THE STIMULUS OF TRAILS

GREG MAZU
LEE LAU
2018 National Outdoor Recreation Conference
Burlington, VT
April 2018
INTRODUCTIONS

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INTRODUCTIONS
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Session Outline

• Disclaimer
• Overview of Economic Impact
• Survey Studies
• Case Studies
• Discussion
Disclaimer

• Typos are Free
• I hike for a living and roll for recreation
• Sorry for all the words
Why Trails Are Important

- Exercise and wellness for residents and visitors
- Scenic beauty and connection to the natural world
- Inspire stewardship and conservation
- Increase recreation-based tourism with quality and diverse opportunities
- Promote healthy family activities
- Show positive investment in the community
Why Trails Are Important

- Golf Course
  - $500,000 - $1,000,000 per hole
- Playground
  - $70,000 - $125,000
- Skate Park
  - $8,000 - $25,000 per 10,000 square feet
- Paved Bike Path
  - $150,000 – $1,000,000 per mile
- Natural Surface Trail
  - $5,000 - $40,000 per mile
Why Trails Are Important

• Golf Course
  • $500,000 - $1,000,000 per hole
• 20 mile Trail System
  • $528,000
Why Trails Are Important

After construction of new trails:

60% of shops see an increase in bike and equipment sales in their shops

More than 3X as many new bicycles

14.9m are sold in the U.S. each year than cars 4.6m
Outdoor Recreation Product Sales $120.7 Billion
APPAREL, FOOTWEAR, EQUIPMENT, VEHICLES, ACCESSORIES, SERVICES

Trips and Travel-Related Spending $524.8 Billion
FOOD/DRINK, TRANSPORTATION, ENTERTAINMENT/ACTIVITIES, LODGING, SOUVENIRS/GIFTS/MISC.

$120.7 Billion + $524.8 Billion = $646 Billion
Direct Sales
ACTIVE OUTDOOR RECREATION PARTICIPANTS BY THE NUMBERS

- BICYCLING: 60 MILLION
- CAMPING: 45 MILLION
- FISHING: 33 MILLION
- HUNTING: 13 MILLION
- PADDLING: 24 MILLION
- SNOW SPORTS: 16 MILLION
- TRAIL: 56 MILLION
- WILDLIFE Viewing: 66 MILLION

(millions of adult American participants)
An Overlooked Economic Giant

Annual Consumer Spending, in Billions

- Pharmaceuticals: $331
- Motor Vehicles and Parts: $340
- Outdoor Recreation: $646
- Financial Services and Insurance: $780
- Outpatient Health Care: $767
- Gasoline and Other Fuels: $354
- Household Utilities: $309
Outdoor Recreation Employs America

Job Comparisons, by Industry

- REAL ESTATE, RENTALS, LEASING: 2.0M
- OIL AND GAS: 2.1M
- INFORMATION: 2.5M
- EDUCATION: 3.5M
- TRANSPORTATION AND WAREHOUSING: 4.3M
- CONSTRUCTION: 5.5M
- FINANCE AND INSURANCE: 5.8M
- OUTDOOR RECREATION: 6.1M
Public Lands in Colorado

Over 30 million acres of public land in Colorado

Approximately 45% of Colorado is public land
Economic Impact in Colorado

Outdoor recreation generates $34.5B annually

313,000 jobs
Economic Impact in Colorado

$0
Economic Impact in Colorado

November 28, 2016
Economic Impact in Colorado

$13.2B in consumer spending
$4.2B in wages and salaries
Economic Impact in Colorado

Co State combined economic impact of Recreation $17.4B
Oil & Gas industry comparison $19.8B
Oil & Gas industry peaked in 2014
Survey Studies
Grand County’s Natural Assets

- Approximately 80% public lands in Grand County
- Over 1,000 miles of trails on public, private, municipal lands
- Rocky Mountain National Park
- Arapaho National Recreation Area
- 6 Wilderness or special management areas
- Lakes region
Grand County’s Natural Assets

- 2 Ski Resorts
- 4 Nordic Centers & other groomed winter trails
- 2 Downhill mountain bike parks
- Colorado River and whitewater park
- Mountain Bike Capital USA™
- Idleglen area world class snowmobiling
- Wolford Reservoir area is a motorized destination
Grand County’s Natural Assets

- Continental Divide Scenic Trail
- Hunting & fishing throughout the County
- Trail Ridge Road and 3 other scenic byways in the County
- Backcountry skiing access
- Backcountry huts for year round use
Top Guest Activities - Summer

- Sightseeing: 60%
- Rocky Mountain National Park: 53%
- Restaurant Dining: 50%
- Hiking: 45%
- Watching wildlife: 43%
- Shopping: 34%
- Camping/Backpacking: 18%
- Fishing: 16%
- Water sports (boating, rafting, kayaking, swimming, etc): 15%
- Festival/Special event: 15%
- Road biking: 14%
- Nightlife: 10%
- Other: 10%
- Museum/gallery: 8%
- Horseback riding: 7%
- Cross country mountain biking: 7%
- Downhill mountain biking: 6%
- Amusements: 6%
- Golf: 5%
- Rock Climbing: 3%
- Theater: 3%
- Wedding/Family reunion: 3%
- Guided tour: 2%
- Hunting: 2%
Grand County, CO

Lodging Type by season

- In paid/rented lodging (hotel, condo, rental, ...): 61% for Summer Visitor, 83% for Winter Visitor
- With friends/family who live in the area: 14% for Summer Visitor, 13% for Winter Visitor
- Tent/Camping: 20% for Summer Visitor, 0% for Winter Visitor
- Other: In a second home/vacation unit that I own: 1% for Summer Visitor, 0% for Winter Visitor
## Grand County, CO

### Main Reasons for visit by visitor type

<table>
<thead>
<tr>
<th>Reason</th>
<th>Overall</th>
<th>Visitor</th>
<th>Have considered visiting</th>
<th>Summer Visitor</th>
<th>Winter Visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enjoyment of the scenic beauty of the mountain area</td>
<td>62%</td>
<td>60%</td>
<td>69%</td>
<td>72%</td>
<td>50%</td>
</tr>
<tr>
<td>Noncompetitive recreational activity</td>
<td>54%</td>
<td>60%</td>
<td>27%</td>
<td>53%</td>
<td>66%</td>
</tr>
<tr>
<td>Enjoyment of ski area resort/town</td>
<td>51%</td>
<td>57%</td>
<td>4%</td>
<td>42%</td>
<td>41%</td>
</tr>
<tr>
<td>Mountain getaway</td>
<td>46%</td>
<td>46%</td>
<td>46%</td>
<td>53%</td>
<td>41%</td>
</tr>
<tr>
<td>Rest and relaxation</td>
<td>42%</td>
<td>40%</td>
<td>49%</td>
<td>48%</td>
<td>34%</td>
</tr>
<tr>
<td>National park</td>
<td>34%</td>
<td>31%</td>
<td>45%</td>
<td>45%</td>
<td>16%</td>
</tr>
<tr>
<td>General sightseeing/touring</td>
<td>34%</td>
<td>29%</td>
<td>56%</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Climate/weather</td>
<td>32%</td>
<td>33%</td>
<td>29%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Previous experience/annual vacation</td>
<td>31%</td>
<td>36%</td>
<td>8%</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Visit friends/relatives</td>
<td>13%</td>
<td>15%</td>
<td>6%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Hadn’t been to the area before, wanted to see it</td>
<td>12%</td>
<td>5%</td>
<td>46%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Recommended by friend, family, word of mouth</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Special event</td>
<td>8%</td>
<td>10%</td>
<td>3%</td>
<td>14%</td>
<td>6%</td>
</tr>
<tr>
<td>Special package/offer/price/discount</td>
<td>7%</td>
<td>7%</td>
<td>9%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Group arrangement/family reunion</td>
<td>6%</td>
<td>7%</td>
<td>1%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Combined business/pleasure</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Competitive sporting event participant</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Business/professional</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Wedding/honeymoon/anniversary</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Convention/conference/trade show</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Grand County,

- Economic impact: direct spending, repeat visits, relocation or 2\textsuperscript{nd} home investment
- Overnight stays for recreation visits (avg. 4.6 nights/visit)
- Year round tourism for outdoor recreation pursuits
Grand County, CO

Fill the deficit from extraction funds when mine/mill closes
Bellingham, WA

Whatcom Mountain Bike Coalition
10 week survey of mountain bikers and trail runners
749 respondents
66% were 30-49
Bellingham, WA

Tourism
• **31.5%** of respondent resided outside county
• Annual income **$70k+**
• Most spent **$40+/visit** at local establishments
Whistler Bike Park
<table>
<thead>
<tr>
<th>Destination</th>
<th>2012</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>42%</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>US</td>
<td>19%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>UK</td>
<td>13%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Other destination</td>
<td>26%</td>
<td>19%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Whistler Bike Park

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local resident</td>
<td>33%</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>Day visitor</td>
<td>10%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Overnight visitor</td>
<td>58%</td>
<td>67%</td>
<td>62%</td>
</tr>
<tr>
<td>Type of Accommodation</td>
<td>2012</td>
<td>2011</td>
<td>2010</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Hotel/motel</td>
<td>24%</td>
<td>31%</td>
<td>44%</td>
</tr>
<tr>
<td>Rental cabin/chalet</td>
<td>50%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Family/friends accommodation</td>
<td>6%</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Owned vacation unit/home</td>
<td>3%</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Camping</td>
<td>14%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Category</td>
<td>2012</td>
<td>2011</td>
<td>2010</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>17 or younger</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single, no kids</td>
<td>23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Household with children at home</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HH with children no longer at home</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Case Studies
Fruita-Grand Junction
Fruita Grand Junction

- Fruita, CO - Trails pump $1.5M into town economy (2004 BLM Management Plan)
- Sales taxes increased 51% (1999 - 2004)
- 80% increase over same period for restaurant sales tax revenues
- BLM local trailhead records for 2000 - 2004 indicate nearly 3x user growth (24.8k - 71.4k)
- 2004 - 2014 records indicate further user growth of nearly 2x (71.4K - 133.8K)

- Current annual economic impact likely ~$3M
Moab

Mining Employment, Percent of Total Employment, Grand County, Utah

- 1970: 20%
- 1980: 23%
- 1985: 8%
- 2000: 2%
Moab

Total Economic Impacts in Terms of Jobs Resulting from Expenditures by Non-Local Visitors to BLM Lands, Grand County, Utah, 2007

Sources of Travel and Tourism Related Revenue, Grand County, Utah, 2009

- **Sales Tax (Hotel & Lodging):** $3.0 million
- **Resort Tax:** $2.4 million
- **Transient Room Tax:** $1.6 million
- **Restaurant Tax:** $0.4 million
- **Car Rental Tax:** < $0.1 million

Moab

Participation on BLM Moab Field Office Lands by Recreational Activity, 2007

- 31% Camping
- 17% Biking
- 6% Hiking
- 8% Motor Vehicle
- 15% Biking
- 6% Nature Viewing
- 3% Non-Motorized Water

Moab

Local Government Revenue, Grand County, Utah, 2009

- All Other Revenue: 78%
- Travel and Tourism Revenue: 16%
- Natural Resources Revenue: 5%
Singletrek pod Smrkem
Singletrek pod Smrkem

60km of Trail
Built in 4 phases
Cost about $1mil
USD
Singletrek pod Smrkem

50,000 visitors per year
50% of visitors are weekenders
Weekenders spend about $100 USD
Sea to Sky Corridor
Sea to Sky Corridor

North Shore Trails
Squamish
Whistler
Sea to Sky Corridor

Mountain biking is an important draw in the Sea to Sky corridor for both locals and out of town visitors alike. Over the course of the survey, many local residents told the surveyors that the trail systems they were riding on were an important consideration in their decision to move to the host communities, and for out of town visitors, the trail systems of the Sea to Sky corridor provide some of the best mountain
Sea to Sky Corridor

$10.3mil Direct Spending
$9.3mil Total Spending
$4.5mil in Taxes
Sea to Sky Corridor

Rider Volumes

- North Shore: 18,660
- Squamish: 8,910
- Whistler Valley: 25,695
- Whistler Bike Park: 76,671

*Est. 3 Month Total*
## Sea to Sky Corridor

### Rider Origin
(by riding party)

<table>
<thead>
<tr>
<th></th>
<th>Resident</th>
<th>Mixed</th>
<th>Non-resident</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Shore</td>
<td>33%</td>
<td>12%</td>
<td>55%</td>
</tr>
<tr>
<td>Squamish</td>
<td>44%</td>
<td>7%</td>
<td>49%</td>
</tr>
<tr>
<td>Whistler Valley</td>
<td>34%</td>
<td>9%</td>
<td>57%</td>
</tr>
<tr>
<td>Whistler Bike Park</td>
<td>13%</td>
<td>7%</td>
<td>80%</td>
</tr>
</tbody>
</table>
Sea to Sky Corridor

Day Trips vs Overnight Stays
(Non residents)

<table>
<thead>
<tr>
<th>Location</th>
<th>Day Trip</th>
<th>Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Shore</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Squamish</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Whistler Valley</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Whistler Bike Park</td>
<td>89%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Sea to Sky Corridor

Non Resident Spending
(per person/day)

Day trip | Over night
---|---
North Shore: $39 | $48
Squamish: $92 | $54
Whistler Valley: $84 | $93
Whistler Bike Park: $99 | $133
Whiterock Conservancy

- 15,000-acre Farm
- Economically depressed town
- Seed Mill focus of town economy
Whiterock Conservancy

Create what is essentially a Non-Profit State Park
Whiterock Conservancy

- Construct 20 miles of new trail
- Leverage Existing Trails
- Construct Campsites
- Utilize Existing Campgrounds
SEARCH:
Pink
Bike
Lee Lau
Economi
Questions?