

Montezuma County Outdoor Recreation Use and Economic Impact Study

April 2024

Prepared by:



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Executive Summary

The purpose of the Montezuma County Outdoor Recreation Use and Economic Impact Study is to describe the quantity and type of outdoor recreation and heritage site visitation in Montezuma County and to estimate the spending and other economic impacts.

This study demonstrates that outdoor recreation assets and heritage sites draw visitors to Montezuma County. Intercept survey data collected at various outdoor recreation and heritage sites in Montezuma County demonstrate that 55.6% of warm season outdoor recreation users are visitors from outside of Montezuma County. Most outdoor recreation visitors (63.8%) stay overnight at least one night in Montezuma County and 55% of these overnight visitors camp and 27% of which stay in hotels or vacation rentals.

Trail counts, road counts, campground reservations, attendance counts, boat launches and other direct measures of outdoor recreation use have been collected and were shared by BLM, USFS and CPW with the project team. These counts in aggregate add up to 88,230 visitor parties before adding the 92,740 annual visitor parties at Mesa Verde and Hovenweep. The average outdoor recreation visitor party size in Montezuma County is 2.9 people. In total, the counted use at the outdoor recreation and heritage sites covered in this study is 180,970 visitor parties per year.

Outdoor recreation visitors spend, an average of \$802 per overnight visitor party per trip, \$102 for day visitors, and \$551 overall average per visitor party spending in Montezuma County. Spending by counted visitor parties on BLM, USFS and CPW recreation sites totals \$48,614,730 before adding the \$29,838,200 annual spending by visitor parties at Mesa Verde and at Hovenweep. This means that each year, outdoor recreation and heritage site visitors spend \$78,452,930 in Montezuma County. Visitor spending injects new dollars into the local economy, and multipliers result from increased sales in businesses that serve tourism businesses and from the spending of wages earned in the tourism industry. Total economic output is \$100,700,100 per year and 724 jobs.

Outdoor recreation assets in Montezuma County have an effect on another potent segment of the economic base: households. Seventy-six percent (76%) of county resident respondents to the Montezuma County Outdoor Recreation Intercept Survey indicated that outdoor recreation affected their decision to move to Montezuma County. According to Colorado Department of Local Affairs, the "households" economic base sector generates over 4,000 jobs in the county. Thirty-five percent (35%) of Montezuma County resident survey respondents said that outdoor recreation was the main reason for them moving to the county. This means that outdoor recreation assets contributes toward 1,379 jobs in the households economic base sector.



Background

A common theme voiced by the community during the community meetings held for this project in May, 2023 was the need for balancing between local quality of life and economic growth when planning for the future of outdoor recreation and heritage tourism. CRAFT Studio 101 in spring/summer 2020, which was put on by Colorado Tourism Office and hosted by Cortez Cultural Center and Cortez Chamber of Commerce, brought renewed focus on outdoor recreation and heritage tourism and also resurfaced the concern about maintaining quality of life for locals. This study was designed to provide empirical, county-specific data about the quantity of outdoor recreation and heritage site use in Montezuma County and the economic activity associated with this use. It provides an information base for weighing the tradeoffs of future choices about outdoor recreation and heritage tourism.

The appendices to this report summarize the information that was the foundation of the analysis presented in this report:

Appendix 1 Outdoor Recreation and Heritage Asset Inventory – The inventory of outdoor recreation and heritage assets includes a list of trails and trail systems, activities occurring/allowed on the trails, level of difficulty, seasonality, ease of access, and jurisdiction. The inventory lists outdoor recreation facilities such as reservoirs, state wildlife areas, and other facilities. About 70 businesses directly related to outdoor recreation (including non-profit businesses) were included in the inventory spanning business categories such as retail, manufacturing, tours and guide services, youth organizations, guest ranches, and commercial campgrounds.

Appendix 2 Outdoor Recreation Demand-Side Assessment – 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.

Appendix 3 Montezuma Outdoor Recreation Intercept Survey Results 2023 – The 2023 intercept survey methodology is described in the Data and Methodology section below and the full results are summarized in this appendix. Survey results are also cited and presented throughout the report.



Outdoor Recreation Use Study

The primary purpose of the outdoor recreation use study is to describe the quantity and type of outdoor recreation and visitation to heritage assets in Montezuma County. With the help of the 2023 Montezuma County Outdoor Recreation Intercept Survey (see Appendix 3) conducted as part of this study and other data provided by federal lands agencies, this study provides an estimate of the number of parties visiting from outside of Montezuma County who used local outdoor recreation assets or visited heritage sites.

Methodology and Data

This study relied on outdoor recreation user counts, heritage site visitation counts, road traffic counts and trail traffic counts collected by Bureau of Land Management, US Forest Service, the National Parks Service and Colorado Parks and Wildlife (CPW). These user counts, traffic counts and attendance counts were requested directly from the agencies and are included and cited throughout the study. The user counts, traffic counts and attendance counts were crucial inputs into the calculation of total annual use. Some outdoor recreation use goes uncounted and is not included in this study because counts were not available. An example of uncounted use is use of USFS trails accessed directly from Highway 145 northeast of Town of Dolores.

User counts chart the quantity of trail use but do not provide information about the users, for example, whether they are locals or visitors. The best way to learn details about outdoor recreation users and heritage site visitors is to ask them directly. Three-hundred and seventy-eight (378) intercept surveys were collected in person from mid-June through mid-September 2023 at trailheads, along Forest Service roads, in campgrounds, lakeside and at outdoor recreation facilities and heritage sites throughout Montezuma County. The intercept survey began with observations about activities/modes, party size and other visible attributes. Some of the questions differed depending on whether trail users were residents of Montezuma County or visitors from outside of the county. The survey was designed to quantify the proportion of visitor use compared to local use, understand trip characteristics among visitors and track visitor spending patterns. Survey results are displayed and cited throughout the main body of this report and complete survey results are presented in Appendix 3.

The National Park Service conducts attendance and economic impact studies for Mesa Verde National Park and Hovenweep National Monument. Similarly, Mancos State Park has been included in recreation use and market studies by Colorado Parks and Wildlife. These studies utilize a combination of user counts and intercept surveys to provide a profile of visitors and their impacts on the local economy. The relevant results from agency studies were cited in this analysis to estimate use and impacts of Mesa Verde National Park, Hovenweep National Monument and Mancos State Park. Although Hovenweep National Monument is in Utah, it has impacts on Montezuma County.

Outdoor Recreation Use Summary

The Outdoor Recreation Use Study results are listed according to the type of outdoor recreation asset or heritage site for which user counts were available in June and July of



2023. "Use" means the entry of one person upon an outdoor recreation and/or heritage site to participate in recreation activities for an unspecified period of time. The detailed data and analysis for each type of asset follows this summary.

Figure 1 – Montezuma County Outdoor Recreation and Heritage Asset Use Summary

Outdoor Recreation Asset in Montezuma County	Total Uses (Annual)
BLM Trails and Roads	76,338
Canyons of the Ancients Visitor Center	29,614
Forest Service Trails and Roads	234,716
Forest Service Campgrounds	13,043
McPhee Reservoir: Inspected Boat Launches	12,886
Paddle Sports on Upper Dolores River, McPhee Reservoir, and other recreation water bodies	29,150
Mancos State Park	32,078
Mesa Verde National Park	499,790
Hovenweep National Monument (Utah)	28,446
Total	956,061

Source: RPI Consulting Summative Results

Use by Outdoor Recreation Asset

Trail counts were taken by BLM as far back as 2018 on select BLM trails systems and access roads using TRAFx trail counters and software. Trail counts do not necessarily represent the number of trail users because many trail outings start and end at the same trailhead, thus the same user will typically register two counts on the same outing. To avoid double counting on an out-and-back route, analysts assume two passes are equal to one trail user. Road counts for collector roads where traffic is funneled into one or just a few routes were used to estimate traffic throughout interconnected roads systems.

The highest level of BLM trail use occurs in nested loop trail systems and on trails accessing popular attractions. BLM roads see an average monthly use in the low hundreds, while the very remote trails accessing wilderness study areas see low use.

Figure 2 – BLM Trails and Roads Use

Type	BLM Area	Annual Uses
Attraction Roads	Painted Hand Pueblo Hovenweep BLM 4721	2,553
Attraction Trails/Pathways	Lowry Pueblo Sand Canyon Pueblo Escalante Pueblo Trail	31,604
Trail Systems	Phil's World Summit Ridge Aqueduct Sand Canyon	36,013



Type	BLM Area	Annual Uses
Remote Trails	Cross Canyon WSA Squaw and Papoose WSA	510
OHV Trails	CANM OHV Mud Springs RMZ Phil's World OHV	1,446
Dispersed Access Roads	Rincon Mesa Chutes 'n Ladders	4,212
Total		76,338

Source: BLM Trail and Road Counts (TRAFX), 2018–2023

The Canyons of the Ancients National Monument (CANM) Visitors Center is the highest use BLM facility and location with an average of 29,614 in annual attendance excluding 2020 and 2021 which abnormally low years due to occupancy restrictions and other impacts of the pandemic.

Figure 3 – CANM Visitor Center Attendance

Year	Total Visitors, CANM Visitor Center
2017	29,024
2018	29,902
2019	33,084
2020	10,424
2021	6,598
2022	26,447

Source: CANM Visitor Center attendance counts, BLM, 2018–2023

The amount of use on US Forest Service roads was estimated using USFS road counts on roads in Montezuma County. The traffic counts were adjusted to count vehicle trips on primary access roads used to access other forest roads and trails and to avoid double counting. Despite the fact that forest roads are open to vehicles just over half the year, USFS roads in Montezuma County accommodate nearly 87,000 visitor parties per year.

Figure 4 – USFS Roads and Trails Use

USFS Area	All Average Daily Vehicle Counts	Average Daily Vehicle Counts, Primary Accesses	Annual Visitor Parties	Months Open
West La Platas	645	493	41,350	5.5
Boggy Draw Area	388	297	31,705	7
West Dolores	87	87	9,287	7
Taylor Creek	43	43	4,590	7
Total		920	86,932	

Source: USFS Road Counts



There are three USFS campgrounds in Montezuma County, two of which are at McPhee Reservoir. Campground occupancy data showed that McPhee Campground is the busiest campground in part because it is the most conveniently located Forest Service campground in Montezuma County.

Field observations suggest that a significant volume of camping occurs in dispersed camping areas compared to formal campgrounds. Although the number of nights spent in dispersed camping areas is unknown, disperse campers are included in the USFS Road and Trails Use estimate above.

Figure 5 – USFS Campground Use

	House Creek Campsites Occupied	McPhee Campsites Occupied	Transfer Campsites Occupied	Total Visitor Parties
2017	1,482	2,038	440	3,960
2018	1,034	1,494	381	2,909
2019	1,449	1,979	692	4,120
2020	685	2,235	376	3,296
2021	930	2,868	712	4,510
Average	1,116	2,123	520	3,759

Source: USFS Dolores Ranger District records

Colorado Parks and Wildlife inspects trailered water craft using the Main Boat Ramp and the House Creek Boat Ramp at McPhee Reservoir, creating the most accurate water-based recreation data set available in the county. Each boat launched is one visitor party.

Figure 6 – McPhee Reservoir Inspected Water Craft

Year	Incoming Boat Inspections Main Boat Ramp and House Creek Boat Ramp, McPhee Reservoir
2015	4,461
2016	5,147
2019	4,524
2020	5,955
2021	4,298
2022	4,250
Average Annual	4,773

Source: USFS Monthly Site Reports, McPhee Main and House Creek

Canoeing and kayaking participation is 9.4% of adults in the southwest according to the 2019-2024 SCORP, with even higher rates for stand-up paddle boarding and whitewater rafting. McPhee Reservoir, the Dolores River above the Town of Dolores and several smaller reservoirs such as Summit and Totten Reservoirs offer convenient options for paddle sports in Montezuma County.



Figure 7 – Paddle Sports Use: Upper Dolores River, McPhee Reservoir, and Other Water Bodies

	Participation Rate	Annual Uses
Canoeing/kayaking	9.4%	10,528
Stand-up paddle boarding	13.3%	14,915
Whitewater rafting	16.5%	3,707

Source: 2019-2024 State of Colorado Outdoor Recreation Plan public survey results; USFS Monthly Site Reports, McPhee Main and House Creek

Whitewater rafting use estimates on the Dolores River above Town of Dolores accounted for the numerous “day-run” whitewater options within day trip distance of Montezuma County. This analysis conservatively estimates that estimated whitewater rafting user days will be distributed evenly throughout these well-known, perennial day-runs in Southwest Colorado.

Figure 8 – Comparable Day-Run Rafting Sections in the Area

Day-Run Rafting Sections (Perennial)	Nearest Community	Rating
Lower Animas River	Durango, CO	Class II-III+
Pagosa Springs Town Run	San Juan River, Pagosa Springs, CO	Class II-III
San Miguel Canyon	San Miguel River, Telluride, CO	Class II-IV
Upper Dolores	Dolores, CO	Class II-III
Moab Daily, Colorado River	Moab, UT	Class II-III

Despite the growing interest in outdoor sports, Mesa Verde National Park is the single largest draw for visitors in Montezuma County. Combined with Mancos State Park and Hovenweep National Monument, these highly managed facilities see an average of 560,314 visits per year. Hovenweep is in Utah just across the state border from Montezuma County but it has a tangible effect on the county.

Figure 9 – Montezuma County Annual Outdoor Recreation Uses: State Park and National Park Service Assets

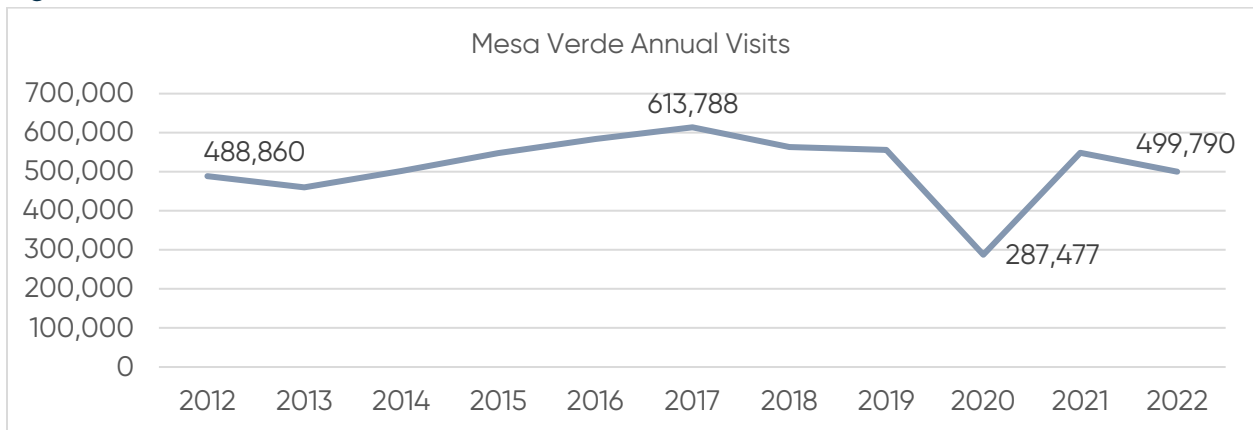
	Total Uses (Annual)
Mancos State Park	32,078
Mesa Verde National Park	499,790
Hovenweep National Monument	28,446
Total Visits	560,314

Source: RPI Consulting Summative Results

Visitation at Mesa Verde National Park and visitation at Hovenweep National Monument have exhibited a parallel trend with a steady increase in visitation until 2016 when visitation leveled and both exhibited a sharp decline in 2020 due to pandemic related restrictions and impacts.

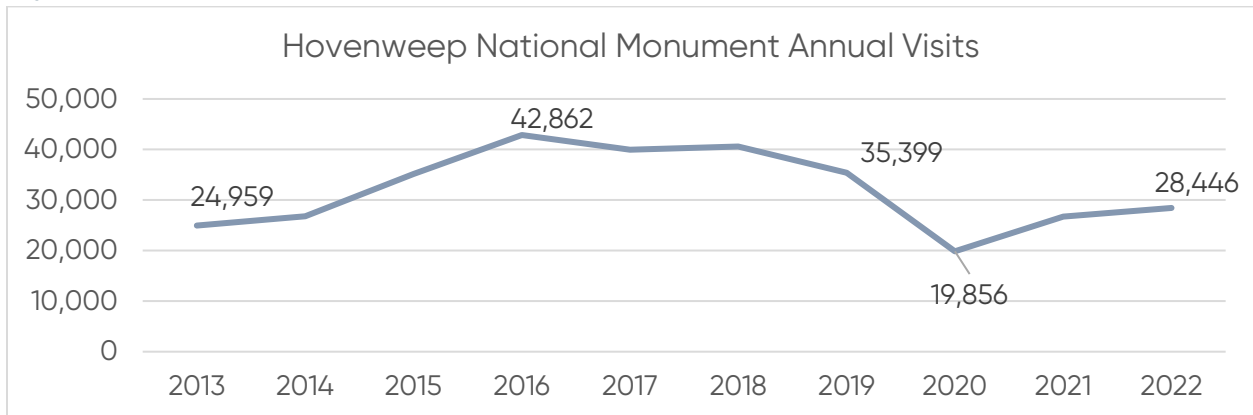


Figure 10 – Total Visits to Mesa Verde National Park



Source: National Park Service Stats Database, March 2023

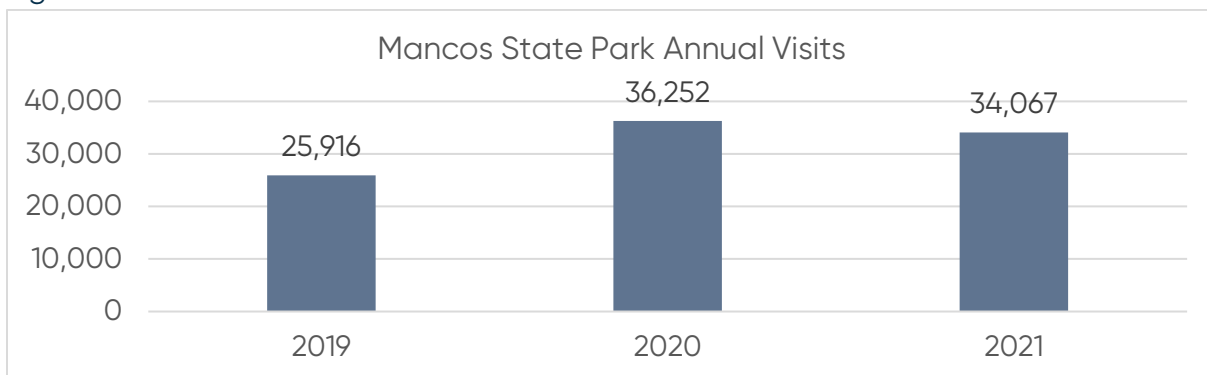
Figure 11 – Total Visits to Hovenweep National Monument



Source: National Park Service Stats Database, March 2023

Manco State Park offers camping, reservoir activities, trails and winter access and has seen 32,078 average annual visits. From a fiscal perspective, it is an enormous benefit to the Mancos Area to be able to host so many visitors in a facility provided by the state.

Figure 12 – Mancos State Park Visitation 2019-2021



Source: Colorado State Parks Region Visitation Report, Colorado Counties Inc., 2022



Intercept surveys collected at the Mancos State Park entrance gate asked how far visitors had traveled, which provides an estimate of how many visitors to Mancos State Park are Montezuma County residents and how many are visitors from outside of the County.

Figure 13 – Mancos State Park Visitor Distance Traveled

Survey Result	% Mancos State Park Visitors
In-State Traveled more than 25 miles	33%
Out of State Visitors	47%
Traveled 25 miles or less	20%
Mean travel distance	385
People per vehicle	2.9

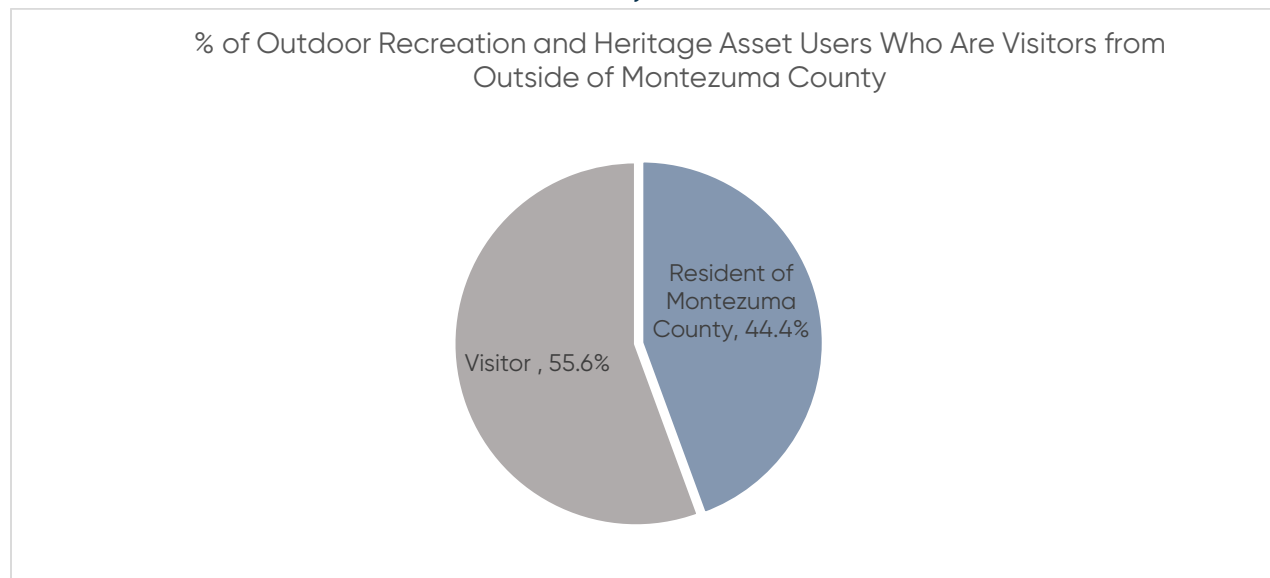
Source: Colorado State Parks Marketing Assessment visitor intercept survey results, 2009

Annual Visitor Parties

The outdoor recreation use analysis summarized in the previous sections of this report is presented in terms of total uses. "Use" means the entry of one person upon an outdoor recreation and/or heritage site to participate in recreation activities for an unspecified period of time. In order to complete the spending analysis and economic impact analysis, outdoor recreation use needs to be stated in terms of visitor parties, which are groups of recreationists together or individuals recreating solo.

The 2023 Montezuma County Outdoor Recreation Intercept Survey results show that 55.6% of Montezuma County outdoor recreation users were visitors from outside of Montezuma County and 44.4% live in Montezuma County.

Figure 14 – Survey Results, Percentage of Outdoor Recreation and Heritage Asset Users Who Are Visitors from Outside of Montezuma County



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023



The average outdoor recreation visitor party size is 2.9 people. Most parties are either an individual or two people recreating together. The annual visitor parties for all outdoor recreation assets are the quotient of the total uses divided by the visitor party size.

Figure 15 – Survey Results, Size of Visitor Party

Number in visitor party	% of Total
1	21.9%
2	41.4%
3	11.9%
4	12.9%
>=5	11.9%
Average party size	2.9

Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

There are 180,970 visitor parties from outside of Montezuma County who utilize outdoor recreation assets in the county each year. In the ensuing sections of this report, visitor parties are the basis for calculating economic impacts.

Figure 16 – Outdoor Recreation and Heritage Asset Visitor Parties from Outside of Montezuma County

Assets in Montezuma County	Annual Visitor Parties (from outside of Montezuma County)
BLM Trails and Roads	15,720
Canyons of the Ancients Visitor Center	6,100
Forest Service Trails and Roads	48,330
Forest Service Campgrounds	3,940
McPhee Reservoir: Inspected Boat Launches	1,620
Paddle Sports on Upper Dolores River, McPhee Reservoir, and other recreation water bodies:	3,670
Mancos State Park	8,850
Mesa Verde National Park*	88,360
Hovenweep National Monument*	4,380
Total	180,970

* The National Park Service established travel party size estimates for Mesa Verde National Park and Hovenweep National Monument



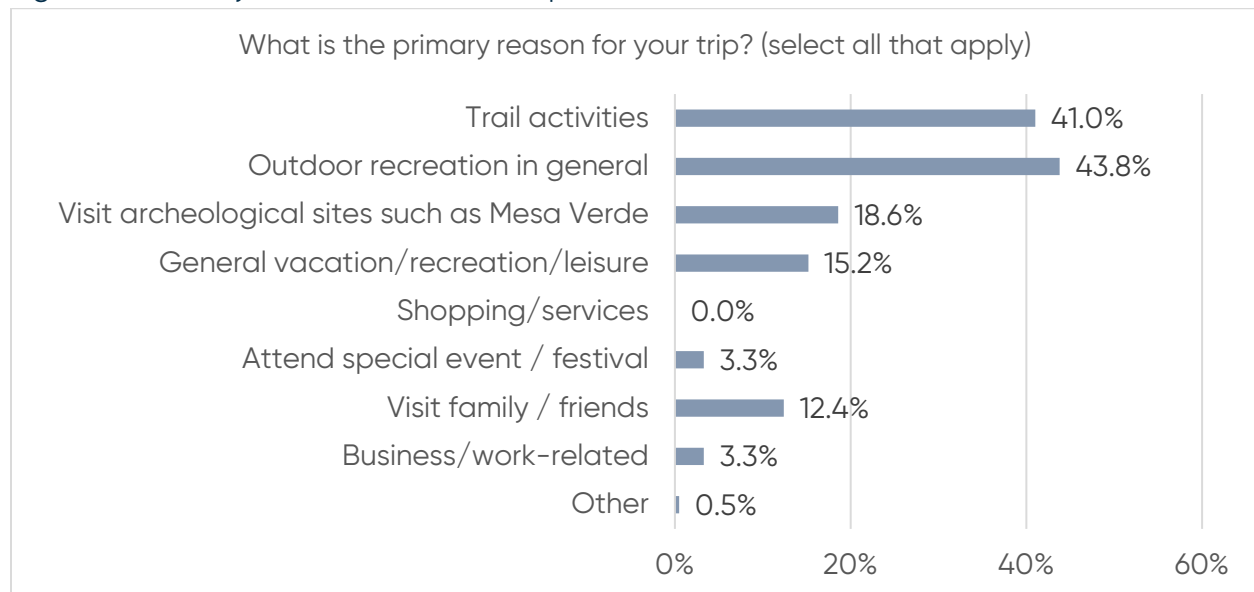
Economic Impact Analysis

The outdoor recreation assets in the county contribute to visitors' experiences and draw visitors to the area. Outdoor recreation assets in Montezuma County contribute because visitors from outside of the county spend money in the local economy. Economic impacts occur as a result of new money being injected into the local economy. The impact analysis first requires summation of the expenditures of the 180,970 annual visitor parties. The nearly \$78,452,930 in estimated annual visitor spending by these visitors occurs in several sectors including food and drinks, retail shopping, recreation, entertainment, and overnight accommodations. Economic multipliers resulting from this spending generates additional sales and jobs for a total of \$100,700,100 in annual economic output and 720 jobs in the county.

Outdoor Recreation and Heritage Trip Characteristics

Most visitors responding to the intercept surveys were in Montezuma County specifically for outdoor recreation. Forty-one percent (41%) of intercept survey visitor respondents registered "trail activities" as a primary reason for their trip, 43.8% were in Montezuma County for outdoor recreation in general and 18.6% were in the county to visit archeological sites.

Figure 17 – Survey Results: Reason for Trip



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

Eighty-six percent (86%) of overnight visitors were staying for 2 or more days and nearly half of all visitors stayed at least 3 days. Ninety-five percent of survey respondents were staying in Montezuma County. The average length of stay for an outdoor recreation visitor party in Montezuma County is 4.15 nights, which shows that visitors who use outdoor recreation assets tend to be on multi-day, destination leisure trips centered on Montezuma County.

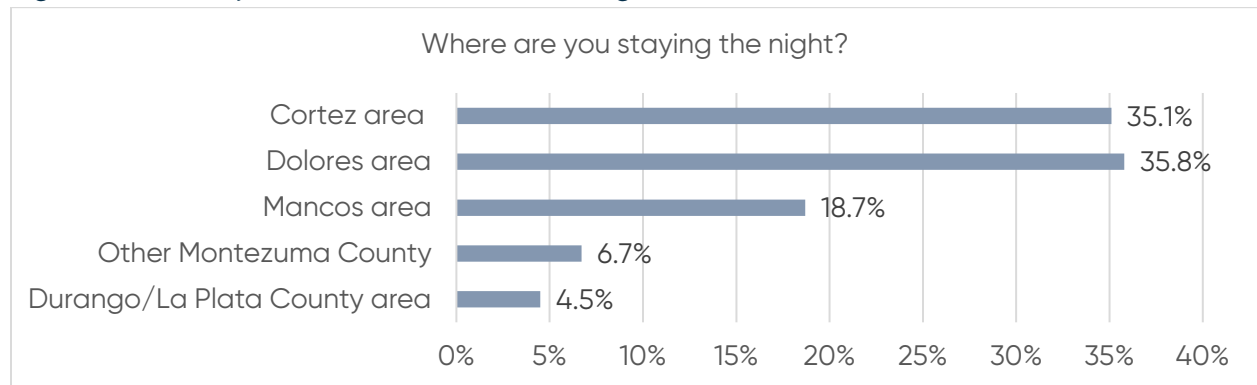


Figure 18 – Survey Results: Length of Stay

Length of stay	% of Total
1 day/not overnight	36.2%
2 days	11.4%
3 days	20.5%
4 days	14.3%
5 days	4.3%
6 days	1.4%
7 or more days	11.9%
Average length of stay (days)	4.2

Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

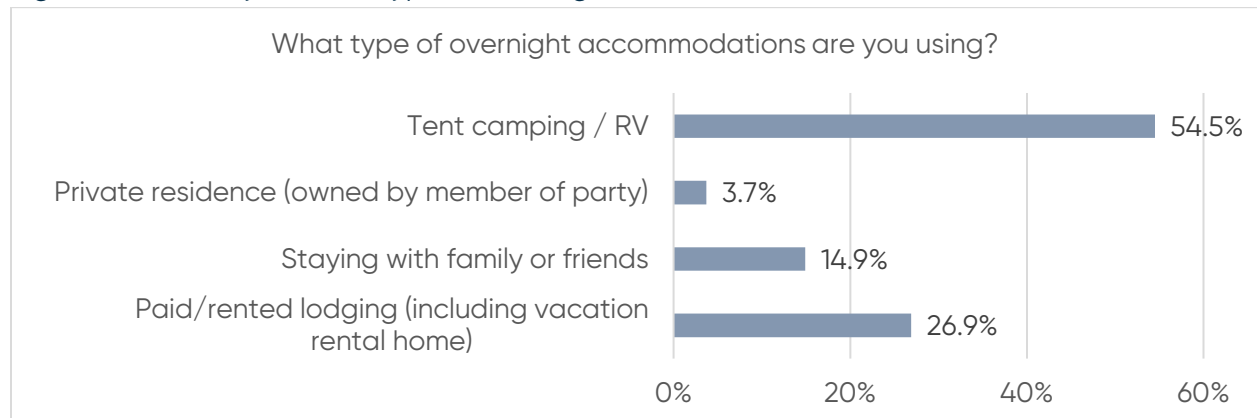
Figure 19 – Survey Results: Location of Overnight Visitor Accommodations



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

About 27% of visitor respondents indicated that they were staying in paid or rented lodging. Over half of visitor respondents indicated they were tent/RV camping and 15% were staying with family or friends. Visitor respondents staying in paid lodging and those paying for tent/RV camping have the most impact on the local economy.

Figure 20 – Survey Results: Type of Overnight Accommodations



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023



Outdoor Recreation and Heritage Visitor Spending Summary

Visitor spending (lodging, food, recreation, etc.) in Montezuma County translates directly to jobs and income in the local economy. Outdoor recreationists visiting from outside of the county were asked to list the spending during their stay in the county. Average spending per overnight travel party is \$802 per trip while average spending per day visitor party is \$102 per trip. The overall average of \$551 spending per travel party per trip is used to calculate total visitor spending associated with outdoor recreation.

Figure 21 – Outdoor Recreation and Heritage Asset Visitor Parties from Outside of Montezuma County

Segment	Average Visitor Party Spending per Visit
All Visitor Parties	\$551
Overnight Visitor Parties	\$802
Day Visitor Parties	\$102

Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

The National Park Service periodically publishes “National Park Visitor Spending Effects” which includes an analysis that specifies Mesa Verde and Hovenweep visitor spending in that occurs in Montezuma County and differentiates visitor spending occurring in other counties. Together the spending from these two heritage destinations is nearly \$30 million annually in Montezuma County.

Figure 22 – Outdoor Recreation and Heritage Asset Visitor Parties from Outside of Montezuma County

	Mesa Verde National Park	Hovenweep National Monument
2022 Total Visitor Spending	\$58,031,000	\$2,028,000
Percent Spending by Non-County Residents	99.8%	98.7%
% Visitor Spending in Montezuma County	50%	44%
Annual Visitor Spending in Montezuma County	\$28,957,500	\$880,700

Source: 2022 National Park Visitor Spending Effects, National Park Service; Mesa Verde National Park Visitor Study 257, 2012

The visitor spending for the outdoor recreation and heritage assets not managed by the National Parks Service was calculated by multiplying outdoor recreation visitor parties by per visitor party spending. In total the 180,970 outdoor recreation and heritage site visitor parties spend over \$78 million annually in the county.



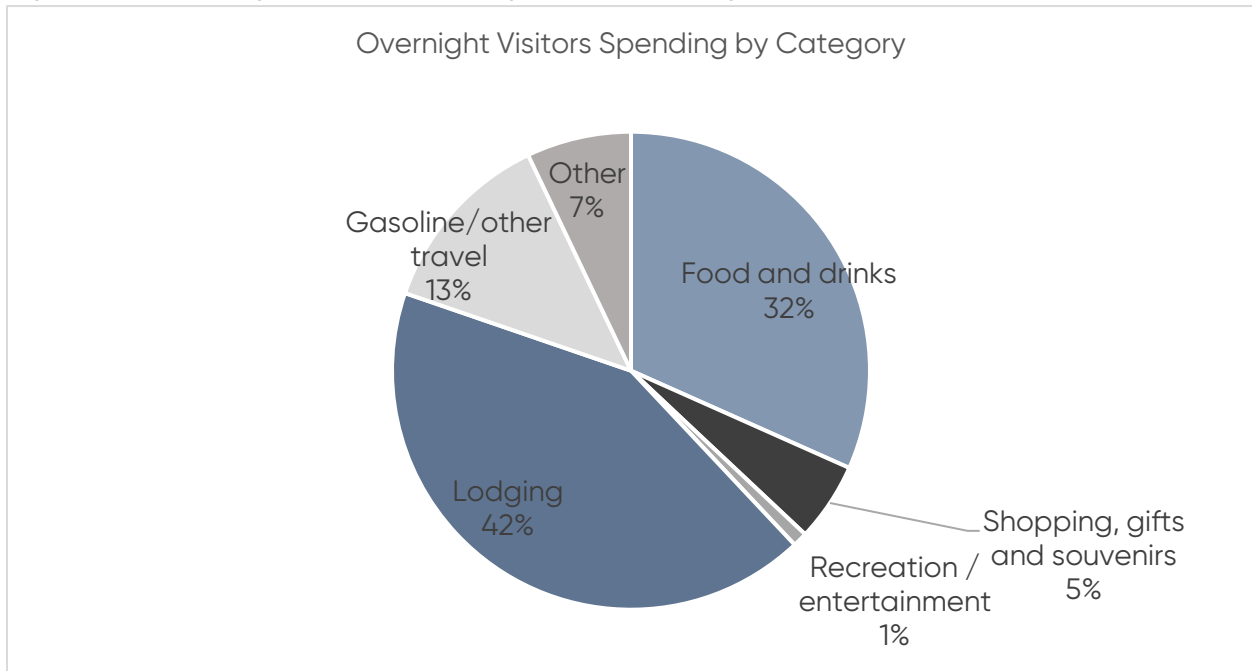
Figure 23 – Outdoor Recreation and Heritage Asset Visitor Parties from Outside of Montezuma County

Assets in Montezuma County	Annual Visitor Parties (from outside of Montezuma County)	Visitor Spending (Annual)
BLM Trails and Roads	15,720	\$8,661,720
Canyons of the Ancients Visitor Center	6,100	\$3,361,100
Forest Service Trails and Roads	48,330	\$26,629,830
Forest Service Campgrounds	3,940	\$2,170,940
McPhee Reservoir: Inspected Boat Launches	1,620	\$892,620
Paddle Sports on Upper Dolores River, McPhee Reservoir, and other recreation water bodies:	3,670	\$2,022,170
Mancos State Park	8,850	\$4,876,350
Mesa Verde National Park	88,360	\$28,957,500
Hovenweep National Monument	4,380	\$880,700
Total	180,970	\$78,452,930

Source: RPI Consulting Summative Results

Overnight visitors spend more money than day visitors (\$802 per overnight visitor party vs. \$102 per day visitor party). Most overnight visitors are in paid lodging or are camping, often in paid campgrounds. In addition, overnight visitors stay longer which means more spending on food, drink, fuel and other supplies.

Figure 24 – Overnight Visitor Spending by Retail Category

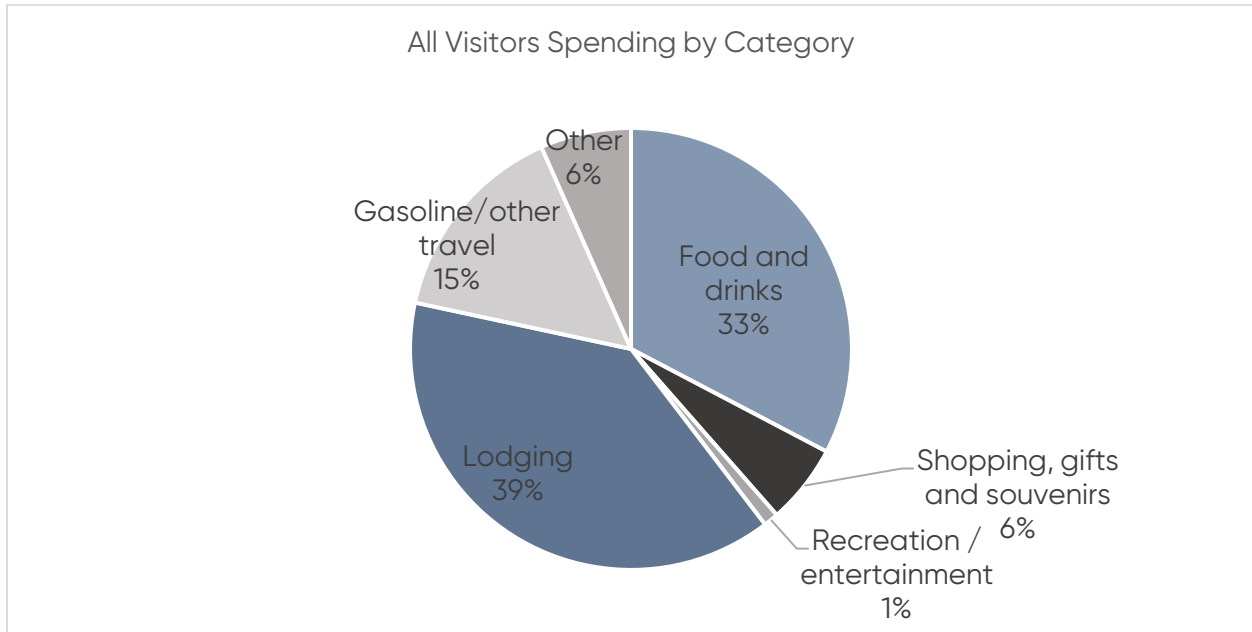


Source: Montezuma County Outdoor Recreation Intercept Survey, 2023



Adding day visitors into the mix results in a higher proportion of spending occurring in the retail sectors, eating/drinking, retail/shopping and gasoline/other travel costs because day visitors do not purchase lodging.

Figure 25 –All Visitor Spending by Category Including Overnight and Day Visitors



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

The National Park Service “National Park Visitor Spending Effects” includes a breakdown of visitor spending by category as well. The spending breakdown for National Park Service facilities was calculated separately for each facility based on the percentage spending by category.

Figure 26 – Visitor Spending by Category for National Park Service Visitors

Category	Mesa Verde Visitor Spending Breakdown	Hovenweep Visitor Spending Breakdown
Camping	2.9%	2.2%
Gas	16.0%	17.5%
Groceries	6.1%	6.8%
Hotels	32.3%	33.1%
Recreation Industries	11.9%	7.1%
Restaurants	18.4%	19.6%
Retail	6.8%	8.9%
Transportation	5.8%	4.8%

Source: 2022 National Park Visitor Spending Effects, National Park Service



With all of the outdoor recreation visitation to Montezuma County and all of the spending by overnight and day visitors, visitors spend a grand total of \$78,452,930 annually in the county.

Figure 27 – Outdoor Recreation and Heritage Visitor Total Spending by Category

Category	Visitor Spending by Category (Annual)
Food and drinks	\$23,215,600
Shopping, gifts and souvenirs	\$4,877,840
Recreation / entertainment	\$4,031,980
Lodging	\$29,330,740
Gasoline/other travel	\$13,764,740
Other	\$3,232,030
Total	\$78,452,930

Source: RPI Consulting Summative Results

Economic Impact of Outdoor Recreation and Heritage Visitor Spending

This economic impact analysis describes the impact on the local economy (Montezuma County) of a typical year of spending by visitors. Sales to visitors from outside of the area bring new dollars into the local economy. RIMS II Multipliers (Regional Input-Output Modeling System) by Bureau of Economic Analysis specify economic impacts by industry classification because each industry interacts uniquely other industries in the economy. RIMS II Multipliers are constructed from a detailed set of industry accounts that measure the goods and services produced by each industry and the use of these goods and services by other industries and consumers. Multipliers apply to total output (in dollars) and total jobs generated.

Figure 28 – RIMS II Multipliers for the Local Economy

Visitor Spending Category	Total Output Multiplier Montezuma County, CO	Jobs Per \$Million in Sales Montezuma County, CO
Food and drinks	1.4112	11.2012
Shopping, gifts and souvenirs	1.366	12.2513
Recreation / entertainment	1.3289	6.4604
Lodging	1.3427	8.3325
Gasoline/other travel	1.4182	10.6502
Other	1.366	12.2513

Source: RIMS II Multipliers for Montezuma County, Bureau of Economic Analysis, 2023

The total impact of from outdoor recreation and heritage visitor spending on the local economy in terms of output is \$100.7 million. For example, \$21,626,100 in annual spending (less sales tax) on food and drinks multiplied by the 1.4112 total output multiplier for this sector yields a total output of \$30,518,800. When the total impact is valued in terms of jobs, the total impact of outdoor recreation visitor spending is 724 jobs. For example,



\$21,626,100 in annual spending (less sales tax) on food and drinks multiplied by 11.2012 jobs per \$million for this sector yields 242 jobs.

Figure 29 – Economic Impact of Outdoor Recreation Visitor Spending on Montezuma County

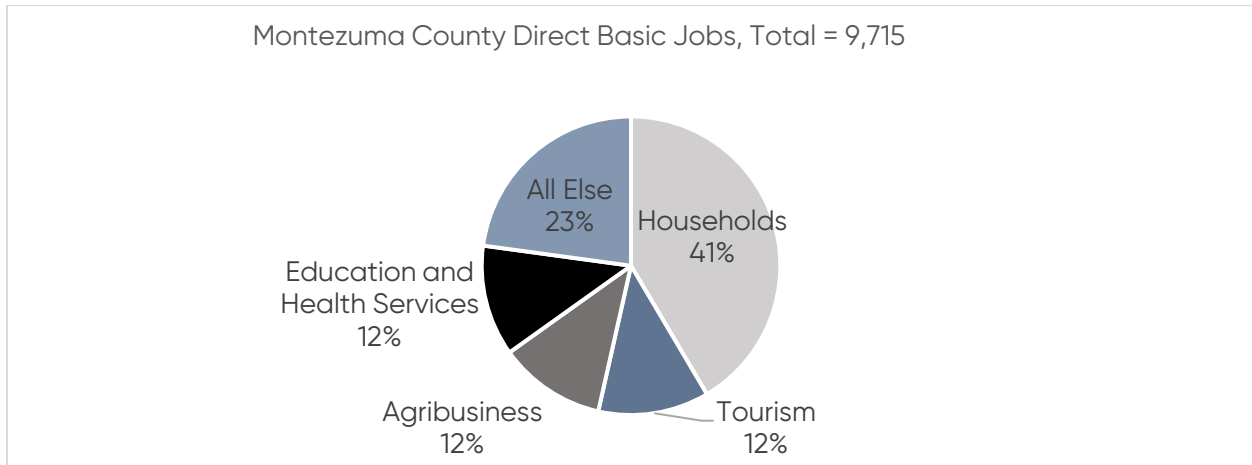
Visitor Spending Category	Spending (Minus Sales Tax)	Total Output	Jobs
Food and drinks	\$21,626,100	\$30,518,800	242
Shopping, gifts and souvenirs	\$4,543,900	\$6,207,000	56
Recreation / entertainment	\$3,755,900	\$4,991,200	24
Lodging	\$27,322,500	\$36,685,900	228
Gasoline/other travel	\$12,822,300	\$18,184,600	137
Other	\$3,010,700	\$4,112,600	37
Total	\$73,081,400	\$100,700,100	724

Source: RPI Consulting Summative Results

Effect of Outdoor Recreation on Location Choices and Economic Impact

Outdoor recreation assets in Montezuma County have an effect on another strong segment of the economic base: households. According to Colorado Department of Local Affairs Economic Base Analysis, 41% of direct basic jobs (those bringing money in from outside the county) are from household spending of money originating from outside of the county. Outdoor recreation assets affect peoples' decisions to move to Montezuma County and therefore is a factor in the largest segment of the county's economic base.

Figure 30 – Montezuma County Economic Base Analysis: Jobs

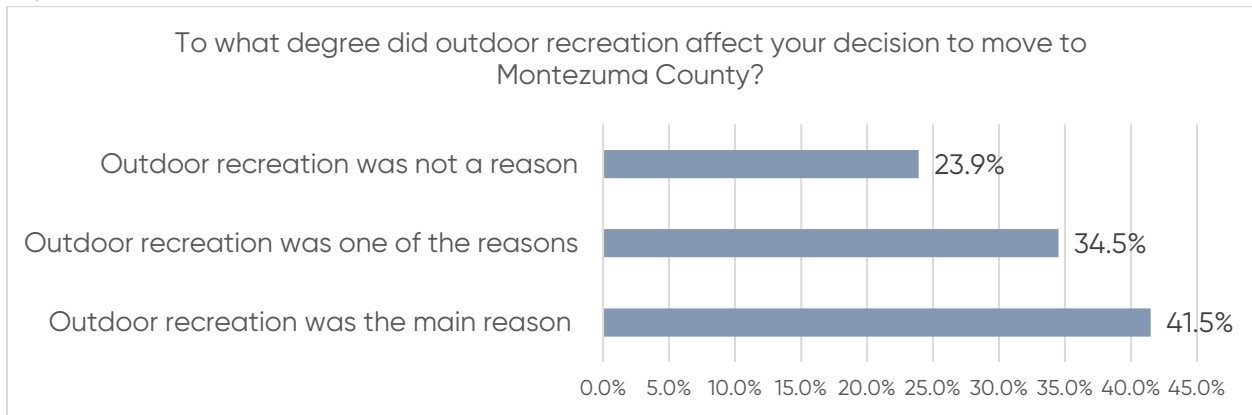


Source: Colorado Department of Local Affairs

Seventy-six percent (76%) of county resident respondents to the Montezuma County Outdoor Recreation Intercept Survey indicated that outdoor recreation affected their decision to move to Montezuma County. Over 40% of county resident respondents said that outdoor recreation was the main reason for them moving to the county.



Figure 31 – Survey Results: Effect of Outdoor Recreation on Location Decisions



Source: Montezuma County Outdoor Recreation Intercept Survey, 2023

The preference to move to Montezuma County for its outdoor recreation assets has economic effects. The “households” economic base sector generates over 4,000 jobs. With only the 34.5% residents who said that outdoor recreation was the main reason for them moving to the county, outdoor recreation assets generate 1,379 jobs in the county in the households economic base sector.

Figure 32 – Residents Who Moved to Montezuma County Because of Outdoor Recreation

<p>% of Outdoor Recreation Participants for Whom Outdoor Recreation was the Main Reason or One of the Reasons to Move to Montezuma County:</p> <p style="text-align: center;">76%</p>	<p>% of Residents for Whom Outdoor Recreation was the Main Reason or One of the Reasons to Montezuma County</p> <p style="text-align: center;">34.5%</p>
<p># of Jobs Driven by Montezuma County Residents:</p> <p style="text-align: center;">4,032</p>	<p># of Jobs Affected by Residents for Whom Outdoor Recreation was the Main Reason or One of the Reasons to Move to Montezuma County:</p> <p style="text-align: center;">1,379</p>

Source: Montezuma County Outdoor Recreation Intercept Survey, 2023; Outdoor Industry Association State Specific Participation, 2023; American Community Survey, 2021; Colorado Department of Local Affairs



Local Sales Tax Generated by Visitor Spending

Many of the sales made to outdoor recreation visitors are taxable sales subject to local sales and lodgers tax. Five taxing authorities charge sales tax on retail sales in Montezuma County.

Figure 33 – Sales Tax Rates

	Sales Tax Rate	Lodgers Tax Rate
City of Cortez	4.5%	2.0%
Town of Mancos	4.0%	-
Town of Dolores	3.5%	-
Montezuma County Hospital District	0.4%	-
Montezuma County	-	1.9%

Source: City of Cortez, Town of Mancos, Town of Dolores, Montezuma County, Montezuma County Hospital District

Because such a large percentage of sales are subject to sale tax, revenues would total \$3.6 million per year for all taxing authorities combined with the municipalities bring in a combined \$3.1 million per year.

Figure 34 – Sales Tax Revenue from Outdoor Recreation and Heritage Visitor Spending

	Annual Revenue Generated by Sales to Outdoor Recreation Visitors
Combined Sales Tax Collections in Mancos, Dolores, Cortez	\$3,138,000
Montezuma County Hospital District Sales Tax	\$313,800
Combined Lodgers' Tax Collections in Montezuma County and Cortez	\$149,900
Total Revenue	\$3,601,700

Source: RPI Consulting Summative Results

