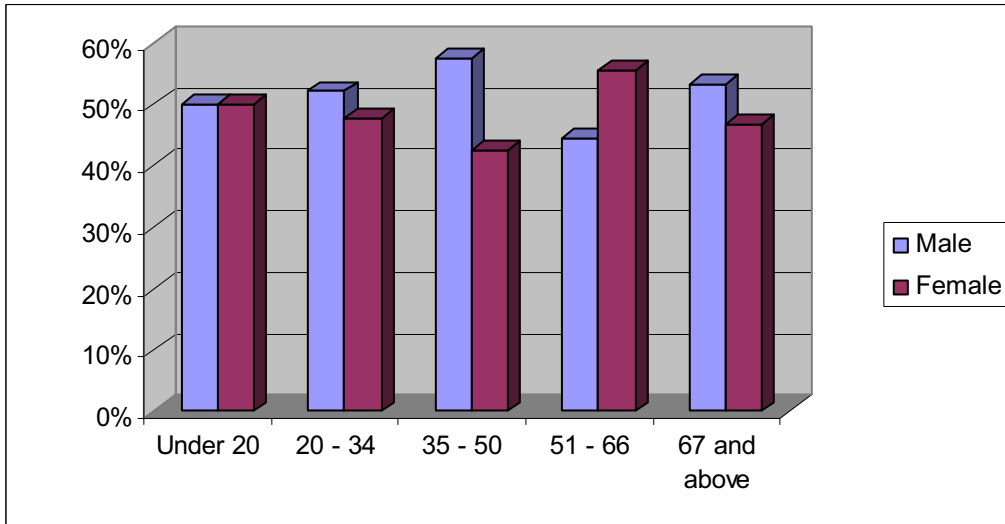
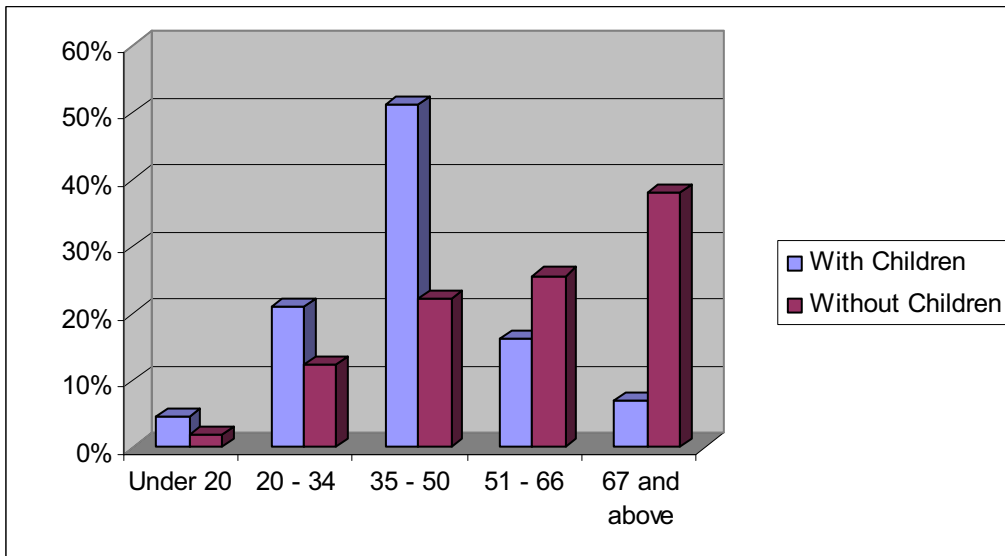


Figure 3: Age and Gender of Survey Respondent



Much as one might expect, the majority of those traveling with children fall in the 35 to 50 age group, while the majority traveling without fall in the 51 to 66 and 67 and above age groups. Roughly 51% of survey respondents traveling with children were in the 35 to 50 age group, compared to about 22% of those traveling without children. In contrast, roughly 64% of those traveling without children were in the 51 to 66 and 67 and above age group, compared to only 23% of those traveling with children (see Figure 4).

Figure 4: Age of Respondents Traveling with Children vs. Respondents Traveling without Children



Size and Composition of Travel Party

The average travel party included 2.6 persons, compared to the byway average of 3.1 persons. The median travel party size, however, was 2. Roughly 54% of respondents

reported two person travel parties. Of the byways surveyed, respondents on the Santa Fe Trail reported the smallest travel parties.

Figure 5: Number of Persons in Travel Party

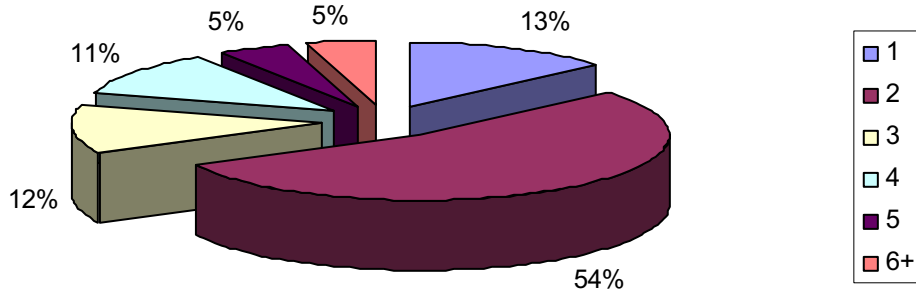
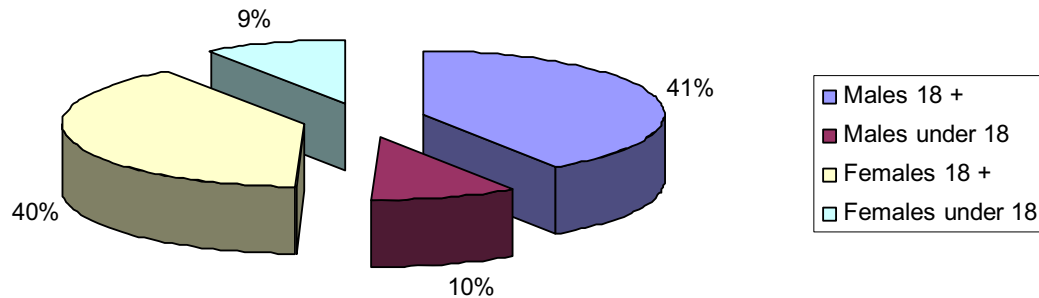


Figure 6: Travel Party by Age and Gender



Approximately 27% of respondents reported traveling with children under the age of 18, compared to an average of 34% across all byways surveyed. Next to Top of the Rockies, the Santa Fe Trail had the lowest percentage of respondents traveling with children under the age of 18. Much as one might expect, travel party sizes differ substantially between those traveling with children and those traveling without. The average travel party size of those traveling with children was 4.1 persons versus 2.0 persons for those traveling without. Just over 58% of those traveling without children consisted of travel parties with one adult male and one adult female. Roughly 40% of those traveling with children reported one adult male and one adult female in their group.

Figure 7: Number of Children in Travel Party

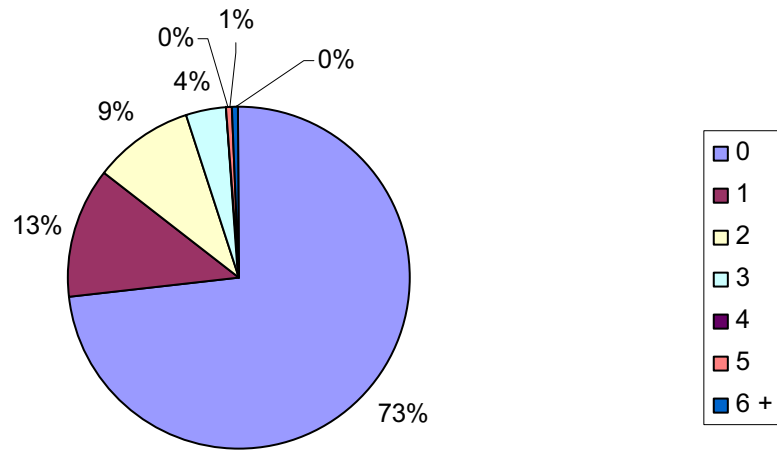
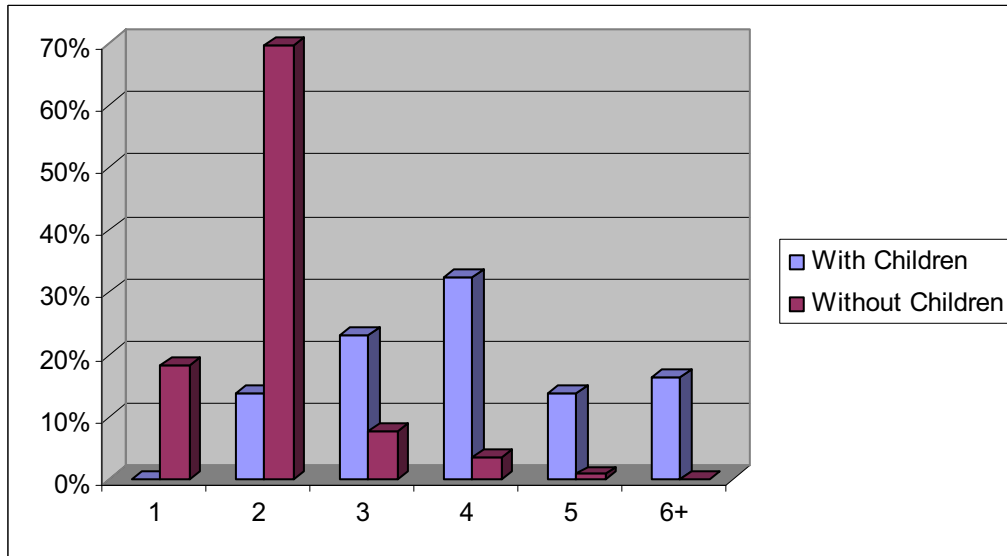


Figure 8: Number in Travel Party with Children vs. Travel Party without Children



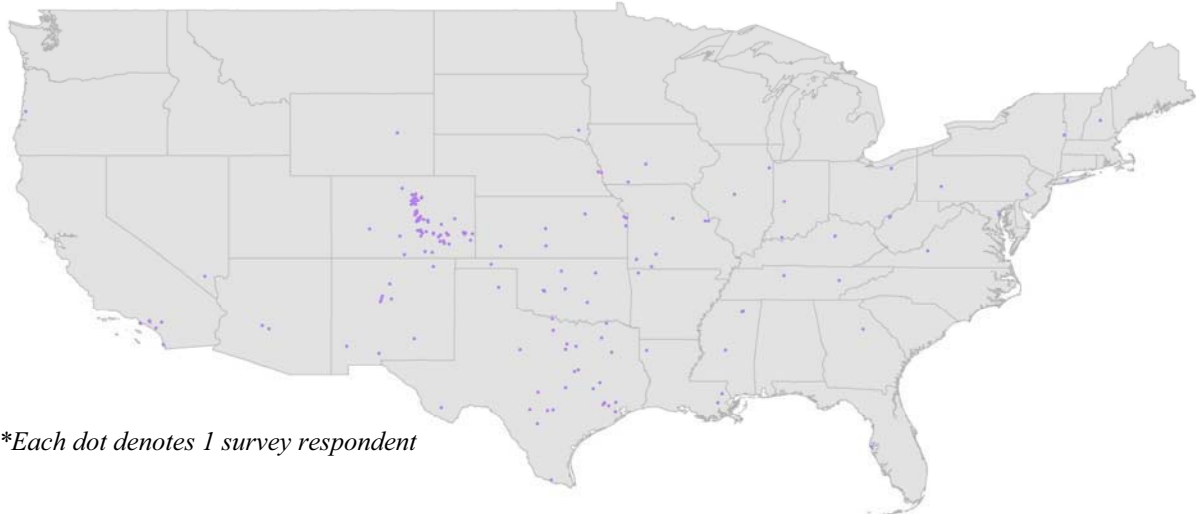
Characteristics of Byway Travel

Origin (Survey Question 1)

Origin by State

Survey respondents originated from twenty-nine states and five foreign countries. Approximately 35% of respondents originated in Colorado. Of those originating in Colorado, roughly 64% reported coming from one of the metropolitan Front Range counties between Fort Collins and Pueblo. In other words, roughly 22% of those surveyed are from the Front Range metropolitan area that includes the cities of Ft. Collins, Greeley, Boulder, Denver, Colorado Springs and Pueblo. After Colorado, Texas was home to the greatest number of respondents, representing 15% of travelers surveyed. Roughly 6% of those surveyed originated in a foreign country, including Canada, Germany, Mexico and the United Kingdom.

*Figure 9: Map of Respondent Origin**



**Each dot denotes 1 survey respondent*

*Figure 10: Top States of Origin**

State of Respondent Origin		
Response	Count	%
Colorado	63	37.7%
Texas	28	16.8%
New Mexico	12	7.2%
Kansas	8	4.8%
California	7	4.2%
Oklahoma	7	4.2%

**% of U.S. survey respondents*

Origin by Region

An examination of traveler origin by census region reveals that about 47% of U.S. travelers on the Santa Fe Trail Scenic Byway originated in the Mountain region states of Colorado, New Mexico, Arizona, Utah, Idaho, Montana and Wyoming. Excluding Colorado, about 9% of travelers originated in Mountain region states. The West South

Central states of Texas, Oklahoma, Louisiana and Arkansas accounted for 24% of travelers, and the West North Central states of North Dakota, South Dakota, Nebraska, Kansas, Minnesota, Iowa and Missouri accounted for 11%.

Figure 11: Origin by Census Region*



*% of U.S. survey respondents

Origin by Distance

Roughly 44% of travelers surveyed originated within 249 miles of the byway. About 14% originated from between 250 and 499 miles away, and roughly 27% originated between 500 and 999 miles away. Roughly 16% of travelers came from an origin 1,000 miles away or more.

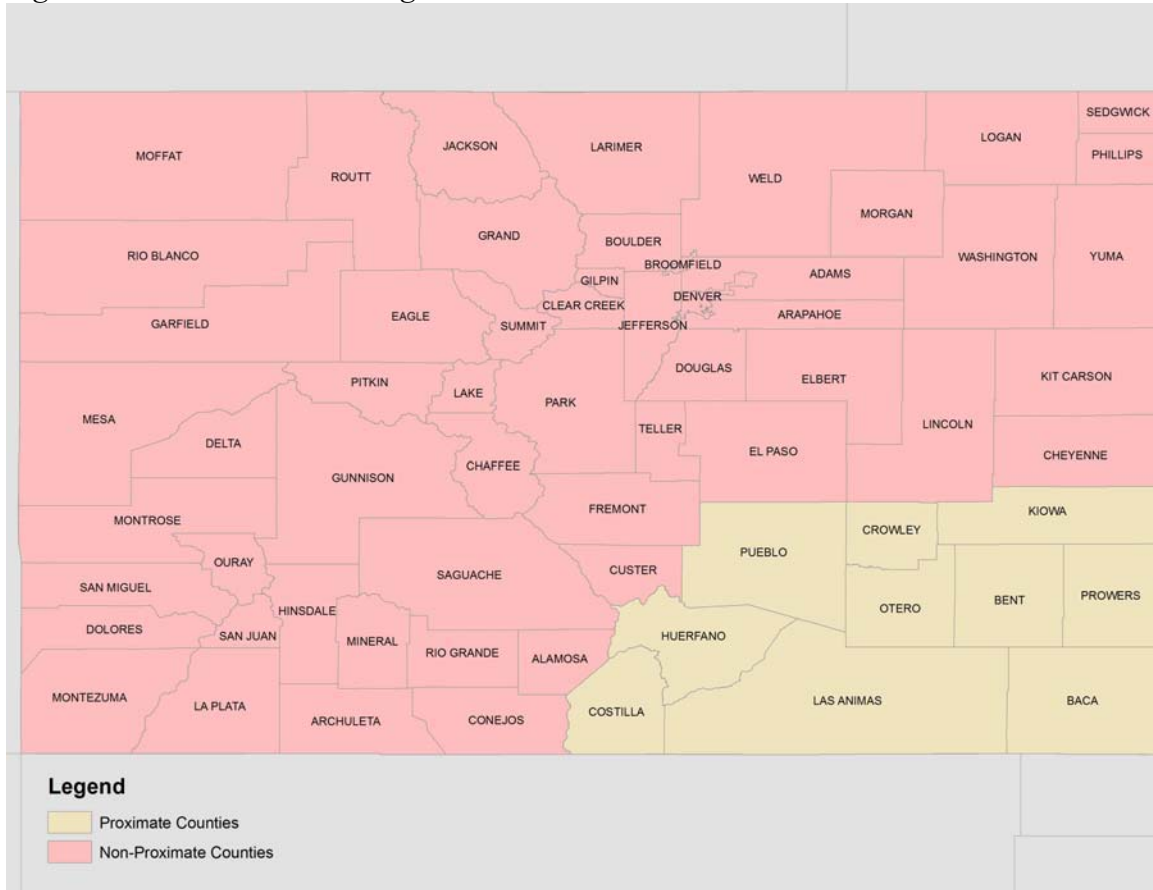
Figure 12: Distance from Travel Origin

Distance Travel Origin to Byway Destination	
0-249 miles	43.9%
250-499 miles	13.5%
500-999 miles	26.9%
1000-1499 miles	5.3%
1500-1999 miles	3.5%
2000+ miles	7.0%

Non-Proximate Origin

A non-proximate origin refers to an origin that is not in the near vicinity of the byway. For the purposes of this study, a proximate origin was defined as any county through which a byway passes, and any counties adjacent to those (see Figure 13). Proximate counties include not only Las Animas, Otero, Bent and Prowers counties, through which the byway runs, but also all of the adjacent counties including Costilla, Huerfano, Pueblo, Crowley, Kiowa and Baca counties. All other points of traveler origin are thereby considered *non-proximate*.

Figure 13: Non-Proximate Origins

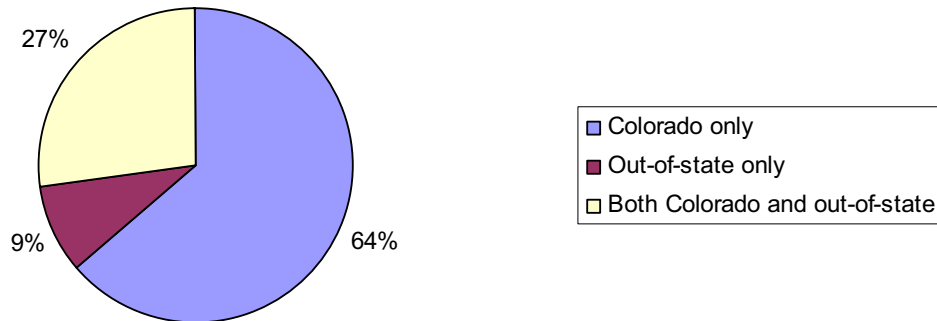


This breakdown is important because first it shows the extent to which the byway is a draw for the immediate surrounding region and second, it shows the extent to which the byway is visited by non-regional tourists, those who are more likely to stay longer, eat out, spend the night or otherwise spend greater amounts of money on the byway and in adjacent cities. Eighty-five percent (85%) of survey respondents on the Santa Fe Trail came from a non-proximate origin. Across all nine byways, roughly 87% of those surveyed were non-proximate in origin.

Destination (Survey Questions 2 – 3)

Survey respondents were allowed to cite multiple destinations. Roughly 64% reported only a Colorado destination, about 27% reported an out-of-state destination and a Colorado destination, and roughly 9% reported only an out of state destination.

Figure 14: Respondent Destination



Fifty-seven percent (57%) of those surveyed reported a destination on the Santa Fe Trail Scenic Byway, compared to 60% across all byways. This suggests that roughly six of ten traveling the byway appear to be traveling the byway for the byway experience itself or for a local destination such as Bent’s Old Fort, Trinidad or John Martin Reservoir and about four of ten are merely passing through or are on a side-trip from their primary destination.

Trip Distance and Duration (Survey Questions 11 – 12)

Respondents were asked to estimate their total trip distance, in miles, from their home or other point of travel origin and back. Those that flew into the region from a distant origin were asked to report round-trip distance from the airport. The average distance across all byways was roughly 1,700 miles. The median distance, however, was significantly smaller at only 1,200 miles. The average trip duration across all byways was roughly 9 days, and 7 days at the median. The average distance and duration of respondents on the Santa Fe Trail was roughly 1,700 miles and 8.5 days, with a median trip distance and duration of 1,300 miles and 5 days.

Figure 15: Trip Distance (in miles)

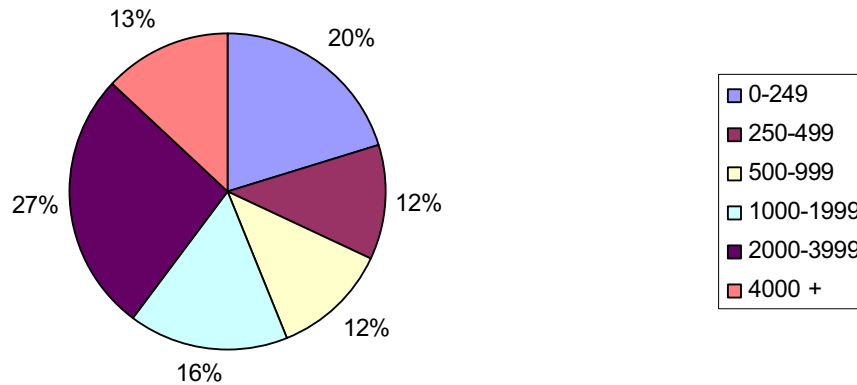
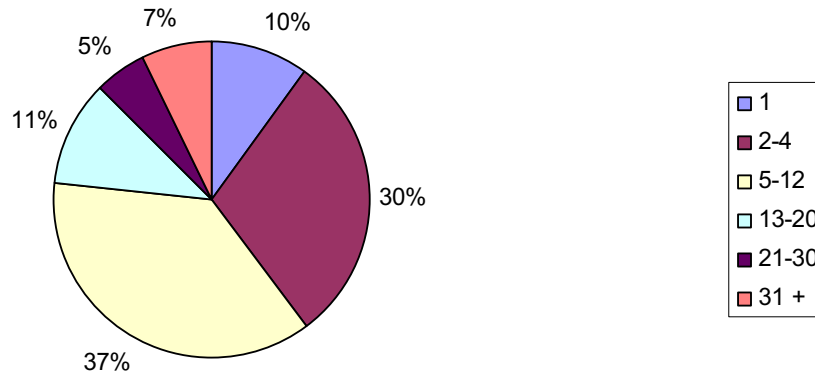


Figure 16: Trip Duration (in days)

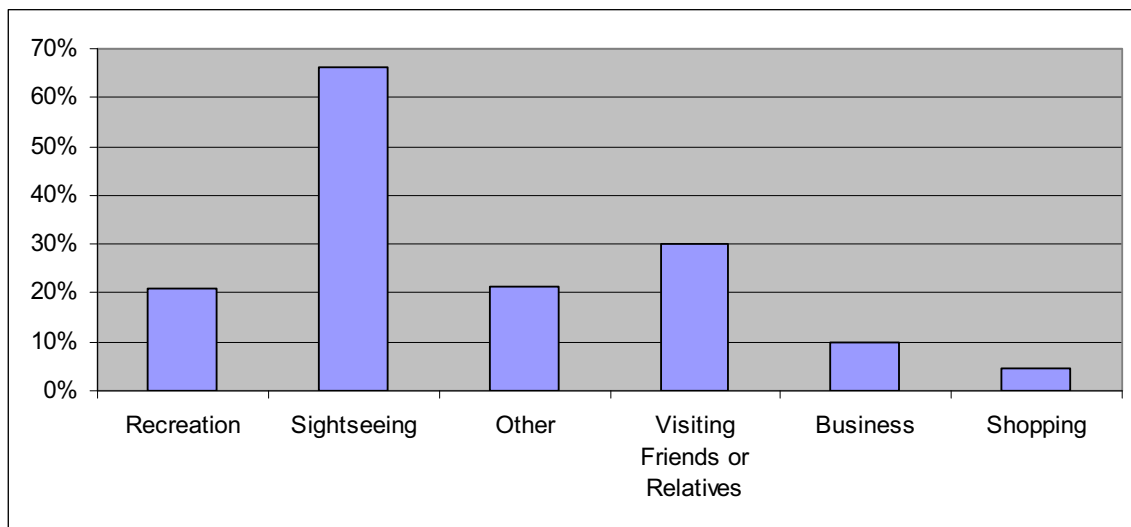


Of those surveyed on a weekend, 36% reported taking a 1 to 4 day trip. On weekdays, 28% reported taking a 1 to 4 day trip. Similarly, on weekends roughly 35% of those surveyed reported total trip distances of 499 miles or less, while on the weekday 29% of respondents reported trips of 499 miles or less. Eighteen percent (18%) of those surveyed on weekends were on both short distance (less than 500 miles) and short duration (less than 5 days) weekend or extended weekend trips. The low incidence of short distance and duration trips, and the relatively small differences observed between weekend and weekday travelers suggests that short distance weekend travelers are a relatively minor component of tourist traffic on the Santa Fe Trail Scenic Byway. In contrast, across all byways surveyed nearly 1/3 of byway travelers on the weekend were on short distance (less than 500 miles) and short duration (less than 5 days) weekend or extended weekend trips.

Purpose of Travel (Survey Question 9)

Survey respondents were asked to select the purpose or reason for their travels from a list of six choices: sightseeing, recreation, visiting friends or relatives, business, shopping and other. Multiple answers were permitted. Approximately 66% of those surveyed reported that “sightseeing” was the purpose, or one of the purposes of their visit to the area. Roughly 30% of those surveyed reported visiting friends or relatives as one of the purposes for their travel. Approximately 21% reported “recreation,” about 10% reported traveling for business and about 4% for shopping. About 21% of respondents cited “other” reasons, including 3% of travelers who cited the Santa Fe Trail Days Festival in Trinidad as the reason for their travel.

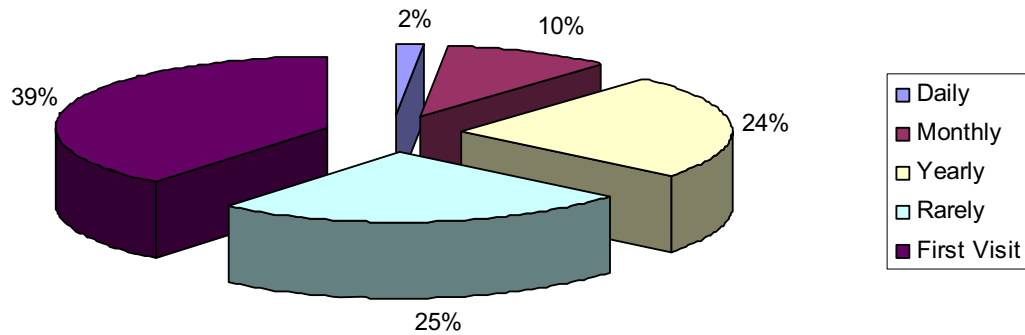
Figure 17: Purpose of Travel



Trip Frequency (Survey Question 10)

Survey respondents were asked how frequently they visit or travel to the byway and adjacent towns and sites. Respondents were asked to approximate within five categories: daily, monthly, yearly, rarely or first visit. Approximately 39% reported their first visit to the byway or the general area of the byway. Roughly 25% reported visiting the area before, but only rarely, and about 36% reported visiting the area at least annually. In other words, slightly less than 4 of 10 travelers are regular, repeat visitors, while slightly more than 6 of 10 visit the area of the Santa Fe Trail only infrequently.

Figure 18: Frequency of Visits



Mode of Travel (Survey Question 4)

Survey respondents were asked to provide information on the type of vehicle or mode of travel employed in their travels on the byway. The majority, about 84%, reported traveling in a car, truck, or SUV owned by themselves or someone in their travel party. About 11% reported traveling by “other” vehicle, the majority being van or mini-van. Approximately 5% reported traveling in a rental vehicle. About 6% reported traveling by RV and about 5% by motorcycle (see Figure 19).

Figure 19: Mode of Travel

Vehicle Type	% of Respondents
Rental Vehicle	5.0%
Own Car, Truck, SUV, Van	84.3%
RV	6.3%
Motorcycle	5.0%
Other	11.3%

Appendix A: Detailed Tables

Survey Results

Day of Survey		
Response	Count	%
Weekday	122	67.0%
Weekend	60	33.0%
Total	182	100%
NA	0	0%

Age and Gender

Gender of Respondent		
Response	Count	%
Male	83	52.2%
Female	76	47.8%
Total	159	87.4%
NA	23	12.6%

Gender of Population		
Response	Count	%
Male	205	50.4%
Female	202	49.6%
Total	407	100.0%

Age of Respondent		
Response	Count	%
Under 20	4	2.5%
20 - 34	23	14.6%
35 - 50	47	29.9%
51 - 66	36	22.9%
67 and above	47	29.9%
Total	157	86.3%
NA	25	13.7%

Age of Respondent				
Response	Male Count	%	Female Count	%
Under 20	2	50.0%	2	50.0%
20 - 34	12	52.2%	11	47.8%
35 - 50	27	57.4%	20	42.6%
51 - 66	16	44.4%	20	55.6%
67 and above	25	53.2%	22	46.8%
Total	82	100.0%	75	100.0%

Age of Respondent- Parties with Children		
Response		%
Under 20	2	4.7%
20 - 34	9	20.9%
35 - 50	22	51.2%
51 - 66	7	16.3%
67 and above	3	7.0%
Total	43	100.0%

Age of Respondent- Parties w/o Children		
Response	Count	%
Under 20	2	1.8%
20 - 34	14	12.4%
35 - 50	25	22.1%
51 - 66	29	25.7%
67 and above	43	38.1%
Total	113	100.0%

Size and Composition of Travel Party

% of Respondents with Children Under 18		
Response	Count	%
Children Under 18	43	27.2%
No Children Under 18	115	72.8%
Total	158	86.8%
NA	24	13.2%

Size of Travel Party		
Response	Count	%
1	21	13.3%
2	86	54.4%
3	19	12.0%
4	18	11.4%
5	7	4.4%
6	2	1.3%
7	4	2.5%
8	0	0.0%
9	0	0.0%
10+	1	0.6%
Total	158	86.8%
NA	24	13.2%

Number of Children in Travel Party		
Response	Count	%
0	115	72.8%
1	20	12.7%
2	15	9.5%
3	6	3.8%
4	0	0.0%
5	1	0.6%
6+	1	0.6%
Total	158	86.8%
NA	24	13.2%

% Male-Female Couples- Parties with Children		
Response	Count	%
1 Adult Male, 1 Adult Female	17	39.5%
Total	43	100.0%

% Male-Female Couples- Parties w/o Children		
Response	Count	%
1 Adult Male, 1 Adult Female	67	58.3%
Total	115	100.0%

Size of Travel Party- Parties with Children		
Response	Count	%
1	0	0.0%
2	6	14.0%
3	10	23.3%
4	14	32.6%
5	6	14.0%
6+	7	16.3%
Total	43	100.0%

Size of Travel Party- Parties w/o Children		
Response	Count	%
1	21	18.3%
2	80	69.6%
3	9	7.8%
4	4	3.5%
5	1	0.9%
6+	0	0.0%
Total	115	100.0%

Origin

Country of Respondent Origin		
Response	Count	%
United States	172	94.5%
Foreign Country	10	5.5%
Total	182	100.0%

State of Respondent Origin		
Response	Count	%
Colorado	63	37.7%
Texas	28	16.8%
New Mexico	12	7.2%
Kansas	8	4.8%
California	7	4.2%
Oklahoma	7	4.2%
Missouri	6	3.6%
Louisiana	3	1.8%
Mississippi	3	1.8%
Arizona	2	1.2%
Arkansas	2	1.2%
Illinois	2	1.2%
Indiana	2	1.2%
Iowa	2	1.2%
Nebraska	2	1.2%
New York	2	1.2%
Ohio	2	1.2%
Pennsylvania	2	1.2%
Tennessee	2	1.2%
Florida	1	0.6%
Georgia	1	0.6%
Kentucky	1	0.6%
Maryland	1	0.6%
Nevada	1	0.6%
New Hampshire	1	0.6%
Oregon	1	0.6%
South Dakota	1	0.6%
Virginia	1	0.6%
Wyoming	1	0.6%
Alabama	0	0.0%
Alaska	0	0.0%
Connecticut	0	0.0%
Delaware	0	0.0%
District of Columbia	0	0.0%
Hawaii	0	0.0%
Idaho	0	0.0%
Maine	0	0.0%
Massachusetts	0	0.0%

Michigan	0	0.0%
Minnesota	0	0.0%
Montana	0	0.0%
New Jersey	0	0.0%
North Carolina	0	0.0%
North Dakota	0	0.0%
Rhode Island	0	0.0%
South Carolina	0	0.0%
Utah	0	0.0%
Washington	0	0.0%
West Virginia	0	0.0%
Wisconsin	0	0.0%
Total	167	100.0%

Front Range Origin		
Response	Count	%
Front Range	40	63.5%
Other Colorado Origin	23	36.5%
Total	63	100.0%

Distance to Respondent Origin		
Response	Count	%
0-249 miles	75	43.9%
250-499 miles	23	13.5%
500-999 miles	46	26.9%
1000-1499 miles	9	5.3%
1500-1999 miles	6	3.5%
2000+ miles	12	7.0%
Total	171	94.0%
NA	11	6.0%

% of Respondents from a Non-Proximate Origin		
Response	Count	%
Non-Proximate Origin	155	85.2%
Proximate Origin	27	14.8%
Total	182	100.0%

Destination

Destination of Respondent		
Response	Count	%
Colorado <i>only</i>	98	63.6%
Out-of-state <i>only</i>	14	9.1%
Both Colorado and out-of-state	42	27.3%
Total	154	84.6%
NA	28	15.4%

Byway Destination		
Response	Count	%
Byway Destination	88	57.1%
Non-Byway Destination	66	42.9%
Total	154	84.6%
NA	28	15.4%

Trip Distance and Duration

Trip Distance		
Response	Count	%
0-249 miles	25	20.3%
250-499 miles	14	11.4%
500-999 miles	15	12.2%
1000-1999 miles	20	16.3%
2000-3999 miles	33	26.8%
4000+ miles	16	13.0%
Total	123	67.6%
NA	59	32.4%

Trip Distance- Weekend		
Response	Count	%
0-249 miles	12	25.0%
250-499 miles	5	10.4%
500-999 miles	7	14.6%
1000-1999 miles	9	18.8%
2000-3999 miles	14	29.2%
4000+ miles	1	2.1%
Total	48	100.0%

Trip Distance- Weekday		
Response	Count	%
0-249 miles	13	17.3%
250-499 miles	9	12.0%
500-999 miles	8	10.7%
1000-1999 miles	11	14.7%
2000-3999 miles	19	25.3%
4000+ miles	15	20.0%
Total	75	100.0%

Trip Duration		
Response	Count	%
1 day	11	9.9%
2-4 days	33	29.7%
5-12 days	41	36.9%
13-20 days	12	10.8%
21-30 days	6	5.4%
31 + days	8	7.2%
Total	111	61.0%
NA	71	39.0%

Trip Duration- Weekend		
Response	Count	%
1 day	3	4.3%
2-4 days	22	31.9%
5-12 days	14	20.3%
13-20 days	2	2.9%
21-30 days	0	0.0%
31 + days	1	1.4%
Total	42	100.0%

Trip Duration- Weekday		
Response	Count	%
1 day	8	11.6%
2-4 days	11	15.9%
5-12 days	27	39.1%
13-20 days	10	14.5%
21-30 days	6	8.7%
31 + days	7	10.1%
Total	69	100.0%

Purpose of Travel

Purpose of Travel		
Response	Count	%
Sightseeing	105	66.0%
Recreation	33	20.8%
Business	16	10.1%
Visiting Friends and Family	48	30.2%
Shopping	7	4.4%
Other	34	21.4%
Total	159	87.4%
NA	23	12.6%

Frequency of Visits

Frequency of Visits		
Response	Count	%
Daily	2	1.4%
Monthly	15	10.1%
Yearly	36	24.3%
Rarely	37	25.0%
First Visit	58	39.2%
Total	148	81.3%
NA	34	18.7%

Mode of Travel

Mode of Travel		
Response	Count	%
Rental Vehicle	8	5.0%
Car	61	38.4%
SUV	40	25.2%
RV	10	6.3%
Truck	33	20.8%
Motorcycle	8	5.0%
Bike	0	0.0%
Other	18	11.3%
Total	159	87.4%
NA	23	12.6%

Appendix B: Survey Instrument

Byways Market Niche Study Survey Instrument

for the surveyor - do not ask!

Gender	1. male	2. female	Age	1. under 20	2. 20-34	3. 35-50	4. 51-66	5. 67 and above
Date	_____			Time	_____			
	(__ - __ - 07)				(military time: 01:00 - 24:00)			
Location	_____			Weekend	_____	Weekday	_____	
	(code: 01 - 20)							

Hello, I'm working with the Colorado Scenic Byways program in order to learn more about your experiences on our state's designated scenic byways. You are one of a small number of people chosen for this survey, so your answers are very important. The survey takes about two minutes to complete. Your responses are voluntary and anonymous. **May I please have a few minutes of your time for this survey?**

1. _____ What is your home zip code (or country for foreign visitors)? _____
2. _____ What is your principal destination within Colorado? _____
(see region codes: 01 - 14)
3. _____ What is your ultimate destination (if not in Colorado)? _____
(see census codes: 01 - 95)
4. _____ What type of vehicle are you driving today? (circle all that apply)
1. a rented vehicle? OR 2. car 3. SUV
4. RV 5. truck 6. motorcycle
7. bike 8. other _____
5. _____ How many males are traveling with you and of those how many are under 18 years old?
total males
6. _____
males under 18
7. _____ How many females are traveling with you and of those how many are under 18 years old?
total females
8. _____
females under 18
9. _____ What is the purpose of your travel today? (circle all that apply)
1. sightseeing 2. recreation 3. business
4. visiting friends/relatives 5. shopping 6. other _____
10. _____ How frequently do you travel this route? 1. daily 2. monthly 3. yearly 4. rarely 5. first visit
11. _____ What is the total length of your trip in miles? (from your home or other travel origin)
12. _____ If your trip includes at least one night on the road, how many days will your trip require from its origin to ultimate destination?