

Colorado Scenic Byways Market Niche Study



Top of the Rockies

June 2008



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Executive Summary

This supplemental report provides a review of key findings from data collected on Top of the Rockies 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
- Santa Fe Trail
- 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*.

Top of the Rockies Survey Results

Surveys were conducted on the Top of the Rockies Scenic Byway August 9-11, 2007. Three-hundred-thirty-two (332) surveys were administered at the Leadville Visitor Center, and at Independence Pass. Approximately 82% of surveys were conducted on weekdays, and 18% on the weekend. Some of the key findings include:

- Top of the Rockies, along with Trail of the Ancients, had one of the highest % of travelers coming from distant origins, nearly 37% of respondents reported coming from an origin over 1,000 miles from the byway.
- Top of the Rockies had the second lowest % of travelers from a proximate origin, less than 5% of travelers came from Lake, Pitkin, Summit or adjacent counties.
- Top of the Rockies had the lowest % of respondents traveling with children, roughly 22%.
- Top of the Rockies had the highest % of respondents traveling by rental car, just under 22% of those surveyed.
- Top of the Rockies had the highest % of respondents traveling by motorcycle, nearly 7%.
- Nearly 3/4 report visiting for the first time, or visiting only rarely.
- Respondents traveled an average round-trip distance of 1,400 miles or 800 miles at the median.
- Respondents took trips averaging 8 days or 7 days at the median.

About the Byway

Rarely falling beneath 9,000 feet in elevation, Top of the Rockies is worthy of its name. The byway begins near the ski resort of Copper Mountain, at the junction of State Highway 91 and Interstate 70. From Copper Mountain the byway runs south, over Fremont Pass, to the historic mining town of Leadville. At Leadville the byway continues north and south. To the north, the route follows U.S. Highway 24 over Tennessee Pass and through the small mountain towns of Red Cliff and Minturn, before ending where U.S. 24 meets Interstate 70. To the south the route continues on Highway 91, and then turns west onto State Highway 82. On Highway 82 the byway passes by the small historic hamlet of Twin Lakes and the Twin Lakes Reservoir, before climbing up to the Continental Divide at Independence Pass and then continuing down into Aspen.

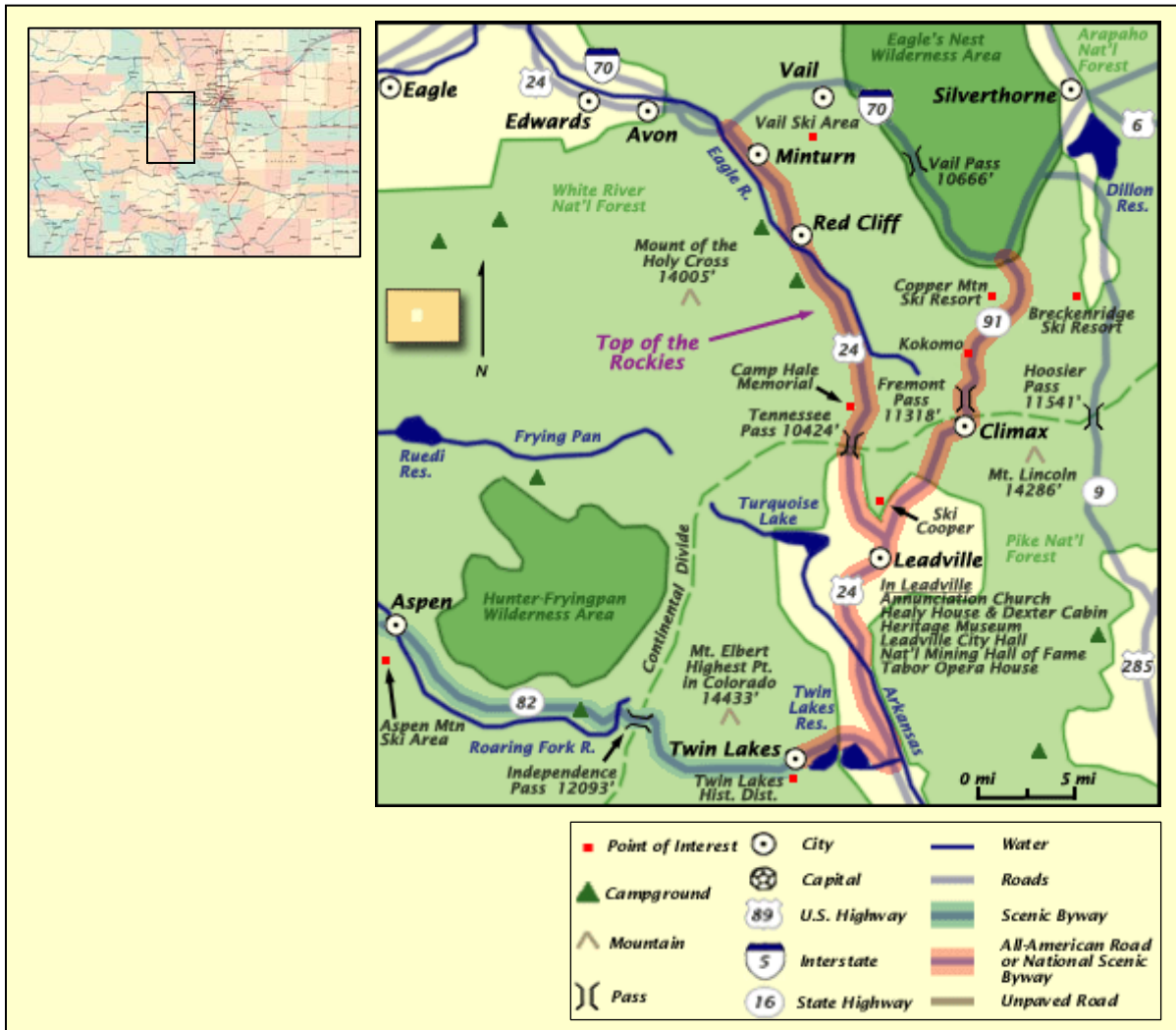
Leadville was at the forefront of the 1879 silver boom and retains much of its mining heritage. Today the town is a National Historic Landmark District filled with historic buildings, Victorian houses and ramshackle mines. Leadville is also host to a number of museums including the Leadville Heritage Museum and the National Mining Hall of Fame. Recreational opportunities abound in the surrounding areas. Hiking, camping, mountain biking, and fishing can all be found in close proximity.

Traveling south from Leadville, the byway passes beneath Mount Elbert (14,433 feet) and Mount Massive (14,421) before turning west and passing by Twin Lakes. **Twin Lakes Village** is a small, historic settlement and the site of a general store, a restaurant, visitor center, and a couple of quaint bed and breakfasts. Twin Lakes Reservoir and adjacent public lands provide opportunities for boating, fishing, hiking and camping at several National Forest campgrounds.

Top of the Rockies was just recently extended from Twin Lakes to Aspen. From Twin Lakes the byway climbs to its highest point at the top of 12,095 foot Independence Pass. Travelers can park at the top, and enjoy spectacular views. A short hike leads to a scenic overlook providing dramatic vistas to the east. From Independence Pass, the byway makes a dramatic descent into the historic (and famous) town of **Aspen**.

To the north of Leadville the byway passes over Tennessee Pass. Camp Hale, a former training ground from the Army's 10th Mountain Division, lies between the pass and the town of Red Cliff. **Red Cliff**, and the nearby town of **Minturn** are both small, historic mining towns filled with numerous preserved (and unpreserved) historic buildings.

Figure 1: Top of the Rockies Scenic Byway and Surrounding Areas



Characteristics of the Byway Traveler

Age and Gender

Sixty percent (60%) of survey respondents were male, and 40% female. Respondents reported the number of persons traveling with them. On Top of the Rockies, respondents reported traveling with an additional 610 persons, for a total of 942 respondents and respondent travel party members. Of this total, approximately 52% were male and 48% female.

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 41% were estimated to fall in the 51 to 66 age group, and approximately 40% in the 35 to 50 age group. Roughly 14% were estimated to be in the 20 to 34 age group and 5% in the 67 and above age group (see Figure 2). Male respondents exceeded female respondents substantially in each age group, except the 35 to 50 group, where men outnumbered women by a much smaller margin. (see Figure 3).

Figure 2: Age of Survey Respondent

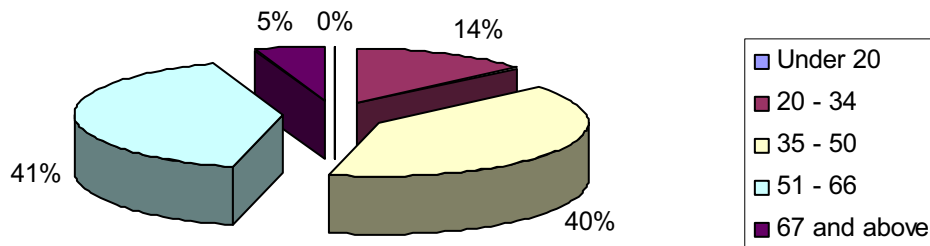
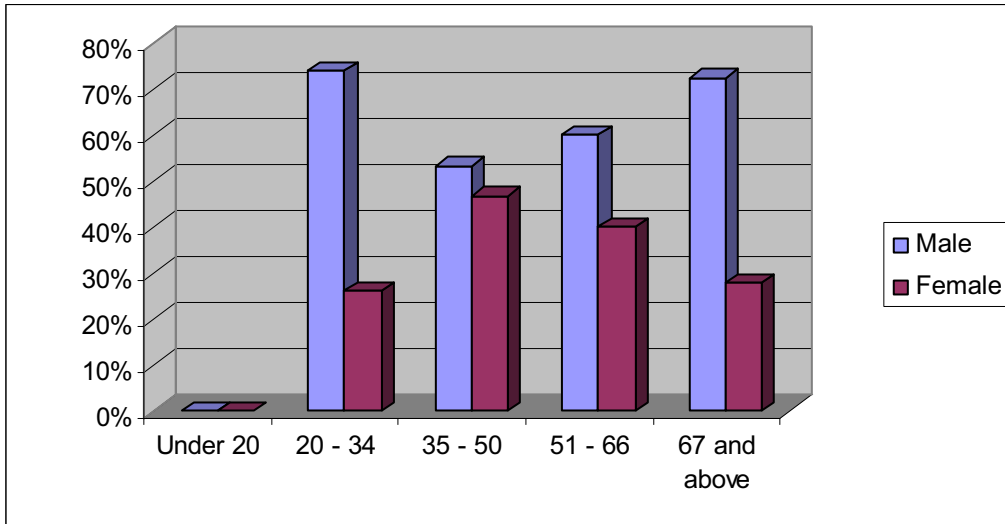
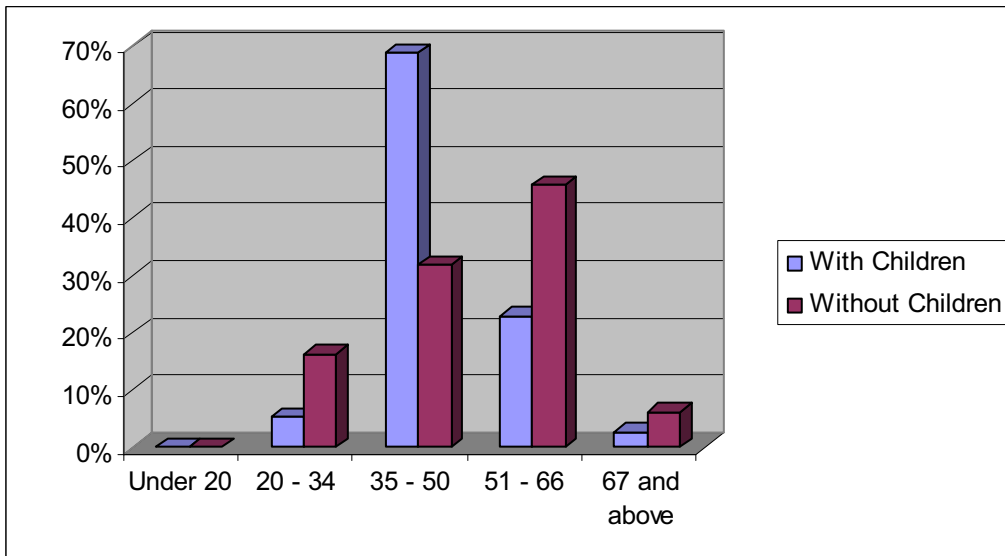


Figure 3: Age and Gender of Survey Respondent



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 70% of survey respondents traveling with children were in the 35 to 50 age group, compared to about 32% of those traveling without children. In contrast, roughly 46% of those traveling without children were in the 51 to 66 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 2.8 persons, compared to the byway average of 3.1 persons. The median travel party size, however, was two. Roughly 52% of respondents reported two person travel parties.

Figure 5: Number of Persons in Travel Party

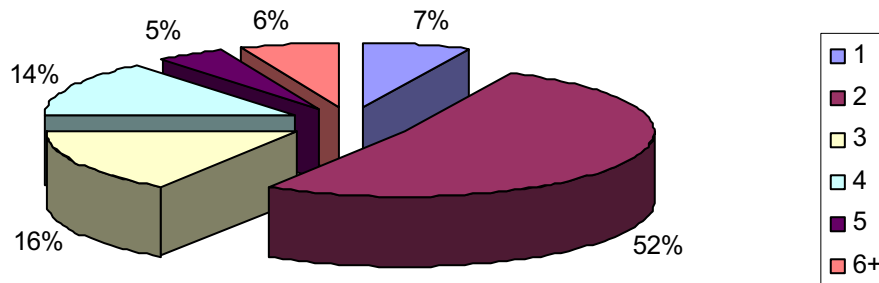
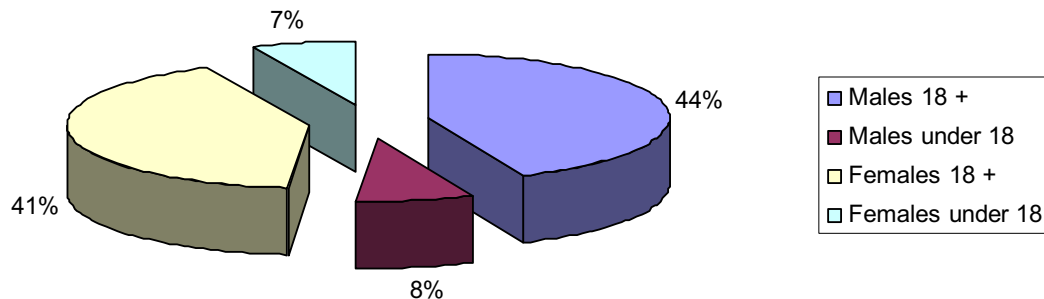


Figure 6: Travel Party by Age and Gender



Approximately 22% of respondents reported traveling with children under the age of 18, significantly less than the average of 34% observed in the aggregate data set. Children accompanied travelers in smaller proportions on Top of the Rockies than on any other byway. 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 4.3 persons, versus 2.4 persons for those traveling without. Just over 56% of those traveling without children consisted of travel parties

with one adult male and one adult female. Roughly 65% of those traveling with children reported one adult male and one adult female in their group.

Figure 7: Number of Children in Travel Party

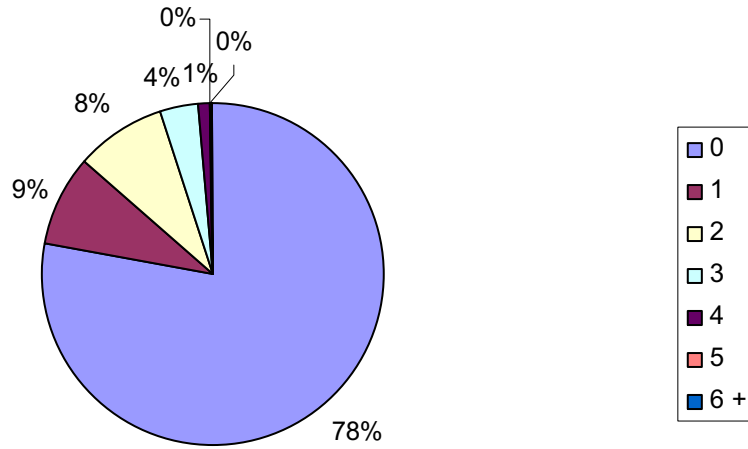
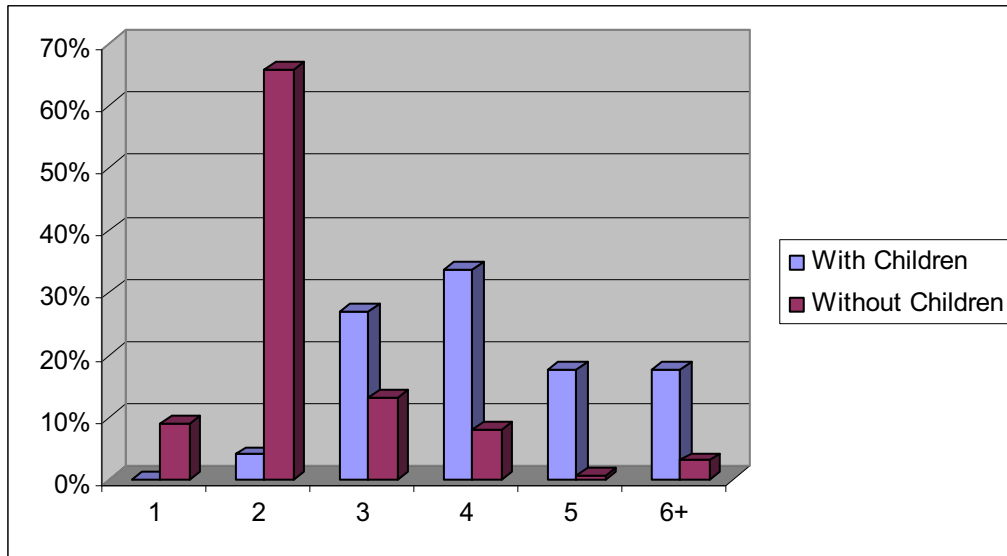


Figure 8: Number in Travel Party with Children vs. Travel Party without Children



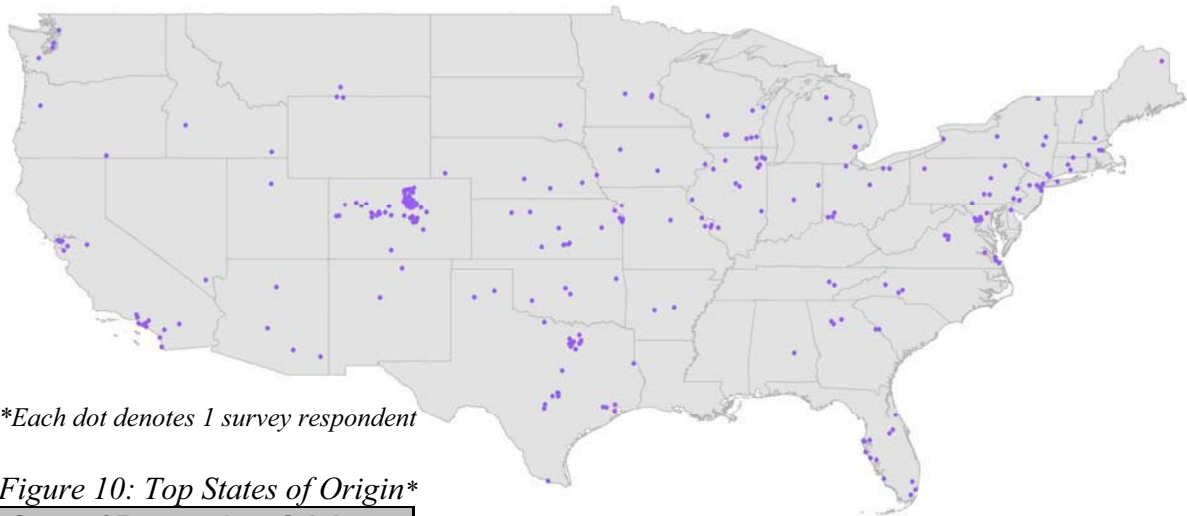
Characteristics of Byway Travel

Origin (Survey Question 1)

Origin by State

Survey respondents originated from forty-two states, the District of Columbia and ten foreign countries. Approximately 25% of respondents originated in Colorado. Of those originating in Colorado, roughly 74% reported coming from one of the metropolitan Front Range counties between Fort Collins and Pueblo. In other words, roughly 19% 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 roughly 9% of travelers surveyed.

*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	84	27.6%
Texas	31	10.2%
California	19	6.3%
Kansas	15	4.9%
Florida	13	4.3%

**% of U.S. survey respondents*

Origin by Region

An examination of traveler origin by census region reveals that about 32% of U.S. travelers on the Top of the Rockies Scenic Byway originated in the Mountain region states of Colorado, New Mexico, Arizona, Utah, Idaho, Montana and Wyoming. Excluding Colorado, about 4% of travelers originated in Mountain region states. Next to Trail of the Ancients, Top of the Rockies had the greatest geographic dispersion of traveler origin. Roughly 13% of travelers surveyed originated in the South Atlantic region, including travelers from Florida, North Carolina and Virginia. Roughly 12%

came from the West South Central states of Texas, Oklahoma, Louisiana and Arkansas. About 11% each came from the West North Central and East North Central regions.

Figure 11: Origin by Census Region*



*% of U.S. survey respondents

Origin by Distance

Roughly 29% of travelers surveyed originated within 249 miles of the byway. About 11% originated from between 250 and 499 miles away, and roughly 23% originated between 500 and 999 miles away. Roughly 37% of travelers come from an origin 1,000 miles away or more.

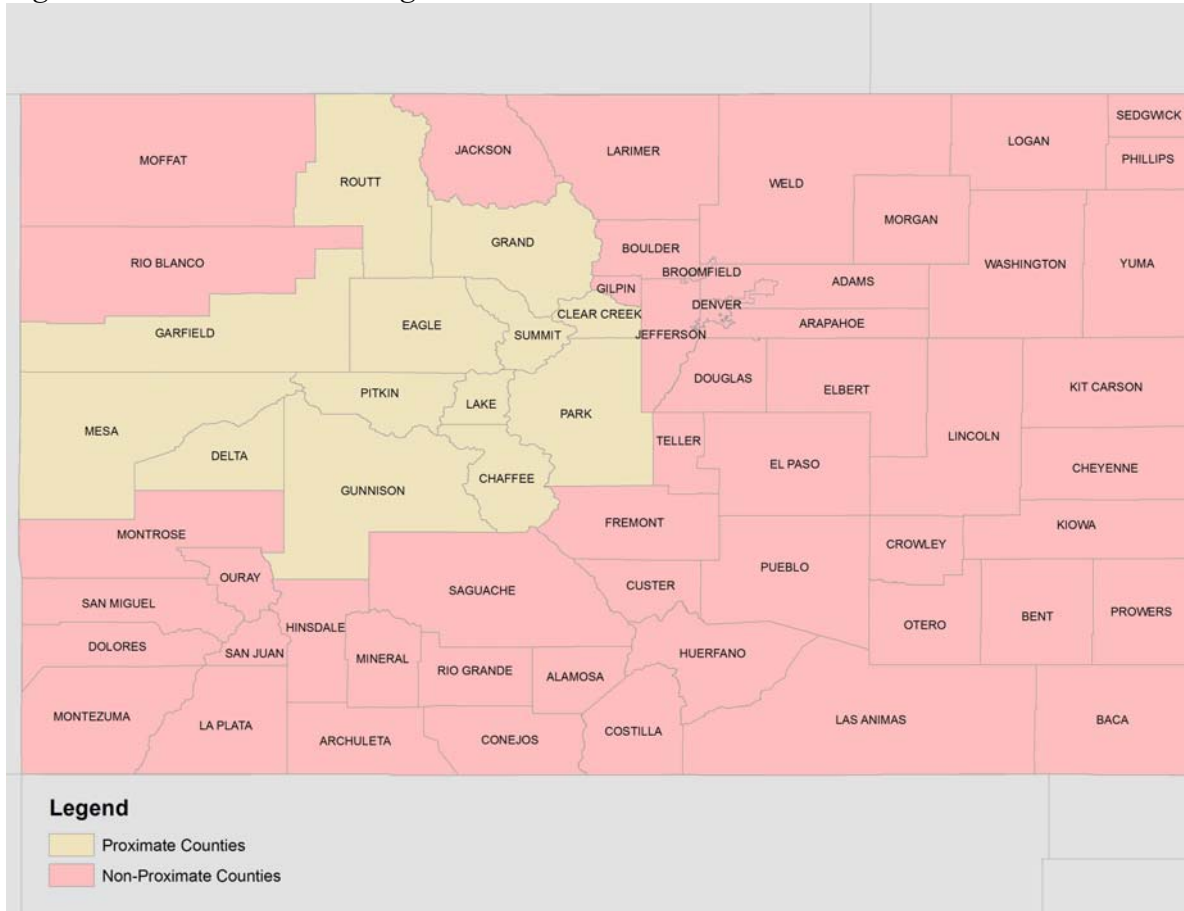
Figure 12: Distance from Travel Origin

Distance	
Travel Origin to Byway Destination	
0 - 249 miles	29.3%
250 – 499 miles	11.0%
500 – 999 miles	22.7%
1,000 - 1,499 miles	11.4%
1,500 - 1,999 miles	16.4%
2,000 – miles	9.1%

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 12). Proximate counties include not only Eagle, Lake, Summit and Pitkin counties, through which the byway runs, but also all of the adjacent counties including Routt, Garfield, Mesa, Gunnison, Chaffee, Park, Clear Creek and Grand counties. All other points of traveler origin are thereby considered *non-proximate*.

Figure 13: Non-Proximate Origins

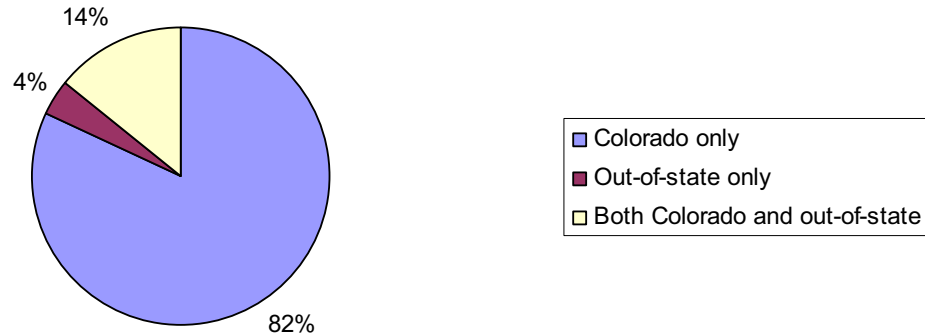


This breakdown is important because first it shows the extent to which the byway is a draw for the immediate surrounding region and second, it shows the extent to which the byway is visited by non-regional tourists, those who are more likely to stay longer, eat out, spend the night or otherwise spend greater amounts of money on the byway and in adjacent cities. Ninety-five percent (95%) of survey respondents on Top of the Rockies 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 82% reported only a Colorado destination, about 14% reported an out-of-state destination and a Colorado destination, and roughly 4% reported only an out of state destination.

Figure 14: Respondent Destination



Forty-eight percent (48%) of those surveyed reported a destination on the Top of the Rockies Scenic Byway. This is significantly lower than the byway average of 60%. Only Dinosaur Diamond and Trail of the Ancients have a lower percentage of travelers reporting a destination on the byway. This suggests that only about half of those traveling the byway appear to be traveling the byway for the byway experience itself, or for a local destination such as Leadville, Aspen or Independence Pass. The other 50% are likely passing through or are on a side-trip from their primary destination. Top of the Rockies provides an interesting example of a byway with a relatively low proportion of destination travelers, but many “side-trippers.” While only about half of those surveyed reported a byway destination such as Minturn, Aspen, Leadville or Independence Pass, many reported very nearby destinations. A little less than 20% of those surveyed reported destinations in the nearby resort areas of Snowmass, Vail, Beaver Creek, Avon and Summit County.

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 Top of the Rockies was roughly 1,400 miles and 8 days with a median trip distance and duration of 800 miles and 7 days.

Figure 15: Trip Distance (in miles)

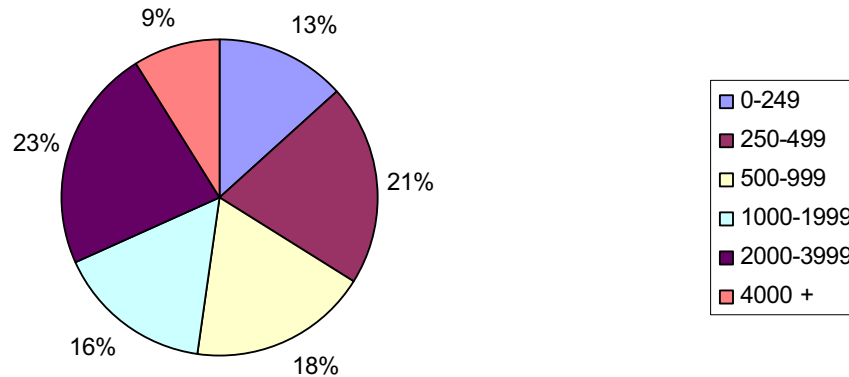
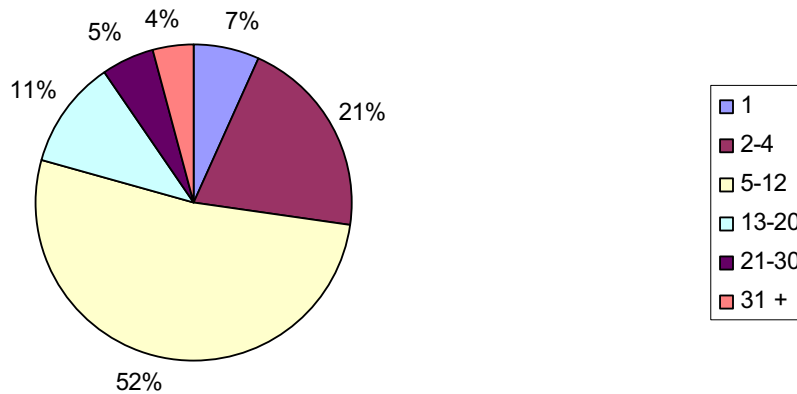


Figure 16: Trip Duration (in days)



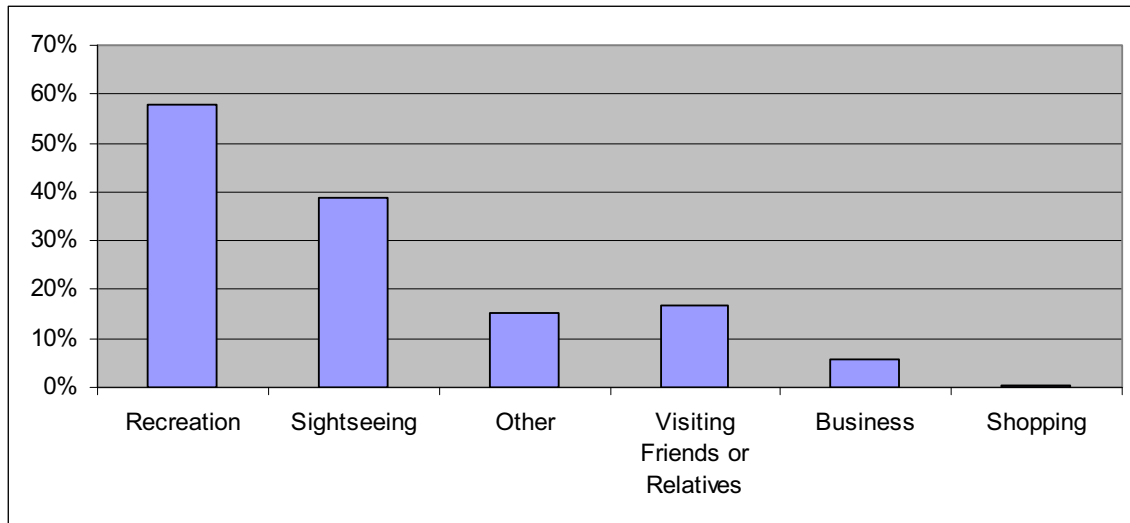
Of those surveyed on a weekend, 51% reported taking a 1 to 4 day trip. On weekdays, 22% reported taking a 1 to 4 day trip. On weekends roughly 56% of those surveyed reported total trip distances of 499 miles or less, while on weekdays only 29% of respondents reported trips of 499 miles or less. Forty-four percent (44%) 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. In contrast, across all byways, only 32% of weekend travelers reported trips of the same distance and duration. Relative to other byways, Top of the Rockies draws a significantly larger proportion of short distance and duration weekend travelers.

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 58% of those surveyed reported that “recreation” was the purpose, or one of the purposes of their visit to the area. Roughly 39% of those surveyed reported “sightseeing” as one of the purposes for their travel. Approximately 17% reported visiting friends or relatives, and about 6% reported traveling for business. About 15% of respondents cited “other” reasons, including roughly 6% who reported traveling the byway to attend the Leadville Trail 100 Mountain Bike Race, and 2% who reported some other special event such as a family reunion, wedding, conference or retreat.

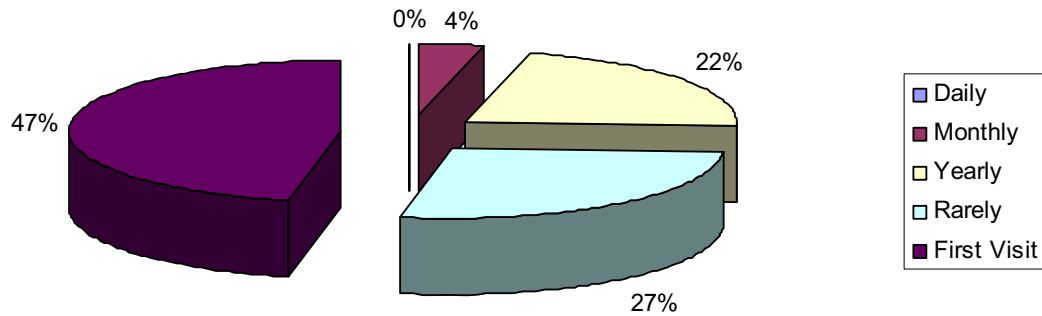
Figure 17: Purpose of Travel



Frequency of Visits (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 47% reported their first visit to the byway or the general area of the byway. Roughly 27% reported visiting the area before, but only rarely, and about 26% reported visiting the area at least annually. In other words, slightly more than a quarter of travelers are regular, repeat visitors, while nearly three-quarters visit the area of the byway only infrequently. In comparison, across all byways 38% reported visiting at least annually and 62% reported visiting infrequently or for the first time.

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 76%, reported traveling in a car, truck, SUV or “other” auto (van, mini-van, etc.) owned by themselves or someone in their travel party. Approximately 7% reported traveling by motorcycle, and about 6% by RV. Nearly 22% of travelers reported traveling by rental car. Of all the byways surveyed, Top of the Rockies had the highest proportion of visitors traveling by motorcycle and the highest proportion traveling by rental car. The high proportion of visitors traveling by rental cars corresponds with a relatively high number of travelers coming from distant origins. Nearly a quarter of travelers reported coming from New England, the Mid-Atlantic or South Atlantic states.

Figure 19: Mode of Travel

Vehicle Type	% of Respondents
Rental Vehicle	21.6%
Own Car, Truck, SUV, Van	76.2%
RV	6.4%
Motorcycle	6.7%
Other	1.8%

Appendix A: Detailed Tables

Survey Results

Day of Survey		
Response	Count	%
Weekday	271	81.6%
Weekend	61	18.4%
Total	332	100%
NA	0	0%

Age and Gender

Gender of Respondent		
Response	Count	%
Male	199	59.9%
Female	133	40.1%
Total	332	100.0%
NA	0	0%

Gender of Population		
Response	Count	%
Male	489	51.9%
Female	453	48.1%
Total	942	100.0%

Age of Respondent		
Response	Count	%
Under 20	0	0.0%
20 - 34	46	13.9%
35 - 50	133	40.1%
51 - 66	135	40.7%
67 and above	18	5.4%
Total	332	100.0%

Age of Respondent				
Response	Male Count	%	Female Count	%
Under 20	0	0.0%	0	0.0%
20 - 34	34	73.9%	12	26.1%
35 - 50	71	53.4%	62	46.6%
51 - 66	81	60.0%	54	40.0%
67 and above	13	72.2%	5	27.8%
Total	199	59.9%	133	40.1%

Age of Respondent- Parties with Children		
Response	Count	%
Under 20	0	0.0%
20 - 34	4	5.4%
35 - 50	51	68.9%
51 - 66	17	23.0%
67 and above	2	2.7%
Total	74	100.0%

Age of Respondent- Parties w/o Children		
Response	Count	%
Under 20	0	0.0%
20 - 34	42	16.3%
35 - 50	82	31.8%
51 - 66	118	45.7%
67 and above	16	6.2%
Total	258	100.0%

Size and Composition of Travel Party

% of Respondents with Children Under 18		
Response	Count	%
Children Under 18	74	22.3%
No Children Under 18	258	77.7%
Total	332	100.0%
NA	0	0.0%

Size of Travel Party		
Response	Count	%
1	23	6.9%
2	173	52.1%
3	54	16.3%
4	46	13.9%
5	15	4.5%
6	11	3.3%
7	4	1.2%
8	2	0.6%
9	1	0.3%
10+	3	0.9%
Total	332	100.0%
NA	0	0.0%

% Male-Female Couples- Parties with Children		
Response	Count	%
1 Adult Male, 1 Adult Female	48	64.9%
Total	74	100.0%

% Male-Female Couples- Parties w/o Children		
Response	Count	%
1 Adult Male, 1 Adult Female	145	56.2%
Total	258	100.0%

Size of Travel Party- Parties with Children		
Response	Count	%
1	0	0.0%
2	3	4.1%
3	20	27.0%
4	25	33.8%
5	13	17.6%
6+	13	17.6%
Total	74	100.0%

Size of Travel Party- Parties w/o Children		
Response	Count	%
1	23	8.9%
2	170	65.9%
3	34	13.2%
4	21	8.1%
5	2	0.8%
6+	8	3.1%
Total	258	100.0%

Origin

Country of Respondent Origin		
Response	Count	%
United States	313	94.3%
Foreign Country	19	5.7%
Total	332	100.0%
NA	0	0.0%

State of Respondent Origin		
Response	Count	%
Colorado	84	27.6%
Texas	31	10.2%
California	19	6.3%
Kansas	15	4.9%
Florida	13	4.3%
Illinois	12	3.9%
Virginia	11	3.6%
New York	10	3.3%
Pennsylvania	9	3.0%
Wisconsin	8	2.6%
Michigan	6	2.0%

Missouri	6	2.0%
Ohio	6	2.0%
Georgia	5	1.6%
Nebraska	5	1.6%
Arizona	4	1.3%
Connecticut	4	1.3%
Minnesota	4	1.3%
Oklahoma	4	1.3%
Washington	4	1.3%
District of Columbia	3	1.0%
Iowa	3	1.0%
Maryland	3	1.0%
Massachusetts	3	1.0%
New Jersey	3	1.0%
New Mexico	3	1.0%
North Carolina	3	1.0%
Arkansas	2	0.7%
Idaho	2	0.7%
Indiana	2	0.7%
New Hampshire	2	0.7%
Oregon	2	0.7%
Tennessee	2	0.7%
Wyoming	2	0.7%
Alabama	1	0.3%
Delaware	1	0.3%
Hawaii	1	0.3%
Kentucky	1	0.3%
Maine	1	0.3%
Montana	1	0.3%
Nevada	1	0.3%
South Dakota	1	0.3%
Utah	1	0.3%
Alaska	0	0.0%
Louisiana	0	0.0%
Mississippi	0	0.0%
North Dakota	0	0.0%
Rhode Island	0	0.0%
South Carolina	0	0.0%
West Virginia	0	0.0%
Total	304	100.0%

Front Range Origin		
Response	Count	%
Front Range	62	73.8%
Other Colorado Origin	22	26.2%
Total	84	100.0%

Distance to Respondent Origin		
Response	Count	%
0-249 miles	93	29.3%
250-499 miles	35	11.0%
500-999 miles	72	22.7%
1000-1499 miles	36	11.4%
1500-1999 miles	52	16.4%
2000+ miles	29	9.1%
Total	317	95.5%
NA	15	4.5%

% of Respondents from a Non-Proximate Origin		
Response	Count	%
Non-Proximate Origin	316	95.2%
Proximate Origin	16	4.8%
Total	332	100.0%
NA	0	0.0%

Destination

Destination of Respondent		
Response	Count	%
Colorado <i>only</i>	266	81.8%
Out-of-state <i>only</i>	13	4.0%
Both Colorado and out-of-state	46	14.2%
Total	325	97.9%
NA	7	2.1%

Byway Destination		
Response	Count	%
Byway Destination	85	26.2%
Non-Byway Destination	240	73.8%
Total	325	97.9%
NA	7	2.1%

Trip Distance and Duration

Trip Distance		
Response	Count	%
0-249 miles	40	13.4%
250-499 miles	61	20.4%
500-999 miles	55	18.4%
1000-1999 miles	48	16.1%
2000-3999 miles	68	22.7%
4000+ miles	27	9.0%
Total	299	90.1%
NA	33	9.9%

Trip Distance- Weekend		
Response	Count	%
0-249 miles	10	18.5%
250-499 miles	20	37.0%
500-999 miles	10	18.5%
1000-1999 miles	7	13.0%
2000-3999 miles	5	9.3%
4000+ miles	2	3.7%
Total	54	100.0%

Trip Distance- Weekday		
Response	Count	%
0-249 miles	30	12.2%
250-499 miles	41	16.7%
500-999 miles	45	18.4%
1000-1999 miles	41	16.7%
2000-3999 miles	63	25.7%
4000+ miles	25	10.2%
Total	245	100.0%

Trip Duration		
Response	Count	%
1 day	22	6.7%
2-4 days	68	20.7%
5-12 days	171	52.0%
13-20 days	37	11.2%
21-30 days	17	5.2%
31 + days	14	4.3%
Total	329	99.1%
NA	3	0.9%

Trip Duration- Weekend		
Response	Count	%
1 day	7	11.5%
2-4 days	24	39.3%
5-12 days	24	39.3%
13-20 days	1	1.6%
21-30 days	4	6.6%
31 + days	1	1.6%
Total	61	100.0%

Trip Duration- Weekday		
Response	Count	%
1 day	15	5.6%
2-4 days	44	16.4%
5-12 days	147	54.9%
13-20 days	36	13.4%
21-30 days	13	4.9%
31 + days	13	4.9%
Total	268	100.0%

Purpose of Travel

Purpose of Travel		
Response	Count	%
Sightseeing	129	38.9%
Recreation	192	57.8%
Business	19	5.7%
Visiting Friends and Family	56	16.9%
Shopping	1	0.3%
Other	51	15.4%
Total	332	100.0%

Frequency of Visits

Frequency of Visits		
Response	Count	%
Daily	0	0.0%
Monthly	13	3.9%
Yearly	72	21.8%
Rarely	90	27.3%
First Visit	155	47.0%
Total	330	99.4%
NA	2	0.6%

Mode of Travel

Mode of Travel		
Response	Count	%
Rental Vehicle	71	21.6%
Car	110	33.5%
SUV	90	27.4%
RV	21	6.4%
Truck	31	9.5%
Motorcycle	22	6.7%
Bike	2	0.6%
Van/Minivan	19	5.8%
Other	4	1.2%
Total	328	98.8%
NA	4	1.2%

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?