

# Montezuma County Outdoor Recreation Use Study and Visitor Spending Analysis

Results 11-08-2023



# Two methodology tracks

- Track 1: Assets covered by 2023 Montezuma County Outdoor Recreation Intercept Survey
  - BLM Trails and Roads
  - Canyons of the Ancients Visitor Center and Escalante Pueblo Trail
  - USFS Trails and Roads
  - USFS Campgrounds
  - McPhee Reservoir: Inspected Boat Launches
  - Paddle Sports Use: Upper Dolores River, McPhee Reservoir, and Other Recreation Water Bodies
- Track 2: Assets Covered by Intercept Surveys Previously Conducted by Land Managers
  - Mancos State Park
  - Mesa Verde National Park
  - Hovenweep National Monument

# Montezuma County Annual Outdoor Recreation Uses: Assets Covered by 2023 Intercept Surveys

Outdoor Recreation Asset	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
Upper Dolores River, McPhee Reservoir, and other recreation water bodies: paddle sports	29,150
Mancos State Park	32,078
Mesa Verde National Park	499,790
Hovenweep National Monument	28,446
Total	956,061

- Definition: A single "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

# Annual Outdoor Recreation Uses: BLM Trails and Roads

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
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, 2018–2023

# Annual Outdoor Recreation Uses: CANM Visitor Center

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

- Average annual counts 2017-2019 and 2022 = 29,614
- 2020 and 2021 were excluded from average due to COVID restrictions

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

# Annual Outdoor Recreation Uses: USFS Trails and Roads

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	

Total vehicle-based visitor parties	86,932
Outdoor recreation group size	2.7
Total uses	234,716

- Total uses do not include USFS trailheads accessed directly from non-USFS roads (e.g. state highways, municipal streets)

Source: USFS Road Traffic Counts 2008-2015, group size from 2023 Montezuma County Outdoor Recreation Intercept Survey

# Annual Outdoor Recreation Uses: USFS Developed Campgrounds

	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	<b>3,759</b>

Source: USFS Dolores Ranger District records

# Annual Outdoor Recreation Uses: 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



# Paddle Sports Use: Upper Dolores River, McPhee Reservoir, and Other Water Bodies

	Participation Rate	Annual Uses
Calculated Use		
Canoeing/kayaking	9.4%	10,528
Stand-up paddle boarding	13.3%	14,915
Whitewater rafting	16.5%	3,707
Total		29,150

Rafting uses were distributed evenly among day runs in the region:

Perennial Day-Run Rafting Sections	Nearest Community	Rating
Lower Animas River	Durango, CO	Class II-III+
Pagaosa 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

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

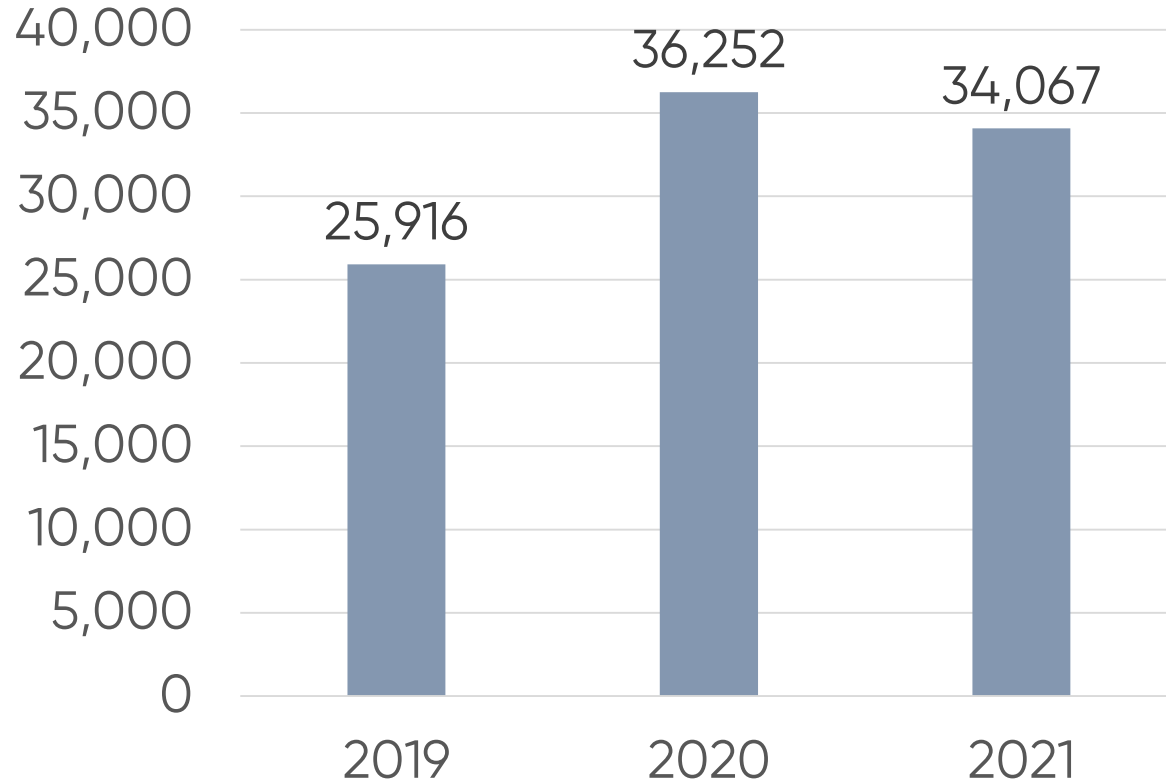
# Montezuma County Annual Outdoor Recreation Uses: State Park and National Park Service Assets

	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

# Mancos State Park Visitation 2019-2021

## Mancos State Park Annual Visits



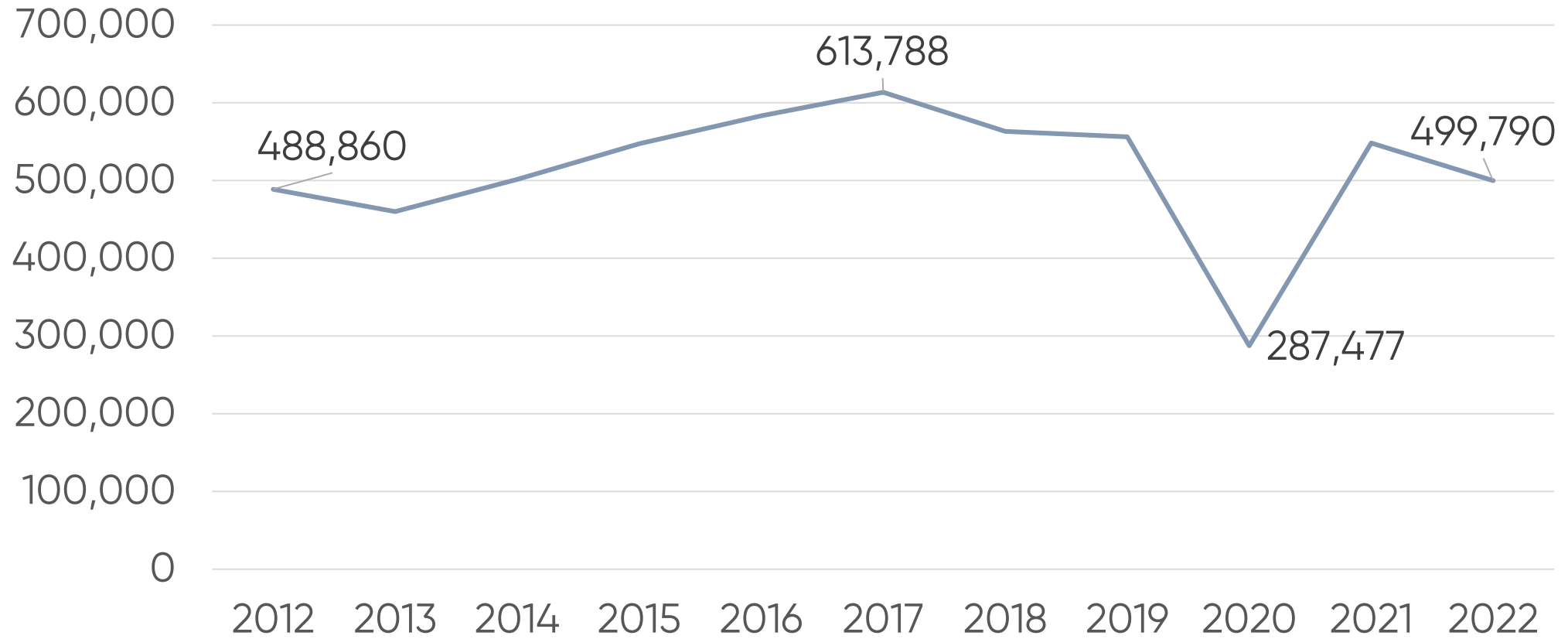
In-State Traveled more than 25 miles	33%
Out of State Visitors	47%
Traveled 25 miles or less	20%
Mean travel distance	385
People per vehicle	2.9

- 32,078 Average Annual Visits

Source: Colorado State Parks Region Visitation Report, Colorado Counties Inc. 2022, Colorado State Parks Marketing Assessment visitor intercept survey results, 2009

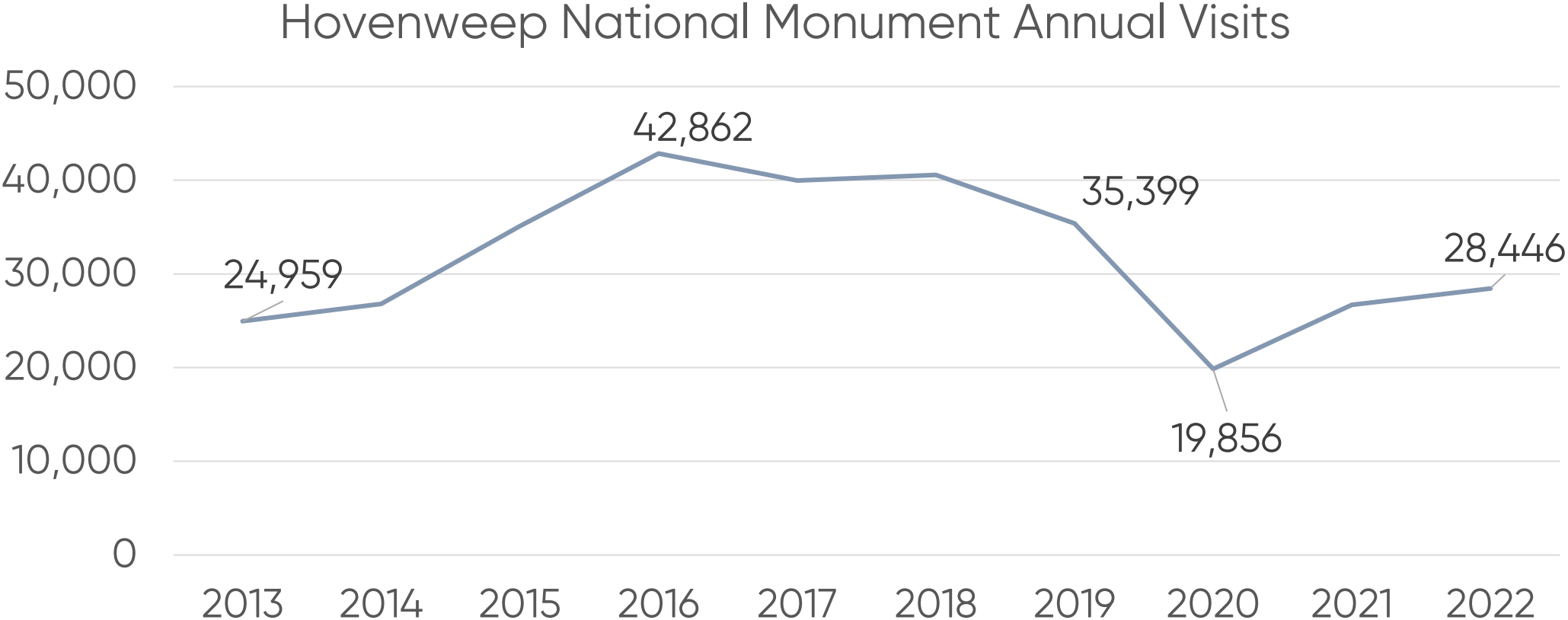
# Mesa Verde National Park Annual Visitation 2002-2022

Mesa Verde Annual Visits



Source: National Park Service Stats Database, March 2023

# Hovenweep National Monument Annual Visitation 2013-2022



Source: National Park Service Stats Database, March 2023

# Annual Visitor Parties

# Montezuma County Annual Outdoor Recreation Visitor Parties

Outdoor Recreation Asset	Visitor Parties (Annual)
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
Upper Dolores River, McPhee Reservoir, and other recreation water bodies: paddle sports	3,670
Mancos State Park	8,850
Mesa Verde National Park	88,360
Hovenweep National Monument	4,380
<b>Total</b>	<b>180,970</b>

Source: RPI Consulting Summative Results

# Montezuma County Outdoor Recreation Visitor Spending Analysis



Mesa Verde  
Country



[doloresoutfitters.com](http://doloresoutfitters.com)



# Montezuma County Annual Outdoor Recreation Visitor Spending Analysis: Background Information

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

Source: 2023 Montezuma County Outdoor Recreation Intercept Survey Results

	Mesa Verde	Hovenweep
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

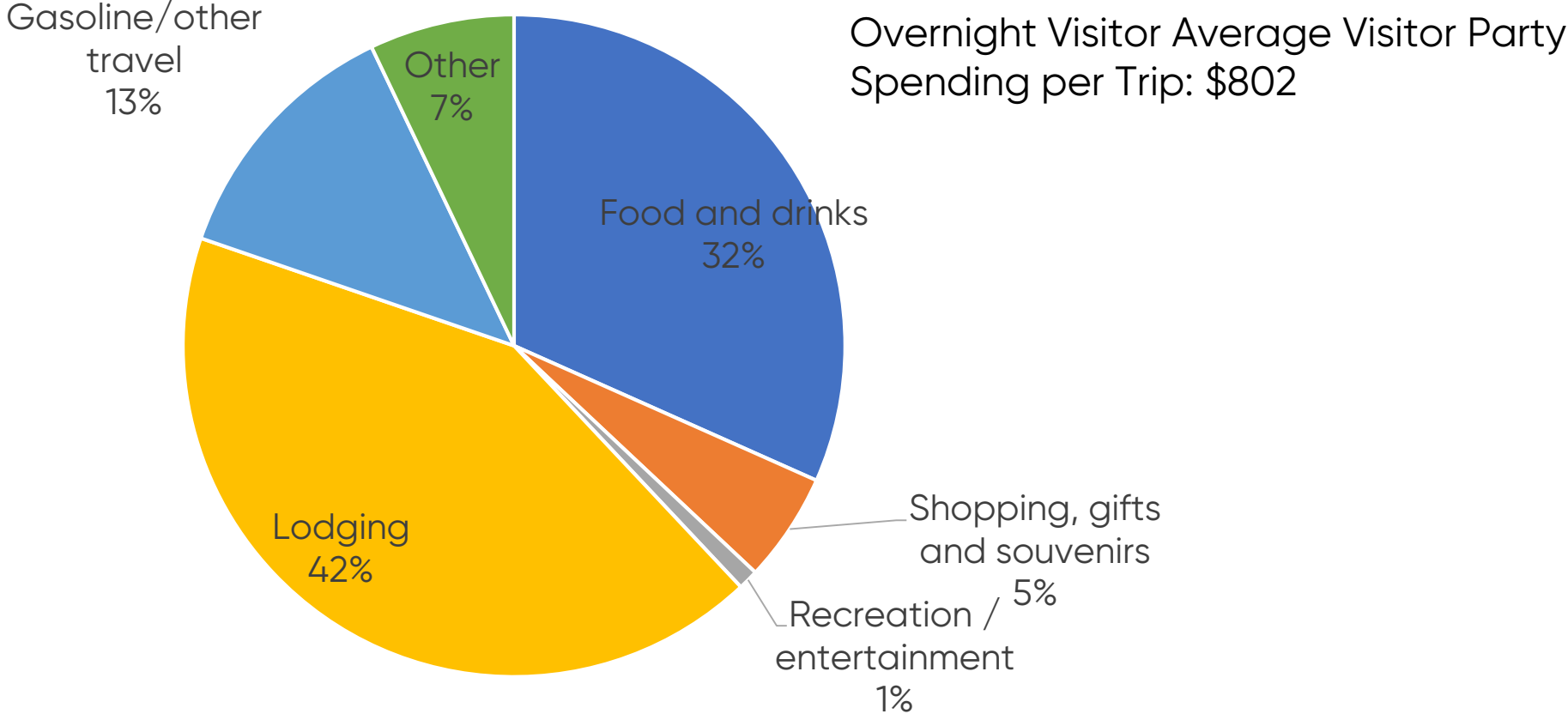
# Montezuma County Annual Outdoor Recreation Visitor Spending Analysis: Visitor Spending Total

Outdoor Recreation Asset	Visitor Parties (Annual)	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
Upper Dolores River, McPhee Reservoir, and other recreation water bodies: paddle sports	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
<b>Total</b>	<b>180,970</b>	<b>\$78,452,930</b>

Source: RPI Consulting Summative Results

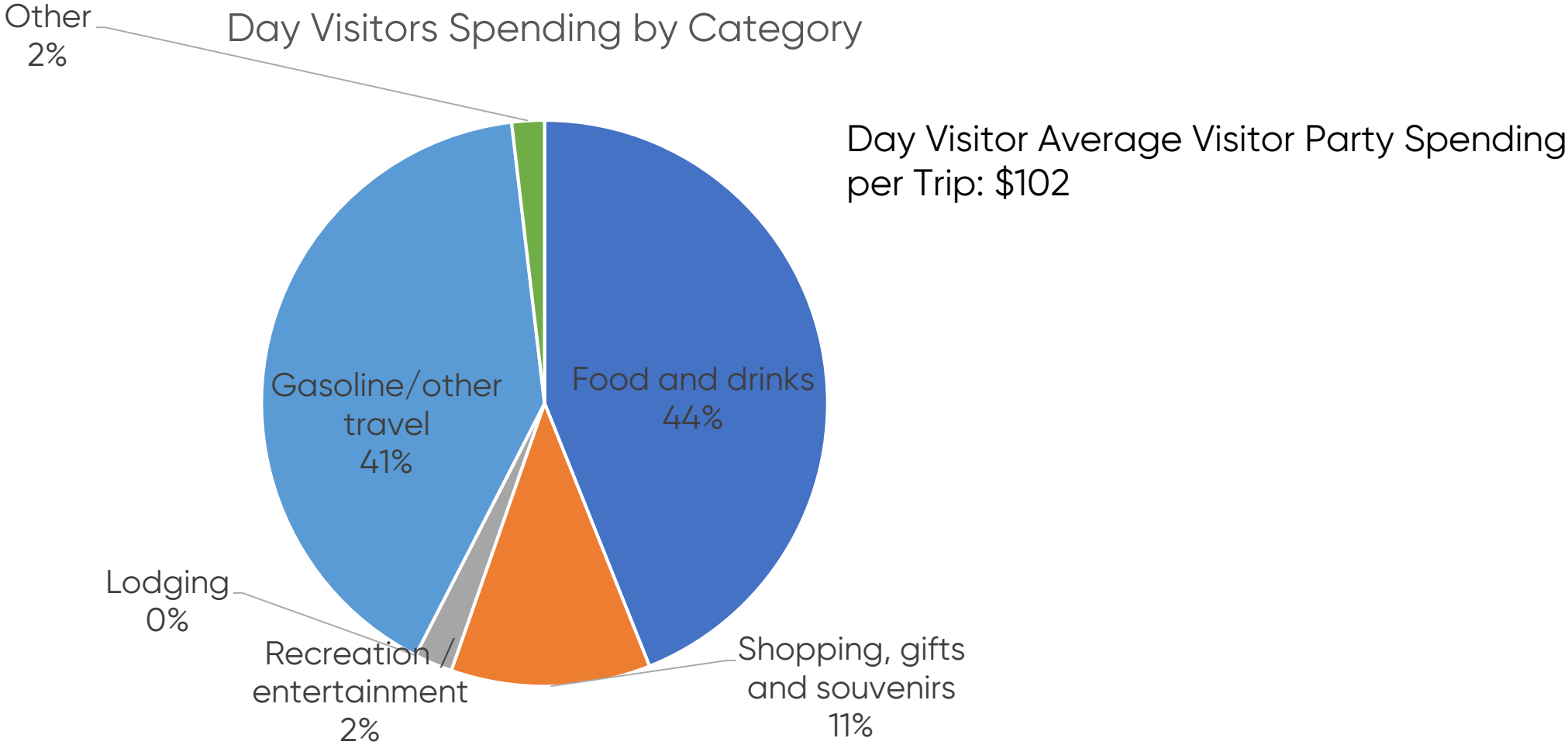
# Montezuma County Annual Outdoor Recreation Visitor Spending by Sector: Intercept Survey Results

Overnight Visitors Spending by Category



Source: 2023 Montezuma County Outdoor Recreation Intercept Survey Results

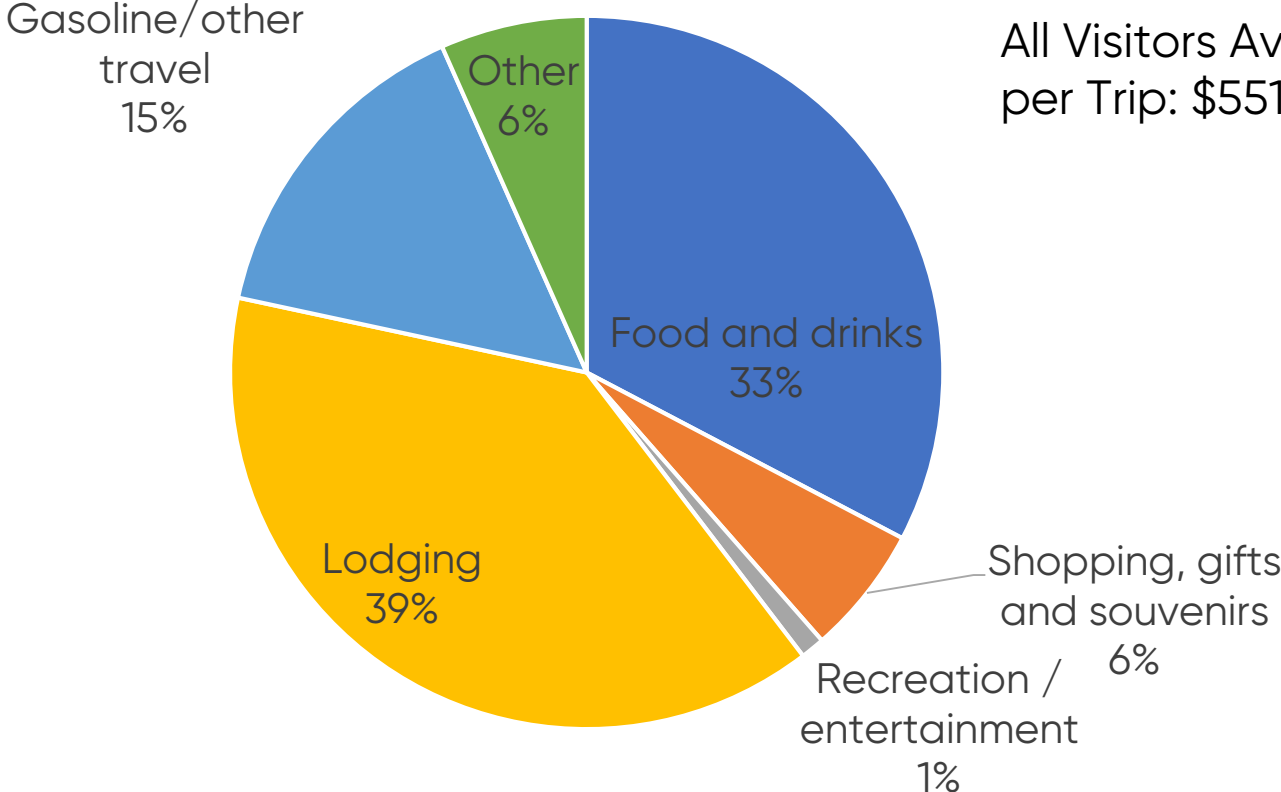
# Montezuma County Annual Outdoor Recreation Visitor Spending by Sector: Intercept Survey Results



Source: 2023 Montezuma County Outdoor Recreation Intercept Survey Results

# Montezuma County Annual Outdoor Recreation Visitor Spending by Sector: Intercept Survey Results

All Visitors Spending by Category



All Visitors Average Visitor Party Spending per Trip: \$551

Source: 2023 Montezuma County Outdoor Recreation Intercept Survey Results

# Montezuma County Annual Outdoor Recreation Visitor Spending by Sector: National Park Service Analysis

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

# Visitor Spending by Sector

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
<b>Total</b>	<b>\$78,452,930</b>

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

# Estimated Local Sales Tax Generated by Outdoor Recreation Visitors

	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 (Mesa Verde Country)	-	1.9%

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



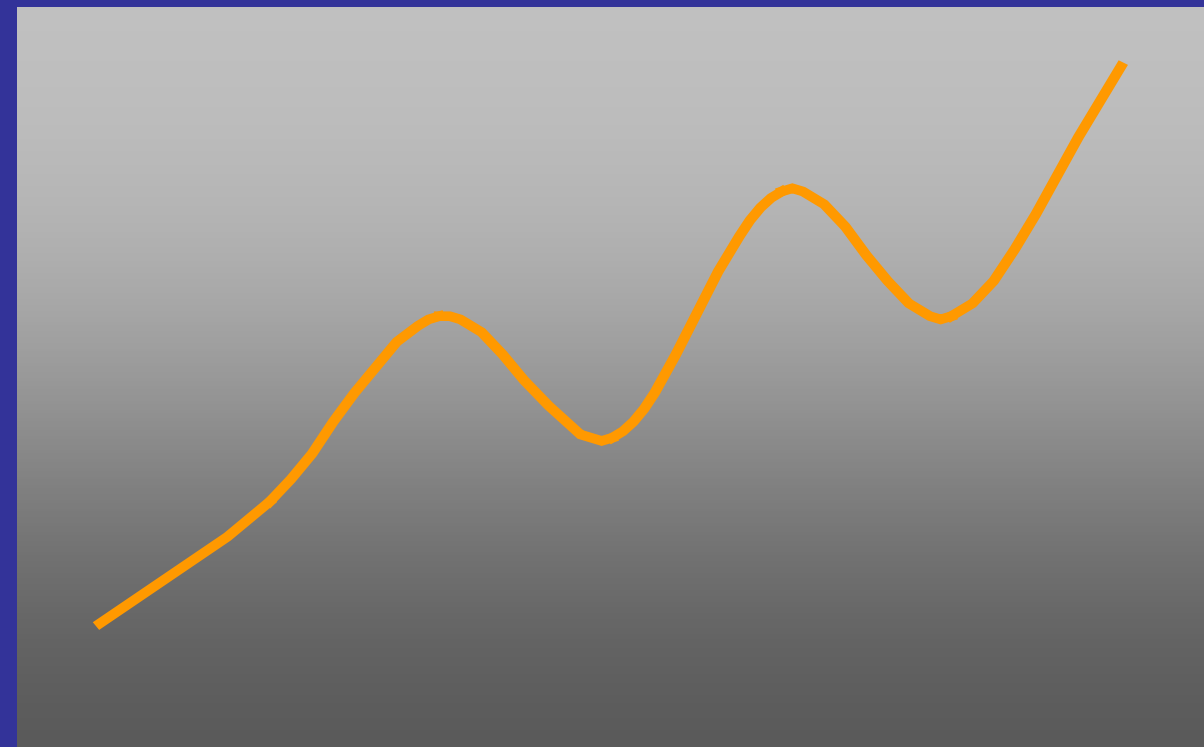
# County Resident Spending: Outdoor Recreation Equipment

Equipment Spending Southwest Region (Annual)	\$214,000,000
Participants Southwest Region (Annual)	972,000
Equipment Spending per Participant (Annual)	\$220
Total Outdoor Recreation Equipment Spending by Montezuma County Resident Participants (Annual)	\$2,430,617

Source: 2019-2024 State of Colorado  
Outdoor Recreation Plan

- The 2019 SCORP data on equipment spending means \$220/year per participant
- \$2.4 million spent by Montezuma County Residents
- Not all will be spent in Montezuma County due to retail leakage

# Montezuma County Outdoor Recreation Economic Impact Analysis



# Economic Impact: Multipliers by Visitor Spending Category

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

- Total output multipliers include value-added and earnings multipliers.
- Jobs per \$million includes jobs generated directly by the sales and induced jobs.

# Economic Impact: Total Output and Jobs by Visitor Spending Category in Montezuma County

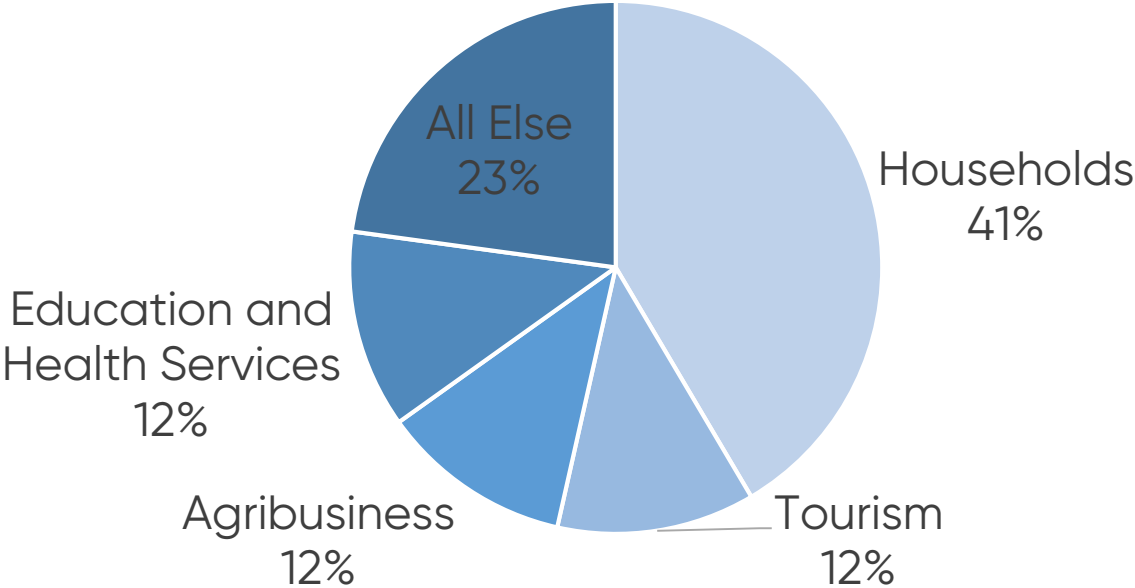
Visitor Spending Category	Spending (Less Sales Tax)	Total Output	Jobs
Food and drinks	\$21,626,100	\$30,518,800	242
Shopping, gifts and souvenirs	\$4,543,900	\$6,207,000	56
Recreation / entertainment	\$3,755,900	\$4,991,200	24
Lodging	\$27,322,500	\$36,685,900	228
Gasoline/other travel	\$12,822,300	\$18,184,600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

Source: RPI Consulting Summative Results

- Multiplier effects result in \$27.6 million in additional output beyond direct spending
- The outdoor recreation economy supports 724 jobs located in Montezuma County

# Economic Impact: Residents Who Moved Here Because of Outdoor Recreation

Montezuma County Direct Basic Jobs, Total = 9,715



Source: Colorado Department of Local Affairs

- 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.

# Economic Impact: Residents Who Moved Here 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;"><b>76%</b></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;"><b>34%</b></p>
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<p># of Jobs Driven by Montezuma County Residents:</p> <p style="text-align: center;"><b>4,032</b></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;"><b>1,379</b></p>
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- Outdoor recreation affects 1,379 resident services jobs in the county

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