



The economic benefits of Great Outdoors Colorado and the Conservation Trust Fund

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The Trust for Public Land
January 2018



The Trust for Public Land creates parks
and protects land for people,
ensuring healthy, livable communities
for generations to come.

The Trust for Public Land's Conservation Economics team has extensive experience measuring the economic benefits and fiscal impacts of land conservation. Partnering with The Trust for Public Land's award-winning GIS team, the Conservation Economics team has published over 40 economic analyses for jurisdictions throughout the country, including communities in Alabama, Arizona, California, Colorado, Georgia, Illinois, Kansas, Kentucky, Maine, Massachusetts, Minnesota, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia, Washington, and Wyoming.

The Trust for Public Land has advanced this research working with leading academic partners and research institutions, including Colorado State University, Dartmouth College, Georgia Institute of Technology, Michigan State University, University of California, Davis, University of Georgia, Texas A&M, University of Minnesota, University of New Hampshire, University of Wyoming, and the U.S. Forest Service.

tpl.org/goco-ctf-economic-benefits

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Executive summary

IN COLORADO, PROFITS FROM THE SALE OF LOTTERY PRODUCTS are distributed to Great Outdoors Colorado (GOCO), the Conservation Trust Fund (CTF), and Colorado Parks and Wildlife (CPW). Coloradans have long known that their investment in GOCO and CTF has improved the quality of life in their communities and statewide. These programs create and support high-quality parks, trails, rivers, open spaces, recreation amenities, and wildlife, which provide an array of economic benefits. This economic analysis by The Trust for Public Land demonstrates the extensive and varied values provided by these investments, presented below (see [Table 1](#)):¹

GENERATING JOBS AND PROMOTING ECONOMIC ACTIVITY: Investment by GOCO and CTF spurs economic activity and creates jobs. The Trust for Public Land analyzed Colorado's investment through GOCO and CTF in the last ten years and found that these programs supported 11,800 jobs and \$507 million in labor income. That is, every \$1 million invested by GOCO and CTF supported 17.2 jobs.

LEVERAGING FEDERAL, LOCAL, PRIVATE, AND NONPROFIT FUNDS: By attracting support from other sources, the state maximizes its investments through GOCO and CTF. These funds leverage matching funds from federal and local governments, as well as private sources such as land trusts and foundations. GOCO has leveraged at least \$1.45 billion in additional contributions over its history, meaning that each GOCO dollar attracted at least \$2.31. Meanwhile, CTF provided essential funds to supplement local budgets and leveraged at least \$1.49 billion in other funding since 2004, resulting in at least \$2.43 for every dollar invested.

PROVIDING RECREATION: Residents of Colorado enjoy the state's parks, trails, rivers, open spaces, recreation amenities, and wildlife. In fact, 90 percent of Coloradans participate in outdoor recreation activities in Colorado each year, and 66 percent of residents recreate outdoors at least once a week on average. The top five outdoor activities by percent of population are walking, hiking or backpacking, picnicking, fishing, and tent camping. Each year residents receive a benefit of at least \$399 million for the recreational use of these amenities.

ATTRACTING TOURISM: Many people visit Colorado because of its scenic beauty and ample outdoor recreation opportunities. For example, 22 percent of leisure visitors hike or backpack and 22 percent visit national or state parks. The outdoors draws tourists who would not otherwise visit Colorado. In fact, 15 percent of leisure visitors to Colorado come *specifically* for the parks, trails, rivers, open spaces, recreation amenities, and wildlife that make the outdoors accessible to tourists. The visitors who come to the state primarily to visit the outdoors are estimated to spend \$1.21 billion annually in Colorado and generate \$44.9 million in state tax revenues and \$66.4 million in local tax revenues.

SHAPING FUTURE LEADERS: In 2011, GOCO began a partnership with Colorado Youth Corps Association. This partnership helps Colorado communities realize substantial savings through subsidized costs for outdoor projects such as trail construction, while providing job training and education opportunities to 2,180 youth corps members. A few examples of this partnership's diverse outcomes include \$343,000 in trail work completed by youth volunteers and \$1.59 million in AmeriCorps scholarships awarded since 2011.

TRANSFORMING SCHOOL YARDS: Regular access to playgrounds, facilitated by GOCO's School Yard Initiative, can improve health and reduce health care costs for Colorado families. Since 2011, the program has transformed 44 school yards that serve 18,000 children and maximized the impact of funding dollars by targeting high-need communities and leveraging additional funding sources for

¹ All numbers in the text and tables are rounded to three significant digits unless otherwise noted. Because of rounding, some report figures and tables may appear not to sum. The values of the economic benefits estimated in this analysis are reported in 2017 dollars unless otherwise specified.

playground renovations. Further, community-led renovations provide additional benefits across Colorado through building community cohesion and citizen-level civic engagement.

PROPELLING ECONOMIC DEVELOPMENT: Parks, trails, rivers, open spaces, recreation amenities, and wildlife contribute to the high quality of life in Colorado, which plays an important role in attracting businesses and employees to the state. In addition, by providing opportunities for recreation, investments through GOCO and CTF support \$392 million in resident spending on sporting goods annually. This spending supports 1,510 Colorado businesses that sell sporting goods and recreation-related equipment, and together these businesses support 14,800 employees and generate \$4.30 billion in sales.

SUPPORTING FARMING AND RANCHING: Farming and ranching are essential to Colorado's economy and cultural identity. GOCO supports the state's farming and ranching industries by keeping working lands open and active. The state's 33,800 operating farms generate \$8.58 billion in agricultural production and support thousands of jobs.



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TABLE 1. SUMMARY OF ECONOMIC BENEFITS PROVIDED BY GOCO AND CTF

BENEFIT CATEGORY	VALUE (2017\$)
Cumulative economic impact and jobs, 2007-2016	
Employment (number of jobs)	11,800
Labor income	\$507,000,000
Value added	\$791,000,000
Output	\$1,410,000,000
Cumulative leverage	
Minimum amount leveraged by GOCO, 1994-2016	\$1,450,000,000
Minimum amount leveraged by CTF, 2004-2016	\$1,490,000,000
Annual recreational use, 2013	\$399,000,000
Annual tourism, 2016	
Total visitor spending attributable to the outdoors	\$1,210,000,000
State tourism tax revenue attributable to the outdoors	\$44,900,000
Local tourism tax attributable to the outdoors	\$66,400,000
Illustrative benefit of youth corps*	
Construction, improvement, and maintenance of trails	\$343,000
Scholarships awarded to youth corps participants	\$1,590,000
Cumulative School Yard Initiative	
Number of transformed schoolyards	44
Number of children served	18,000

SUMMARY OF ECONOMIC INDUSTRIES SUPPORTED BY GOCO AND CTF**	VALUE (2017\$)
Annual economic development, 2016	
Spending on sports, recreation, and exercise equipment	\$392,000,000
Sales generated by sporting goods stores and wholesalers	\$4,300,000,000
Annual farming and ranching, 2015	
Value of agricultural products (2015\$)	\$8,580,000,000

*Trail work and scholarships are examples of the types of benefits that results from GOCO investments in youth corps. Please see full analysis for a more complete summary of benefits provided by this program.

**The economic development and farming and ranching values presented here are illustrative of the importance of these industries to Colorado's economy. Not all of the value in these categories is exclusively generated by GOCO and CTF; however, the amenities created and enhanced by GOCO and CTF do play an important role in supporting these industries.

Introduction

COLORADO'S LANDSCAPE IS DIVERSE AND BEAUTIFUL – covered by rugged mountains, vast plains, distinctive forests, iconic farms and ranches, expansive canyons, rushing rivers, and elevated mesas. Residents and visitors benefit from the varied geography and natural resources that extend from the Rocky Mountains to the eastern plains and the Colorado Plateau to the Arkansas River.

The Colorado Lottery, through Great Outdoors Colorado (GOCO) and the Conservation Trust Fund (CTF), supplies substantial dedicated funding for land conservation and outdoor recreation.² This report analyzes the economic benefits that stem from these investments and focuses on a subset of investments by the State of Colorado in parks, trails, rivers, open spaces, recreation amenities,³ and wildlife through GOCO and CTF. The goal of this report is to understand the economic value that stems from Colorado's lottery investments, including economic impact and job creation, leveraged funding, recreation, tourism, economic development, agriculture, and GOCO's youth corps program and School Yard Initiative.

In 1980, Colorado's voters amended the Colorado Constitution to establish a state-supervised lottery with a portion of the proceeds to be placed in the newly created CTF and distributed for parks, recreation, and open space purposes. The General Assembly enacted legislation to implement the Colorado Lottery in 1982, and in 1992 voters reaffirmed that a portion of lottery profits be used for parks, recreation, and open space purposes through the passage of Amendment 8. The 1992 measure also created GOCO. Presently in Colorado, profits from the sale of lottery products are distributed to GOCO, CTF, and Colorado Parks and Wildlife. GOCO funds are subject to a cap, above which profits are directed to the Colorado Department of Education's Public School Capital Construction Assistance Fund.

The following descriptions provide context about each fund:

GREAT OUTDOORS COLORADO TRUST FUND (GOCO)

Voters approved a constitutional amendment to create Great Outdoors Colorado in 1992. The initiative redirected lottery proceeds from capital construction to wildlife, parks, rivers, trails, and open space heritage. Each year, up to 50 percent of lottery proceeds are distributed to the GOCO Trust Fund; a constitutionally mandated GOCO cap is adjusted for inflation each year. In fiscal year 2017, GOCO received \$64.4 million.⁴ These funds support parks, trails, wildlife, rivers, and open spaces. GOCO's 2015–2020 strategic plan has three primary goals: to protect urban and rural land for people and wildlife, connect people to the outdoors by increasing access and closing gaps in trail systems, and inspire children and their families to develop a connection to the outdoors. Its board of trustees awards competitive grants to local governments and land trusts and makes investments through CPW. Since its inception, GOCO has created and enhanced over 1,000 community parks and outdoor recreation areas, restored and reconstructed over 900 miles of trails, added over 47,000 acres to its state park system, protected more than 1 million acres of land and 750 miles of rivers, supported 43 endangered and threatened species, engaged more than 9,000 youth corps members, and transformed 44 school playgrounds that serve 18,000 students.⁵

CONSERVATION TRUST FUND (CTF)

Colorado's voters amended the Colorado Constitution in 1980 to establish a state-supervised lottery with part of the net proceeds to be placed in the CTF. In 1982, the General Assembly enacted

2 Colorado Parks and Wildlife et al., *2014 Colorado Statewide Comprehensive Outdoor Recreation Plan*.

3 Recreation amenities include recreation areas and facilities.

4 Colorado Lottery, "Giving Back," accessed December 27, 2017, <https://www.coloradolottery.com/en/about/giving-back/>.

5 Great Outdoors Colorado, "About Us," accessed September 18, 2017, www.goco.org/about-us.

legislation to implement the Colorado Lottery and allocated 40 percent of annual net revenues to be distributed to the CTF. This allocation was reaffirmed in 1992.⁶ The 40 percent of lottery proceeds that CTF receives each year is distributed directly to local governments for the acquisition and maintenance of parks, open space, and recreational facilities. In fiscal year 2017, CTF received \$53.3 million.⁷ The Colorado Department of Local Affairs (DOLA) administers this fund and makes distributions quarterly. Over 470 counties, cities, towns, and Title 32 special districts are currently eligible to receive CTF funding, and the amount is determined based on population. CTF funds can be used for the acquisition, development, and maintenance of new conservation sites as well as capital improvements and maintenance for recreational purposes on any publicly owned site, including parks, open space, community and recreation centers, libraries, fairgrounds, golf courses, skate parks, athletic fields, swimming pools, museums, campgrounds, zoos, and skating rinks. Eligible expenses include acquisition and related expenses, development and construction of buildings, playgrounds, trails, lakes, tennis courts, basketball courts, sports fields, restroom facilities, pavilions, parking lots, and landscaping, as well as salaries to support landscaping and the maintenance of parks, trails, and swimming pools. Funds can also support capital improvements and fixed assets, such as the repair of playground equipment or the purchase of new picnic tables, fencing, or maintenance equipment.

COLORADO PARKS AND WILDLIFE (CPW)

CPW is responsible for perpetuating wildlife resources, providing quality state parks, and offering outdoor recreation opportunities across the state. Each year, 10 percent of lottery proceeds are distributed to CPW to fund projects for nongame species and provide opportunities for Coloradans to watch and learn about Colorado wildlife. In fiscal year 2017, CPW received \$13.3 million.⁸ Lottery funding for CPW has funded an Angler Education Program that introduces people to the sport of fishing and the Colorado Birding Trail, which provides Coloradans and visitors the opportunities to see and learn more about the birds that call Colorado home.

DIVISION OF PUBLIC SCHOOL CAPITAL CONSTRUCTION—BUILDING EXCELLENT SCHOOLS TODAY (BEST)

Any proceeds generated beyond the GOCO cap are directed to the Colorado Department of Education’s Public School Capital Construction Assistance Fund. In fiscal year 2017, over \$2.2 million in lottery proceeds went to BEST to improve conditions at some of Colorado’s underfunded schools.⁹ This fund is not analyzed in this report.



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6 Bret Hillberry, Division of Local Government, Colorado Department of Local Affairs, email message to author, August 10, 2017.
7 Colorado Lottery, “Giving Back.”
8 Ibid.
9 Ibid.

Economic impact and jobs

INVESTMENT IN PARKS AND CONSERVATION BY GOCO AND CTF SPURS ECONOMIC ACTIVITY and creates jobs. That is, spending ripples through the economy adding value and generating employment. For example, park development and maintenance requires that labor and supplies be purchased from businesses within the local economy. These businesses, in turn, increase their purchases and employ more individuals who spend their earnings on local goods and services. These ripple effects, also referred to as multiplier effects, can be measured to demonstrate the value added, economic output, and employment impacts of investing in the creation, maintenance, and improvement of parks, trails, rivers, open spaces, recreation amenities, and wildlife. The Trust for Public Land conducted an analysis of the economic and employment impacts of the investments that Colorado has made in the last ten years through GOCO and CTF.

Measuring investments

The Trust for Public Land collected data from GOCO and the Colorado Department of Local Affairs (DOLA), which administers the CTF, on expenditures made between 2007 and 2016. This time horizon was chosen due to the availability of data. Data on completed GOCO grants were available since GOCO's inception in 1992 through 2016.¹⁰ Data on CTF expenditures were available for distributions made from 2004 through 2016. Given the differing periods of data availability, The Trust for Public Land decided that investigating the economic impact of spending over the last ten years (2007–2016) was the most recent and complete time period for analysis.¹¹

Once The Trust for Public Land secured data on expenditures, the organization's economists worked with staff at GOCO and DOLA to categorize that spending into one of two categories that would determine the multipliers used to estimate the economic impacts of the lottery spending through GOCO and CTF over the last ten years. The Trust for Public Land assigned each line item to one type of spending, either capital or operations and maintenance, following the recent research.¹²

Capital expenditures include the acquisition or creation of a new asset or the enhancement of an existing asset. This category includes things like buildings, trails, equipment, vehicles, or enhancements that substantially increase the useful life or value of an asset, or increase its usefulness (e.g., restoration). For GOCO, capital expenditures include grants for programs focused on local parks and outdoor recreation, state park development, open space land management and restoration, and trails. Capital expenditures for CTF include new site development or public site capital

10 The data provided by GOCO include all completed grants. The recent GOCO numbers reflect closed grants and do not include a number of grants that have been awarded but not completed. Specifically, several grants were awarded in 2015 and 2016 that have not yet closed and are not included in this analysis. For that reason, the resulting economic impacts estimated by The Trust for Public Land are conservative and underestimate the full economic impact of GOCO and CTF over the last ten years. In addition, the grant year may not always correspond with the year of the expenditure, but it is the best available information to estimate the year funds were spent.

11 Although CTF distributions to local governments began in 1983 when the lottery was first implemented, it was only more recently that DOLA has been responsible for administering the fund. Though information on CTF distributions from DOLA to local governments is available for each year that distributions have been made, information prior to 2004 does not contain the level of specificity related to spending that is necessary to conduct an economic analysis. Data provided by DOLA included the amount of CTF funds expended, a description of the purchases, the year, and a code to categorize how the local government spent the funds. Local governments report this information, which DOLA utilizes but does not edit for accuracy because the purpose of the database is to enable DOLA to audit spending by local governments and ensure that spending is in accordance with the program's requirements. Local governments are not required to spend their revenues immediately after they are distributed; in fact, some save CTF funds over multiple years to utilize on a single large project. Source: Bret Hillberry, email message to author.

12 Analyzing capital and operations and maintenance expenditures is consistent within the industry standards for analyzing the economic impact of parks and recreation. National Recreation and Park Association, *The Economic Impact of Local Parks: An Examination of the Economic Impacts of Operations and Capital Spending on the United States Economy*, 2015; Fairfax County Park Authority, *The Economic Impacts of the Fairfax County Park Authority*, 2016; Carmel Clay Parks and Recreation in Indiana, *The Economic Impact of Carmel Clay Parks and Recreation*.

improvements.¹³ Significant GOCO grant funds are used for land acquisition projects, and a sizable portion of CTF funds is used for new site acquisition; however, both types of acquisition projects are excluded from the analysis because they cannot be included in the input-output modeling due to the nature of the expenditure.¹⁴

Operations and maintenance expenditures include recurring or running costs, like rent, utilities, salaries, programmatic spending, and maintenance, except where these expenses are not permitted under the guidelines and requirements of GOCO and CTF (e.g., utility bills are ineligible for CTF funding). For GOCO, operations expenditures include grants for programs that support capacity building, operations, wildlife species conservation, outdoor recreation programming, and planning. Operations and maintenance for CTF includes the maintenance of new or public sites.

Substantial effort went into categorizing expenditures as capital or operations and maintenance. GOCO staff members worked diligently to assign their grants to each category using a documented, reliable, and replicable methodology. The Trust for Public Land categorized CTF expenditures based on the way that each line item was categorized for the purposes of determining eligibility. Table 2 provides a breakdown of spending. Over the last ten years, from 2007 through 2016, Colorado invested more than \$688 million in capital projects and operations and maintenance across the state through GOCO and CTF.¹⁵ Most GOCO investments fall within the capital category (60.1 percent), while most CTF investments occur in the operations and maintenance category (51.8 percent).

TABLE 2. INVESTMENTS THROUGH GOCO AND CTF (2007-2016)

CATEGORY	SPENDING (UNADJUSTED FOR INFLATION)	PERCENT
GOCO		
Capital*	\$141,000,000	60.1%
Operations and maintenance	\$89,600,000	39.9%
Subtotal	\$231,000,000	
CTF		
Capital*	\$220,000,000	48.2%
Operations and maintenance	\$237,000,000	51.8%
Subtotal	\$457,000,000	
Total GOCO and CTF	\$668,000,000	

*Capital does not include land purchases, as these expenditures cannot be included in input-output models since they are simple transactions exchanging money for land.

13 Local governments categorize expenditures as one of eight categories, including new site acquisition, development, or maintenance; public site capital improvements or maintenance; or TV translator facility acquisition, development, or maintenance. The Trust for Public Land utilized this project code to select and categorize expenditures as capital or operations and maintenance. The Trust for Public Land excluded all TV translator facility spending, which represented a small portion of the overall distributions.

14 Capital does not include land purchases, as these expenditures cannot be included in input-output models since they are simple transactions exchanging money for land. In the process of removing land transactions, The Trust for Public Land likely also removed some of the transaction costs that accompany land purchases. Such an omission contributes to the underestimation of the full economic impacts.

15 Between 1994 and 2017 over \$950 million in GOCO grants has been awarded and utilized on projects across the state. And over the life of the CTF program from 1983 through 2017, approximately \$1.18 billion in distributions has been made. The figures used in this analysis are significantly lower because they do not include substantial investments made in land transactions, or those made before 2007 or after 2016.

Determining impact

The Trust for Public Land examined the economic impact of this investment using a regional input-output model developed by IMPLAN Inc. and the U.S. Bureau of Economic Analysis, which uses industry- and location-specific multipliers, to calculate the total economic impact of spending in the state of Colorado.¹⁶

Three types of impacts are associated with investment in parks and land conservation:

1. **DIRECT IMPACTS** include the dollar amount invested by GOCO and CTF and the jobs created directly by this spending. To illustrate this impact, consider the sequence of events that take place when a grant recipient or local government makes an investment to develop a park in its community. Park development requires that supplies and labor be purchased, some locally. The grantee or local government entities purchase design and construction services from these companies to landscape a park and build a playground. The companies receive a portion of those funds as revenue from the sale of services. Direct jobs include the share of jobs at the companies that are supported by this spending on services. These investments by GOCO and CTF create increased demand for goods and services locally.
2. **INDIRECT IMPACTS** are generated when supplying industries respond to the increased demand and purchases are made from additional businesses. These purchases also generate sales and jobs. To continue the park development example above, each business providing goods and services to the design and construction companies benefits indirectly from investments through GOCO and CTF.
3. **INDUCED IMPACTS** result from the local spending of the workers who are supported directly and indirectly by GOCO and CTF investments. Induced impacts are changes in sales, jobs, and income in the state resulting from household spending of income earned either directly or indirectly from state spending through GOCO and CTF. The induced impacts of the park development example include a share of the retail spending by workers at the design and construction companies and by employees at the businesses providing goods and services to the design and construction companies. This spending creates additional “induced” jobs at these retail locations.

The model takes into account relationships between industries in local, regional, and national economies. Since not all of the economic activity that is generated happens in the state, the model considers “leakages” that represent goods and services imported from outside Colorado.

By analyzing the multiplier effects (i.e., how the impacts of spending ripple through the economy) while accounting for leakages, IMPLAN calculates the economic impact of the state’s investment through GOCO and CTF. The analysis provides estimates of economic activity (output or the value of transactions), labor income (salaries, wages, and benefits), value added (equivalent to gross domestic product), and employment (headcount jobs).

Local jobs and economic impact

The state’s direct investment of \$688 million through GOCO and CTF over the last ten years (2007–2016) has supported 11,800 jobs and \$507 million in labor income (see Table 3 ●). That is, every \$1 million invested in CTF and GOCO supports 17.2 jobs. These investments also added \$791 million in value and generated \$1.41 billion in economic output.

¹⁶ The multipliers used in this analysis were chosen based on their known impacts on the local economy (the most conservative multipliers were used) and their similarity to the types of expenditures for which GOCO and CTF funds are used.

This rate of job creation is consistent with recent research on the economic impact of park and related spending across the county. For example, a recent study for the National Recreation and Park Association found that \$54.7 billion in operations and capital expenditures by local and regional public parks nationwide resulted in 999,000 jobs, or 18.26 jobs per \$1 million in spending.¹⁷

TABLE 3. ECONOMIC IMPACT OF INVESTMENTS BY GOCO AND CTF ON COLORADO'S ECONOMY (2007-2016)

IMPACT TYPE	EMPLOYMENT	LABOR INCOME (2017\$)	VALUE ADDED (2017\$)	OUTPUT (2017\$)
Direct effect	7,580	\$290,000,000	\$415,000,000	\$748,000,000
Indirect effect	1,710	\$98,100,000	\$166,000,000	\$298,000,000
Induced effect	2,520	\$119,000,000	\$211,000,000	\$369,000,000
Total effect	11,800	\$507,000,000	\$791,000,000	\$1,410,000,000

Employment: Annual average of monthly jobs, which can be either full time or part time

Labor income: All forms of employment income, including employee wages and benefits as well as proprietor income

Value added: The difference between total output and the cost of its intermediate inputs

Output: The value of industry production



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17 National Recreation and Park Association, *The Economic Impact of Local Parks*.

Leveraged federal, local, private, and nonprofit funding

THE COLORADO LOTTERY IS A STATE FUNDING PROGRAM WITH AN IMPACT GREATER THAN THAT OF ITS BUDGET. The program facilitates cooperation among a range of partner organizations and catalyzes additional investments in land conservation, park development, maintenance, and related investments. Together, GOCO and CTF play a critical role in attracting federal, local, private, and nonprofit sources of funding to complete projects of social, cultural, and economic importance across the state. This section of the report will analyze the extent to which GOCO and CTF expenditures leverage additional investments in the state. To understand the leverage generated by GOCO and CTF, The Trust for Public Land researched match requirements and, to the extent possible, match history for GOCO and CTF expenditures. The results of this analysis are summarized below.

Great Outdoors Colorado

GOCO's investments in parks, trails, rivers, open spaces, recreation amenities, and wildlife leverage funding from federal, local, private, and nonprofit sources. Except for GOCO funds granted directly to Colorado Parks and Wildlife and in competitive Youth Corps Grants, all other GOCO grants require a match.¹⁸ Currently, a GOCO grant made through a program with a match requirement may fund a maximum of 75 percent of the total project cost.¹⁹ Of the remaining 25 percent match, 10–15 percent must be cash, depending on the program.²⁰

By attracting support from other sources, the State of Colorado does not have to bear the entire cost burden of a project and therefore maximizes its investment. Leveraging funds enables more local projects to be completed, creating additional economic benefits. Using information on grants awarded between 1994 and 2016, The Trust for Public Land estimates that GOCO leveraged at least \$1.33 billion in federal, state, local, private, and nonprofit funding for land purchases, parks and recreation facilities, outdoor recreation programming, planning, and more. That is, for all competitive grant programs requiring a match, every \$1 invested by GOCO was matched by at least \$2.50 from other sources (see Table 4 ●).²¹

Although match is not required for projects funded through direct grants to Colorado Parks and Wildlife and competitive Youth Corps Grants, a portion of these investments leverage additional funds as well. Through these projects, GOCO leveraged at least \$123 million in federal, state, local, private, and nonprofit funding for land purchases, land management and restoration, trails, parks and recreation facilities, environmental education, and more between 1994 and 2016.²² Therefore, projects without match requirements still saw a match of at least \$1.29 from federal, state, local, private, and nonprofit sources for every \$1 invested by GOCO.²³ Together, GOCO grants that require and do not require a match have leveraged at least \$1.45 billion in funding from other sources, which results in at least \$2.31 leveraged by every dollar invested in GOCO (see Table 4 ●).

18 Match is required for all programs under competitive Local Government, Open Space, and Youth Initiative grant types (except Youth Corps).

19 GOCO match requirements have varied; previously GOCO grants could fund a maximum of 70 percent of total project cost.

20 Great Outdoors Colorado, *GOCO Competitive Grant Program Procedures of the State Board of the Great Outdoors Colorado Trust Fund*, 2016.

21 For projects that had no, or limited, match information provided by GOCO, The Trust for Public Land assumed that GOCO provided at maximum 75 percent of the total project cost, and calculated what the estimated match amount would be. Recorded match amounts were used when available and complete.

22 This figure is based on a subset of Colorado Parks and Wildlife and Youth Corps Grant projects for which the GOCO grant amount and the final project cost were available: 114 of 1,725 total projects.

23 For programs with no match requirement, The Trust for Public Land estimated leverage using information for the subset of projects for which there is a recorded GOCO grant amount and budget/total cost (114 of 1,725 projects). This estimate is likely very conservative, since the match is not tracked comprehensively for these programs.

**TABLE 4. MINIMUM FUNDING LEVERAGED BY GOCO AND CTF
(UNADJUSTED FOR INFLATION)**

CATEGORY	GRANT AMOUNT	MINIMUM MATCH AMOUNT	MINIMUM LEVERAGE PER \$1 INVESTMENT
GOCO (1994-2016)			
For grants that require match	\$531,000,000	\$1,330,000,000	\$2.50
For grants that do not require match	\$95,300,000	\$123,000,000	\$1.29
Total	\$627,000,000	\$1,450,000,000	\$2.31
CTF (2004-2016)			
Total	\$611,000,000	\$1,490,000,000	\$2.43

Project highlight: South Boulder Creek Forest Legacy (Tolland Ranch)

The Tolland Ranch conservation easement is an example of a project where a GOCO grant was leveraged with particular success. To protect the 3,330-acre property, an \$800,000 GOCO Open Space grant was leveraged with \$4.9 million from the U.S. Forest Service’s Forest Legacy Program, \$1.5 million from Boulder County, and significant landowner donations. On this project, each \$1 invested by GOCO was matched by an additional \$8.46 from other sources.

Owned by the Toll family for over 120 years, the Tolland Ranch property has significant conservation characteristics and was the top priority for the Forest Legacy Program in 2013. Permanent protection of the forested property protects critical drinking water sources for the cities of Boulder and Denver, safeguards wildlife habitat and migration corridors, initiates a plan of active forest management, and will sustain and enhance the area’s recreational opportunities. The property lies south of the Eldora Mountain Resort, which leases a portion of the property for its extensive system of Nordic ski trails, and is bordered by James Peak Wilderness, Indian Peaks Wilderness, and Roosevelt National Forest. The property now serves as a protected buffer between the James Peak Wilderness to the west and extensive rural subdivisions to the east. On the date of the project’s closing, U.S. Senator Michael Bennet said, “Coloradans in every corner of our state believe that the conservation of our land and way of life are top priorities. Today we celebrate another victory for conservation in the South Boulder Creek watershed. It will continue to benefit Colorado’s outdoor recreation economy and support jobs in the recreation and tourism industry.”

The Conservation Fund negotiated the conservation easement agreement with the Toll family and worked to secure the necessary funding. The conservation easement project was the catalyst for a larger initiative that conserved 4,700 total acres owned by the Toll family in the South Boulder Creek watershed involving an additional \$550,000 from the federal Land and Water Conservation Fund, \$650,000 from Denver Water, and over \$3.3 million in landowner donations. As a whole, the project totaled over \$11.7 million, and each \$1 invested by GOCO was matched by approximately \$14.70 from other sources.

Sources: The Conservation Fund, “Conservation Easement Permanently Protects Largest Private Property in South Boulder Creek Watershed,” <https://www.conservationfund.org/news-resources/press-releases/684-conservation-easement-permanently-protects-largest-private-property-in-south-boulder-creek-watershed/>; “GOCO Grants to Preserve 15,000 Acres, Create New Public Open Space, Fishing Area,” <http://www.goco.org/news/goco-grants-preserve-15000-acres-create-new-public-open-space-fishing-area>.

Conservation Trust Fund

Although CTF does not have a match requirement, its investments in public parks, trails, open spaces, and facilities often serve to supplement municipal general fund and capital improvement dollars. On over 20 percent of projects that received CTF funds, those grants have leveraged funding available through a variety of sources, including municipal capital improvement funds, parks funds, property tax levies, school district funds, golf course funds, GOCO grants, Colorado Department of Transportation funds, and more.

Leveraging funds enables more local projects to be completed, creating additional economic benefits. Using information on distributions made between 2004 and 2016, The Trust for Public Land estimates that CTF invested \$611 million and leveraged at least \$1.49 billion in funding from various sources for land purchases, construction and maintenance of parks and recreation facilities, capital improvements, and more. This results in at least \$2.43 leveraged by every dollar invested in CTF (see [Table 4](#)).²⁴

The analysis above demonstrates how GOCO and CTF funding facilitates cooperation among a range of partner organizations and catalyzes additional investments in land conservation, park development, maintenance, and related expenditures. Together, GOCO and CTF play a critical role in attracting federal, local, private, and nonprofit sources of funding to complete projects of social, cultural, and economic importance across the state.



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24 The CTF database does not comprehensively track leverage; however, many local governments report total project budgets as part of the reporting process. In order to estimate the leverage per dollar of CTF invested, The Trust for Public Land first estimated the leverage for all distributions. This was calculated as the sum of the difference between the total project cost and the CTF amount, for all projects where the total project cost was greater than the CTF amount (5,497 of 23,402 distributions). The Trust for Public Land then divided that sum by the total of all CTF distributions.

Case study: Lottery support keeping Greeley's parks vibrant

How CTF and GOCO contribute to the nitty-gritty of running an award-winning park system

BY THE CITY OF GREELEY DEPARTMENT OF CULTURE, PARKS, AND RECREATION

It takes a lot of cooperation to make a great park system. But thanks to strong partnerships and diverse funding mechanisms including CTF and GOCO, the City of Greeley has done just that. Sitting within the eastern edge of the Colorado north Front Range region, Greeley is renowned for its beautiful park system, youth athletic programs, and special events. Greeley has 41 park locations. Its crown jewel, Island Grove Regional Park, serves as the site for the regional county fair and is one of the top dog show venues in the United States. A strong collaboration with the Greeley-Evans School District for programming and the sharing of fields and facilities has also created a partnership that is the envy of many communities.

As Greeley works each year to ensure successful park operations, master planning, equipment procurement, and capital projects, CTF funds are a key piece of the funding puzzle. Overall, Greeley's annual CTF funds supplement approximately 18 percent of the City's park operations annual budget of roughly \$5 million. Most CTF dollars are utilized for staff salaries at various park sites and athletic fields, but Greeley also depends on the availability of CTF funding to supplement ongoing park system maintenance. Funds go toward day-to-day needs such as irrigation repair parts, small equipment acquisitions, and general maintenance supplies. CTF funding even contributes to Island Grove Regional Park, one of the most picturesque event complexes in the nation. Greeley has a unique partnership with Weld County, which contributes nearly 21 percent of the park's total annual budget of \$1.9 million from its CTF funds for Greeley to manage the 165-acre site. For Greeley, CTF support bridges the department's funding needs and makes sure much-needed monies stay in the City's General Fund to support other priorities such as public safety, street maintenance, and recreation programming.

Along with CTF support, Greeley has been fortunate to receive several grants in the past two years through GOCO. The City recently received a highly competitive grant for open space preservation and utilized \$980,000 in GOCO matching funds to purchase over 380 acres within the Cache la Poudre River corridor securing the future of a federally designated National Heritage Area and a major natural resource in northern Colorado. In 2016, a \$327,000 GOCO Local Government grant also assisted in the completion of Greeley's first all-inclusive and universally accessible playground at Island Grove (Aven's Village). Partnering to maximize impacts has been a strength of Greeley. And at each step along the way, from park acquisitions to operations, CTF and GOCO have been some of Greeley's best partners.



CITY OF GREELEY DEPARTMENT OF CULTURE, PARKS, AND RECREATION

Recreation

WITH COLORADO'S NATURAL BEAUTY AND EXTENSIVE RECREATIONAL OPPORTUNITIES, it is no wonder that recreation is such a critical part of life for Coloradans. The state's investment in GOCO and CTF has capitalized on these opportunities in the following ways:

- Helping to create and enhance community parks and outdoor recreation areas, such as Baldrige Park in Montrose and Lake County Community Park.
- Aiding in the restoration and reconstruction of trails, like the Manitou Incline in Colorado Springs, Triple Creek Greenway in Aurora, and South Platte River Trail in Denver.
- Protecting critical lands and rivers like Red Mountain Ranch in Larimer County and the headwaters of the Arkansas River in Chaffee County.
- Providing essential funding to Colorado Parks and Wildlife to expand and improve the state park system as has been the case with several state parks, including Cheyenne Mountain State Park in El Paso County and Staunton State Park in Jefferson and Park Counties.
- Enabling local governments seeking to acquire, develop, and maintain public recreation sites to meet their community needs, such as the Kim Equine Pavilion in Kim County and Commons Park on the banks of the South Platte River in Denver.

Coloradans gain value from the recreational use of parks, trails, rivers, open spaces, recreation amenities, and wildlife. Economists know this is true because people pay for recreational access to state and national parks and even private facilities. This value exists even if individuals do not have to pay to access these amenities (e.g., pay an entry fee). The benefit accrues to the user in one of two ways: by providing cost savings to individuals who were willing to pay to recreate but didn't have to, and by providing travel cost savings to individuals who do not have to travel to access a substitute site. In this section, The Trust for Public Land estimates the number of recreational users and the recreational value gained by GOCO and CTF.

Both indoor and outdoor recreation is important to residents of Colorado, and both are supported by investments through the lottery. Unfortunately, data are not currently available on indoor recreation, such as that which occurs in recreation centers and pools. Therefore, this analysis focuses on the recreational value of GOCO and CTF through outdoor amenities. The Colorado Lottery, including GOCO and CTF, has been successful in funding outdoor recreation in the state – covering every county, rural and urban communities, and various activities, which makes sense given the measurable importance of outdoor recreation to local residents.²⁵

According to an outdoor recreation participation survey conducted in 2013 as part of Colorado's 2014 Statewide Comprehensive Outdoor Recreation Plan, 90 percent of Coloradans participate in outdoor recreation activities in Colorado each year, and 66 percent of residents recreated outdoors at least once a week on average. The top five outdoor activities by percent of population are walking, hiking or backpacking, picnicking, fishing, and tent camping. The survey asked about a mix of 38 trail, water, winter, and wildlife-related activities; see Table 5 ● for the top ten outdoor recreation activities by percentage of the population that participates.²⁶

25 Kelly Pohl and Megan Lawson, *State Funding Mechanism for Outdoor Recreation*, 2017.

26 Colorado Parks and Wildlife et al., *Recreation Plan*.

TABLE 5. TOP TEN OUTDOOR RECREATION ACTIVITIES BY PERCENTAGE OF COLORADO POPULATION THAT PARTICIPATES, ACCORDING TO COLORADO'S 2014 STATEWIDE COMPREHENSIVE OUTDOOR RECREATION PLAN²⁷

RANK	ACTIVITY	PERCENT PARTICIPATION	ACTIVITY DAYS
1	Walking	66.3%	104,000,000
2	Hiking/backpacking	51.9%	47,600,000
3	Picnicking	37.1%	17,300,000
4	Fishing	36.4%	26,400,000
5	Tent camping	35.6%	14,200,000
6	Skiing or snowboarding at a ski area	33.5%	14,500,000
7	Jogging/running (outdoors)	30.8%	46,900,000
8	Swimming (outdoors)	30.2%	17,700,000
9	Road biking	27.2%	32,800,000
10	Playground activities	22.3%	26,500,000

GOCO and CTF enable a multitude of opportunities for outdoor recreation, even as the definition of outdoor recreation continues to broaden and include activities beyond the traditional options of hiking and camping. Urban populations have different priorities than rural populations, and youth engage in a different set of activities compared with their adult counterparts. In 2013, Colorado Parks and Wildlife conducted focus groups with Denver Metro Area youth and found that outdoor recreation was important to them, but that the definition included team sports, biking, skateboarding, and running rather than traditional activities such as camping, skiing, hunting, and fishing.²⁸ Thus, it is essential to consider a broad set of activities that occur out of doors.

The Trust for Public Land estimated the recreational use value that accrues to residents by multiplying the average dollar value of each recreational activity to each recreational use. That is, if a person goes on 10 mountain bike rides in a year, and the average value per ride is \$2.20, that person benefits from recreational use worth \$22.00 per year. The Trust for Public Land utilized information on adult resident participation in outdoor recreation that was collected through the SCORP survey process. The results of the survey that are available within its online appendix include the number of activity days for each of the included 38 unique activities. The Trust for Public Land utilized this information to estimate the number of participants in each activity that is supported by GOCO and CTF, as well as the average number of activity days per participant.²⁹ The estimated participation takes into account the role that GOCO and CTF play in bolstering opportunities for the diverse types of activities available to Colorado residents, the potential for participation in multiple activities during one day, and the tendency of respondents to overreport behaviors that are perceived as socially desirable. To adjust for participation in multiple activities and overreporting, The Trust for

²⁷ For a comprehensive list of activities and their rankings, see Appendix B of the 2014 Colorado Statewide Comprehensive Outdoor Recreation Plan. Colorado Parks and Wildlife et al., *Recreation Plan*.

²⁸ Colorado Parks and Wildlife et al., *Recreation Plan*.

²⁹ Of the 38 activities included in the SCORP survey, this analysis includes 30 activities that are supported by GOCO and CTF investments. Activities included are (by number of activity days): walking, hiking and backpacking, running and jogging, road biking, playground activities, fishing, swimming, picnicking, mountain biking, wildlife viewing, tent camping, team or individual sports, golf, snowshoeing or cross-country skiing, developed RV camping, big-game hunting, rock climbing, whitewater rafting, sledding or tubing, kayaking, geocaching, upland bird and small-game hunting, horseback riding, ice fishing, backcountry skiing, waterfowl hunting, ice skating, canoeing, stand-up paddleboarding, and sailing. The Trust for Public Land omitted eight activities because GOCO and CTF do not make significant, if any, investments that would support these types of recreation. Skiing or snowboarding at a ski area, ATV riding or 4-wheel driving, target skeet shooting, powerboating, waterskiing, off-road motorcycling, snowmobiling, and jet skiing have all been omitted.

Public Land relied on results from a professional telephone survey it conducted in Colorado Springs that included a means of rigorously controlling for these features in the survey instrument.

Once participation was determined, The Trust for Public Land assigned dollar values to each activity day based on the average value per visit for each activity. The Trust for Public Land applied a methodology that it developed using the framework of the Unit Day Value method, which is employed by the U.S. Army Corps of Engineers to count park visits by specific activity, assigning each activity a dollar value.³⁰ The Trust for Public Land determined the value of recreation activities in Colorado utilizing estimates of outdoor recreation value from Oregon State University’s Recreation Use Values Database and market rates, when available. Oregon State University’s database contains values for more than 20 activities and comprises over 420 economic studies that estimated the use value of recreational activities in the United States and Canada from 1958 to 2015.³¹ In determining which values to use, The Trust for Public Land’s economists applied the values that are most conservative and relevant to Colorado.

In quantifying the benefits of resident use, The Trust for Public Land also recognized that not every outdoor recreation activity day within a given period has the same value to the resident. In fact, additional uses of a park, trail, or open space to recreate are less valuable than the first use. For example, an individual’s first day mountain biking is worth more than that same individual’s tenth day of the year.³² The Trust for Public Land also accounted for any fees charged to participate in an activity, such as an entrance fee. The per-person fee is subtracted from the imputed value and only the “extra” value is assigned. For example, if a night of camping is worth approximately \$16 and the user is charged a \$10 fee, the value of the resident’s first time camping would be \$6.

The average value per visit of \$3.90 is a unique calculation for Colorado residents across all activities (Table 6). The Trust for Public Land calculated the value based on the frequency and type of park visits engaged in by residents of Colorado in 2013, the most recent year for which comprehensive statewide data are available.

	PERSON VISITS	AVERAGE VALUE PER VISIT	VALUE (2017\$)
Total	102,000,000	\$3.90	\$399,000,000

This analysis finds the outdoor recreational use value that accrues to Colorado residents is \$399 million (Table 6). GOCO and CTF are major funding mechanisms in the state that ensure the protection of public lands that provide essential access to outdoor recreation opportunities. Without these public amenities, many Coloradans would not have free or low-cost opportunities to participate in outdoor recreation. Aside from this analysis, we know that Colorado’s outdoor recreation amenities are well used. For example, Colorado’s state parks, which receive a large amount of GOCO funding, draw the highest park visitation of any public entity in Colorado, receiving more than 740 million visits each year, or 54 visits per acre.³⁴

30 The unit day values for recreation used by the U.S. Army Corps of Engineers range from \$3.96 to \$11.89 for general park use such as hiking on trails, and from \$16.10 to \$47.05 for specialized activities that require specialized equipment and expertise. Wilbert V. Paynes, *Memorandum for Planning Community of Practice: Economic Guidance Memorandum, 17-03, Unit Day Values for Recreation for Fiscal Year 2017*, U.S. Army Corps of Engineers, 2016.

31 Oregon State University, “Recreation Use Values Database,” accessed July 6, 2017, <http://recvaluation.forestry.oregonstate.edu/database>.

32 This is consistent with the economic law of diminishing marginal utility, which recognizes that the more of a good one consumes, within a given time and holding all else constant, the smaller the gain in the total utility derived from each additional amount. Utility, in this case, is the amount of satisfaction derived from the consumption of outdoor recreation activity days.

33 This recreational use value represents the value that residents would have to pay to engage in recreational activities if Colorado’s parks, trails, rivers, open spaces, and recreation amenities did not provide them at low or no cost.

34 Colorado Parks and Wildlife et al., *Recreation Plan*.

In addition to providing critical opportunities for outdoor recreation, GOCO and CTF funds are utilized by local governments to support indoor recreation facilities. These indoor amenities provide monumental value to local residents; however, data are not available to quantify resident participation in indoor recreational activities. In addition, this analysis focuses exclusively on adults and does not estimate the value of recreation activities for youth. In these ways, this analysis underestimates the true recreational value provided by GOCO and CTF.

This analysis does not include consumer spending related to outdoor recreation that has significant impacts on the local economy. For example, in 2017, the outdoor recreation economy in Colorado generated \$28.0 billion in consumer spending, contributed \$2 billion in state and local tax revenue, and supported 229,000 jobs with an associated \$9.7 billion in wages and salaries.³⁵ For more information on the economic impact of outdoor recreation and sporting goods more generally, please see the economic development section on [page 33](#).



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35 Outdoor Industry Association, "Colorado," accessed July 14, 2017, <https://outdoorindustry.org/state/colorado/>.

Case study: Optimistic about Pessimist DiscGolfPark

Using CTF and GOCO to turn Fort Morgan's signature Riverside Park into a regional attraction

BY THE CITY OF FORT MORGAN COMMUNITY SERVICES

Contrary to its name, a new disc golf facility in Fort Morgan, Colorado, has city officials feeling positive about the impact of this sport on their community. The Pessimist DiscGolfPark opened in September 2015 at the city's signature 300-acre Riverside Park as the first DiscGolfPark in the United States. DiscGolfPark is a globally recognized model of disc golf course design that involves maintaining and enhancing the native terrain of a park while standardizing amenities to maximize the usability of the course from the beginner to professional level.

The new 18-hole course was completed solely with CTF dollars and complements Fort Morgan's existing 27-hole Optimist Disc Golf Course (originally named after a local club team) at the other end of Riverside Park. Although many cities have disc golf courses, together these two courses are helping burnish Fort Morgan's reputation as a destination for disc golf.

"This course has a great mix of technical shots as well as long open drives to test many different aspects of your game," wrote 19-year disc golf veteran Cael Zaslav on the website *DGCourseReview*. "This was a great course and makes this park great with two challenging courses. . . . This makes Fort Morgan more of a disc golf destination."

The first weekend Pessimist DiscGolfPark opened, the city hosted 140 participants who competed in the Johnny Roberts Memorial Tournament. The park also hosts the annual High Plains Challenge disc golf tournament that has become a summer tradition and sees over 150 amateur and pro contestants each fall. "As tours grow in popularity, we hope to have a chance to get big events on a larger scale," says Joshua Miller, director of Economic Development for the City of Fort Morgan. "We can be tied to big brands and head in the direction the sport is growing. That is important."

GOCO funding may be seen as providing the lion's share of funding for larger park projects, but CTF funding is also a critical tool for strategic park investments. "We were able to complete the Pessimist DiscGolfPark solely with our CTF dollars. So much of Riverside Park and our ability to do a project like this is due to these programs," notes Miller. "GOCO has funded a variety of projects in this park and, in some of our larger projects, has provided the main funding source, while matching funds are provided by the City and CTF."

With the help of these funding programs, Fort Morgan's reputation as a mecca for the sport is reaching beyond Colorado and building opportunities for regional and even national tourism. The City of Fort Morgan hopes the addition of the Pessimist course will continue to attract more players and visitors to the area and make Fort Morgan a regular stop for national disc golf tournaments. Meanwhile, the initial success of the Pessimist course has the city nothing less than . . . well, optimistic.



CITY OF FORT MORGAN
DEPARTMENT OF COMMUNITY SERVICES

Tourism

TOURISM CONTRIBUTES SIGNIFICANTLY TO COLORADO'S ECONOMY. Both GOCO and CTF support the tourism economy by ensuring that visitors have access to high-quality, scenic, and well-maintained amenities. In this analysis, The Trust for Public Land uses existing tourism data to calculate the tourism benefit provided by investments by GOCO and CTF in parks, trails, rivers, open spaces, recreation amenities, and wildlife.

Land conservation preserves the beautiful areas that attract visitors to Colorado. The tourism and outdoor recreation industries benefit greatly from GOCO and CTF investments in wild areas, urban parks, and farms and ranches that make the state a beautiful place to visit with wide-ranging activities in which to partake. For example, Garden of the Gods, a city park in Colorado Springs that has benefited from GOCO and CTF investments, attracts an estimated two million visitors each year.³⁶ It is a significant park and outdoor recreation–related tourist attraction. In recent years, Garden of the Gods has been ranked the top U.S. park, the second-best park in the world,³⁷ and the second of “America’s Best Free Attractions.”³⁸

GOCO and CTF support the tourism industry by providing the essential recreation areas that make the outdoors accessible to tourists. Funds from GOCO and CTF are used throughout the state to create and enhance community parks and outdoor recreation areas, restore and reconstruct trails, protect lands and rivers, expand the state park system, and acquire, develop, and maintain public recreational sites.

Colorado’s scenery alone attracts tourists, and the state’s Scenic and Historic Byways are important drivers of economic activity.³⁹ Many byways pass by GOCO-funded projects, such as the Gold Belt Tour in Southern Colorado. And, Federal Highway Administration funding was previously distributed through the Byways program and used as a match for GOCO projects. These investments bolster the tourism industry by providing high-quality outdoor amenities for people to visit, which creates jobs and strengthens the state’s economy.

Visitors fuel the tourism economy in Colorado, with 82.4 million trips in 2016. Tourists include day-trippers (54 percent) and overnight leisure visitors (41 percent), and they can originate from inside or outside the state.⁴⁰ Either way, these visitors spend significant amounts of money while on their trips (see Table 7 ●). Direct travel spending in Colorado ripples through the economy and impacts jobs, provides wages, and produces tax revenue. The total direct travel spending in Colorado during 2016 was over \$19.7 billion.⁴¹ This spending directly supported over 165,000 jobs and earnings of over \$5.8 billion, which generated \$725 million and \$491 million in local and state taxes, respectively.⁴²

Tourists visit parks, trails, rivers, open spaces, and recreation amenities in Colorado to participate in a wide variety of activities. Though not always recognized, these resources play a significant role in the state’s tourism economy. Many people visit Colorado because of its scenic beauty and ample outdoor recreation opportunities. A significant percentage of overnight leisure visitors to Colorado in 2016 visited outdoor amenities (see Table 8 ●). For example, 22 percent of leisure visitors hike or backpack

36 City of Colorado Springs, Parks, Recreation, and Cultural Services, *Park System Master Plan*, 2014.

37 TripAdvisor, “TripAdvisor Announces World’s Top Landmarks and Parks in Travelers’ Choice Attractions Awards,” June 17, 2014, accessed September 7, 2017, <http://ir.tripadvisor.com/releasedetail.cfm?ReleaseID=854990>.

38 Mark Harden, “USA Today: Nation’s 2nd-Best Free Attraction Is in Colorado,” *Denver Business Journal*, September 2, 2016, accessed September 7, 2017, <http://www.bizjournals.com/denver/news/2016/09/02/usa-today-nations-2nd-best-free-attraction-is-in.html>.

39 Colorado Department of Transportation, *Colorado Byways Economic Data Analysis*, 2016.

40 The remaining trips are attributable to overnight business travel (4.2 million or 5 percent of total trips). Longwoods International, *Colorado Travel Year 2016 Draft Report*, 2017.

41 Total direct travel spending includes all travel spending in Colorado, including destination spending, international travel, resident airfare, and travel agencies.

42 Dean Runyan Associates, *Colorado Travel Impacts 1996-2016p*, 2017.

and 22 percent visit national or state parks. The outdoors attracts visitors who would not otherwise visit Colorado. In fact, visiting the outdoors was the main purpose of 15 percent of Colorado's 2016 overnight leisure trips. Outdoor visitors staying overnight in Colorado frequently participate in outdoor recreation activities (see Table 9). These activities all depend on the availability of high-quality recreational opportunities, such as those supported by GOCO and CTF. Even if tourists use many parks at no cost, or spend modestly on recreational activities, they end up spending considerable amounts on food, entertainment, lodging, fuel, gifts, and other items during their time in Colorado. Outdoor visitors staying overnight in Colorado spent an average of \$350 per trip, accounting for 9 percent of the total spending by all overnight visitors. Nine percent represents the spending of visitors who came for the primary purpose of the outdoors, but it does not include the spending of other visitors who come for another primary reason and utilize the outdoors, or extend their stay in order to enjoy the outdoors, which would further increase their spending impacts in the state. This visitor spending also excludes the spending by individuals who come to ski or tour, which generates 26 percent of all spending by overnight visitors.⁴³

TABLE 7. TOTAL TRAVEL SPENDING IN COLORADO BY DAY OR OVERNIGHT AND IN-STATE OR OUT-OF-STATE VISITORS (2016)

TYPE OF TRAVEL SPENDING IN COLORADO BY DOMESTIC VISITORS	AMOUNT (2017\$)
Total travel spending*	\$18,100,000,000
Day visitors	\$3,400,000,000
Colorado residents	\$2,200,000,000
Out-of-state visitors	\$1,200,000,000
Overnight visitors	\$14,700,000,000
Colorado residents	\$2,700,000,000
Out-of-state residents	\$12,000,000,000

* Total travel spending amount here differs from the \$19.7 billion in total direct travel spending referenced above because it includes only the travel spending by domestic visitors to Colorado rather than all travel spending in Colorado, including destination spending, international travel, resident airfare, and travel agencies.

TABLE 8. OUTDOOR RECREATION ACTIVITIES OF OVERNIGHT LEISURE VISITORS (2016)

ACTIVITY	PERCENT OF OVERNIGHT LEISURE VISITORS WHO PARTICIPATED
Visited national or state parks	22%
Hiked or backpacked	22%
Camped	12%
Climbed mountains	10%
Skied/snowboarded	8%
Biked	7%
Visited beach or waterfront	6%
Golfed	6%
Visited winery	5%
Went rafting	4%
Hunted	4%
Went boating	4%
Went birding	4%

43 Longwoods International, *Colorado Travel Report*.

TABLE 9. TOP FOUR ACTIVITIES OF OUTDOOR VACATIONERS IN COLORADO (2016)⁴⁴

ACTIVITY	PERCENT OF OUTDOOR VACATIONERS WHO PARTICIPATED
Hiking and backpacking	45%
Camping	36%
Visiting a national/state park	35%
Fishing	22%

A diverse set of agencies own and manage public parks, trails, open spaces, and facilities in Colorado, including the National Park Service, U.S. Forest Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Colorado Parks and Wildlife, and over 470 local governments. Together, these entities provide vast acreage and significant programming that attract out-of-state visitors; however, data are not available from each entity on visitor numbers or tourist expenditures. Thus, it is not possible to use this approach to extrapolate the number of visitors to all the public parks, trails, open spaces, and facilities in the state.

Nonetheless, The Trust for Public Land was able to utilize information contained in studies conducted by Longwoods International and Dean Runyan Associates to measure the value of parks, trails, rivers, open spaces, recreation amenities, and wildlife in Colorado's tourism economy. Tourist activities, number of visitors, and tourist spending determine the contribution of park amenities to the tourism economy and are detailed in these tourism reports. One can get a sense of how much tourists spend in Colorado due to its parks, trails, open spaces, and facilities, and the taxes generated by those expenditures, by calculating the direct travel spending that resulted from tourists who came to Colorado primarily to experience the outdoors. The proportion of visitor spending that is attributable to the outdoors can also be applied to tourism tax revenues generated within Colorado.

TABLE 10. TOURISM SPENDING AND THE OUTDOORS IN COLORADO (2016)

CATEGORY	VALUE (2017\$)
Travel spending by out-of-state visitors to Colorado*	\$13,400,000,000
Percentage of spending by tourists whose primary reason to visit Colorado is the outdoors*	9%
Approximate spending of tourists whose primary reason to visit Colorado is the outdoors	\$1,210,000,000
State tax revenue generated by direct travel spending in Colorado**	\$499,000,000
State tourism tax revenue in Colorado attributable to the outdoors	\$44,900,000
Local tax revenue generated by direct travel spending in Colorado**	\$737,000,000
Local tourism tax revenue in Colorado attributable to the outdoors	\$66,400,000

* Longwoods International, *Colorado Travel Report*.
** Dean Runyan Associates, *Colorado Travel Impacts*.

44 Ibid.

Parks, trails, rivers, open spaces, recreation amenities, and wildlife are important components of Colorado’s economy because they enhance the scenic beauty of the state and provide essential access to the outdoors for tourists. As shown in Table 10, out-of-state visitors spend \$13.4 billion in Colorado annually. Nine percent of Colorado’s travel spending is attributable to visitors who come primarily to visit the outdoors. Thus, approximately \$1.21 billion in spending each year is due to the parks, trails, rivers, open spaces, recreation amenities, and wildlife that make the outdoors accessible to tourists. Spending by these park-related visitors generates \$44.9 million and \$66.4 million in state and local tax revenues, respectively (see Table 10 [🔗](#)).

These estimates are conservative because they include only the spending or tax revenue generated by visitors who come to Colorado for the primary purpose of the outdoors. The estimates do not include spending or tax revenue generated by visitors who come for special events that occur at facilities and places supported by GOCO and CTF, such as fairs, festivals, or sports events.⁴⁵ That is, the estimates do not include a portion of overnight visitors who attend fairs, exhibitions, and festivals on their trip, such as Labor Day Lift Off, a hot air balloon festival hosted in Colorado Springs’ Memorial Park. Nor do they include overnight leisure visitors who attended or participated in sports events, such as the soccer and lacrosse tournaments at McNeil Field Complex in Montrose and rugby tournaments at Infinity Park in Glendale. And finally, these figures do not include the significant number of visitors to Colorado who engaged in outdoor activities and related spending while visiting Colorado for some other primary purpose.

By investing in the state’s parks, trails, rivers, open spaces, recreation amenities, and wildlife, GOCO and CTF provide significant investments in the quality of life, recreational opportunities, and sense of place that attract visitors to Colorado. This analysis sheds light on the exceptional tourism value provided by GOCO and CTF investments.



SEAN SHERIDAN

45 Colorado Parks and Wildlife et al., *Recreation Plan*.

Case study: Mesa County's world class wines and tremendous trails

Connecting communities and building economic resiliency with GOCO

BY THE TRUST FOR PUBLIC LAND

Several growing industries in Mesa County are tied to the area's unique climate and dramatic landscape. Fruit production and wineries in Palisade and mountain biking and outdoor recreation in Fruita are examples of Mesa County's development into an internationally recognized tourist destination. GOCO funding supports these industries and helps Mesa County's citizens continue to shape their community's cultural and economic futures.

Mesa County produces 80 percent of Colorado's grapes and 75 percent of its peaches. The town is just a four-hour drive from Denver, facilitating fruit shipping and tourism alike. "When you look at other destinations, what really does set us apart is the wine, the fruit, and the orchards," says Barbara Bowman, division manager of the Visitor and Convention Bureau for Grand Junction. Wine tasting is the top activity for visitors, and wineries contribute tens of millions to Mesa County's economy each year.

Mesa County lost 280 orchards from 1997 to 2007. To combat this loss, Colorado West Land Trust launched its Fruitlands Forever Initiative to protect a critical mass of farmland in 2009. Conservation easements, supported by GOCO funds, have been essential to ensuring the continued success of farming and agritourism and have allowed farm families to provide for their retirement, keep their farms intact, and help the next generation of farmers acquire land. These benefits transfer to the whole industry, as Rob Bleiberg, executive director of Colorado West Land Trust, notes, "We've seen this sea change in perspectives from those who thought it was inevitable that the fruit growing district would be converted for development... We've stabilized the land base in the community. Some farmers who might not have an easement on their place are still much more comfortable investing because they know their neighbors are not going to be selling for development." Bruce Talbot, a fifth-generation Palisade fruit grower who runs Talbot Farms with his father and brothers, explains, "It's the psychology of being stable. What we don't want to do is plant an orchard that gets surrounded by houses that conflict with our agriculture practices."

GOCO support has also transformed the Grand Valley's Colorado Riverfront Trail into a nationally recognized destination, investing over \$11 million in the trail since 1996. From the wineries of Palisade to the Colorado National Monument and the mountain biking in Fruita, visitors can now access the entirety of Mesa's amenities via this trail network. This connectivity is leading to economic gains for the businesses of Fruita. "The [people] that come out here to ride mountain bikes are now bringing their families because of the diversity of trails we have," relates Tony Uriguen, general manager of Backcountry Biker. This activity extends beyond the outdoor recreation industry. Jen Zeuner, owner of Hot Tomato Pizzeria, saw Saturday business double when the bike path to Fruita was first put in. As Scott Winans, president of the Colorado Plateau Mountain Bike Trail Association, notes, "GOCO is a partner that has allowed us to pursue a lot of these projects and responsibly put that money into the community in ways that really pay off for all of its residents."



JOHN FIELDER

Youth Corps

QUANTIFYING THE FULL BENEFITS OF GOCO'S PARTNERSHIPS WITH THE COLORADO YOUTH CORPS

ASSOCIATION (CYCA) is difficult because the program creates such diverse returns and positively affects so many beneficiaries in Colorado. In April 2011, the GOCO Board of Directors approved a \$1 million investment in youth corps programs accredited by the CYCA. The success of this initial partnership led to an annual investment that continues today. Cities, counties, and land trusts, in partnership with local community groups, school districts, and other entities, are able to apply to have local youth corps support community projects. This includes projects such as trail construction, invasive species removal, fire fuel management, and riparian restoration. These projects provide Colorado communities vast savings through subsidized construction and maintenance costs, offer job training and education benefits to youth corps members, and, as a whole, contribute to the increasingly important, multibillion-dollar outdoor recreation industry in Colorado. This section documents these many and varied economic benefits produced through GOCO's support of Colorado's youth corps programs.

Since 2011, GOCO has invested approximately \$1 million each year in CYCA and has helped transform communities across Colorado with 321 GOCO supported projects completed to date.⁴⁶ This work has translated into more than 50 miles of trails construction and more than 85 miles of trail improvements; nearly 100 miles of fencing construction and maintenance; approximately 13,600 trees planted; more than 200 acres of invasive tamarisk mitigation; and many other program outputs (see Table 11).⁴⁷ Communities that are awarded youth corps project support receive an economic benefit in the form of free or greatly reduced project costs.

To get a sense of the value that these outputs provide to local governments in the form of avoided costs or government cost savings, The Trust for Public Land considered the costs of obtaining these program outputs in the private market. That is, if not for youth corps, what is a conservative estimate of how much each community would have had to pay to achieve the same results? For example, the U.S. Forest Service provides a conservative estimate of trail construction cost per mile to be \$2,500.⁴⁸ Applying this value to the 50.8 miles of trails completed by local youth corps yields a conservative estimate of \$127,000 in costs avoided by local communities in which these trails were completed. The Trust for Public Land analyzed a subset of these outputs to estimate the value they provide to local governments (see Table 11). Although illustrative of the types of benefits this program generates, the values in Table 11 are not representative of the full value of this program because each youth corps project is customized to the needs of the particular community, and generates several outputs that have not been included in this estimation of value (e.g., bridges, campsites, and boardwalks).

Another way to understand the community benefits of this program is to look at the value of labor hours that youth corps members have supplied to complete these projects. That is, if not for youth corps, could this labor be supplied by community volunteers, and what would be the equivalent value of volunteer time to generate the same program outputs? An organization called Independent Sector has determined a conservative dollar value estimate of volunteer time based primarily on average

46 The Trust for Public Land analyzed annual outcomes for all CYCA activities supported by GOCO funding from the start of the partnership in 2011 through 2016. GOCO funding to CYCA projects is divided between local government and open space purposes and projects supporting Colorado Parks and Wildlife. Local government and open space projects are administered directly through GOCO and are reported together, while Colorado Parks and Wildlife projects are administered internally by Colorado Parks and Wildlife and are reported individually under State Parks or State Wildlife Areas & Fish Hatcheries. The Trust for Public Land totaled project accomplishments from these three reporting streams to capture outcomes supported by GOCO funding.

47 Full lists of program outputs are published in CYCA's annual youth corps project reports for Local Government & Open Space Purposes, Colorado State Parks, and Colorado State Wildlife Areas & Fish Hatcheries. These outcomes include additional accomplishments such as bridge, campsite, boardwalk, and rock wall construction; trash removal; bench site preparation; weed removal; water management; and many other services.

48 U.S. Forest Service, "Trails Unlimited, New Construction & Restoration," accessed September 21, 2017, <https://www.fs.fed.us/trailsunlimited/services/construction.shtml>.

wages in Colorado.⁴⁹ Between 2011 and 2016, youth corps members supplied 236,000 hours of labor working on GOCO-sponsored projects. Based on the value of a volunteer hour in Colorado,⁵⁰ this translates to a value of \$4.68 million. This estimate is conservative because it ignores the specialized experience, tools, and equipment that youth corps teams bring to these projects. For instance, an average community volunteer would likely not have an herbicide certification or experience operating a chainsaw. These services would demand a premium in the private market and are both things youth corps crews are qualified to perform. In addition to avoiding labor costs associated with these projects, the youth corps program enables local communities to accomplish more with their finite resources.

TABLE 11. A SAMPLE OF THE ECONOMIC BENEFITS PROVIDED TO LOCAL COMMUNITIES FOR GOCO-SUPPORTED YOUTH CORPS PROJECTS AND THEIR ESTIMATED EQUIVALENT DOLLAR VALUE (2011-2016)⁵¹

PROGRAM OUTPUT	TOTAL	VALUE (2017\$)
Trails constructed (miles)	50.8	\$127,000
Trails improved/maintained (miles)	86.4	\$216,000
Fence constructed (miles)	10.8	\$67,100
Fence maintained/removed (miles)	86.8	\$264,000
Trees planted	13,600	\$40,700
Trees removed	11,000	\$46,000
Tamarisk removed (acres)	226	\$711,000

Not only do Colorado communities save money through access to GOCO-supported CYCA projects, the State of Colorado, and CPW specifically, receive an economic benefit in the form of costs savings through this program. Employing youth corps teams to complete construction and maintenance projects is more cost effective than alternative means. For example, a 2012 study by the National Park Service found that using conservation corps to complete cyclic maintenance activities at national parks saved an average of 65 percent compared with using National Park Service staff. The study further found that savings were even greater, averaging 83 percent, when compared with the costs of using contractor crews to complete the same work.⁵²

Beyond costs savings, youth corps projects contribute to the multibillion-dollar outdoor recreation industry. Youth corps projects support the habitat restoration, trail maintenance and construction, invasive species removal, and general landscape-level upkeep needed to maintain Colorado’s world-class reputation for outdoor amenities. As mentioned in the recreation section above, the outdoor recreation economy in Colorado is significant. In total, 229,000 direct jobs, \$9.7 billion in wages and salaries, \$28 billion in consumer spending, and \$2 billion in state and local taxes are generated through this industry each year.⁵³ Youth corps is one of several organizations, volunteer groups, and government agencies whose work supports the amenities that drive this industry. No

49 Independent Sector, “Value of Volunteer Time,” accessed October 6, 2017, <https://www.independentsector.org/resource/the-value-of-volunteer-time/>.

50 Independent Sector estimates that the average volunteer hour in Colorado is worth \$25.97 (2016\$). Independent Sector, *Value of Volunteer Time by State 2011-2016*, 2016.

51 The Trust for Public Land estimated the value of each output using information on established costs to achieve similar outcomes. U.S. Forest Service, “Trails Unlimited”; Hal Gordon, “Cost Estimate of Wire or Electric Fence,” Natural Resource Conservation Service, accessed September 26, 2017, <https://www.nrcs.usda.gov/wps/portal/nrcs/main/national/technical/econ/tools/>; Wes Swaffar, director, Ecosystem Services, National Forest Foundation, email message to author, September 8, 2017; U.S. Forest Service, *A Strategic Assessment of Forest Biomass and Fuel Reduction Treatments in Western States*, 2003; U.S. Fish and Wildlife Service, *The Cost of Invasive Species*, 2012.

52 U.S. Department of the Interior, National Park Service, Park Facility Management Division, *Conservation Corps Projects Analysis*, 2012.

53 Outdoor Industry Association, *Colorado*, 2017, accessed September 8, 2017, <https://outdoorindustry.org/state/colorado/>.

methodology for isolating youth corps' contribution to Colorado's outdoor recreation is currently available. Nonetheless, its contribution bears mention because of the sheer size and importance of the outdoor recreation economy for all Coloradans, and because of the direct impact of youth corps projects on supporting the quality of the outdoor experience. Research also suggests that youth corps participants themselves are more likely to become outdoor recreation consumers than nonparticipant peers.⁵⁴ Youth corps members supported by GOCO are not only supporting the work that maintains and enhances Colorado's outdoors, but they are also creating the next generation of outdoor consumers.



SEAN SHERIDAN

CYCA projects, supported by GOCO funding, have created substantial value for communities across Colorado. Some of the most significant benefits, however, are realized by Colorado's next generation: the corps members. While employed in youth corps, Colorado's young adults gain technical certifications as well as valuable professional experience. Program participants have been shown to be more likely to pursue higher education,⁵⁵ and GOCO-supported youth corps members have earned AmeriCorps education scholarships totaling \$1.59 million since 2011 (see Table 12). Youth corps members are also more likely to pursue careers in natural resource management and outdoor industries than nonparticipant peers.⁵⁶ Youth corps members pursuing a career in the government sector receive a competitive advantage through the Public Land Corps hiring authority. This program allows youth corps members to be considered noncompetitively – that is, hired directly – for new employment positions after serving a set number of hours on eligible conservation projects.⁵⁷

Although members' interest in the outdoors may be sparked by working on-site in Colorado's wild spaces, it is fueled by environmental education throughout their time in the program. In total, GOCO has supported the employment of 2,180 corps members who have received more than 22,900 hours

54 Matt Duerden, Michael Edwards, and Telyn Peterson, *2013 PLSC Evaluation Report*, 2013; Colorado Youth Corps Association, *Colorado Youth Corps 2017 Fact Sheet*, 2017.

55 Duerden, Edwards, and Peterson, *2013 PLSC Evaluation*.

56 Ibid.

57 U.S. Forest Service, Public Lands Corps, *Human Resources Procedures—Frequently Asked Questions*, 2016.

of environmental education (Table 12). The same level of outdoor education, if not provided by this program, would have cost youth corps members an estimated \$456,000, based on the cost of environmental education through the U.S. Fish and Wildlife Service, which offers trainings that can be considered substitutes.⁵⁸ The importance of this curriculum for preparing the next generation of outdoor professionals has been recognized by the Careers in Natural Resources Initiative. Representatives of 91 government agencies, nonprofit organizations, and educational institutions collaborated over a number of years, and CYCA raised \$41,000 to develop portions of the curriculum used by CYCA to help prepare members for natural resource careers.⁵⁹

These developmental impacts are even more significant given the program’s focus on engaging minority youth and low-income Coloradans – populations that have historically been underrepresented in natural resource management industry.⁶⁰ Of the 2,180 corps members supported by GOCO funding since 2011, 23.7 percent identified as a member of an ethnic minority. Further, youth corps has been a path to employment for participants. Working on GOCO-supported projects was a first or second job for 15.7 percent of youth corps members.

The benefits of CYCA projects supported by GOCO are felt across Colorado. What is truly unique about the program is the many and varied ways the youth corps program is generating economic benefits across the state. Communities and state resource management agencies receive substantial cost savings by employing youth corps. The outdoor recreation industry as a whole benefits from the landscape-level upkeep and support provided by youth corps crews. Participants receive education and professional development benefits in the form of subsidized environmental education during their time in youth corps and scholarships awarded because of their involvement in the youth corps. The partnership between CYCA and GOCO provides real, tangible economic benefits for Coloradans at many levels.

TABLE 12. ECONOMIC BENEFITS PROVIDED TO YOUTH CORPS PARTICIPANTS (2011-2016) ⁶¹		
BENEFIT	TOTAL	VALUE (2017\$)
Scholarships awarded	1,260	\$1,590,000
Education hours	22,900	\$456,000

58 U.S. Fish and Wildlife Service, “National Conservation Training Center,” December 1, 2016, accessed September 26, 2017, <https://training.fws.gov/courses/tuition/index.html>.

59 Colorado Youth Corps Association and Colorado Alliance for Environmental Education, *Careers in Natural Resources*; Colorado Youth Corps Association and Colorado Alliance for Environmental Education, *A How-To Guide for Pursuing a Career in Natural Resources*, 2014.

60 Dorceta E. Taylor, *The State of Diversity in Environmental Organizations*, Green 2.0, 2014.

61 The Trust for Public Land analyzed reports from CYCA that detail the educational hours received and scholarships awarded to youth corps members engaging in GOCO-supported CYCA projects. CYCA reports projects supporting local government and open space purposes and projects supporting Colorado Parks and Wildlife separately. As such, there is some level of overlap between these reports. That is, a youth corps member may work on both a local government project and a Colorado State Park project within the same reporting cycle. His or her education hours obtained through youth corps would thus be captured in both reports. In order to avoid double-counting these hours and scholarship dollars, The Trust for Public Land adjusted these totals based on estimates of overlap by CYCA. Scott Segerstrom, executive director, Colorado Youth Corps Association, email message to author, September 13, 2017.

Case study: GOCO enables Southwest Conservation Corps' Farm Corps

Farm Corps cultivates community, leaders, and economic opportunity in Montezuma County

BY THE SOUTHWEST CONSERVATION CORPS

Crops aren't the only thing you can grow on a farm. In Montezuma County, the Southwest Conservation Corps—with the support of GOCO funding—is cultivating the next generation of leaders, building infrastructure, and producing economic activity with its new Farm Corps program.

Montezuma County has a rich legacy of agriculture that is starkly contrasted by limited educational and economic opportunities for the county's youth. The Southwest Conservation Corps (SCC) developed Farm Corps in partnership with the Montezuma School to Farm Project (MSTFP) in 2016 to address these barriers for local youth. GOCO funded the project, which supported eight local youth for four weeks while they built a school garden center in the Montezuma-Cortez School District. Each of the participants earned an hourly wage and Mesa Elementary School now has an outdoor classroom to use for years to come.

The program is not just about building infrastructure; it is also about creating career pathways for Montezuma's youth. One of the participants of the Farm Corps, Ansel, joined the program when he was 15 years old. Ansel was originally looking for an opportunity to make some money and work outside during summer break, but he quickly became a leader among his peers. Ansel helped his crew keep a positive attitude by telling jokes and turning the community chores that camping as a group requires into a fun process.

After Farm Corps, at age 16, Ansel continued his leadership development by taking a paid Youth Advisory Council (YAC) position with the Montezuma Inspire Coalition (MIC). This group, which includes SCC and MSTFP, aims to create more opportunities to connect youth to the outdoors through the development of programs and career pathways in Montezuma County. In this position, Ansel provides guidance on what sorts of programs and resources kids actually need and would participate in throughout the county. While Ansel is now helping his community expand its youth offerings, SCC is helping him develop as an outdoor professional as well. Ansel returned to SCC the following summer to join a conservation crew that worked on Colorado Parks and Wildlife conservation projects across the region.

Projects like Farm Corps leverage GOCO funding to create paid conservation service learning experiences for youth. Farm Corps instills valuable life skills such as teamwork, work ethic, leadership development, and peer accountability in the youth that it engages. This process in turn creates career pathway connections while improving local education infrastructure, all of which point to growth for the next generation of Coloradans.



SOUTHWEST CONSERVATION CORPS

School Yard Initiative

THE SCHOOL YARD INITIATIVE (SYI) PROVIDES CHILDREN WITH ENGAGING OUTDOOR PLACES to play and learn while transforming communities. GOCO's SYI provides funding for playground renovations and construction to improve youth access to the outdoors. Regular access to playgrounds can help children meet recommended minimum activity levels, which translate into improved health and reduced health care costs for Colorado families. The SYI also maximizes the impact of funding dollars by targeting high-need communities and leveraging additional funding sources for renovation grants. Further, the structure of the renovations – often community led – provide additional benefits across Colorado through building community cohesion and citizen-level civic engagement. This section explores outcomes of this initiative and the economic benefits realized by Coloradans because of SYI.

GOCO's SYI initiative was started in 2012 to inspire more active play and enhance outdoor learning on school grounds.⁶² Schools across Colorado are eligible to apply in partnership with local city, county, or park agencies for grants that cover up to 75 percent of the cost for school yard and playground renovations. Particular emphasis is placed on awarding grants to communities of need and where significant barriers prevent families from enjoying the outdoors in their area. Youth engagement and outdoor education are key components of this program. All projects encourage student-led design processes, and elementary schools involved with SYI can partner with Colorado Parks and Wildlife's Schools and Outdoor Learning Environments (SOLE) program to facilitate outdoor learning opportunities, such as fully funded field trips and family nature nights.

Since SYI's founding in 2012, 44 schools serving 18,000 children have been awarded grants totaling \$4.30 million.⁶³ Each school yard is unique since the communities design each project to meet their specific needs. For example, Sopris Elementary School, which serves the community of Glenwood Springs in Garfield County, used SYI support to renovate the school's playground that was partially inaccessible to students each year due to spring waters and mud. Sopris Elementary students created and then collected more than 700 surveys from residents to ensure that the redesign reflected the entire community's needs.⁶⁴ There are also projects such as the Crawford Elementary School playground renovation in Adams County. In this diverse school, 33 languages are spoken and almost 75 percent of the students are English Language Learners.⁶⁵ GOCO funding is helping the school system address overcrowding of the current playground facilities, such as having only six swings for more than 600 students. Similar stories are seen across the 44 schools reached by SYI to date.

Although each SYI project is customized to the needs of each community, all renovations contribute to new, vibrant playgrounds. Research has shown the developmental and health benefits for youth who have access to such spaces to play and grow.⁶⁶ Research also suggests that park renovations specifically can increase childhood activity levels.⁶⁷ A 2010 study looking at nine schools in Denver, for instance, found that playground renovations increased the number of children who are physically active, reduced sedentary behaviors, and increased overall activity levels.⁶⁸ These benefits translate into cost savings in the form of reduced health care costs for Colorado families. A 2014 study looking at

62 Great Outdoors Colorado, "School Yard Initiative," accessed September 13, 2017, <http://www.goco.org/grants/apply/school-yard-initiative>.

63 Erika Meyer, Youth Initiatives Program Coordinator, Great Outdoors Colorado, email message to author, September 14, 2017.

64 Sopris Elementary School, *GOCO School Yard Application for Construction*, 2016.

65 Crawford Elementary School, *GOCO School Yard Application for Construction*, 2016.

66 Catherine L. Ramstetter, Robert Murray, and Andrew S. Garner, "The Crucial Role of Recess in Schools," *Journal of School Health* 80, no. 11 (2010): 517-526.

67 Natalie Colabianchi et al., "Utilization and Physical Activity Levels at Renovated and Unrenovated School Playgrounds," *Preventive Medicine* 48, no. 2 (2009): 140-143.

68 Lois A. Brink, Claudio R. Nigg, Sarah M. R. Lampe, Beverly A. Kingston, Andrew L. Mootz, and Willem van Vliet, "Influence of Schoolyard Renovations on Children's Physical Activity: The Learning Landscapes Program," *American Journal of Public Health*, 100, no. 9 (2010): 1672-1678.

the costs of childhood obesity found that the average obese child incurred additional medical costs of \$12,700 over his or her lifetime compared to a normal weight child.⁶⁹ Looking just at the health benefits of playground renovations in promoting active play and reducing obesity suggests that GOCO's SYI is helping reduce medical costs for Colorado's families and will continue to do so into the future.

As a statewide program, GOCO is able to bring resources to communities through the SYI that would not otherwise be possible for playground renovations. In doing so, GOCO is able to leverage additional funding to maximize the impact of SYI spending. The program has a 25 percent match requirement but often attracts much more in additional funding. Of the 29 completed renovations to date,⁷⁰ \$2.71 million in GOCO grants has been matched by an additional \$1.68 million in local funding sources, including municipal park and city funds, additional grants, in-kind donations, and community fundraisers.⁷¹ Though in some cases GOCO is the main funding stream, for other projects it has been the link needed to bring a project to fruition. Such is the case with Lake County Middle School (see the case study on page 32 ●). Total project costs for this renovation were \$557,000, of which \$456,000 matched GOCO's \$100,000 award. Whether as the main funding source or the missing piece to the funding puzzle, GOCO funding is a key catalyst for these renovations.

GOCO's SYI may be building new playgrounds, but the SYI process is also building strong communities across Colorado. The SYI design and construction process engages families, has student-led components, and encourages interagency cooperation. Although fostering civic engagement through these means is an end in and of itself, research suggests there are also economic benefits of these activities through the fostering of what economists describe as *social capital*. That is, the very skills of cooperation, organizing coalitions, trust building, and navigating public institutions that children and parents develop working through a SYI grant process are the same skills that help create productive workers, successful businesses, and generate economic activity in a community.⁷²

Since 2012, GOCO's SYI has helped transformed 44 communities across Colorado. Although the community development impacts of this program are most apparent, the economic impacts are equally real and significant. This program is fostering health care cost savings while also leveraging community investments and community engagement through the grant process itself.



LAKE COUNTY MIDDLE SCHOOL

69 Eric Andrew Finkelstein, Wan Chen Kang Graham, Rahul Malhotra, "Lifetime Direct Medical Costs of Childhood Obesity," *Pediatrics* 133, no. 5 (2014): 854-862.

70 SYI projects are completed in two-year cycles. Full matching fund data are available only for completed projects and not renovations still in progress, of which there are 15 projects currently ongoing.

71 Erika Meyer, email message to author.

72 Dora L. Costa and Matthew E. Kahn, "Civic Engagement and Community Heterogeneity: An Economist's Perspective," *Perspectives on Politics* 1, no. 1 (2003): 103-111.

Case study: Lake County Middle School Play Yard Project

How a community was able to renovate its first school yard in more than 40 years

BY THE LAKE COUNTY SCHOOL DISTRICT AND GREAT OUTDOORS COLORADO

Lyndon Johnson was president the last time a school play yard in Lake County had been built or remodeled. Thus, it was no surprise that the playground at Lake County Middle School (LCMS) was in need of some TLC. The old playground, consisting of a drab dirt, gravel, and asphalt yard, with a swing set and single play structure, was both inadequate and unsafe for Lake County youth. This was the case until some determined community partners, supported through GOCO's School Yard Initiative (SYI), helped transform this gravelly yard into a state-of-the-art outdoor recreation and education play yard.

Leadville, the home of LCMS, has a rich and colorful history. In the late 1800s, it was the second most populous city in the state, drawing thousands who came to claim their fortunes in mining. After the close of the Climax mine in the 1980s, the city suffered a significant financial blow as jobs and homes were lost. A far cry from its boom days, Lake County's economic statistics at the time of the 2015 SYI grant reflected these recent struggles: unemployment was 8.8 percent, 21.7 percent of residents lived in poverty (compared to 12.2 percent in the state), and 69 percent of students were eligible for free and reduced meals.

These financial troubles were felt across the county's school systems, especially outdoor amenities. Despite a strong commitment from parents, teachers, administrators, and students, LCMS faced particular challenges. It was ranked as the fourth-worst middle school in the state. Meanwhile, only 30 percent of LCMS students met physical activity-level standards.

Walking across the newly renovated play yard site today, one would have little idea that just a few years ago the play yard consisted of an outdated, unsafe, and largely unusable site. The current play yard has a painted gaming area, play structures, a wall climber, a basketball hoop, an outdoor classroom, and a jogging track—now open for all of the community to enjoy. The new school yard fits into Lake County's Public Health Improvement Plan and is helping students as well as community members meet minimum activity levels, which translate into health care cost savings.

GOCO's SYI is not only getting students and community members more active, the initiative is also helping build community capacity and trigger additional funding sources—all of which adds up to more economic benefits. For instance, the SYI grant of \$100,000 eventually leveraged \$457,000 in matching funds from the community. These matching funds came from other grants and in-kind donations as well as from community fundraisers, including a weeklong "Pennies for Playgrounds" student effort that raised more than \$2,000. As a bonus, the strong support for the project made the logistics of working with a large coalition of community stakeholders into an easy process. As community leaders in Lake County continue to work to improve their piece of Colorado, this experience and these connections will continue to provide value. The SYI initiative helped the people of Lake County build a new place to play and a community where there is a reason to want to play.



LAKE COUNTY MIDDLE SCHOOL

Economic development

INVESTMENTS BY GOCO AND CTF IN COLORADO SUPPORT ECONOMIC DEVELOPMENT IN SEVERAL WAYS.

First, these programs support the creation and maintenance of parks, trails, rivers, open spaces, and recreation amenities that enhance quality of life and provide diverse leisure opportunities for residents and visitors in Colorado. The high quality of life, in turn, attracts talent, employers, and investment to the state. Second, residents take advantage of the state's plentiful indoor and outdoor recreation opportunities. By purchasing equipment and gear to use while participating in those activities, residents boost local businesses and contribute to Colorado's recreation economy. Finally, businesses that sell an outdoor recreation experience depend on protected waterways and lands to lead rafting and adventure trips. These businesses offer jobs, attract visitors, and contribute significantly to the state's economy.

This section explores economic development in Colorado as related to parks, trails, rivers, open spaces, and recreation amenities by examining in detail how these amenities enhance quality of life, boost the recreation economy, and support local businesses. The expanded economic development section in Appendix A includes in-depth statistics on participation in recreation and annual household spending on sports and recreation equipment, economic analysis of market potential and spending potential, and a comparison of Colorado with four states often considered peers. The section also explores common household types using Esri Tapestry Segmentation to shed light on residents' recreation and purchasing habits.

Enhancing quality of life

Colorado is attractive to families, individuals, and businesses. The state has a robust business community: *U.S. News and World Report* ranked Colorado number one on its 2017 list of Best States for Economy, giving the state top marks for growth (#2), employment (#2), and business environment (#4).⁷³ WalletHub ranked Colorado number two overall on its 2017 list of Best States for Jobs, and number one for Job Market and Most Job Opportunities.⁷⁴ The outdoor recreation economy plays a significant role in Colorado's economy: the Office of Economic Development and International Trade recognizes "Tourism and Outdoor Recreation" as one of the state's 14 major industries.⁷⁵ The Colorado Outdoor Recreation Industry Office (OREC), launched by Governor Hickenlooper in 2015, is one of only four state government offices in the country focusing specifically on the outdoor recreation economy.⁷⁶ In a 2016 survey, OREC companies rated "quality of life" and "characteristics of community members" especially high among benefits they receive from the communities where they operate.⁷⁷

Residents and visitors benefit from a wide range of outdoor recreation opportunities and highly trained adventure and activity guides in Colorado. As noted previously, Colorado's SCORP survey indicated that 90 percent of Colorado residents participate in outdoor recreation each year. Companies that manufacture outdoor-oriented gear are locating in Colorado to take advantage of nearby opportunities to test products such as skis, snowboards, apparel, and sports-oriented trail foods.⁷⁸

73 *U.S. News and World Report*, "Best States for Economy 2017," accessed September 8, 2017, <https://www.usnews.com/news/best-states/rankings/economy>.

74 Richie Bernardo, "2017's Best & Worst States for Jobs," WalletHub, accessed September 8, 2017, <https://wallethub.com/edu/best-states-for-jobs/35641/>.

75 Colorado Office of Economic Development and International Trade, "Key Industries," accessed September 8, 2017, <https://choosecolorado.com/>.

76 Cailin O'Brien-Feeney, "We Got Another One! North Carolina Establishes Office of Outdoor Recreation," Outdoor Industry Association, accessed September 21, 2017, <https://outdoorindustry.org/article/we-got-another-one-north-carolina-establishes-office-of-outdoor-recreation/>.

77 Laura Blomquist and Liz Sloan, "OREC Survey Results 2016," accessed September 6, 2017, <https://choosecolorado.com/wp-content/uploads/2016/06/OREC-2016-Survey-Results.pptx>.

78 Colorado Office of Economic Development and International Trade, "Key Industries."

Boosting the recreation economy

Colorado's parks, trails, rivers, open spaces, recreation amenities, and wildlife support many types of activities. These activities generate economic activity and support businesses, including those that sell recreation-related equipment. The Trust for Public Land used Esri Business Analyst to examine and better understand the recreation-related economic activity occurring in Colorado.⁷⁹ For more detailed information on economic development and the recreation economy, please see Appendix A.

There is a strong market for recreation goods and services in Colorado. Market potential index (MPI) measures the likely demand for a good or service in an area compared to the U.S. average.⁸⁰ Business Analyst estimates that for outdoor recreation activities in Colorado, the market potential is higher than the national average for many activities, including backpacking, downhill skiing, Frisbee, golf, hiking, jogging or running, mountain bicycling, and tennis (see Table A1 in Appendix A ●).⁸¹ The MPI is higher than the national average for many recreation center and sports field activities as well, including aerobics, Pilates, weight lifting, and yoga. These data demonstrate how residents of Colorado are significantly more likely than households nationally to spend money on gear and equipment related to recreational activities. Colorado residents who spend money on sports and recreation equipment are likely to spend a significant amount: of the 20.8 percent of Colorado households that purchased sports and recreation equipment in the last 12 months, 8.1 percent spent \$250 or more on sports and recreation equipment; 6.6 percent spent \$100–\$249; and 6.1 percent spent \$1–\$99 (see Table A2 in Appendix A ●). Market potential for parks and recreation spending is relatively consistent among Colorado and the comparison states: Arizona, Montana, Utah, and Washington (see Table A4 in Appendix A ●).

Colorado residents spend significant amounts of money on sports, recreation, and exercise equipment: a total of \$392 million annually. Households spend an average of \$185 per year, including, on average, an estimated \$58.70 on exercise equipment and gear; \$31.00 on bicycles; \$17.40 on camping equipment; and \$52.70 on hunting and fishing equipment (see Table A3 in Appendix A ●).⁸² Colorado's median household income is similar to that of the comparison states; however, Colorado households spend the most on sports and recreation equipment annually. Esri Business Analyst compiles estimates of recreation expenditures and calculates a spending potential index (SPI) that represents the amount spent for a product or service relative to the national average.⁸³ The SPI for sports, recreation, and exercise equipment and the categories within is higher than the national average, and the highest among the comparison states. The likelihood that Colorado households will

79 Esri Business Analyst is a tool that allows users to perform detailed geospatial analyses of customer and sales information in combination with demographic, consumer spending, market segmentation, and business data. Typically used to support and recommend business decisions, Business Analyst also provides valuable insight into consumer spending for activities and equipment related to parks, trails, open spaces, and recreational amenities, and enables comparison among peer states as in this report.

80 The MPI is tabulated to represent a value of 100 as the overall demand for the United States. An MPI of more than 100 represents high demand; a value of less than 100 represents low demand. For example, a MPI of 120 implies that demand is likely to be 20 percent higher than the national average. MPI is computed by Esri, using tapestry segmentation data with consumer survey data compiled by GfK MRI. Each respondent is identified by a tapestry segment, so a rate of consumption by tapestry segment can be determined for a product or service for any area. The consumption rate is then multiplied by the number of households belonging to a tapestry segment in an area and summed across all segments. This expected number of consumers is then divided by the total households in an area to obtain the local consumption rate. The MPI is the ratio of local consumption rate divided by national consumption rate, multiplied by 100. Esri, Methodology Statement: Esri US—Market Potential Database, 2015.

81 This list of activities includes outdoor recreation activities with greater than 4 percent of households participating in the last 12 months.

82 This spending includes some categories that include purchases unrelated to parks, trails, open spaces, and recreational amenities (e.g., game tables) and purchases of outdoor recreation-related equipment for activities of limited availability in Colorado (e.g., sailing). Most sailing activity by residents is likely to occur outside the state boundary. Sales of bicycles and hunting and fishing equipment, however, make up a substantial portion of total spending on sports, recreation, and exercise equipment, and the public park, trails and recreation system in Colorado offers numerous opportunities for bicycle riding, hunting, and fishing.

83 The SPI is an indicator of what level of discretionary income consumers are willing to devote to a particular good or service. SPI is tabulated to represent a value of 100 as the overall spending for the United States; therefore, when the SPI is equal to 100 for a specific type of merchandise, consumers are spending at a rate equal to the national average. To calculate the SPI, Esri combines information from the latest Bureau of Labor Statistics Consumer Expenditure Surveys, which include a diary survey for daily purchases and an interview survey for general purposes. Consumer spending is influenced by market conditions and trends and reflects economic and demographic change. Esri, *Esri Consumer Spending Methodology 2016*, 2016.

spend money on any type of sports, recreation, and exercise equipment is at least 10 percent higher than the likelihood of households nationally (see Table A4 in Appendix A ↗).

Supporting local businesses

Parks, trails, rivers, open spaces, and recreation amenities in Colorado are used for multiple types of activities that generate economic activity and support-related businesses. Residents and tourists in Colorado support local businesses in the recreation economy by purchasing sports equipment and gear from local stores, by participating in guided outdoor recreation activities, and by visiting sports and recreation facilities.

This analysis looks specifically at businesses related to what GOCO and CTF may fund, which includes businesses that sell recreation-related equipment and support and enable fitness and outdoor recreation activities. According to Esri Business Analyst, 1,510 stores and wholesalers in Colorado sell sporting goods and recreation-related equipment, and together these businesses support 14,800 employees and generate \$4.30 billion in sales, an average of \$2.85 million per business.⁸⁴ Other businesses support and enable outdoor recreation activities through bicycle, canoe, camping equipment, ski, and snowmobile rentals; float trips and ski tours; and archery, gun safety and marksmanship, skating, skiing, and tennis instruction.⁸⁵ In Colorado, 858 of these businesses employ a total of 9,210 employees, an average of 10.7 employees per business, and generate \$951 million in sales annually.⁸⁶

To summarize, investments by GOCO and CTF, through their support of parks, trails, rivers, open spaces, and recreation amenities, support Colorado's economic development by contributing to the state's high quality of life that makes it an attractive place for people to live, work, and play, and by providing diverse recreational opportunities that support the local recreation economy. The quality of life and the sense of place that these amenities create are paramount to its desirability as a place to live and recreate and to the rankings Colorado receives in the media. In addition, consumer and market data produced by Esri and analyzed by The Trust for Public Land demonstrate that recreation-related expenditures, such as those supported by parks and trails, are an important component of the state's economy.



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84 The sporting goods and recreation-related equipment store information was determined based on selected North American Industry Classification System (NAICS) codes. NAICS is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The analysis includes select NAICS codes from the following categories: 44122, 45399, 42391, and 45111.

85 The fitness and outdoor recreation-related business information was determined based on select NAICS codes from the following categories: 721211, 53229, 48721, 61162, and 71392.

86 Esri, *Business Analyst—All Businesses Report*, accessed for the State of Colorado by The Trust for Public Land, August 30, 2017.

Case study: Lottery dollars: small investment, big return for Montrose

\$300,000 GOCO grant is the first domino leading to \$30 million in investment

BY MONTROSE RECREATION DISTRICT

Montrose, Colorado, is a fiscally conservative town in southwest Colorado. Residents tend to vote against tax increases and maintain high expectations of local government. To garner support, public projects must be fiscally accountable and fulfill clear community needs, often without tapping into tax dollars. In this funding landscape, Ken Sherbenou, executive director of the Montrose Recreation District (MRD), feels much of the community's investment in recreation has been triggered by lottery dollars from CTF and a series of GOCO grants.

A prime example is the Montrose Community Recreation Center (CRC). The first proposal to build the center was met with only 23 percent support. It took 30 years of effort, more than 10 separate plans, and five votes for the Montrose CRC to finally become a reality in 2017. Montrose is now home to a state-of-the-art, 80,000-square-foot center, complete with GOCO-funded outdoor facilities, including pickleball courts, climbing boulders, a walking trail, and multipurpose fields.

In its first six months, the center had more than 7,000 annual pass holders and saw an average daily participation of over 1,500 (in a community of 20,000 residents). It was also drawing visitors to the area for competitions and events. All of this use translates into economic activity—a popular side effect in the fiscally conservative town. An analysis from RPI Consultants prior to the completion of the complex estimated that the CRC would generate annual economic impacts of \$4.6 million.

How did Montrose make it happen? In 2011, MRD and the City of Montrose each applied to GOCO for separate outdoor recreation projects. Both were denied funding. GOCO staff provided ideas for improving the plans, including combining their two adjacent projects into one. The resulting project, the Montrose Water Sports Park, River Trail and Field Renovation project, won \$300,000 in GOCO funding in the highly competitive 2012 grant cycle.

That success drew MRD and the City together as closer partners, and in 2014, the collaboration resulted in its biggest win yet. The City referred a sales tax increase ballot proposal to voters on MRD's behalf and encouraged citizens to support it. Voters approved the plan, making the CRC dream a reality. The \$300,000 GOCO grant in 2012 directly resulted in over \$30 million in improvements.

Montrose Mayor Judy Ann Files summed it up when she said, "Lottery funds are a big reason Montrose is a vibrant place to be." MRD Board President Barbara Bynum agreed: "Without GOCO and lottery proceeds for Parks and Recreation, the future of Montrose, and Colorado, for that matter, would look a lot less bright!"



MONTROSE RECREATION DISTRICT

Farming and ranching

FARMING AND RANCHING ARE SIGNIFICANT INDUSTRIES THAT HELP DIVERSIFY COLORADO'S ECONOMY. These industries, made up primarily of family-owned farms,⁸⁷ generate thousands of jobs and millions of dollars each year in revenue and taxes. Equally significant, as populations grow and development pressures mount across the state, farm and ranch lands provide critical open spaces that benefit all Coloradans. They also contribute to the strong sense of place and cultural identity in Colorado. These benefits are felt across many sectors – from supporting Colorado's reputation as a world-class recreation destination to boosting property values and drawing new residents to the area. Although farm and ranch lands provide these benefits to surrounding communities, these benefits can be lost as individual farms become vulnerable to development. As a state program, GOCO's support of agricultural easements is uniquely situated to rectify this economic inefficiency. GOCO supports the farming and ranching industries in Colorado by keeping working lands open and active, ensuring these benefits continue for the next generation of Coloradans. This section analyzes the economic impact of these industries and the contributions of GOCO-supported easements to that impact.

From cattle to corn and peach trees to poultry, agriculture is a vibrant part of Colorado's economy and culture. As of 2016, 33,800 farms are operating across the state,⁸⁸ producing some of the largest quantities of a diverse range of crops and livestock in the United States. For example, Colorado is the top producer of proso millet in the nation, third producer of sheep, and fifth producer of barley, potatoes, and sorghum.⁸⁹ The total value of agricultural sector production in Colorado was \$8.58 billion in 2015, which includes \$5.50 billion in animal output and \$2.15 billion in crop output.⁹⁰ Table 13 lists the top livestock and crop products by production value.

TABLE 13. TOP FIVE LIVESTOCK AND CROP PRODUCTS IN COLORADO BY VALUE OF CASH RECEIPTS (2015)⁹¹

COMMODITY	CASH RECEIPTS (2015\$)
Cattle and calves	\$4,040,000,000
Dairy (milk)	\$664,000,000
Corn	\$498,000,000
Hay	\$398,000,000
Wheat	\$359,000,000

Working farm and ranch lands provide benefits beyond the direct proceeds of production. These lands are essential components of the state's historic and cultural identity, as indicated by such initiatives as the Centennial Farms Program, a state program that recognizes farms and ranching held by the same family for 100 years or more.⁹² In addition, as opposed to many other industries based in urban centers, farming and ranching provide valuable employment and production opportunities in rural communities.⁹³ Farm and ranch lands also support Colorado's multibillion-dollar outdoor recreation industry through such means as preserving sightlines and buffering conserved lands from

87 Individuals own 81.2 percent of farms in Colorado. U.S. Department of Agriculture, National Agricultural Statistics Service, *2012 Census of Agriculture, Colorado, State and County Data*, 2014.

88 U.S. Department of Agriculture, National Agricultural Statistics Service, *2016 State Agriculture Overview*.

89 U.S. Department of Agriculture, National Agricultural Statistics Service, *Colorado Agricultural Statistics 2016*, 2016.

90 USDA, *Colorado Agricultural Statistics 2016*.

91 Ibid.

92 History Colorado, "Centennial Farms," accessed September 20, 2017, <http://www.historycolorado.org/oahp/centennial-farms>.

93 The Trust for Public Land, *The Economic Benefits of Land Conservation* (San Francisco: The Trust for Public Land, 2007).

less compatible land uses (see the case study on page 40). Finally, these industries boost tourism and related industries. Farm to table options at markets and restaurants are an increasing draw for visitors and residents alike.⁹⁴ Attractions such as wine tastings and vineyard tours bring visitors and spending to Colorado’s countryside (see the case study on page 24).

Although farm and ranch lands are robust pieces of Colorado’s economy, they face similar threats seen by farmers across the country. These threats include aging farmer populations, barriers to entry for new farmers, and development pressures on existing farmland. For example, the average age of the principal farm operator in Colorado was 58.9 as of the last Census of Agriculture.⁹⁵ Part of the reason for this aging population is that new farmers are unable to afford farmland. Aging farmers, meanwhile, faced with the financial requirements of retirement, are incentivized to sell their land off to realize its development value.⁹⁶ Barriers for new farmers are compounded by the fact that Colorado’s climate and agricultural conditions and large ranching presence necessitate larger than average farm sizes for farms to be viable. The average farm in Colorado is 927 acres, more than double the national average of 441 acres.⁹⁷ In addition, while the price of all land has been increasing across the United States, the price of farmland has been increasing at a greater rate nationally and in Colorado over the last several years (Table 14). These trends point to increasing challenges for new farmers looking to purchase lands and increasing incentives for retiring farmers to sell their lands into development.

TABLE 14. CHANGE IN LAND VALUES PER ACRE IN COLORADO AND NATIONALLY (2007-2015)⁹⁸

	COLORADO		UNITED STATES	
	ALL LAND	ALL CROPLAND	ALL LAND	ALL CROPLAND
2007	\$1,130	\$1,270	\$2,010	\$2,530
2015	\$1,440	\$1,910	\$3,020	\$4,130
Change (amount)	\$310	\$640	\$1,010	\$1,600
Change (percent)	27.4%	50.4%	50.2%	63.2%

Agricultural easements represent a way to address many of these challenges and ensure that the benefits of farming and ranching continue to be felt throughout the state. They ensure working lands remain open and play a key role in maintaining economic drivers in rural communities. Supporting industries, such as seed producers and equipment dealers, depend on nearby farmers to make purchases and support their businesses. Conservation easements on agricultural lands also help current farmers extract the development value from their farms and in doing so reduce the barriers to entry for the next generation of farmers.⁹⁹ GOCO is uniquely able to address these challenges at community and landscape scales. Over the course of its history, approximately 69 percent of GOCO’s land acquisition grants have supported agricultural projects, representing an investment of approximately \$213 million.¹⁰⁰

Not all states have a funding mechanism such as GOCO in place to offset national trends of farmland loss. According to the American Farmland Trust, more than 40 acres of farmland are converted to

94 Ed Sealover, “National Players Aiding Connections between Colorado Restaurants, Farmers,” *Denver Business Journal*, September 14, 2017, accessed September 14, 2017, <https://www.bizjournals.com/denver/news/2017/09/13/national-players-aiding-connections-between.html>.

95 USDA, *2016 State Agriculture Overview*.

96 Land Trust Alliance, *The Power of Leveraging Local and Federal Dollars to Strengthen Agricultural Land Easement Investments* (Washington, DC: Land Trust Alliance, 2012).

97 USDA, *Colorado Agricultural Statistics 2016*.

98 Ibid.

99 The Trust for Public Land, *The Economic Benefits of Land Conservation*.

100 Chris Yuan-Farrell, Open Space Program coordinator, Great Outdoors Colorado, email message to author, September 21, 2017.

development every hour in the United States, and 24 million acres of farmland have been lost since 1982.¹⁰¹ Comparing the condition of Colorado’s farmland with national trends suggests that GOCO and similar programs across the state are starting to move the needle against these historic trends. From 2007 to 2015, the number of farms in Colorado still decreased 7.32 percent from 36,900 to 34,200, which was slightly greater than the 6.26 percent decrease nationally (Table 15),¹⁰² However, unlike national trends, Colorado’s land in farms actually increased slightly over that same period from 31.4 million acres to 31.7 million acres in farms. Although the price factors discussed above may indicate the reason for the loss in total number of farms, support mechanisms such as GOCO may be helping to reverse the trends of farmland loss in the state.

TABLE 15. NUMBER OF FARMS AND LAND IN FARMS, COLORADO AND UNITED STATES (2007-2015)¹⁰³

	COLORADO		UNITED STATES	
	FARMS	LAND IN FARMS (ACRES)	FARMS	LAND IN FARMS (ACRES)
2007	36,900	31,400,000	2,200,000	921,000,000
2015	34,200	31,700,000	2,070,000	912,000,000
Change (amount)	-2,700	300,000	-138,000	-9,460,000
Change (percent)	-7.32%	0.955%	-6.26%	-1.03%

GOCO is uniquely positioned to create landscape-scale impacts for the benefit of all Coloradans, benefits that might not be possible to realize at the individual or community level. This is particularly true with supporting agricultural easements because of the size and scale of Colorado’s agricultural lands. The benefits of these industries are significant contributors to Colorado’s economy and reach across several other industries, including tourism and outdoor recreation. Efforts by GOCO and similar easement programs are helping ensure that farming and ranching continue to be robust contributors to Colorado’s economy and culture.



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101 American Farmland Trust, “Farmland,” accessed September 13, 2017, <https://www.farmland.org/our-work/areas-of-focus/farmland>.

102 These calculations are based on state and national statistics on the number of farms and farm acreage. USDA, *Colorado Agricultural Statistics 2016*.

103 USDA, *Colorado Agricultural Statistics 2016*.

Case study: The Trampe Ranch easement

Leveraging GOCO to create landscape-scale impacts in Gunnison Valley

BY GREAT OUTDOORS COLORADO

Something beautiful is happening in Colorado to ensure that a way of life passes to the next generation. In the heart of Gunnison County's cattle country, GOCO funding is helping to leverage the resources needed to preserve critical components of the ranching landscape and maintain the local economy. The conservation of the Trampe Ranch supports the continued viability of agriculture in the Gunnison Valley and provides a natural buffer between the resort areas near Crested Butte and adjacent public lands.

Ranching is tied to the economic and cultural identity of Gunnison Valley going back to the late 1800s. "Ranching is important to the local economy," notes ranch owner Bill Trampe, whose family has worked this land for three generations. Over time he's noticed how agricultural production has diversified and stabilized the local economy, helping "buffer ups and downs" seen in other counties without as strong an agricultural foundation. If anyone should know this, it is Bill Trampe, as the nearly 6,000-acre Trampe Ranch is a key piece of the ranching landscape and a steadying economic influence in the valley, accounting for 20 percent of the county's annual agricultural productivity.

This easement is not just ensuring the continued viability of ranching in the county; it fits into the broader balance of land use in the area by protecting a viewshed for 125 miles of trails and roads surrounding the ranch. "In a lot of ways Trampe Ranch reflects everything that is great about the Gunnison Valley. There's really something for everybody here," adds Justin Spring, director of land protection for The Trust for Public Land. "There's ranchlands, there's the university, there's a ski resort, there's a multitude of trails on the national forest and other public lands. . . . And without Trampe Ranch, a lot of this would be negatively impacted forever."

Over the last 20 years, population growth has put mounting pressure on ranchlands as well as federal lands that have been historically used for grazing. The community has faced the dueling pressures of "cows versus condos," notes Lise Aangeenbrug, former executive director of GOCO. "GOCO created the Protect initiative to try to reach those areas of the state where there were still opportunities to protect land at a large enough scale that could provide for recreation, protect agriculture, protect wildlife habitat, and really look at a whole portfolio of things Coloradans care about." GOCO is in a unique position to help communities make these types of landscape-scale impacts. The Trampe Ranch represents the culmination of a major effort by multiple partners across decades to preserve the best of Colorado's land for the next generation of Coloradans.



JOHN FIELDER

Case study: Rocky Ford is running ahead with GOCO support

GOCO is woven into the fabric of Colorado's communities in diverse ways

BY THE COLORADO CATTLEMEN'S AGRICULTURAL LAND TRUST

The town of Rocky Ford, Colorado, perfectly demonstrates the positive role that GOCO plays in our communities. In April 2016, the Rocky Ford Junior-Senior High School was awarded a \$350,000 GOCO grant to replace its track facility and football field. The new all-weather facility will be well used by the 875 students in the school system, the entire community of Rocky Ford, and surrounding communities and sports teams that will have access to the track and field. While impressive, this new track falls short of telling the entire story of GOCO's impact in Rocky Ford.

Working with several community members to secure this grant was Tammy Ridenoure. Ridenoure is the assistant principal, athletic director, and 12-year veteran coach for the girls' basketball program at the Rocky Ford Junior-Senior High School and a fifth-generation member of the Edgar-Ridenoure ranching family. A prominent farming town since the 1800s and known by many for its watermelons and cantaloupe, Rocky Ford and this often overlooked region of Colorado have faced harsh droughts, a listeria scare, and an ongoing shift in population as fewer and fewer people choose to make a living in rural areas. Ridenoure insists that "GOCO and the lottery funds used to support the track show our kids that they matter and that this community matters, even though we are rural and don't have the level of income that other cities might have."

All the while Ridenoure was leading the effort to secure funding for the school, her family was working with GOCO to conserve the family ranch. The ranch was successfully conserved in June 2016 with funding from a GOCO Open Space grant. This resulted in more than 10,000 acres of iconic prairies being permanently conserved for the benefit of future generations. Further, conservation of the ranch ensures that the ranch will remain viable, productive, and family owned and operated. This is enabling the Ridenoures to remain in Rocky Ford and prepare to raise a sixth generation on the property that has been in their family for more than a century.

In Rocky Ford, ranchers and farmers, among their many roles, serve on the school board, support the local tractor supply store, shop in the grocery stores each week, send their children through the school system, and coach sports teams. Across Colorado, ranchers and farmers support rural communities, their economies, schools, and natural resources. The story of Rocky Ford shows just how impactful GOCO funds are in helping to sustain rural communities. While GOCO's Open Space funding is helping ranching families stay on their ranches, additional GOCO initiatives such as recreation grants are helping rural communities create amenities that benefit their families and economy. As Ridenoure simply put it, "GOCO allows people to think outside the box and provides hope for communities."



COLORADO CATTLEMEN'S
AGRICULTURAL LAND TRUST

Case study: Kim Equine Pavilion and Education Center

There's a new rodeo in town with help from GOCO

BY GREAT OUTDOORS COLORADO

Rodeo is a verb in Kim. Moms rodeo; kids rodeo. But for years, residents of the southeast Colorado ranching town had to travel to Denver or Colorado Springs to pursue their beloved sport. With the help of three Great Outdoors Colorado grants, that started to change nine years ago.

"We are a small ranching community. There is no other sustaining industry," says R. C. Patterson, who grew up on a ranch in Kim. "We've been struggling to maintain a sustainable population here." Rather than search for an outside industry to boost the economy, the community wanted to breathe life into the area in a way that preserved the region's heritage. The town decided to approach GOCO with the idea to build an equine pavilion and education center. "We wanted to save [our town], but we didn't want to ruin it in the process," says Patterson, chair of the Pavilion's board. "Rodeo is our sport. It came from the ranching industry. This is its natural home."

The nonprofit Mustang Pavilion, as locals refer to it (the mustang is the local school mascot), was funded with \$1.1 million from GOCO over three separate phases, as well as private funding from the Gates Family Foundation, the El Pomar Foundation, and in-kind support from the community. "We contributed \$1.1 million, but what the local community was able to do with that by working together compounded that investment," says Jake Houston, GOCO's local government program manager.

Residents stop by the 20-acre property regularly to practice roping and riding. The venue, which is currently all volunteer-run, hosts around 100 events annually, including National Little Britches Rodeo Association competitions, 4-H events, fundraisers, and even wedding receptions. J. J. Autry grew up on a ranch north of Kim; his daughter is highly competitive in youth rodeo. "The Pavilion has stepped up our ability to practice throughout the year, to make ourselves competitive at that higher level," he says. It has also served as a shelter when heavy rains prevented their family from driving 50 miles home one night.

Kim's economy has seen a boost since the Pavilion's opening. The school, once close to being shut down, has been rebuilt. Some local businesses, including the motel, have reopened. Younger families have been drawn to the region. "There's been more and more people my age that are moving back to the ranches to raise our kids in the ranching lifestyle," says Brady Burnham, whose wife is a fifth-generation Kim rancher. "It sure has been nice to raise our kids on the ranch and go to a small community school and have that Pavilion after school where they can go ride and practice," he says.

Jacob Kindler, who moved his family from Kansas four years ago, agrees. "[The Pavilion] helps us solidify the next generation," he says. "It's special to us."



SEAN SHERIDAN

Conclusion

THIS STUDY ILLUSTRATES SEVERAL WAYS THAT GOCO AND CTF ARE KEY ECONOMIC DRIVERS that contribute millions annually in economic benefits. These programs create and support high-quality wildlife, parks, trails, open spaces, and recreation amenities, which provide an array of economic benefits. As explained above, investments by GOCO and CTF in the last ten years have supported 11,800 jobs and \$507 million in labor income. In addition, CTF provides essential funds to match local general fund and capital improvement budgets and has leveraged over \$1.49 billion in other funding since 2004, resulting in every dollar being matched by at least \$2.43 in federal, state, local, nonprofit, and private funding. Meanwhile, GOCO has leveraged at least \$1.45 billion in additional contributions over its history, attracting at least \$2.31 in other funding for every dollar invested.

Residents in Colorado also gain from these investments in wildlife, parks, trails, open spaces, and recreational amenities. Each year Coloradans receive a benefit of \$399 million for the recreational use of these amenities. The quality of the outdoors and opportunities for outdoor recreation are also large drivers of the state's tourism economy. The outdoors draws tourists who would not otherwise visit Colorado. In fact, 15 percent of leisure visitors to Colorado come specifically for the parks, trails, rivers, open spaces, recreation amenities, and wildlife that make the outdoors accessible to tourists. The visitors who come to the state primarily to visit the outdoors are estimated to spend \$1.21 billion annually in Colorado and generate \$44.9 million in state tax revenues and \$66.4 million in local tax revenues.

The partnership between GOCO and the CYCA enables Colorado communities to realize substantial savings through subsidized construction and maintenance costs, provides job training and education benefits to youth corps members, and contributes to the state's critical outdoor recreation industry. Examples include \$343,000 for the construction, improvement, and maintenance of over 135 miles of trails and \$1.59 million in AmeriCorps scholarships awarded to youth corps participants.

Regular access to playgrounds, facilitated by GOCO's School Yard Initiative, improves health and reduces health care costs for Colorado families. The program has transformed 44 school yards that serve 18,000 children and maximized the impact of funding dollars by targeting high-need communities and leveraging additional funding sources for playground renovations. Further, community-led renovations provide additional benefits across Colorado through building community cohesion and citizen-level civic engagement.

Parks, trails, open spaces, and recreational amenities in the state contribute to the high quality of life, which plays an important role in attracting business and employees and supporting a robust recreation economy. By providing opportunities for recreation, these amenities support \$392 million in resident spending on sports, recreation, and exercise equipment annually, or an average of \$185 per household. Along with tourist expenditures, this spending supports 1,510 Colorado businesses that sell sporting goods and recreation-related equipment, and together these businesses support 14,800 employees and generate \$4.30 billion in sales, an average of \$2.85 million per business.

Finally, land conservation supports the agriculture industry in Colorado by helping to maintain the working landscape on which this industry depends. The state's 33,800 farms generate approximately \$8.58 billion in agricultural products annually.

Together, these individual analyses shed light on the measurable economic benefits that GOCO and CTF provide to local communities and residents of Colorado through their investment in the state's parks, trails, rivers, open spaces, recreation amenities, and wildlife.

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Appendix A. Expanded economic development analysis

Investments by GOCO and CTF in Colorado support economic development in the state in several ways. First, these programs support the creation and maintenance of parks, trails, rivers, open spaces, and recreation amenities that provide diverse leisure opportunities for residents and visitors and enhance quality of life in Colorado. The high quality of life, in turn, attracts talent, employers, and investment to the state. Second, residents take advantage of the state's plentiful indoor and outdoor recreation opportunities. By purchasing equipment and gear to use while participating in those activities, residents boost local businesses and contribute to Colorado's recreation economy. Finally, businesses that sell an outdoor recreation experience depend on protected waterways and lands to lead rafting and adventure trips. These businesses offer jobs, attract visitors, and contribute significantly to the state's economy.

This section explores economic development in Colorado as related parks, trails, rivers, open spaces, and recreation amenities by examining in detail how these amenities enhance quality of life, boost the recreation economy, and support local businesses. It also explores common household types using Esri Tapestry Segmentation to shed light on residents' recreation and purchasing habits.

Enhancing quality of life

Colorado is attractive to families, individuals, and businesses. Quality of life plays a significant role in the state's economic development because sought-after employees in today's economy consider more than salary when choosing places of employment. Focus groups conducted by Carnegie Mellon University have found that young creative workers consider lifestyle factors, such as environmental and recreational quality, more heavily than the job itself when choosing where to live.¹⁰⁴

Colorado has a robust business community. In 2017, *U.S. News and World Report* ranked Colorado number one on its list of Best States for Economy, giving it top marks for growth (#2), employment (#2), and business environment (#4). The state clearly stands out as the leader, even among others in the top ten.¹⁰⁵ WalletHub ranked Colorado number two overall on its 2017 list of Best States for Jobs and number one for Job Market and Most Job Opportunities.¹⁰⁶ In 2016, Colorado was number five on *Forbes'* Best States for Business, which also ranked it number one for labor supply and number two for economic climate.¹⁰⁷

The outdoor recreation economy plays a significant role in Colorado's economy: the state Office of Economic Development and International Trade recognizes "Tourism and Outdoor Recreation" as one of the state's 14 major industries.¹⁰⁸ The Colorado Outdoor Recreation Industry Office (OREC), launched by Governor Hickenlooper in 2015, is one of only two state government offices in the country focusing specifically on the outdoor recreation economy. OREC serves as "a central point of contact for the diverse constituents, businesses, communities and groups that rely on the continued health of the outdoor recreation industry."¹⁰⁹ A 2016 survey conducted by the office asked OREC companies "to measure how communities are performing in terms of providing them with an excellent place to operate." OREC received 111 responses. Respondents rated "quality of life" and

104 Richard Florida, *Cities and the Creative Class* (New York: Routledge, 2005).

105 *U.S. News and World Report*, "Best States for Economy 2017."

106 Richie Bernardo, "2017's Best & Worst States for Jobs."

107 *Forbes*, "Best States for Business 2016," accessed September 8, 2017, <https://www.forbes.com/best-states-for-business/list/>.

108 Colorado Office of Economic Development and International Trade, "Key Industries."

109 Colorado Office of Economic Development and International Trade, "Tourism & Outdoor Recreation," accessed September 8, 2017, <https://choosecolorado.com/key-industries/tourism-outdoor-recreation/>.

“characteristics of community members” especially high among benefits they receive from the communities where they operate. Businesses see a clear link between recreational opportunities, local atmosphere including thriving main streets and frequent community events, and their success. A report of the survey results states: “These activities not only provide businesses with revenue but create an atmosphere where people want to be located.”¹¹⁰ A 2016 survey of business owners conducted by Global Strategy Group for the Colorado Outdoor Business Alliance (COBA) found that 94 percent of the business leaders surveyed, from across the political spectrum, strongly or somewhat agree that protecting Colorado’s public lands is good for the state’s economy and that Colorado’s public lands are essential to the state’s brand. In rating important reasons to locate businesses in Colorado, 71 percent of these business leaders cited quality of life, including outdoor recreation opportunities as extremely or very important, rating it number one among the options.¹¹¹

Residents and visitors benefit from a wide range of outdoor recreation opportunities and highly trained adventure/activity guides in Colorado. The Outdoor Industry Association reports that 71 percent of Colorado residents participate in outdoor recreation each year. According to the Colorado Office of Economic Development and International Trade, a record 64.4 million visitors came to the state in 2013, and Colorado ski resorts set new visitation records during the 2013–14 ski season.¹¹² Companies that manufacture outdoor-oriented gear are locating in Colorado to take advantage of nearby opportunities to test products such as skis, snowboards, apparel, and sports-oriented trail foods.¹¹³ As one example, Big Agnes and Honey Stinger, two fast-growing outdoor gear companies, purchased a 20,500-square-foot building for their headquarters in 2016 in Steamboat Springs, where the companies were created. In an article about the purchase, *Steamboat Today* quotes the companies’ cofounder, Bill Gamber, saying, “Both Honey Stinger and Big Agnes were born and bred here in Steamboat, and this move allows us to grow and build the companies. We design, develop, test and sell our products locally, and our employees are such an active bunch that we can’t imagine locating our offices anywhere but our hometown.” The companies employ 103 local workers, up from 30 in 2012.¹¹⁴

Colorado is attractive to employees and residents. Colorado communities are known as places that “provide an excellent quality of life and local atmosphere” that “includes recreational opportunities, lifestyle, a small town feel, a sense of vibrancy, and community events.”¹¹⁵ Results from a 2015 survey conducted by the Urban Land Institute, “Views on Housing, Transportation, and Community,” show that 93 percent of Coloradans are somewhat or very satisfied with the quality of life in their communities. Over half (55 percent) of the state’s residents indicated they are “very satisfied,” slightly higher than the national average of 49 percent.¹¹⁶ On a list of “Community Attribute Priorities,” 87 percent of Coloradans rate quality of environment a “top” or “high” priority, and 64 percent say the same about green space, parks, and recreation.¹¹⁷ Cailin O’Brien-Feeney, state and local policy manager at the Outdoor Industry Association, says that “communities across Colorado recognize that access to outdoor recreation supports health and a high quality of life that attracts employers and families. Great Outdoors Colorado and the Conservation Trust Fund provide the critical funding that help[s] communities and economies across [the] state to thrive.”¹¹⁸

110 Blomquist and Sloan, “OREC Survey Results 2016.”

111 Global Strategy Group, *Colorado Outdoor Business Alliance, Colorado Business Survey Findings*, 2016.

112 Colorado Office of Economic Development and International Trade, *Colorado Tourism and Outdoor Recreation Profile*.

113 Colorado Office of Economic Development and International Trade, “Key Industries.”

114 Scott Franz, “Big Agnes, Honey Stinger Secure New Headquarters in Steamboat Springs,” *Steamboat Today*, September 6, 2016, accessed September 4, 2017, <http://www.steamboattoday.com/news/big-agnes-honey-stinger-secure-new-headquarters-in-steamboat-springs/>.

115 Blomquist and Sloan, “OREC Survey Results 2016.”

116 *Ibid.*

117 *Ibid.*

118 Cailin O’Brien-Feeney, state and local policy manager, Outdoor Industry Association, email message to author, September 9, 2017.

Boosting the recreation economy

Colorado's parks, trails, rivers, open spaces, and recreation amenities are used for many types of activities. These activities generate economic activity and support businesses, including those that sell recreation-related equipment. Esri Business Analyst was used to examine and better understand the recreation-related economic activity occurring in Colorado. These data are derived from market research surveys and do not directly correspond with recreation as reported as part of Colorado's 2014 Statewide Comprehensive Outdoor Recreation Plan.

Participation in recreation

Recreation activities are important to the residents of Colorado. According to Esri Business Analyst, many households in Colorado recreate at recreation centers, parks, trails, and sports fields. In the last 12 months, walking for exercise was the highest-reported activity. In addition, households reported participating in the following outdoor recreation activities: jogging or running, freshwater fishing, hiking, road bicycling, and golf. Colorado residents also participate in activities that are more likely to occur in recreation centers or sports facilities such as swimming and weight lifting.¹¹⁹ Individuals who participate in these recreation activities purchase products to enhance their experience, such as exercise clothing, footwear, bicycles, and fishing tackle, and thereby contribute to the local economy.

Since the activities in which residents participate and the associated purchases they make will determine the impact on the local economy, it is important to understand the preferences and consumer behavior of Colorado residents. Esri Tapestry Segmentation allows us to understand the lifestyle choices of households in Colorado, how they spend their free time, and how they behave as consumers. Tapestry classifies U.S. residential neighborhoods into 67 unique segments based on demographic and socioeconomic characteristics.

The top five Tapestry segments for Colorado include *Savvy Suburbanites* (4.8 percent), *Boomburbs* (4.6 percent), *Soccer Moms* (4.6 percent), *Bright Young Professionals* (4.4 percent), and *Emerald City* (4.2 percent). Cumulatively, these market segments account for 22.6 percent of Colorado households. Cumulatively these top five segments are twice as prevalent as in the United States as a whole: the same segments make up only 10.9 percent of U.S. households.¹²⁰

Digging further into the characteristics of these Tapestry segments shows us how nearly one-quarter of households in Colorado engage with the park and recreation system. Three of Colorado's top tapestry segments, *Savvy Suburbanites*, *Boomburbs*, and *Soccer Moms*, include generally homeownership, largely white households with moderate to high wealth whose members are active in a range of sports and outdoor activities.¹²¹ *Savvy Suburbanites* are "Physically fit residents [who] actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment."¹²² For *Boomburbs*, "Physical fitness is a priority" and leisure includes hiking, bicycling, swimming, and golf.¹²³ *Soccer Moms* are a group of primarily homeownership middle-income families for whom "Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting."¹²⁴ *Bright Young Professionals* includes typically younger households that own or rent and "read sports magazines and participate in a variety of sports, including backpacking, basketball, football, bowling, Pilates, weight lifting, and yoga."¹²⁵

119 Esri, *Business Analyst—Sports and Leisure Market Potential*.

120 Esri, *Business Analyst—Tapestry Segmentation Area Profile*, accessed for the State of Colorado August 30, 2017.

121 Esri, "Tapestry Segment Summaries," accessed September 8, 2017, https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm#ESRI_SECTION1_87F5D845F8E04723AE1F4F502FF3B636.

122 Esri, *Savvy Suburbanites*, 2014.

123 Esri, *Boomburbs*, 2014.

124 Esri, *Soccer Moms*, 2014.

125 Esri, *Bright Young Professionals*, 2014.

Market potential

There is a strong market for recreation goods and services in Colorado. The Trust for Public Land used information from Tapestry profiles to estimate the likely demand for recreation goods and services in the area. Esri Business Analyst is used to estimate the expected number of local consumers, then to calculate the local consumption rate and market potential index (MPI), which measures the likely demand for a good or service in an area compared to the U.S. average.¹²⁶ This demonstrates the strength of the sports and recreation market in Colorado compared to the national average and four comparison states often considered peers: Arizona, Montana, Utah, and Wyoming.¹²⁷ Comparing Colorado to other states allows us to understand the relative demand for recreation services and related products.

Business Analyst estimates that for outdoor recreation activities in Colorado, the market potential index is higher than the national average (MPI >100) for nearly all activities tracked, including backpacking, downhill skiing, Frisbee, golf, hiking, jogging or running, mountain bicycling, and tennis (see Table A1).¹²⁸ Colorado households participate in these activities on a level consistent with households in the comparison states. The market potential index for Colorado is significantly higher for many of these activities than for Arizona and Montana, and on par with the market potential for Utah and Washington.

The MPI is higher than the national average for many recreation center and sports field activities, including aerobics, Pilates, weight lifting, and yoga (see Table A1). Almost all activities with greater than 4 percent participation in Colorado have an MPI greater than the national average, with freshwater fishing and rifle hunting as exceptions. These data demonstrate how residents of Colorado are significantly more likely than households nationally to spend money on gear and equipment related to recreational activities.

Looking more in-depth into the spending habits of Colorado residents helps us understand how much households are spending annually for sports and recreation equipment (see Table A2). Of the 20.8 percent of Colorado households that purchased sports and recreation equipment in the last 12 months, 8.1 percent spent \$250 or more on sports and recreation equipment; 6.6 percent spent \$100–\$249; and 6.1 percent spent \$1–\$99. The highest spending category is the most common and has the highest MPI, suggesting that Colorado households purchase either expensive sports and recreation equipment, such as bicycles, or a high number of lower-priced items.

126 The MPI is tabulated to represent a value of 100 as the overall demand for the United States. An MPI of more than 100 represents high demand; a value of less than 100 represents low demand. For example, a MPI of 120 implies that demand is likely to be 20 percent higher than the national average. MPI is computed by Esri, using tapestry segmentation data with consumer survey data compiled by GfK MRI. Each respondent is identified by a tapestry segment, so a rate of consumption by tapestry segment can be determined for a product or service for any area. The consumption rate is then multiplied by the number of households belonging to a tapestry segment in an area and summed across all segments. This expected number of consumers is then divided by the total households in an area to obtain the local consumption rate. The MPI is the ratio of local consumption rate divided by national consumption rate, multiplied by 100. Esri, *Methodology Statement*, 2015.

127 The Trust for Public Land selected these comparison states in part for their proximity to Colorado, as all are part of the Intermountain West. The Outdoor Industry Association reports comparatively high levels of consumer spending generated by the outdoor recreation economy in Arizona, Colorado, and Washington, ranging from \$21.2 billion annually in Arizona to \$28 billion annually in Colorado. Consumer spending is somewhat lower in Utah, at \$12.3 billion annually; however, Utah is generally recognized as a solid participant in the outdoor recreation economy. Like Colorado, Washington and Arizona also have a dedicated funding source for land conservation. All comparison states and Colorado experienced a similarly high rate of population growth from 2010 to 2015, ranging from 6.1 percent in Arizona to 7.5 percent in Colorado. Outdoor Industry Association, "Advocacy," accessed October 9, 2017, <https://outdoorindustry.org/advocacy/>; Joe Murphy, "Chart: Colorado Is the Second-Fastest Growing State in the U.S.," *Denver Post*, September 6, 2016, accessed October 9, 2017, <http://www.denverpost.com/2016/07/07/colorado-second-population-growth-2015/>.

128 This list includes outdoor recreation activities with greater than 4 percent of households participating in the last 12 months.

TABLE A1. PARTICIPATION IN RECREATION AND MARKET POTENTIAL

RECREATION ACTIVITY	PERCENT OF HOUSEHOLDS THAT PARTICIPATED IN THE LAST 12 MONTHS	MARKET POTENTIAL INDEX
Walking for exercise	28.7%	107
Swimming	17.0%	110
Jogging/running	15.8%	119
Fishing (freshwater)	11.9%	97
Hiking	11.7%	118
Weight lifting	11.3%	114
Bicycling (road)	11.2%	113
Golf	10.6%	116
Bowling	10.2%	108
Aerobics	9.6%	113
Yoga	8.4%	120
Basketball	8.4%	102
Canoeing/kayaking	6.3%	113
Boating (power)	5.6%	105
Target shooting	5.0%	105
Frisbee	4.9%	115
Baseball	4.8%	104
Football	4.7%	101
Tennis	4.6%	115
Bicycling (mountain)	4.5%	117
Soccer	4.2%	110
Hunting with rifle	4.1%	91
Fishing (saltwater)	4.1%	103
Backpacking	3.6%	118
Skiing (downhill)	3.3%	121

TABLE A2. 2016 ANNUAL HOUSEHOLD SPENDING ON SPORTS AND RECREATION EQUIPMENT IN COLORADO

TYPE OF SPENDING	PERCENT OF HOUSEHOLDS THAT SPENT IN LAST 12 MONTHS	MARKET POTENTIAL INDEX
Sports and recreation equipment, \$1-\$99	6.1%	105
Sports and recreation equipment, \$100-\$249	6.6%	107
Sports and recreation equipment, \$250+	8.1%	111

Recreation expenditures and spending potential

Colorado residents spend significant amounts of money on sports and recreation equipment. Esri Business Analyst compiles estimates of recreation expenditures and calculates a spending potential index (SPI) that represents the amount spent for a product or service relative to the national average.¹²⁹

Colorado residents spend a total of \$392 million annually on sports, recreation, and exercise equipment. Households spend an average of \$185 per year, including per year, on average, an estimated \$58.70 on exercise equipment and gear; \$31.00 on bicycles; \$17.40 on camping equipment; and \$52.70 on hunting and fishing equipment (Table A3).¹³⁰ The SPI for sports, recreation, and exercise equipment and the categories within is slightly greater than the national average, ranging from 105 for other sports equipment to 118 for bicycles. The likelihood that Colorado households will spend money on any type of sports, recreation, and exercise equipment is 10 percent higher than the likelihood of households nationally.

TABLE A3. 2016 ANNUAL HOUSEHOLD SPENDING ON SPORTS, RECREATION, AND EXERCISE EQUIPMENT IN COLORADO (2017\$)

SPENDING CATEGORY	AVERAGE AMOUNT SPENT PER HOUSEHOLD	TOTAL SPENDING	SPENDING POTENTIAL INDEX
Sports, recreation, and exercise equipment	\$185.00	\$392,000,000	110
Exercise equipment and gear, game tables	\$58.70	\$124,000,000	106
Bicycles	\$31.00	\$65,600,000	118
Camping equipment	\$17.40	\$36,900,000	115
Hunting and fishing equipment	\$52.70	\$112,000,000	109
Winter sports equipment	\$5.68	\$12,000,000	112
Water sports equipment	\$6.12	\$13,000,000	113
Other sports equipment	\$10.20	\$21,700,000	105
Rental and repair of sports, recreation, and exercise equipment	\$3.41	\$7,210,000	114

The average household spending in Colorado of \$185 per year is the highest among the comparison states. The state's median household income is comparable to that of its comparison states. Total spending on sports, recreation, and exercise equipment for Colorado and the comparison states ranges widely from \$65 million in Montana to \$511 million in Washington. Colorado's spending is in the middle at \$392 million, nearly tied with Arizona. For Colorado, Utah, and Washington, the SPI is above the national average for all categories of recreation equipment spending, with Colorado the highest, at least 10 percent higher than the SPI nationally. Esri also calculates the MPI for categories of spending, \$1–\$99, \$100–\$249, and \$250 or more, and reports the percent of households that spent these amounts over the preceding 12 months. Market potential for Colorado is above the U.S. average

129 The SPI is an indicator of what level of discretionary income consumers are willing to devote to a particular good or service. SPI is tabulated to represent a value of 100 as the overall spending for the United States; therefore, when the SPI is equal to 100 for a specific type of merchandise, consumers are spending at a rate equal to the national average. To calculate the SPI, Esri combines information from the latest Bureau of Labor Statistics Consumer Expenditure Surveys, which include a diary survey for daily purchases and an interview survey for general purposes. Consumer spending is influenced by market conditions and trends and reflects economic and demographic change. Esri, *Esri Consumer Spending Methodology 2016*.

130 This spending includes some categories that include purchases unrelated to parks, trails, open spaces, and recreational amenities (e.g., game tables) and purchases of outdoor recreation-related equipment for activities of limited availability in Colorado (e.g., sailing). Most sailing activity by residents is likely to occur outside the state boundary. Sales of bicycles and hunting and fishing equipment, however, make up a substantial portion of total spending on sports, recreation, and exercise equipment, and the public park, trails and recreation system in Colorado offers numerous opportunities for bicycle riding, hunting, and fishing.

and relatively consistent with that of the comparison states for all spending tiers, except Arizona, which is at or below the national level. For each state except Arizona, the highest spending tier, \$250 or more, also had the highest MPI and greatest percent of households that spent in the last 12 months. This indicates that households in each of these states are more likely to spend a significant amount on recreation and sports equipment than they are likely to spend a modest amount on these items.

TABLE A4. 2016 ANNUAL HOUSEHOLD SPENDING ON SPORTS AND RECREATION EQUIPMENT IN COLORADO AND COMPARISON STATES (2017\$)

	ARIZONA	COLORADO	MONTANA	UTAH	WASHINGTON	AVERAGE OF COMPARISON STATES
Average annual household spending on sports, recreation, and exercise equipment (2016)	\$154	\$185	\$149	\$176	\$184	\$166
Total spending on sports, recreation, and exercise equipment (2016)	\$391,000,000	\$392,000,000	\$65,000,000	\$168,000,000	\$511,000,000	\$284,000,000
Spending potential index	91	110	89	104	109	98
Median household income (adjusted to 2017\$)	\$52,000	\$61,900	\$48,000	\$61,900	\$62,000	\$56,000
Market potential index for sports and recreation equipment spending (\$1-\$99)	102	105	101	107	104	104
Percent of households that spent in last 12 months	5.8%	6.1%	5.8%	6.1%	6.0%	5.9%
Market potential index for sports and recreation equipment spending (\$100-\$249)	99	107	103	110	107	105
Percent of households that spent in last 12 months	6.1%	6.6%	6.3%	6.7%	6.6%	6.4%
Market potential index for sports and recreation equipment spending (\$250+)	96	111	109	114	107	107
Percent of households that spent in last 12 months	7.0%	8.1%	8.0%	8.3%	7.8%	7.8%

Supporting local businesses

Parks, trails, rivers, open spaces, and recreation amenities in Colorado are used for multiple types of activities that generate economic activity and support related businesses. Residents and tourists in Colorado support local businesses in the recreation economy by purchasing sports equipment and gear from local stores, by participating in guided outdoor recreation activities, and by visiting sports and recreation facilities.

This analysis looks specifically at businesses related to what GOCO may fund, which includes businesses that sell recreation-related equipment and support and enable fitness and outdoor recreation activities. According to Esri Business Analyst, 1,510 stores and wholesalers in Colorado sell sporting goods and recreation-related equipment, and together these businesses generate \$4.30 billion in sales, an average of \$2.85 million per business. Sporting goods and recreation-related retail stores and wholesalers support 14,800 employees.¹³¹ These stores account for 0.59 percent of all businesses, 0.65 percent of the total sales volume, and 0.51 percent of all employees in Colorado.¹³² Another category of businesses supports and enables outdoor recreation activities. This includes bicycle, canoe, camping equipment, ski and snowmobile rentals; float trips and ski tours; and archery, gun safety and marksmanship, skating, skiing, and tennis instruction.¹³³ In Colorado, 858 of these businesses employ a total of 9,210 employees, an average of 10.7 employees per business. Businesses in the outdoor recreation activity category have annual sales of \$951 million and account for 0.33 percent of all businesses, 0.14 percent of total sales, and 0.32 percent of employees.¹³⁴

To summarize, investments by GOCO and CTF, through their support of parks, trails, rivers, open spaces, and recreation amenities, support Colorado's economic development by contributing to the state's high quality of life that makes it an attractive place for people to live, work, and play, and by providing diverse recreational opportunities that support the local recreation economy. The quality of life and the sense of place that these amenities create are paramount to its desirability as a place to live and recreate and to the rankings Colorado receives in the media. In addition, consumer and market data produced by Esri and analyzed by The Trust for Public Land demonstrate that recreation-related expenditures, such as those supported by parks and trails, are an important component of the local economy and make Colorado stand out among its peers and nationwide trends.

131 The sporting goods and recreation-related equipment store information was determined based on selected North American Industry Classification System (NAICS) codes. NAICS is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The analysis includes select NAICS codes from the following categories: 44122, 45399, 42391, and 45111.

132 Esri, *Business Analyst—All Businesses Report*.

133 The fitness and outdoor recreation-related business information was determined based on select NAICS codes from the following categories: 721211, 53229, 48721, 61162, and 71392.

134 Esri, *Business Analyst—All Businesses Report*.

Appendix B. Acknowledgements

The Trust for Public Land gratefully acknowledges all of the individuals who contributed their time, energy, and ideas toward the creation of this report. The individuals listed alphabetically below provided input throughout the various phases of the report's production:

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