

Appendix 2

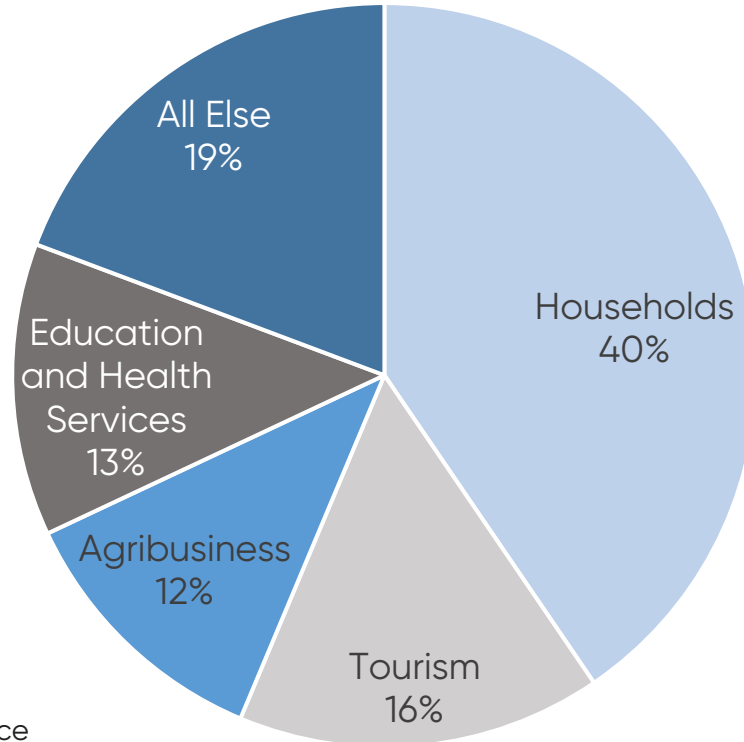
Montezuma County Outdoor Recreation Demand-Side Assessment

Introduction

A compilation of data about outdoor recreation from state agencies was presented to the community as the project kicked off during spring of 2023. This includes locally applicable highlights from "Colorado Travel Year" by Colorado Tourism Office which highlights statewide outdoor recreation visitation, trip characteristics and visitor demographics. Colorado Tourism Office also issues annual "Economic Impacts of Travel" reports which estimate total travel spending and economic impacts for the state, by region and by county. Nationwide and statewide outdoor recreation participation rates were also presented in the early stages of the project.

Montezuma County economic base

Montezuma County Direct Basic Jobs, Total = 9,410



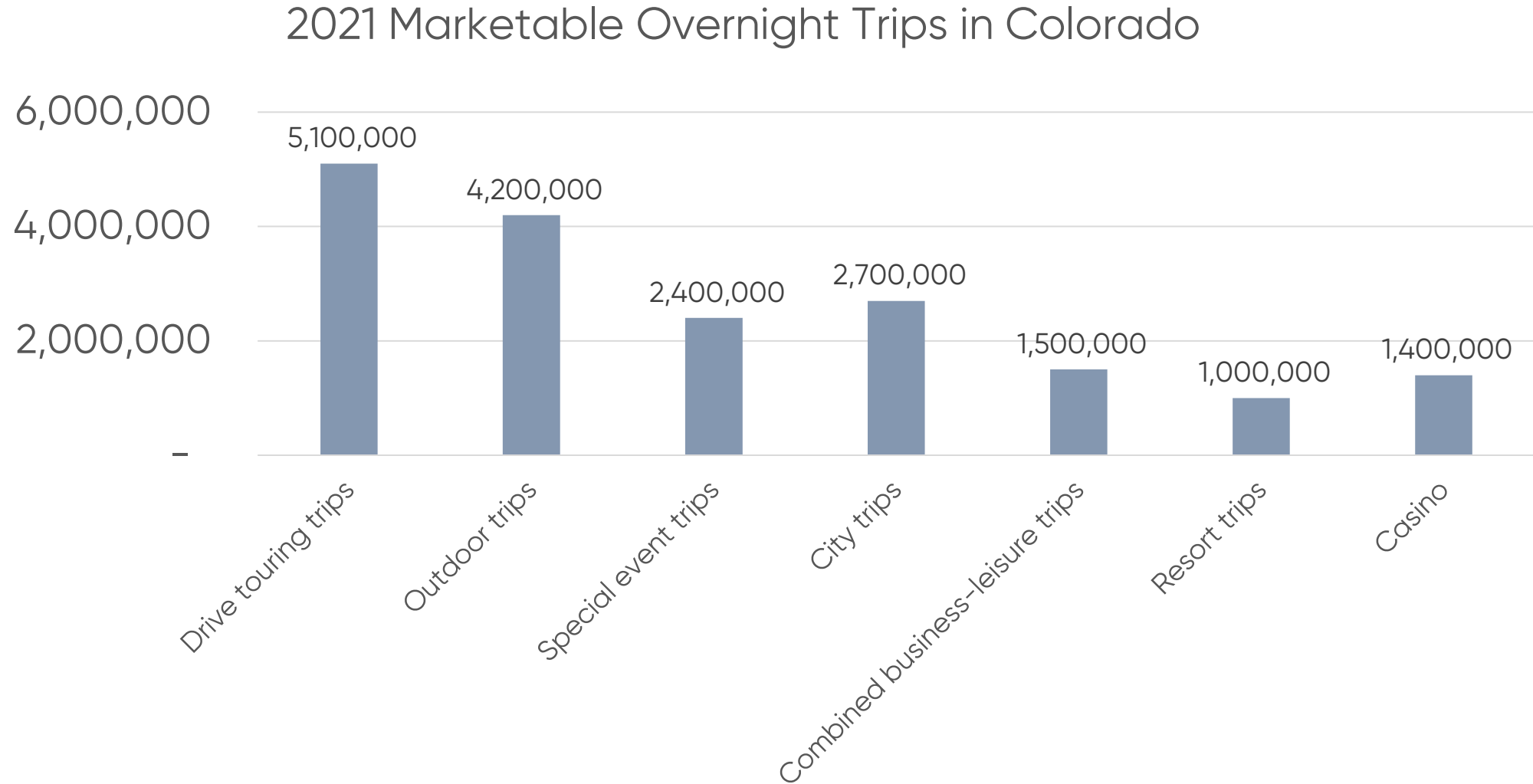
Source: Colorado Demography Office

Included tourism direct basic jobs (DOLA):

- Resort: resorts, attractions, national parks, accommodations
- Second homes: construction, property management
- Services: eating and drinking, retail shopping, entertainment

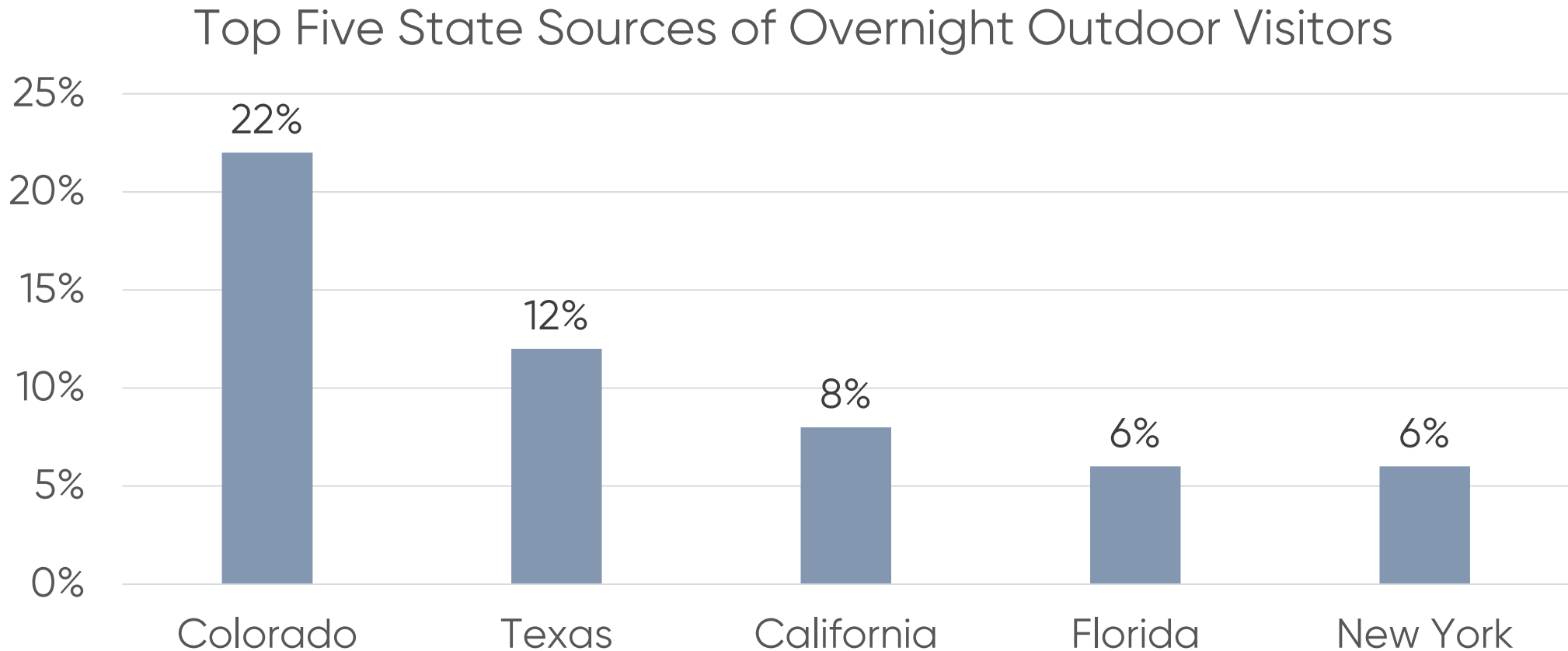
- According to DOLA, tourism is 16% of direct basic jobs or 1,490 jobs
- Households bring in retirement, public assistance and investment income and commuter wages
- "All else" includes finance, insurance, real estate, professional services, trade, transportation, communications, construction, mining, manufacturing, and government.

Overnight Leisure Trips in Colorado, 2021



- Outdoor trips accounted for 23% of all marketable overnight trips in 2021

Source/Origin of Outdoor Overnight Visitors, 2021

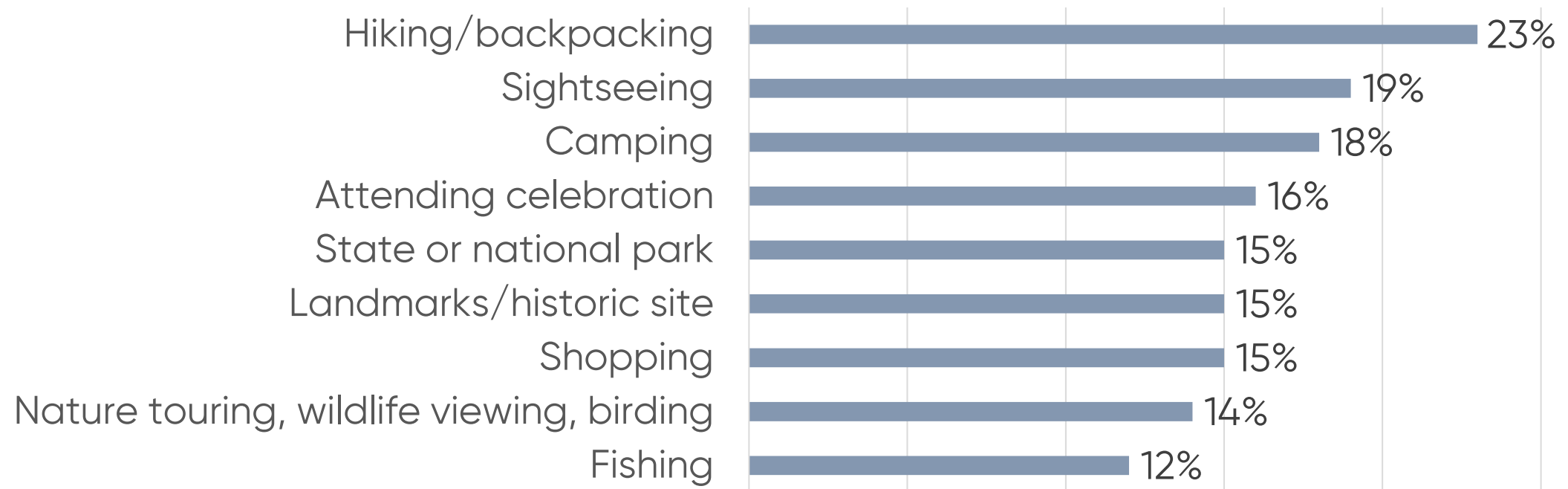


Source: Colorado Tourism Office, Colorado Travel Year 2021, Longwoods International

- In-state residents are the largest market for outdoor recreation (by far)
- 79% of overnight outdoor visitors are repeat visitors

Overnight Outdoor Trips: Activity Participation Rates, 2021

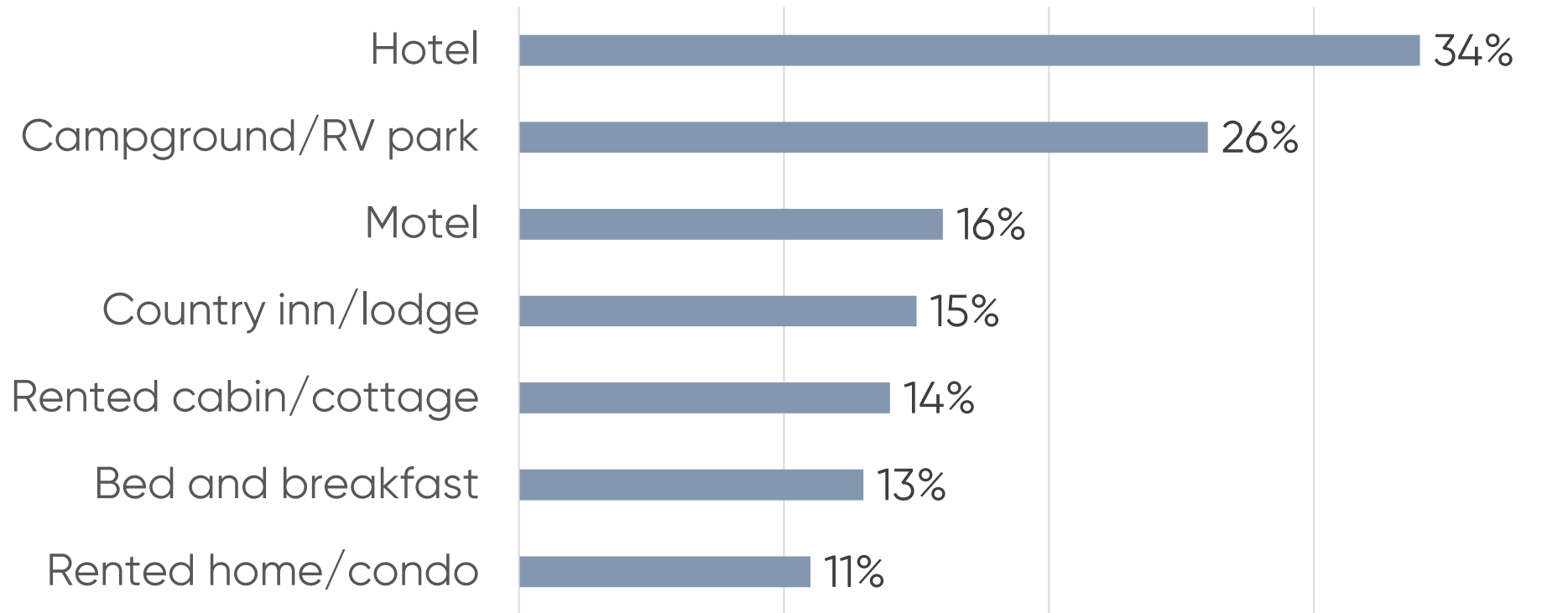
Top Activities and Experiences for Outdoor Trips - Participation Rates



- Hiking, sightseeing and camping are the most popular activities
- State parks, national parks and historic sites are included in many outdoor trips

Overnight Outdoor Trips: Accommodations, 2021

Accommodations for Overnight Outdoor Visits

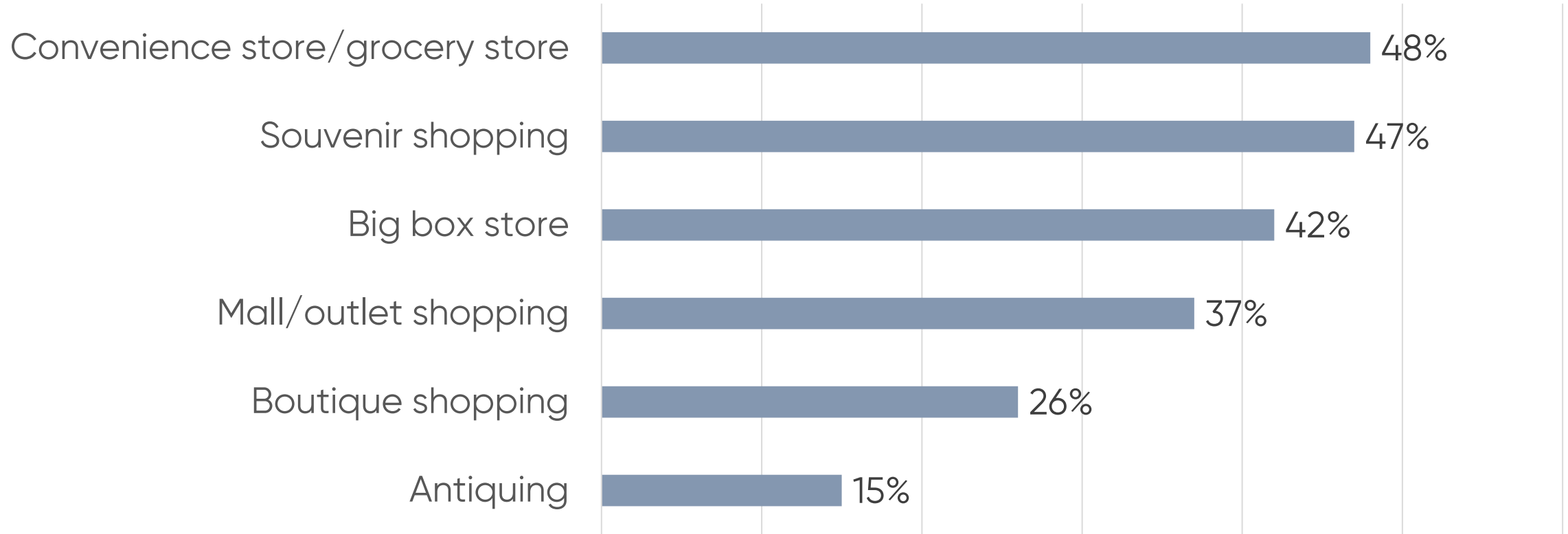


Source: Colorado Tourism Office, Colorado Travel Year 2021, Longwoods International

- Traditional lodging is the most common accommodation type for outdoor visits
- Average length of stay in Colorado for outdoor trips: 2.8 nights
- Average travel party size, composition: 3.2 people total, 2 adults, 1.2 children

Overnight Outdoor Trips: Shopping, 2021

Outdoor Overnight Visitor Shopping Participation Rates by Type

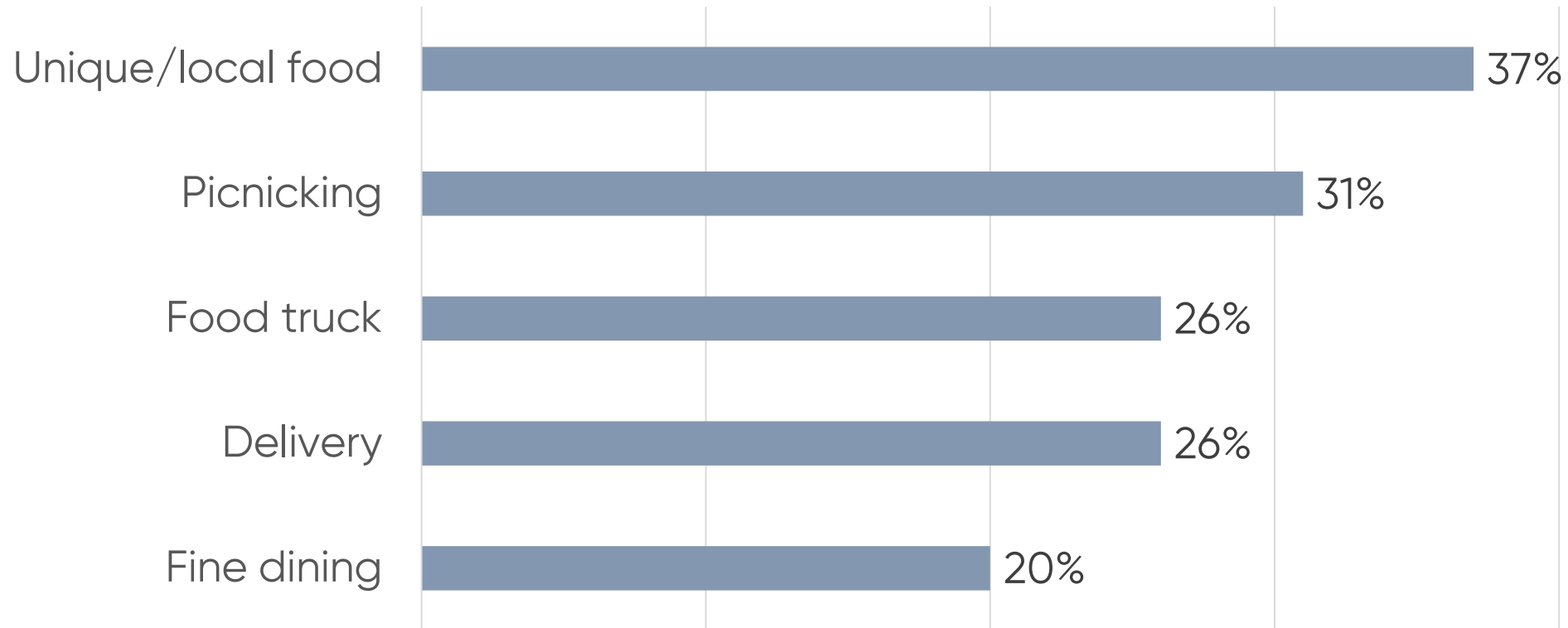


Source: Colorado Tourism Office, Colorado Travel Year 2021, Longwoods International

- About half of overnight outdoor recreation visitors shop for souvenirs
- About one quarter shop at boutiques and one sixth go antiquing
- These are retail categories that are suited for main streets/downtowns

Overnight Outdoor Trips: Dining, 2021

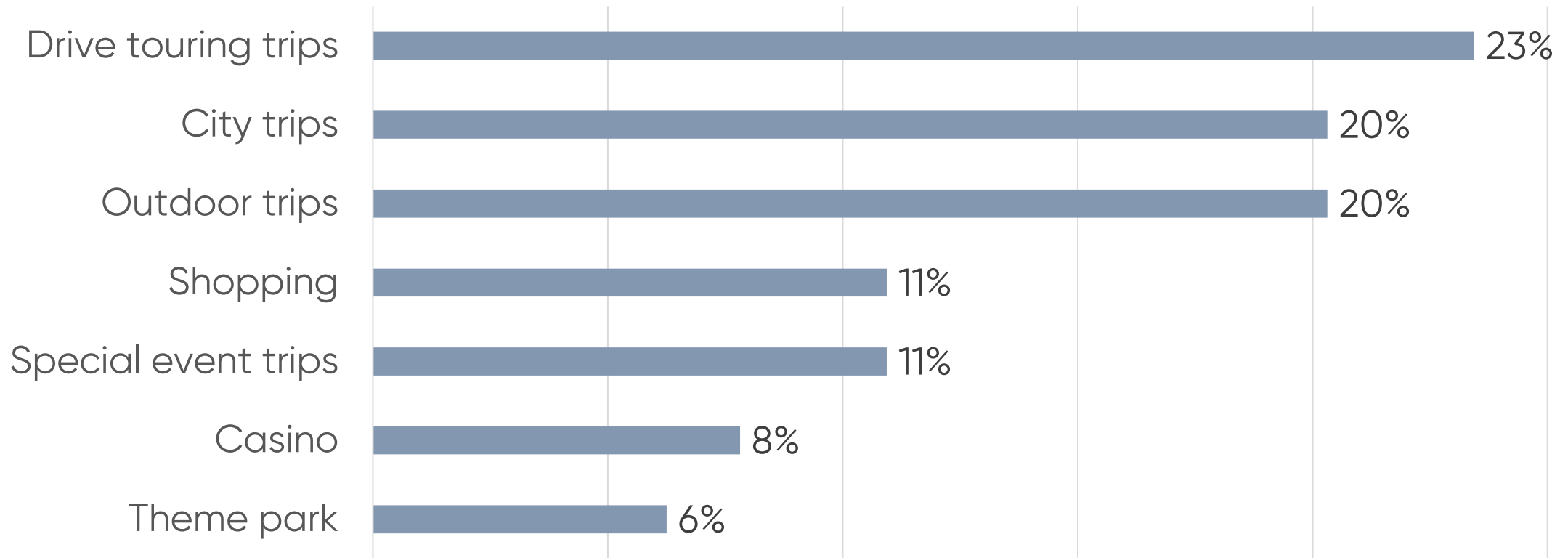
% of outdoor overnight visitors by type of dining



- Most overnight outdoor visitors prefer unique local food, including food trucks.
- Picnicking is common among outdoor overnight visitors

Day Trips in Colorado, 2021

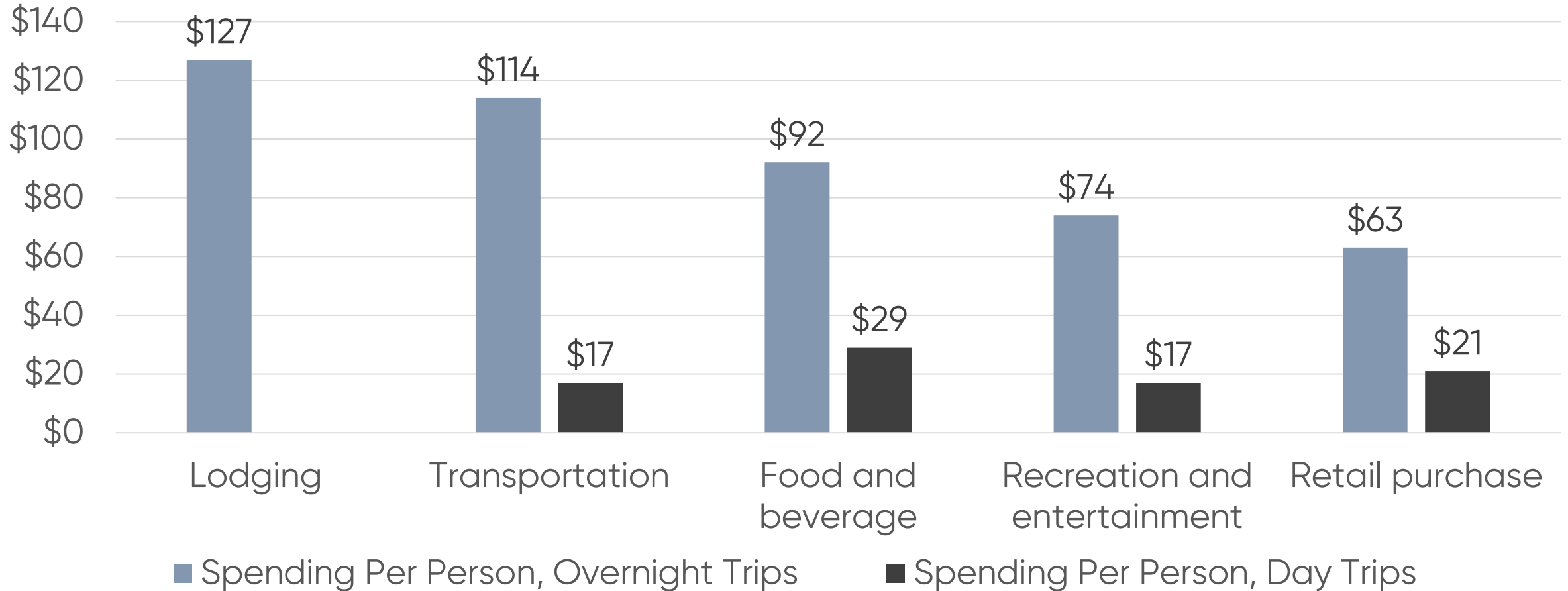
2021 Marketable Day Trips



- Outdoor trips accounted for 20% of all marketable day trips

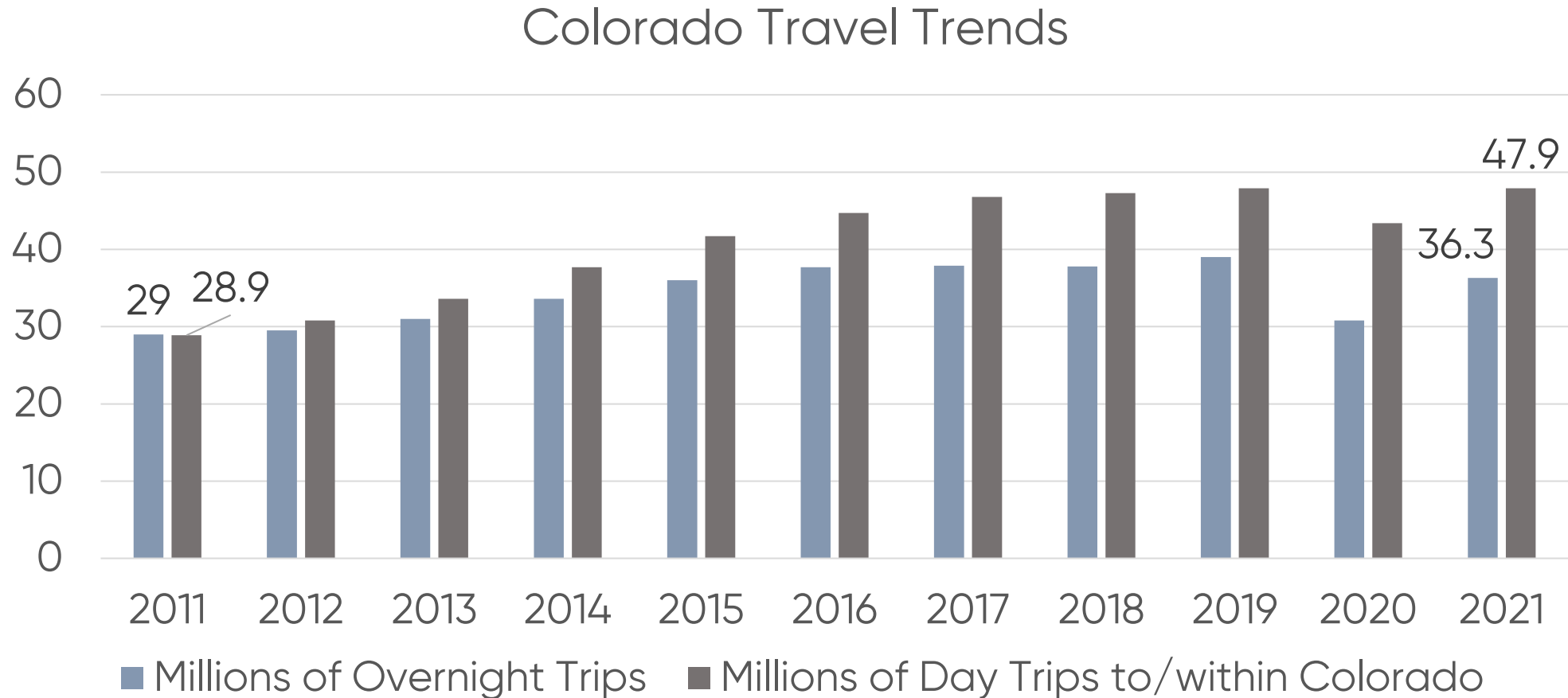
Spending: Overnight Vs. Day Trips

Spending Per Person Per Trip, 2021



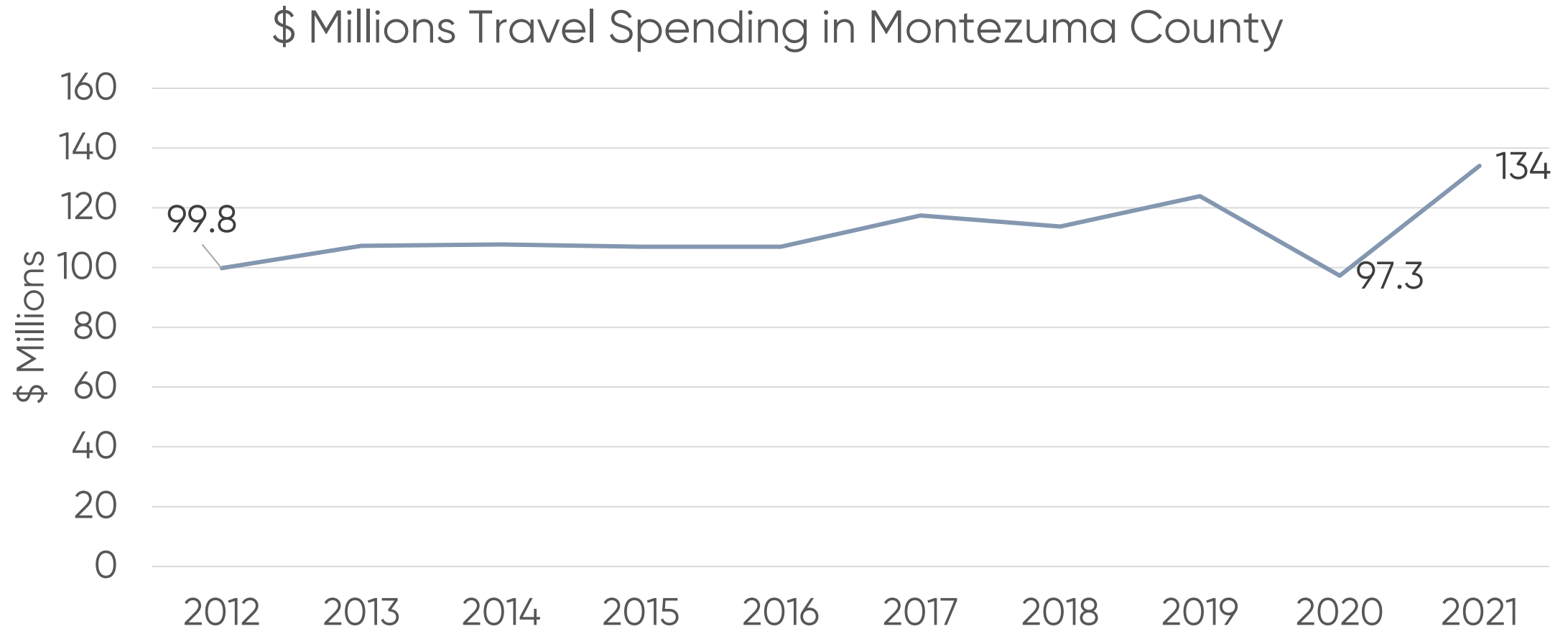
- Overnight trip spending (\$470), over 5 times day trip spending (\$84)

Overnight Vs. Day Trips in Colorado



- Day trips have grown faster than overnight trips

Travel Spending in Montezuma County 2012-2021

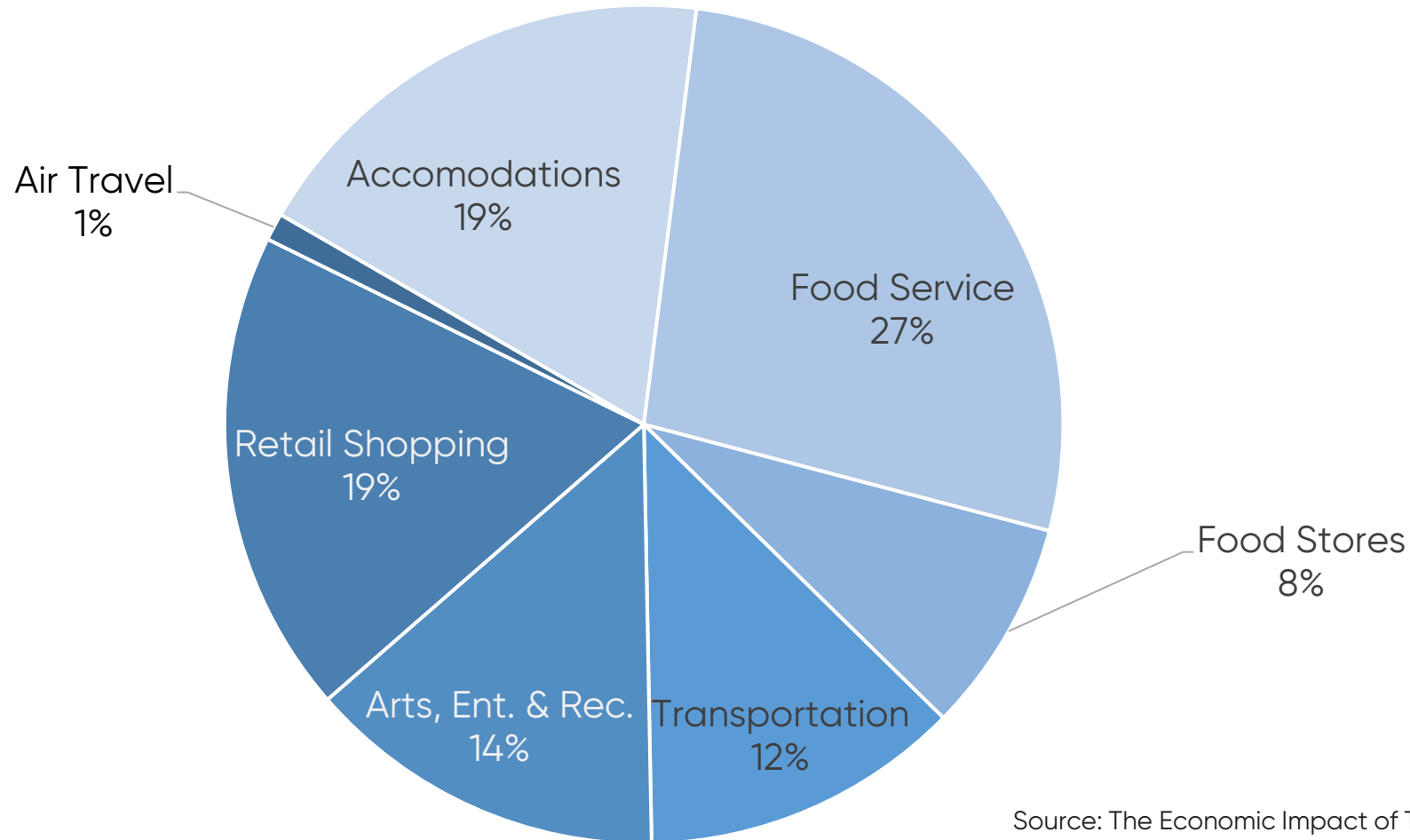


Source: The Economic Impact of Travel, 2022, Colorado Tourism Office, Dean Runyan Associates

- Travel spending in Montezuma County grew by 34% in 10 years
- Travel spending quickly recovered from COVID slump

Montezuma County Visitor Spending by Category, 2021

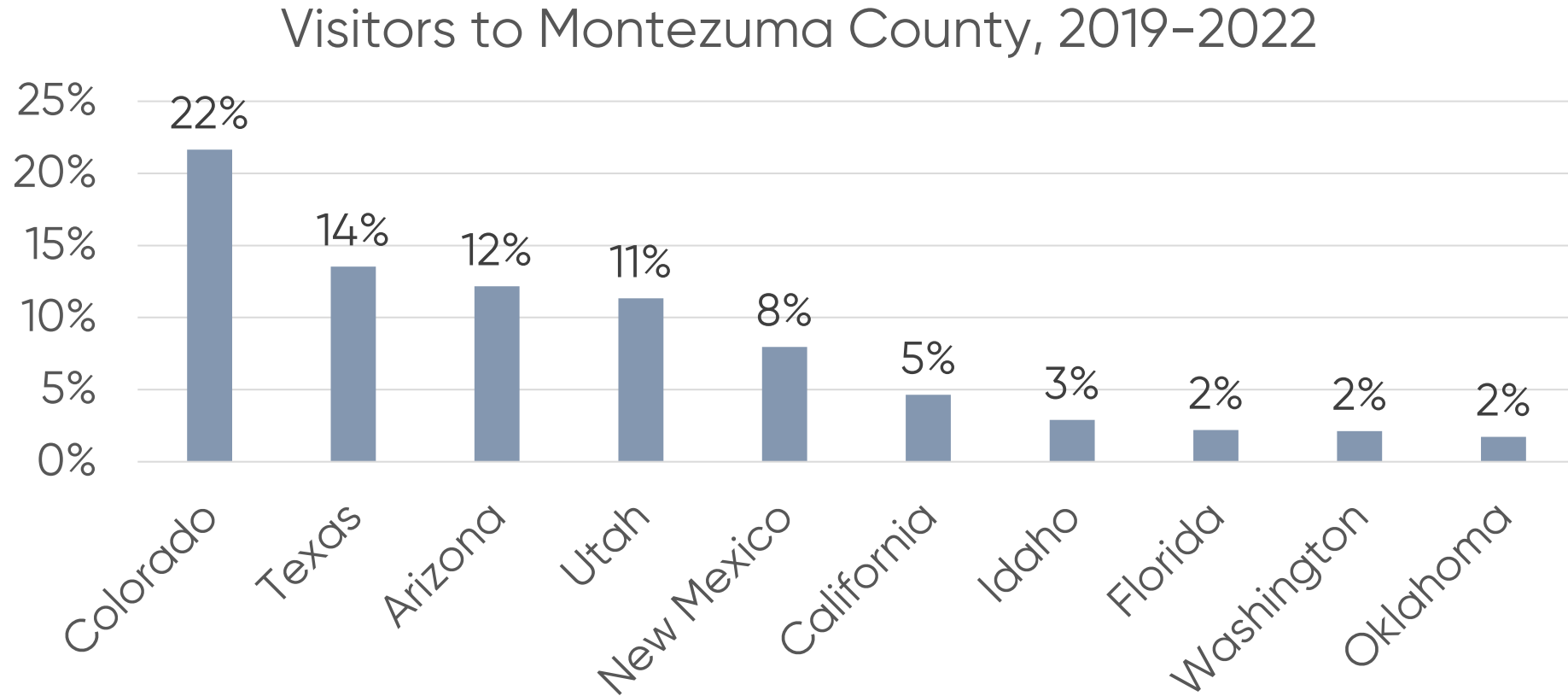
Visitor Spending in Montezuma County (\$millions)



Source: The Economic Impact of Travel, 2022, Colorado Tourism Office, Dean Runyan Associates

- \$134 million in travel spending in 2021
- 67% of travel spending was "essential" (lodging, food, transportation)

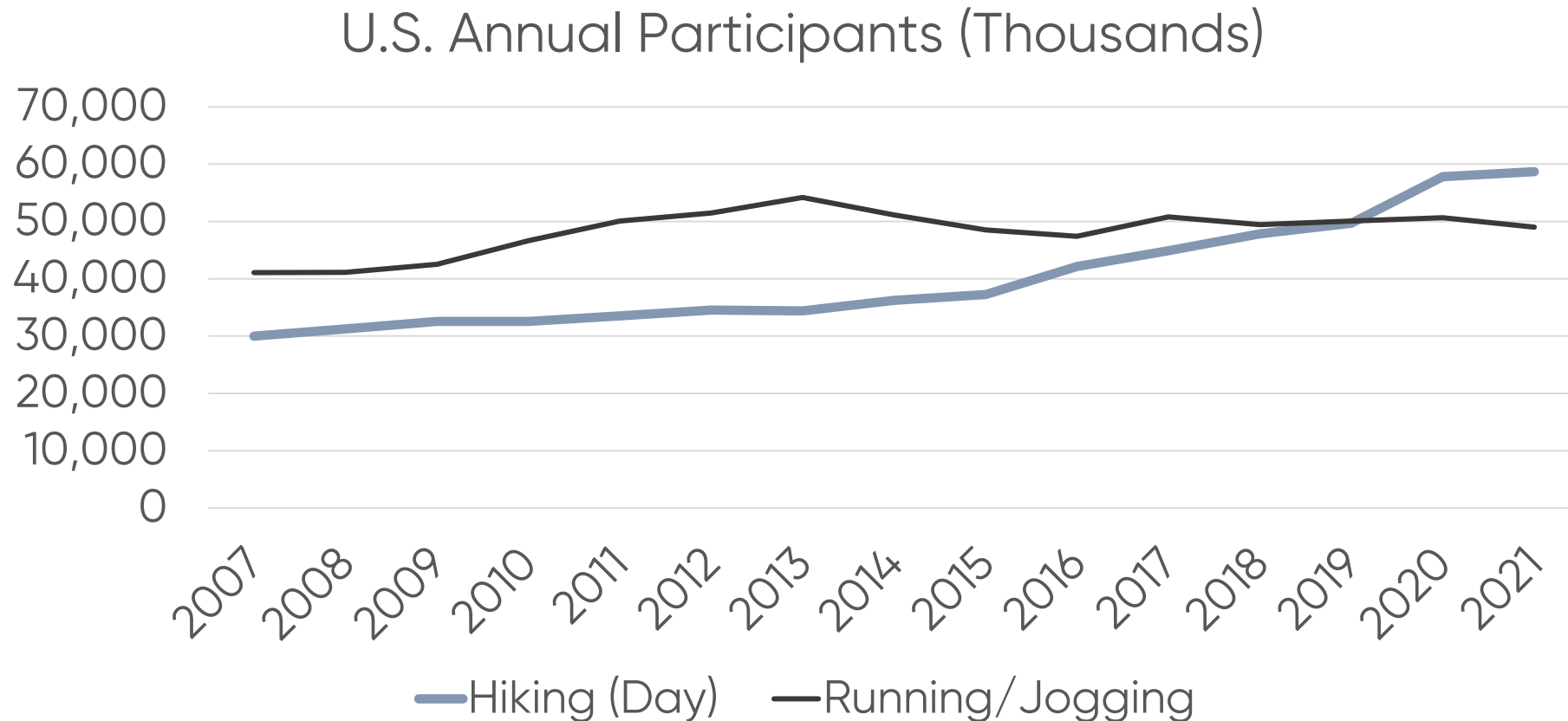
Origin of Visitors to Montezuma County



Source: Datafy Report, Colorado Tourism Office, Mesa Verde Country

- Total trips to Montezuma County 2022: 2,105,729
- Visitor days in Montezuma County 2022: 5,346,410

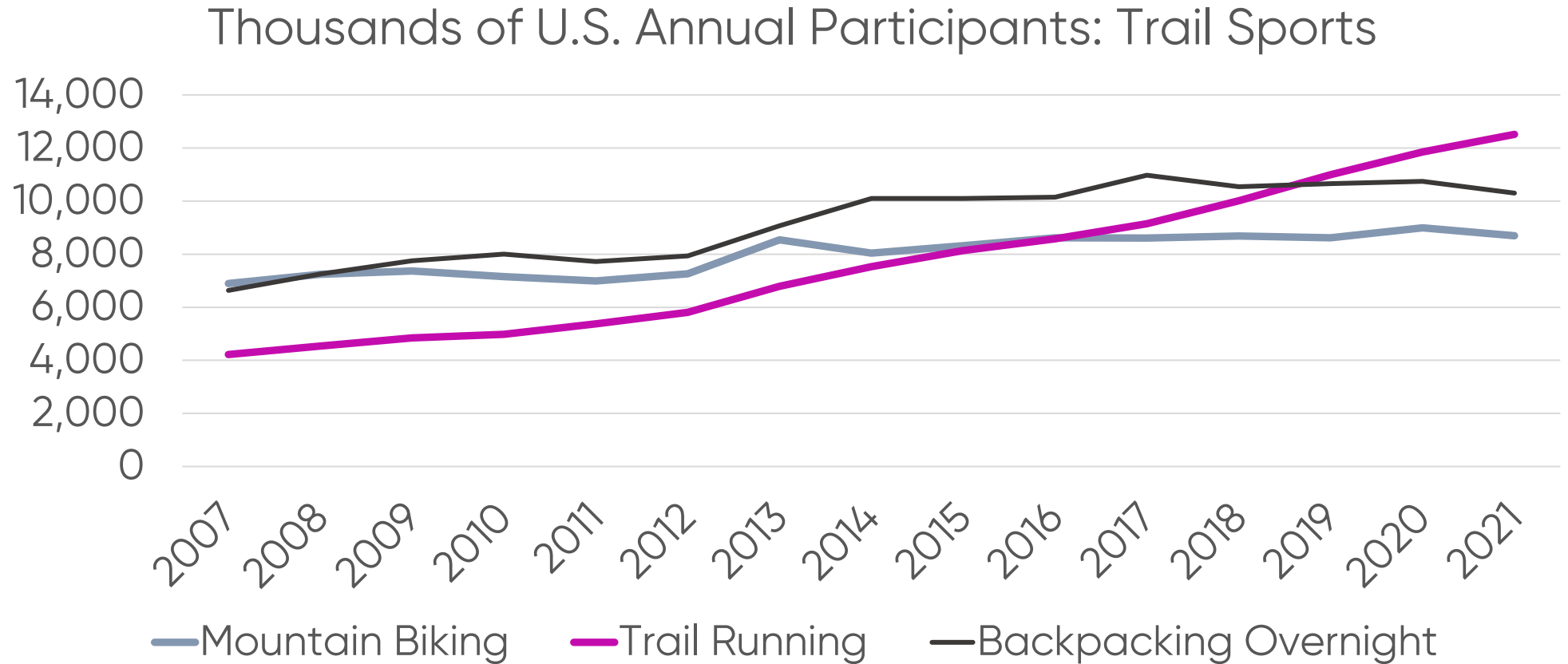
U.S. Outdoor Recreation Participants: Hiking/Running



Source: 2022 Outdoor Participation Study, Outdoor Foundation

- Hiking has shown 7% average annual growth over past 5 years
- More U.S. residents participate in hiking than any other outdoor activity

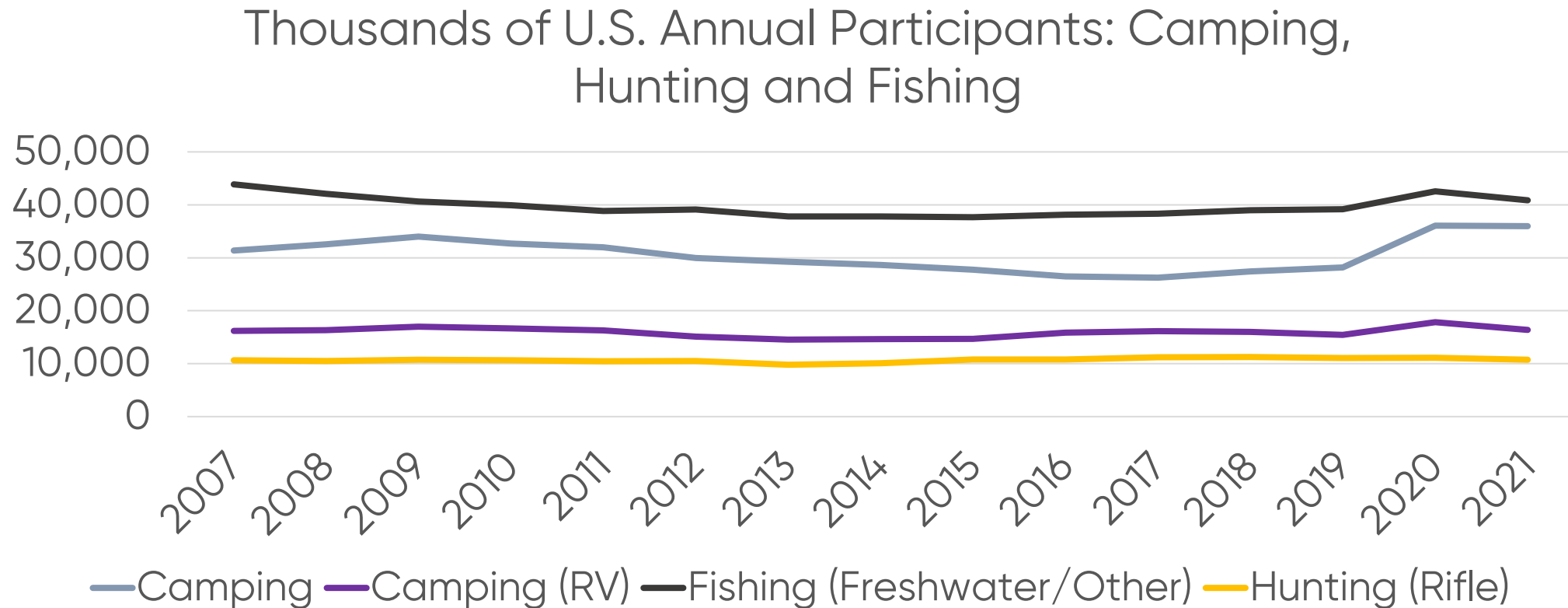
U.S. Outdoor Recreation Participants: Trail Sports



Source: 2022 Outdoor Participation Study, Outdoor Foundation

- Mountain biking participation has been flat since 2013
- Trail running has shown 7.9% average annual growth over past 5 years

U.S. Outdoor Recreation Participants: Hunting and Fishing

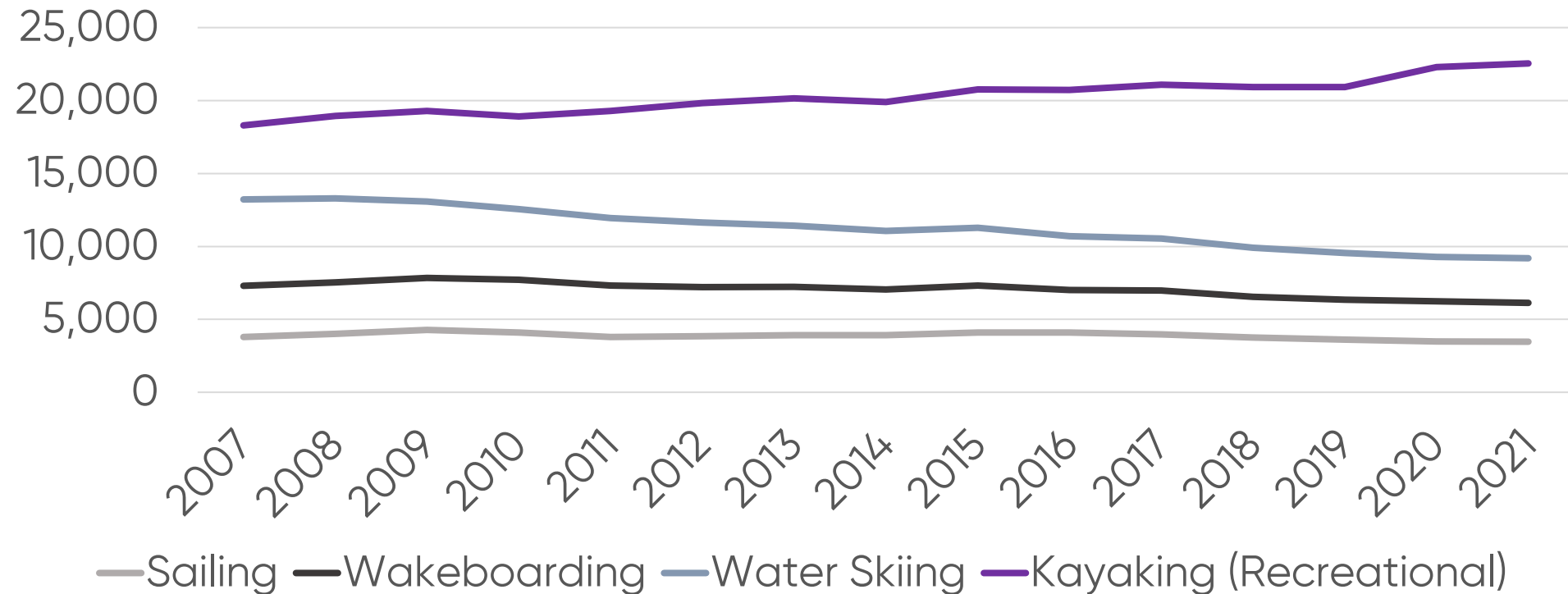


Source: 2022 Outdoor Participation Study, Outdoor Foundation

- Hunting and fishing in the U.S. have been flat
- Camping exhibited a Covid-related increase

U.S. Outdoor Recreation Participants: Reservoir Boating

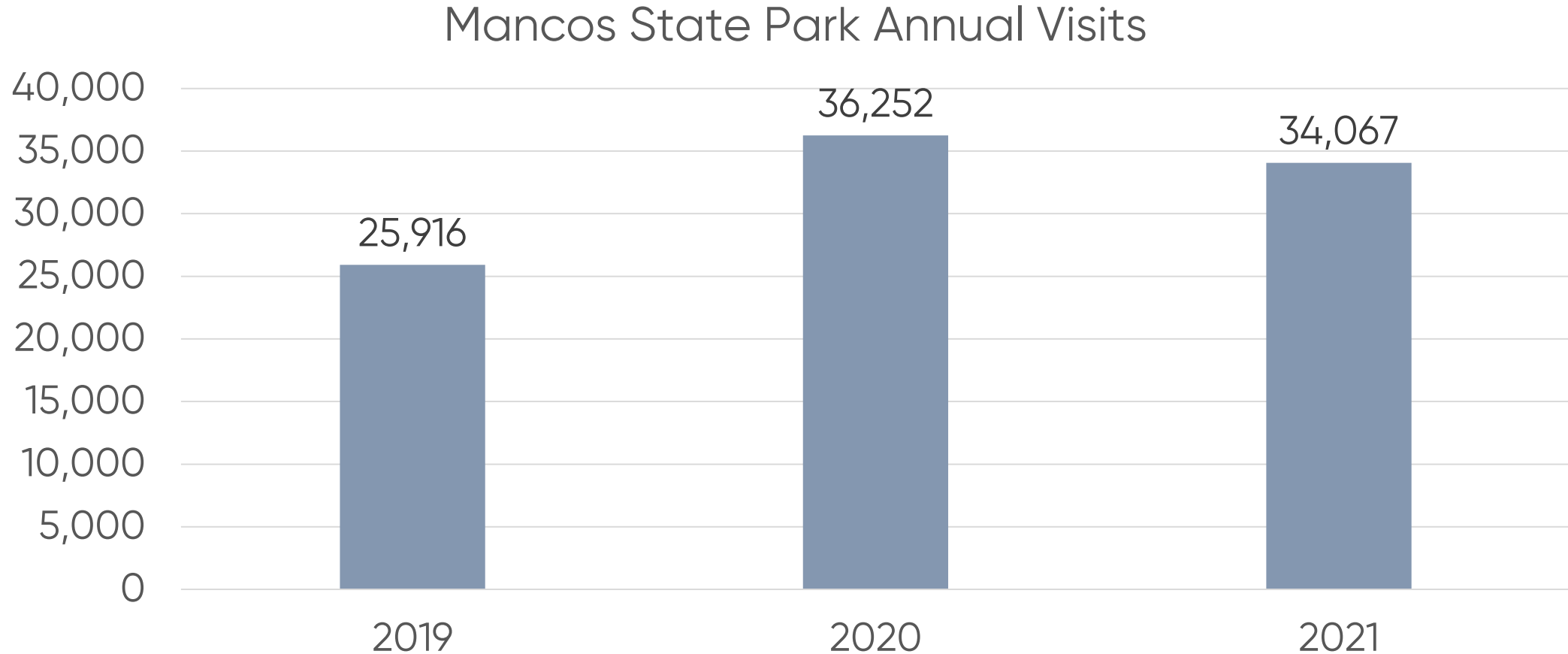
Thousands of U.S. Annual Participants:
Reservoir Boating Activities



Source: 2022 Outdoor Participation Study, Outdoor Foundation

- Kayaking is up, other reservoir boating activities are in decline

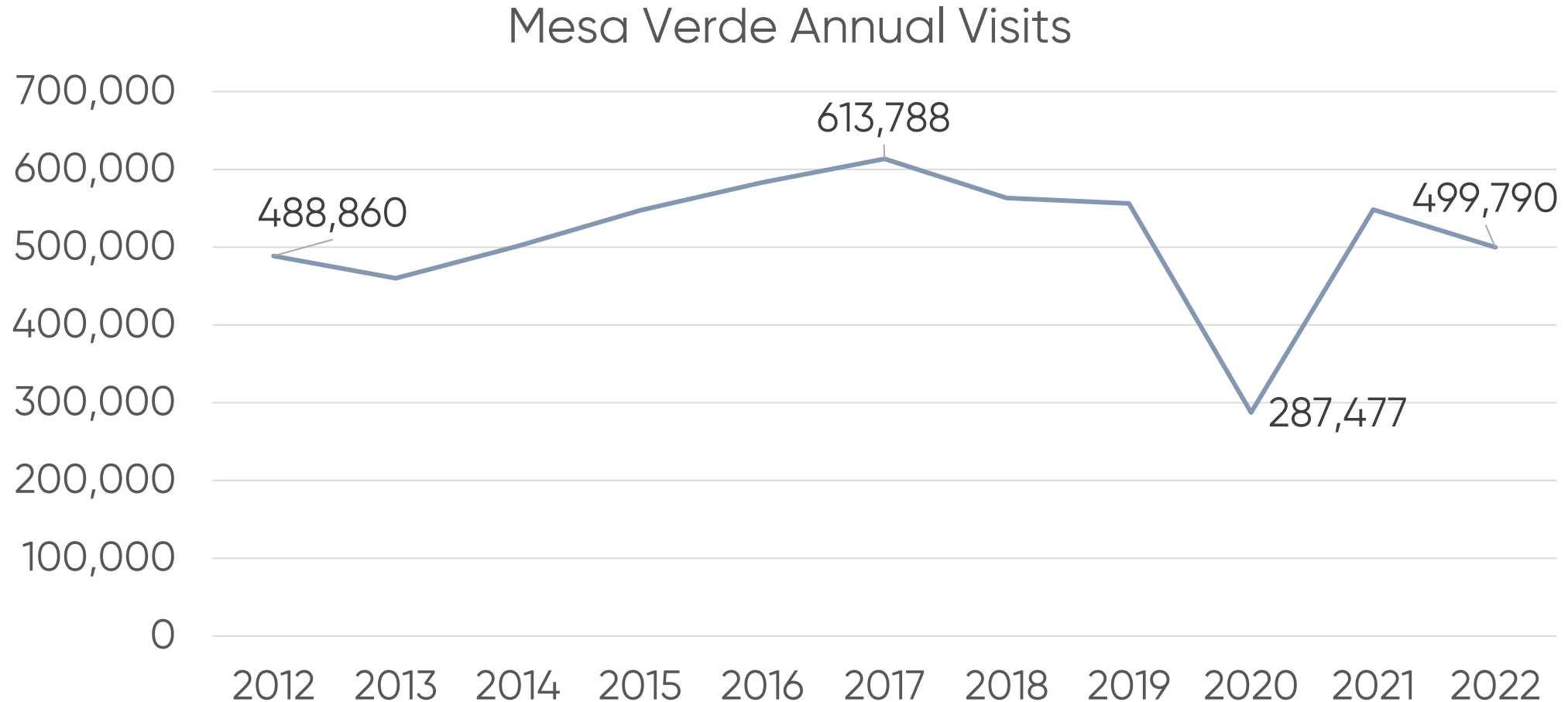
Mancos State Park Visitation 2019-2021



Source: Colorado State Parks Region Visitation Report, Colorado Counties Inc.

- Visits increased 40% in 2020, reflects COVID related surge in outdoor rec.
- Visits dropped some in 2021 but remained well above pre-COVID levels

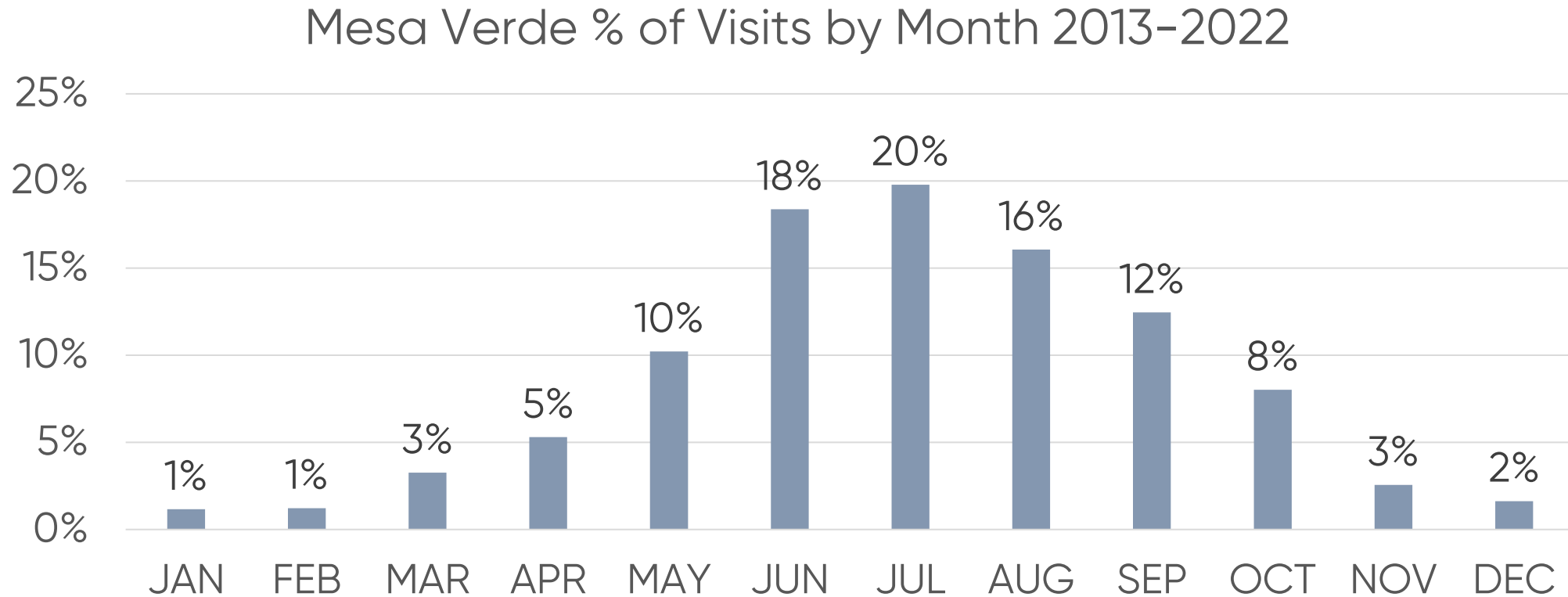
Mesa Verde National Park Annual Visitation 2002-2022



Source: National Park Service Stats Database, March 2023

- Visits grew steadily and dropped in 2018 (severe wildfire season)
- COVID 2020 was a major dip in visitation and effects lingered into 2021
- Visitation not recovered to level before 2018 fire season

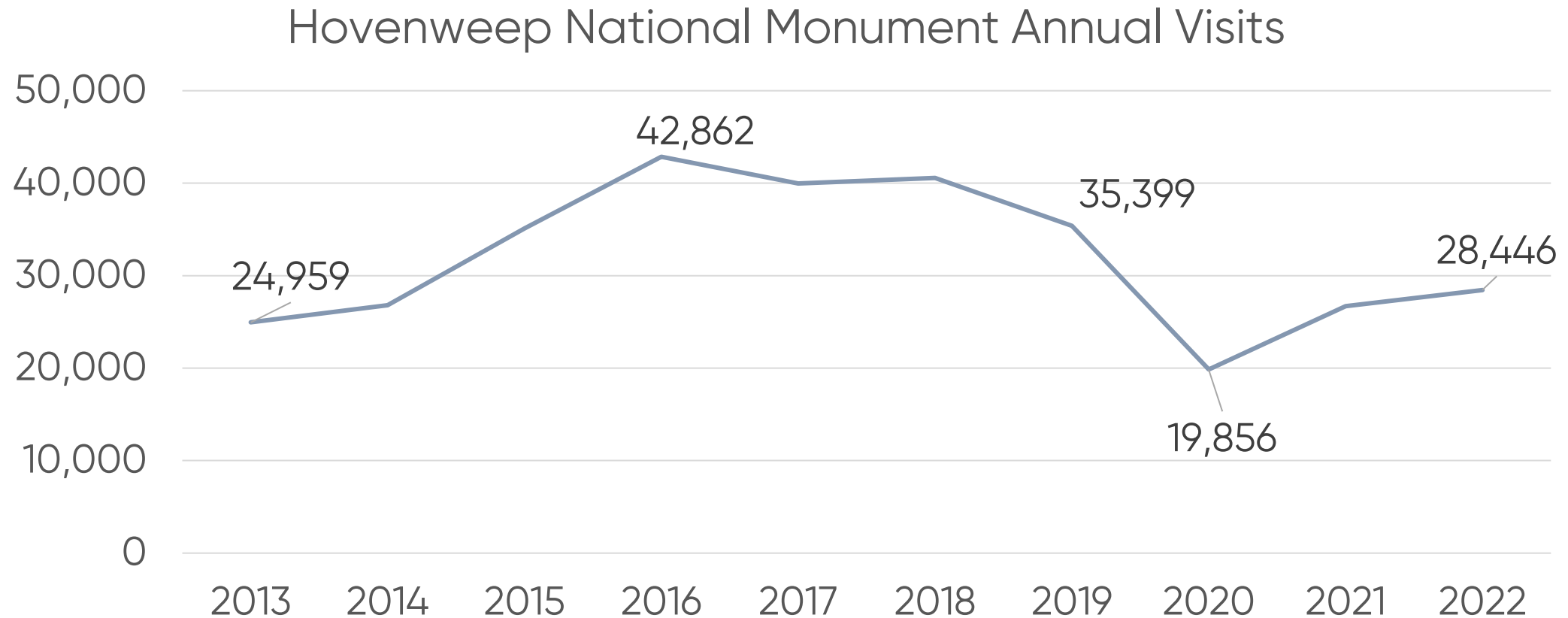
Mesa Verde National Park Seasonality



Source: National Park Service Stats Database, March 2023

- Two-thirds of visits occur June-September
- Just 7% of visits occur from November to February (mostly tour busses)
- Shoulder seasons March-May and October account for 26% of visits

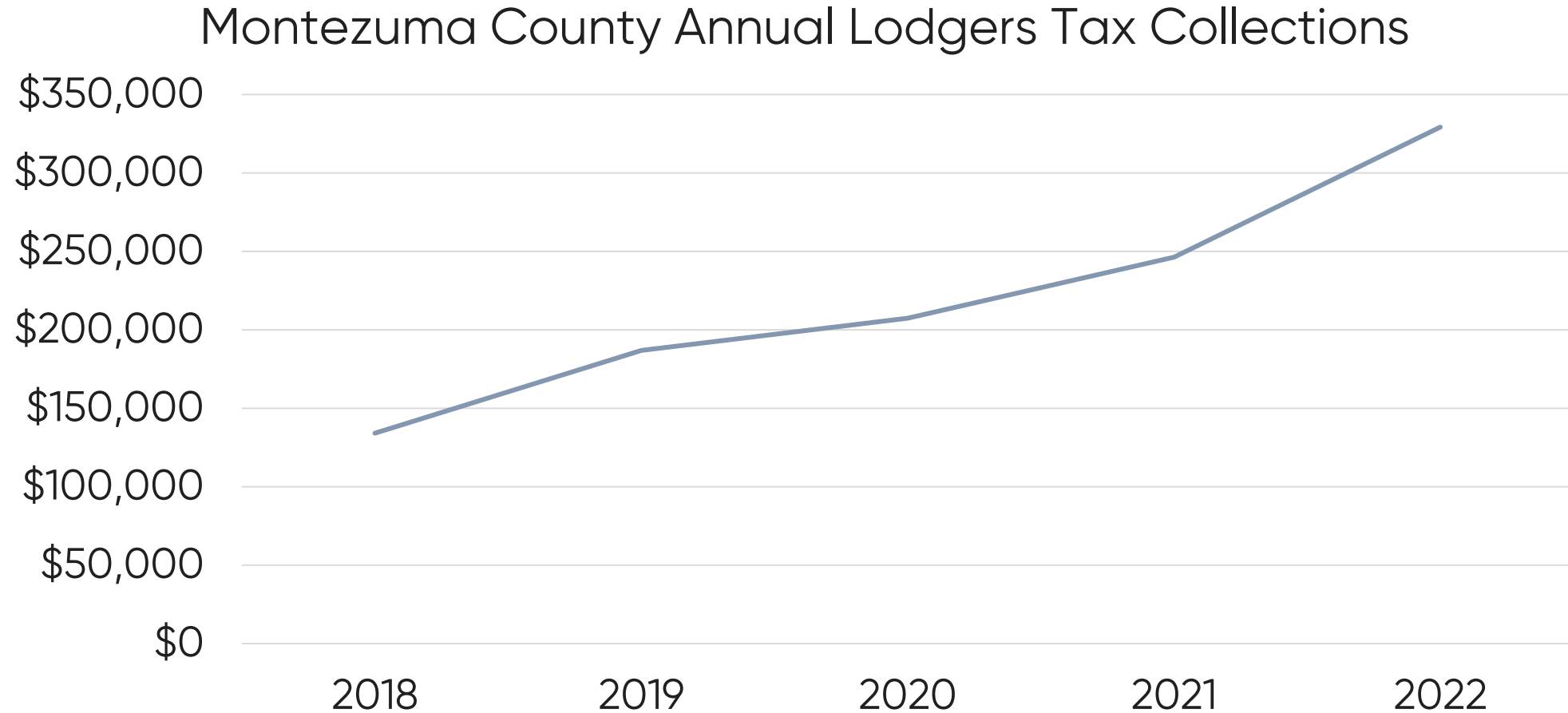
Hovenweep National Monument Annual Visitation 2013-2022



Source: National Park Service Stats Database, March 2023

- Visitation peaked in 2016
- Exhibiting slow recovery from COVID low in 2020

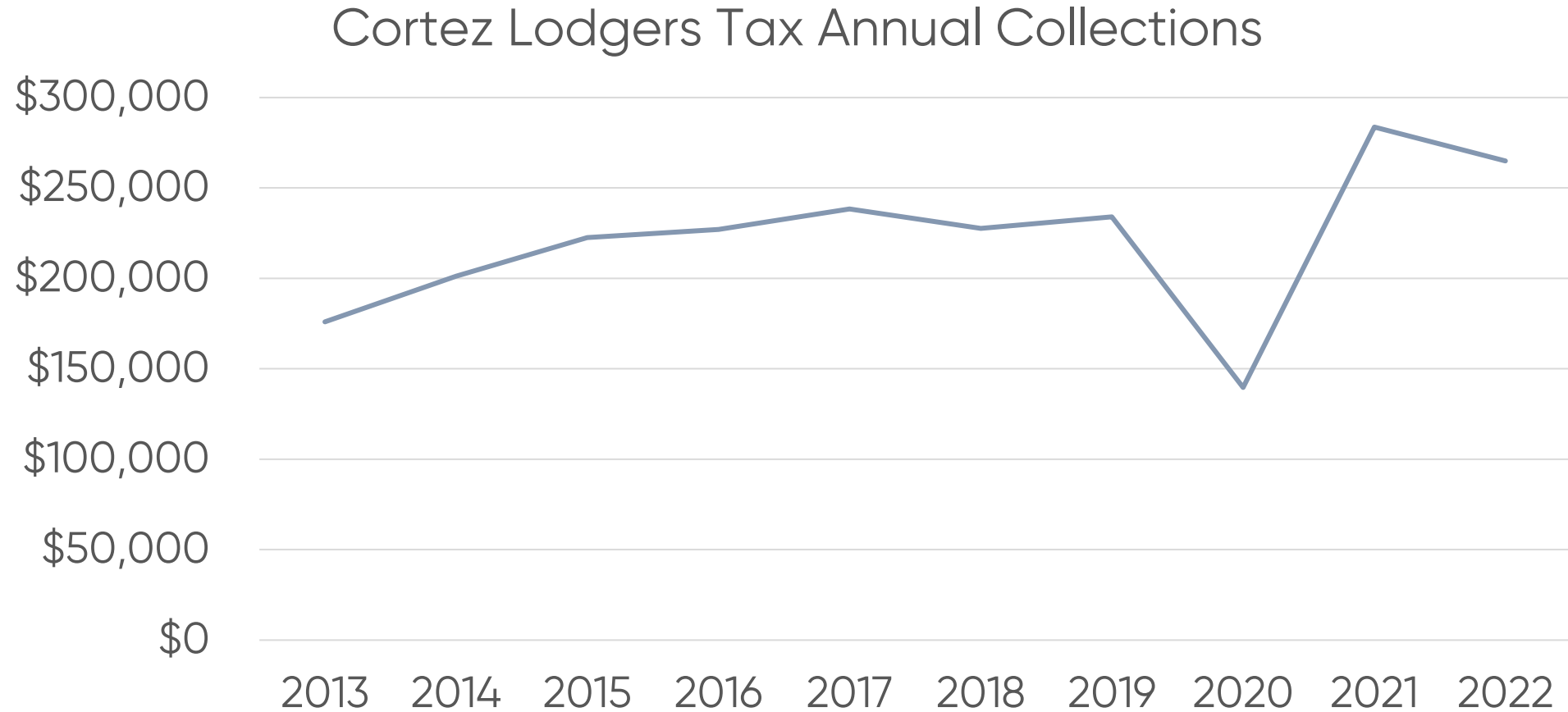
Montezuma County Annual Lodgers Tax Collections



Source: Montezuma County, March 2023

- Lodging tax collections grew by 145% from 2018 to 2023
- Despite Covid, collections grew 11% from 2019 to 2020

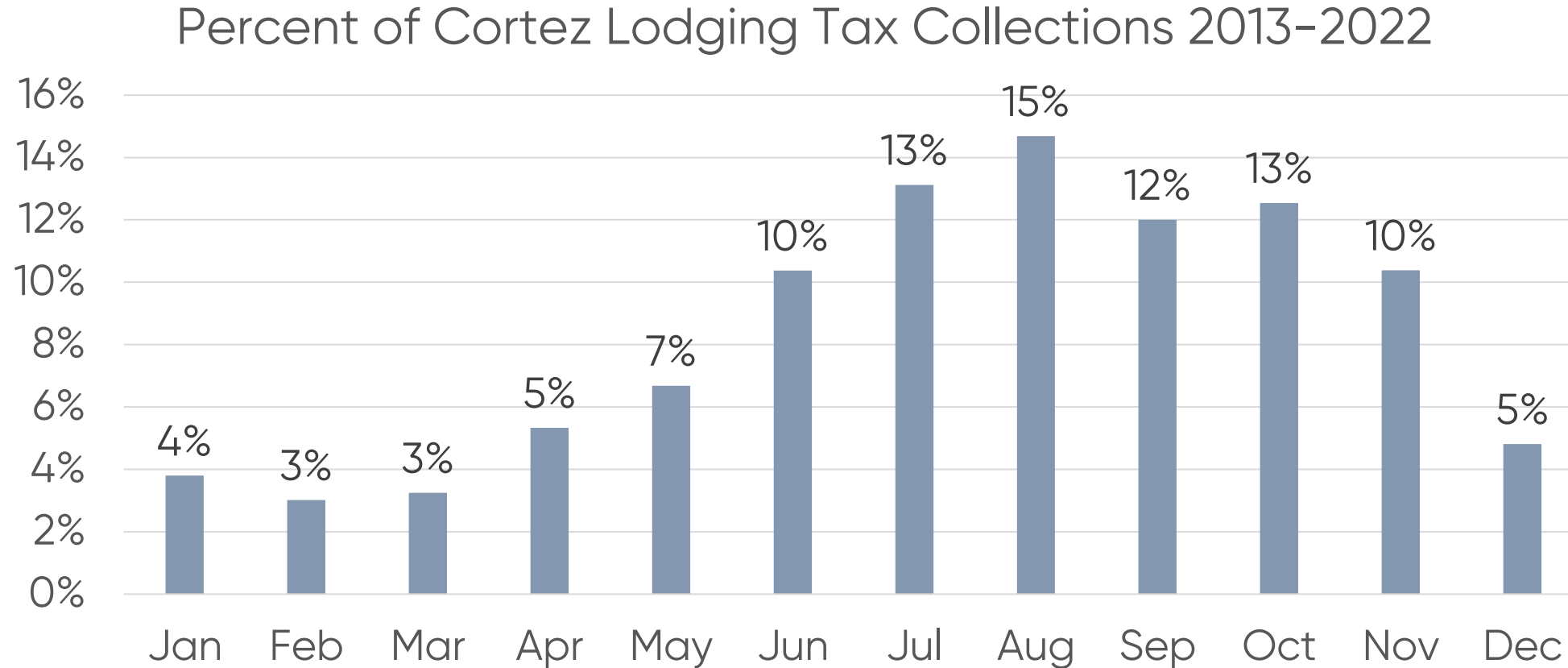
City of Cortez Annual Lodgers Tax Collections



Source: City of Cortez, March 2023

- After COVID low in 2020, 2021-22 collections far exceeded 2015-19
- Lodging tax is somewhat parallel to Mesa Verde Visitation

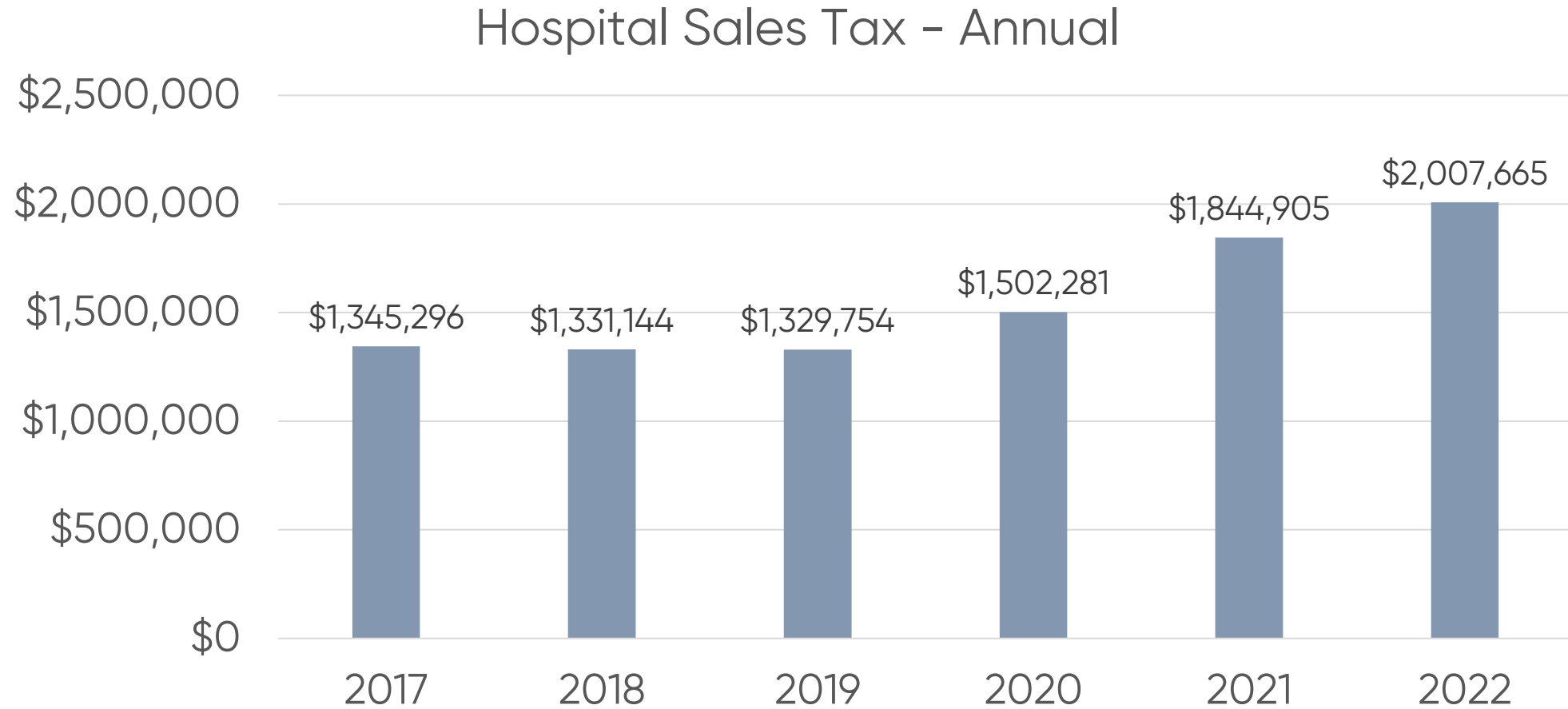
City of Cortez Lodgers Tax Collections by Month 2013-2022



Source: City of Cortez, March 2023

- Summer peak in July and August is classic Colorado tourism
- The fall season is remarkably busy for overnight visitation

Annual Hospital District Annual Sales Tax Collections 2017-2022

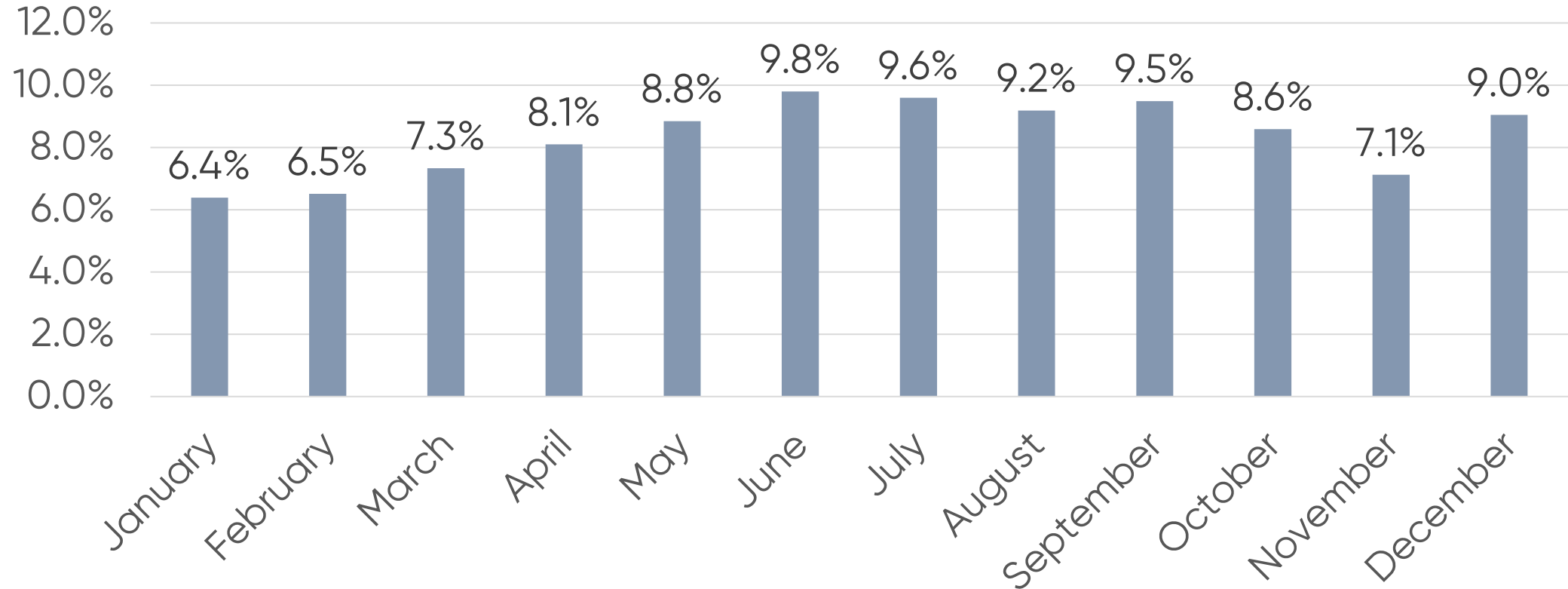


Source: Montezuma County, March 2023

- Countywide sales grew 2020 through 2022
- Growth includes recent requirement that online retailers to pay sales tax

Hospital District Sales Tax Collections by Month 2013-2022

Percent of Sales Tax Collections by Month 2017-2022



Source: Montezuma County, March 2023

- Sales tax collections indicate seasonality
- Retail sales seasonality is not entirely due to tourism

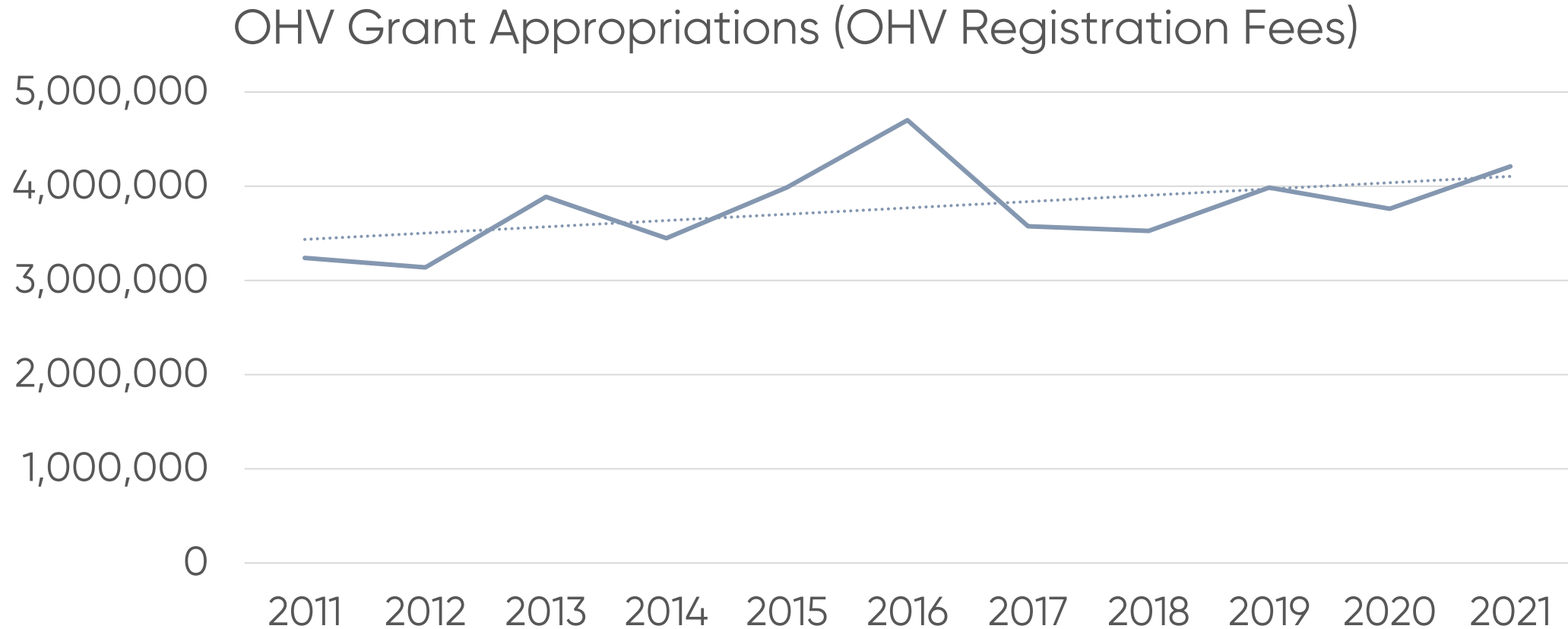
Highway Traffic Counts

	Average Daily Trips 2021	% Annual Growth	Base Year
US 491 North of Cortez	4,780	2.6%	2008
US 491 South of Cortez	7,886	1.6%	2008
SH 145 West of Dolores	3,860	4.0%	2016
US 160 West of Mancos	8,470	1.2%	2018

Source: Colorado Department of
Transportation (OTIS Query Tool)

- Highways near each municipality have shown traffic growth in recent years
- Busiest segments are approaching 10,000 daily trips
- Mix of county residents, visitors, pass-through traffic, and commercial trucks

OHVs in Colorado



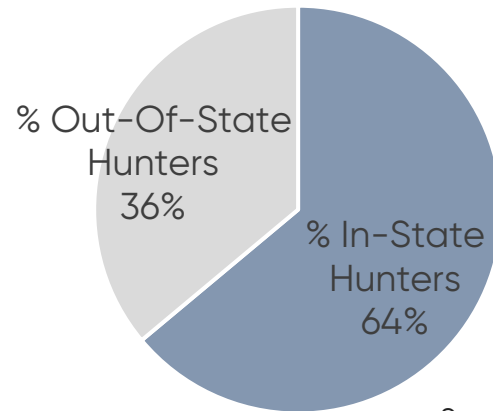
Source: Joint Budget Committee Staff Budget Briefings,
Colorado General Assembly

- OHV grant funding appropriations are an indicator of # of registered OHVs
- Trend indicates moderate growth in ownership of OHVs statewide
- Local data not available

Hunting in Montezuma County – Limited Licenses (Draw)

Limited Licenses Issued via Draw			
	Units 71, 72, 73, 711	% In-State Hunters	% Out-Of-State Hunters
Deer	978	753	225
Elk	738	344	394
Total	1716	1097	619

Deer and Elk Limited Licenses, Units 71, 72, 73, 711



Source: Colorado Parks and Wildlife Hunting Statistics

- 1,716 limited draw hunting licenses issued in units covering Montezuma
- Statewide over-the-counter tags 2021: 54k out of state (37.5%), 90k in-state

Hunting Days, Montezuma and State of Colorado

Montezuma County Hunter-Days 2017	
Big game	21,619
Small game	2,924

Source: 2019 SCORP, Colorado Parks and Wildlife

Hunting Days, Colorado Total	
2012	10,476,442
2017	7,281,066

Source: 2019 SCORP, Colorado Parks and Wildlife

- Montezuma hunter-days almost 25,000 in 2017 (incl. companions w/out tags)
- Statewide hunting dropped by over 3 million 2012-2017