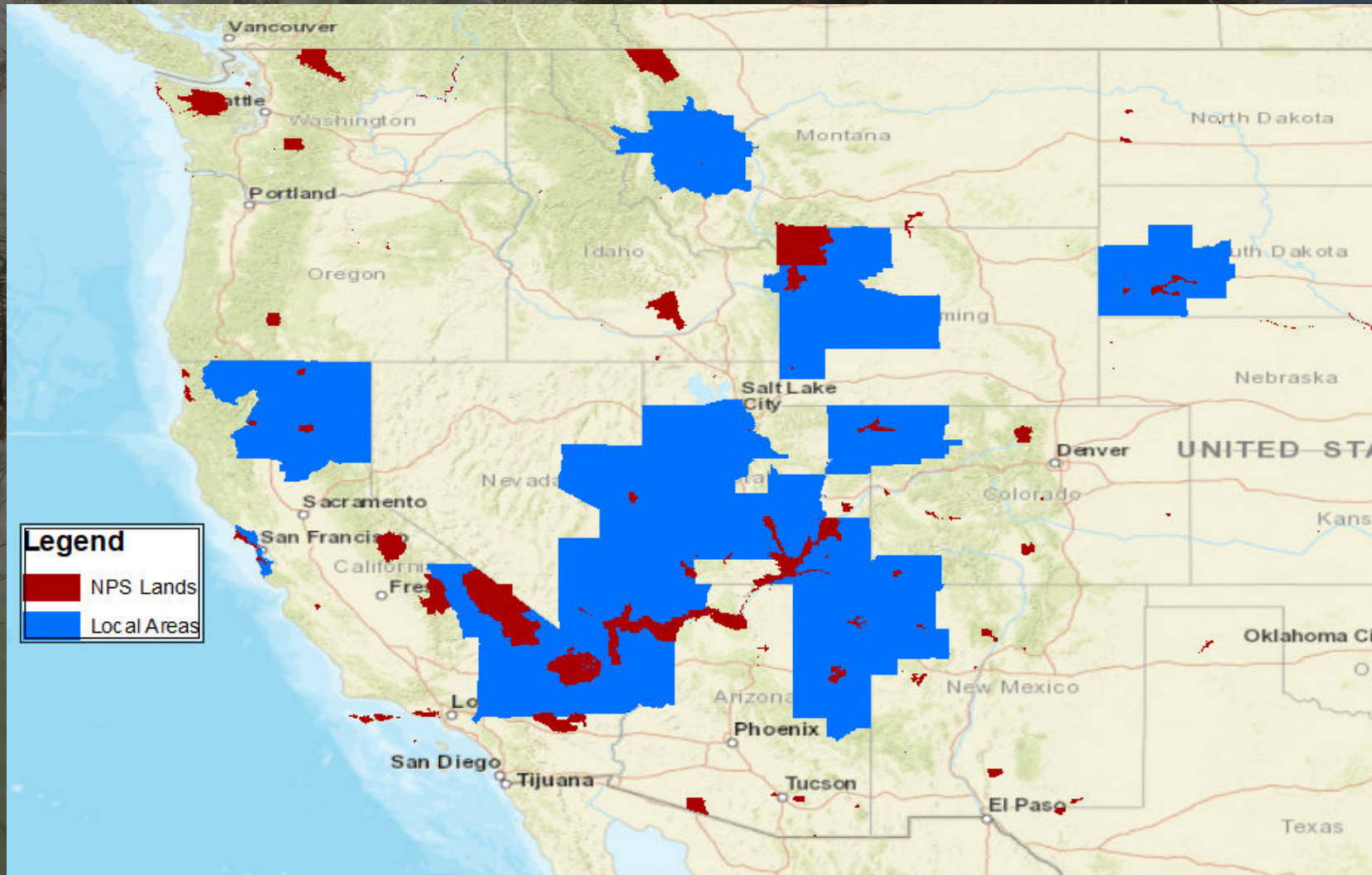


NPS Lands Across the West – Local Areas

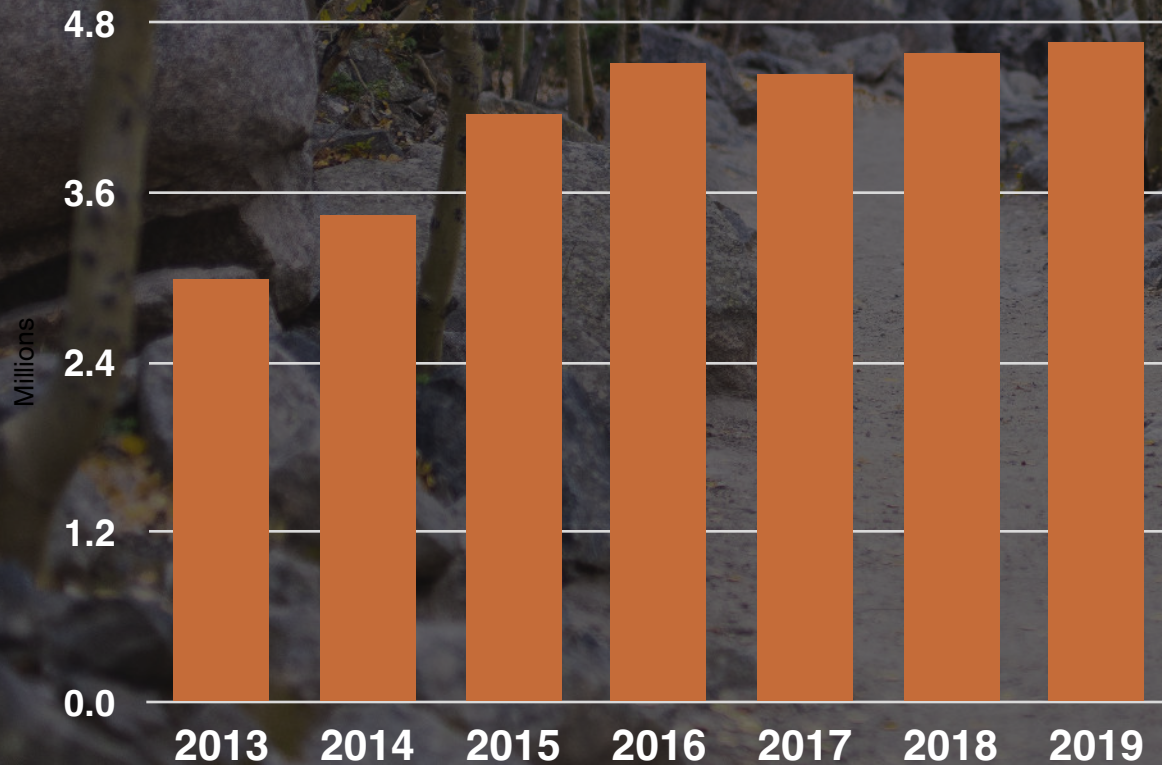




Enabling Case Studies of Local Economies

Estes Park, CO & Rocky Mountain National Park

- Visitation was approximately 3 million in 2013.
- By 2019, they were at 4.6 Million.



Estes Park, CO & Rocky Mountain National Park

Is a reservation system an economic negative?



Rocky Mountain National Park

Timed Entry Reservations

To visit any area of the park **May 26 - October 22**, you need:

Timed Entry Reservation

Two reservation options available



Only available online at:

www.rec.gov
see below for options



Park Pass or Entrance Fee



Available in person or online at:

go.nps.gov/RockyFees



Arrive During Your Time Slot



Have your reservation ready to scan

Park Access

Reservations Required 9am - 2pm

Park Access+

Includes Bear Lake Road Corridor
Reservations Required 5am - 6pm



Already Booked an Activity?

Camping, guided trips, or commercial tours do not need a timed entry reservation

Estes Park, CO & Rocky Mountain National Park

Is a reservation system an economic negative?

- Estes Park receives majority of ROMO visitor spending.
- 80+% visitors pass through EP.



Rocky Mountain National Park
Timed Entry Reservations

To visit any area of the park **May 26 - October 22**, you need:

Timed Entry Reservation + **Park Pass or Entrance Fee** + **Arrive During Your Time Slot**

Two reservation options available

Only available online at: www.rec.gov
see below for options

Available in person or online at: go.nps.gov/RockyFees

Have your reservation ready to scan

Park Access
Reservations Required 9am - 2pm

Park Access+
Includes Bear Lake Road Corridor
Reservations Required 5am - 6pm

Already Booked an Activity?
Camping, guided trips, or commercial tours do not need a timed entry reservation

Estes Park, CO & Rocky Mountain National Park

National Park Service
U.S. Department of the Interior



Natural Resource Stewardship and Science

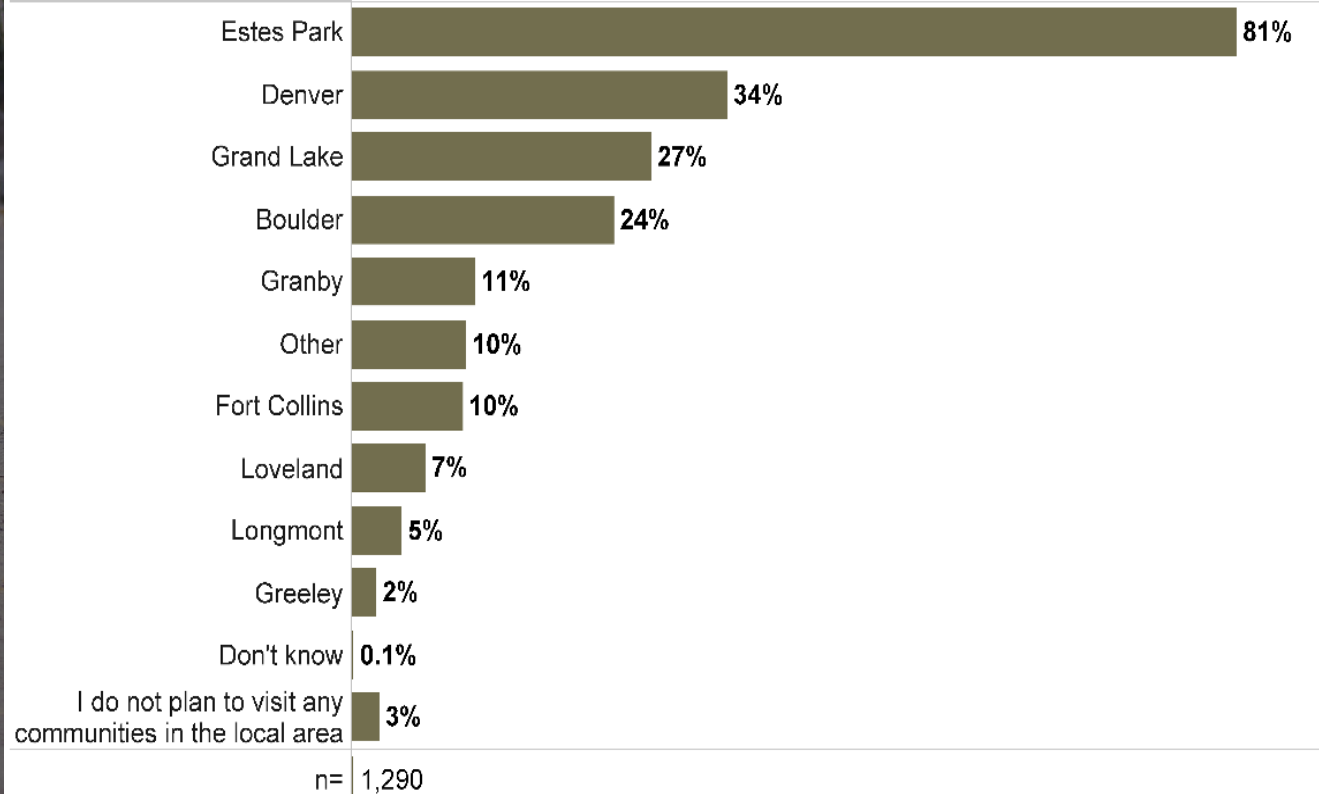
2022 Socioeconomic Research of Rocky Mountain National Park

Report on 2022 Data Collection

Natural Resource Report NPS/ROMO/NRR—2023/2545



Which communities have you already visited or do you plan to visit outside Rocky Mountain while in the local area? Please mark all that apply



Estes Park, CO & Rocky Mountain National Park



Estes Park, CO & Rocky Mountain National Park

National Park Service
U.S. Department of the Interior



Natural Resource Stewardship and Science

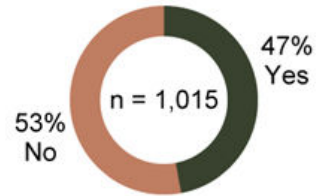
2022 Socioeconomic Research of Rocky Mountain National Park

Report on 2022 Data Collection

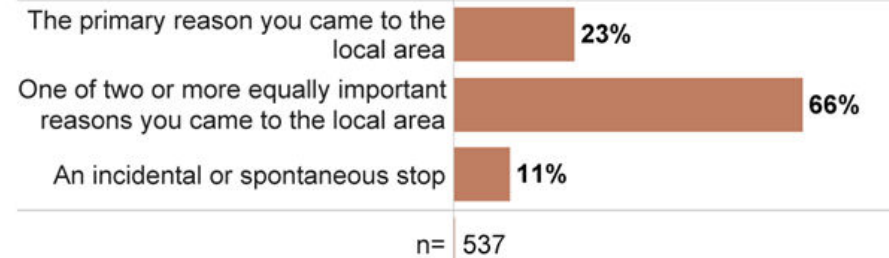
Natural Resource Report NPS/ROMO/NRR—2023/2545



[[If not local/seasonal resident] Was your visit to Rocky Mountain the primary purpose for your overall trip away from home?



[[If not the primary purpose for your overall trip away from home] Was your visit to Rocky Mountain...?



Estes Park, CO & Rocky Mountain National Park

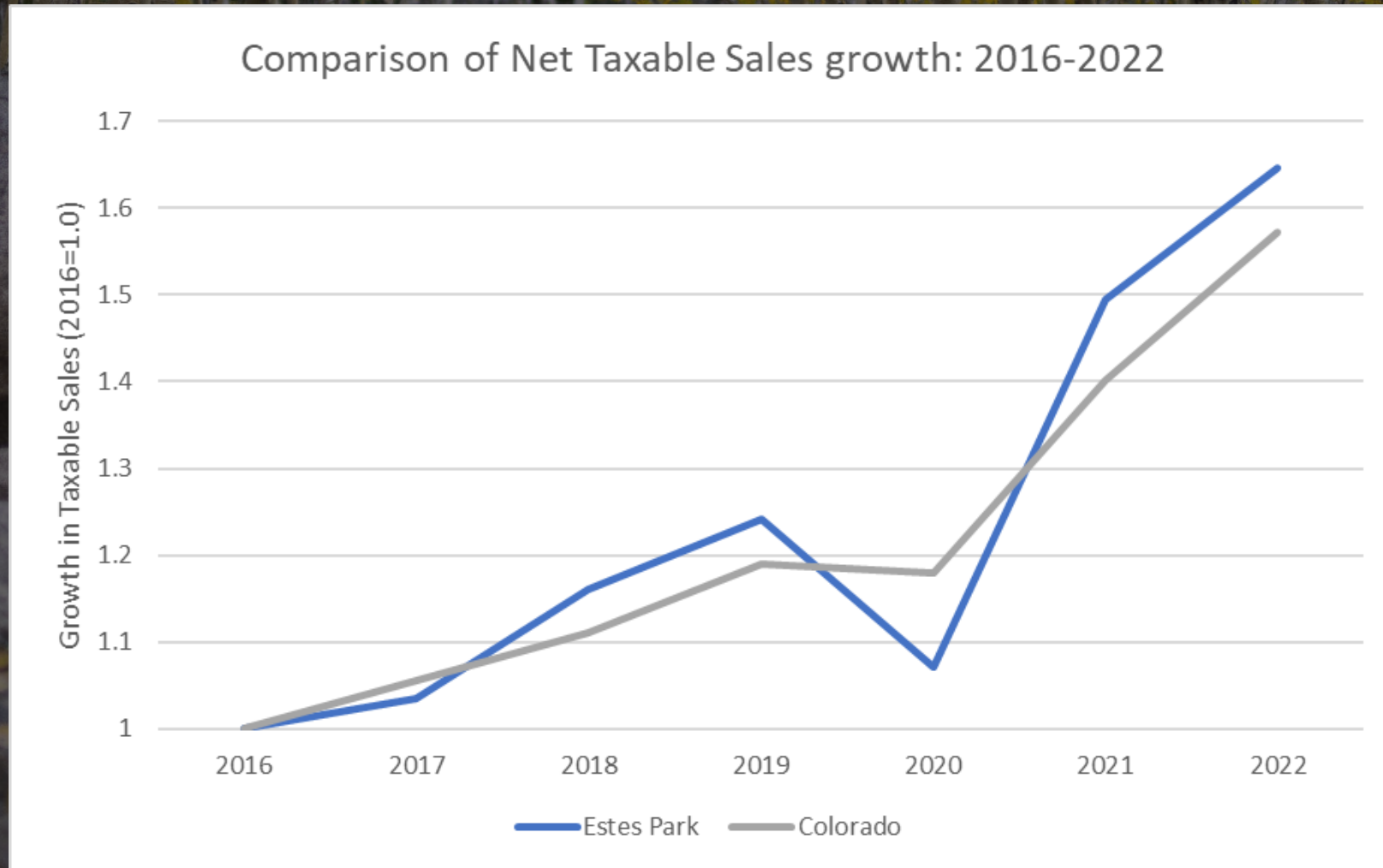
- Travel spending in the Estes Park Local Marketing District increased 47.1% from \$342.7 million in 2020 to \$504.3 million in 2021.
- Direct travel-generated employment grew to 3,100 jobs, a 3.0% increase over 2020.
- Direct travel-generated earnings increased to \$100.6 million, a gain of 12.5% compared to 2020.
- Tax receipts generated by travel spending increased to \$35.0 million, up 43.8% compared to 2020.
- Overall, travel spending in the Estes Park Local Marketing District contributes \$3,270 per resident household in local tax receipts.

The Economic Impact of Travel in the Estes Park Local Marketing District

Dean Runyan Associates (2022)

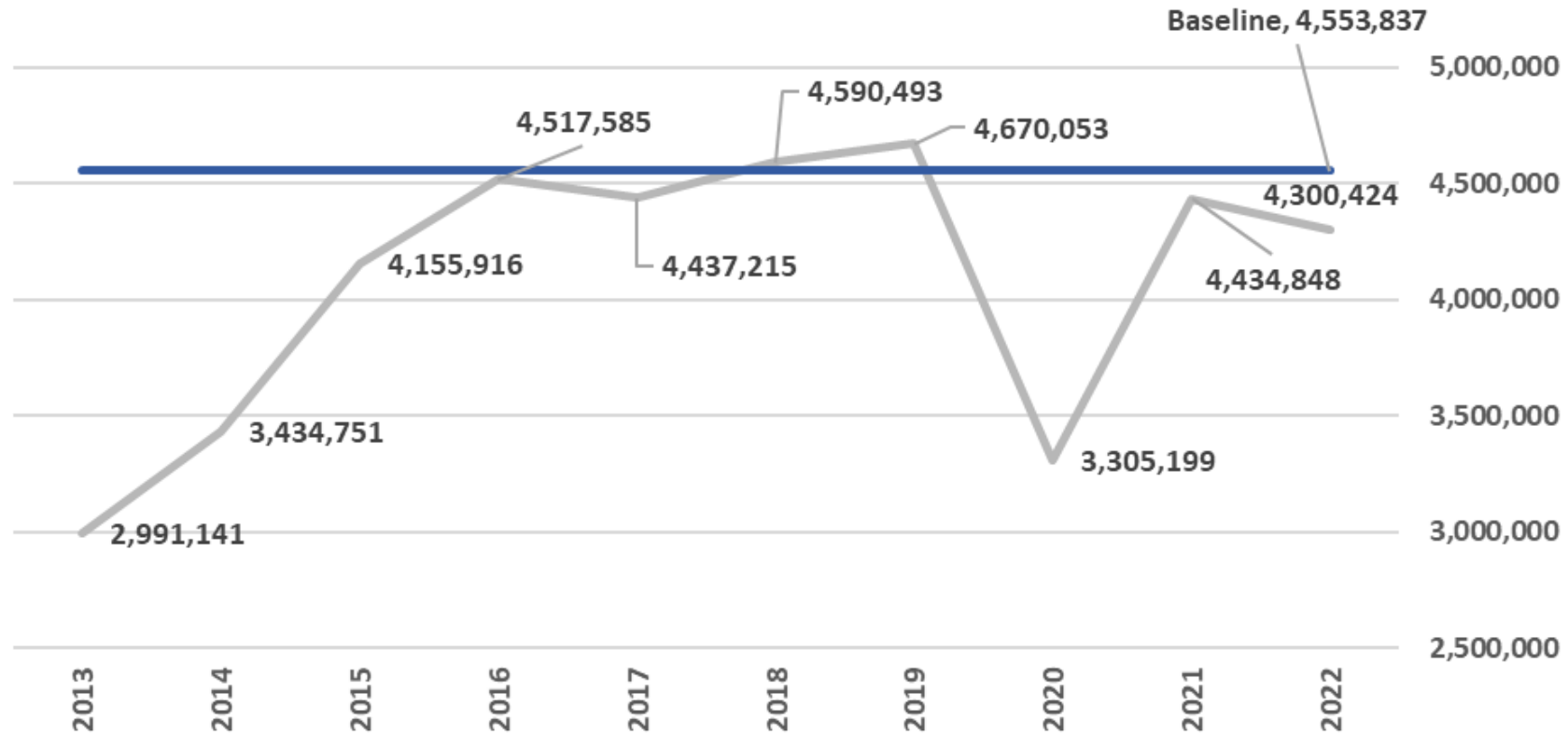
<https://www.visitestepark.com/transparency/>

Estes Park, CO & Rocky Mountain National Park

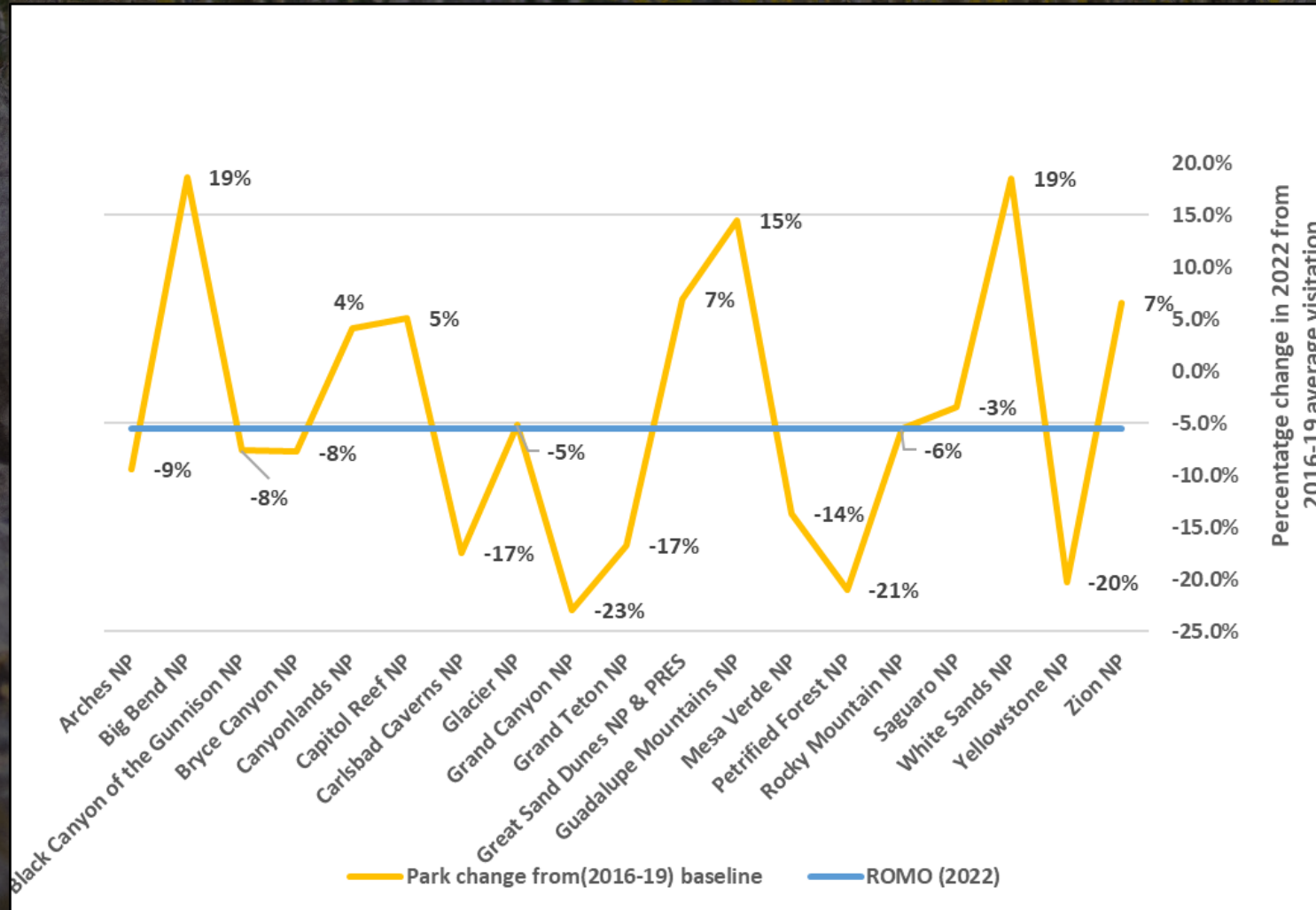


Estes Park, CO & Rocky Mountain National Park

Rocky Mountain NP Total Annual Recreational Visitation: 2013-2022 vs. 2016-2019 Comparison Period Visitation

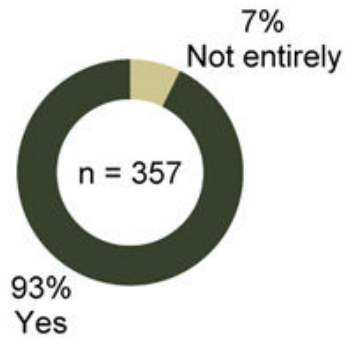


Estes Park, CO & Rocky Mountain National Park



Estes Park, CO & Rocky Mountain National Park

Did your visit to Rocky Mountain meet your expectations?

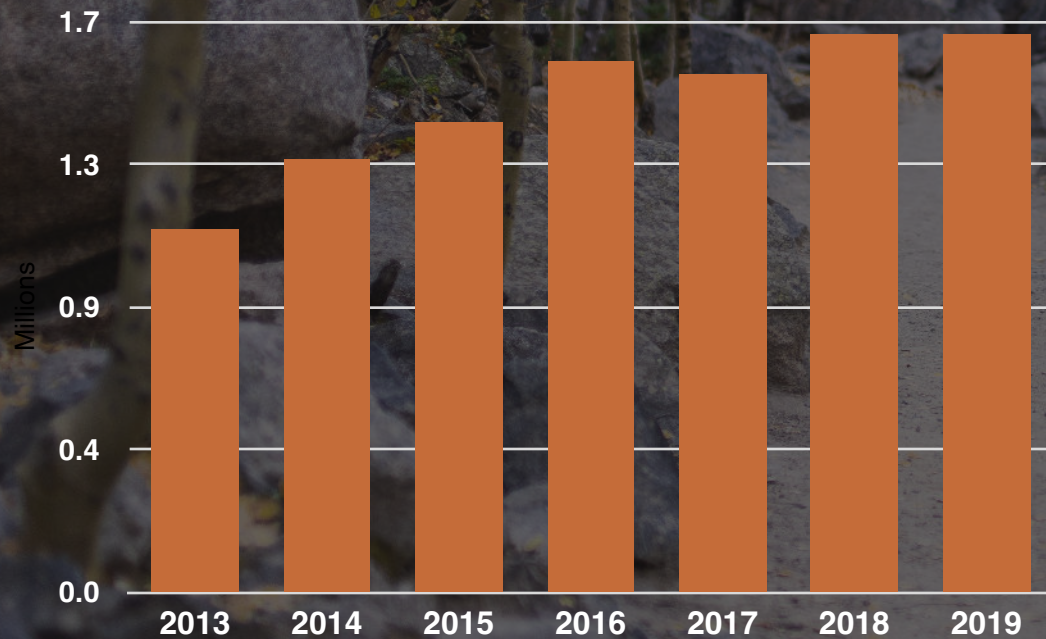


To what extent do you agree or disagree with each of the following statements?

Statement	Rating Category	n=	Percent Responding					Don't know / not sure
			1 - Strongly Disagree	2 - Somewhat Disagree	3 - Neither Agree nor Disagree	4 - Somewhat Agree	5 - Strongly Agree	
Rocky Mountain is a safe place to visit		364	1%	0.3%	1%	12%	85%	1%
Natural resources in Rocky Mountain are in pristine condition		358	1%	4%	9%	32%	53%	2%
Historical and cultural features in Rocky Mountain are well maintained/preserved		362		2%	13%	25%	44%	15%
Vandalism and crime are not a problem at Rocky Mountain		362	4%	5%	15%	14%	40%	23%
Rocky Mountain is too crowded		362	6%	14%	29%	37%	14%	0.3%

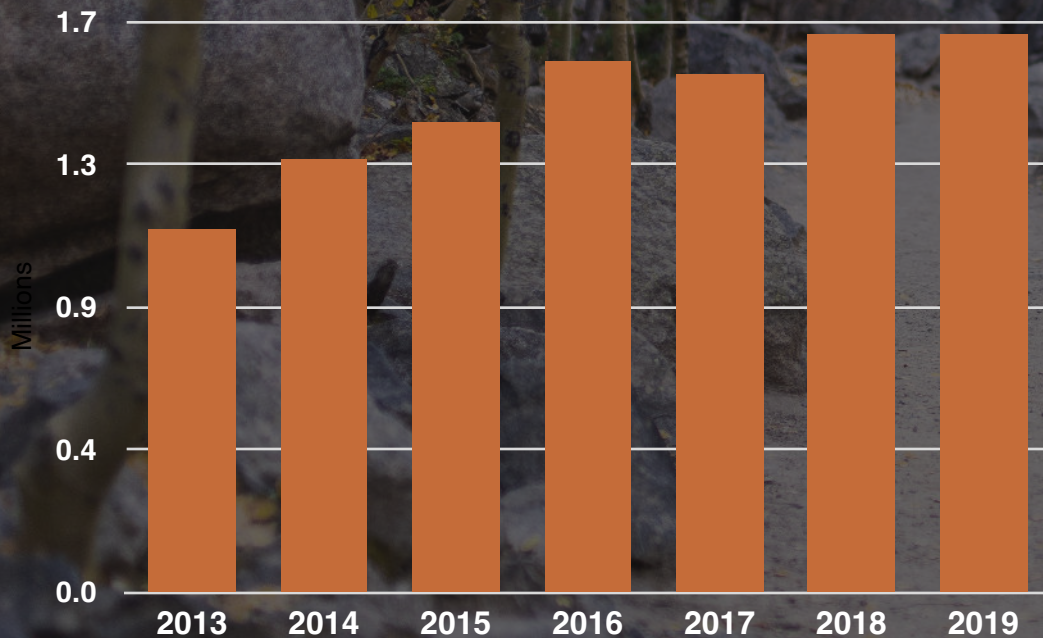
Moab, UT & Arches National Park

- Visitation was approximately 1.1 million in 2013.
- By 2019, they were at 1.7 Million.



Moab, UT & Arches National Park

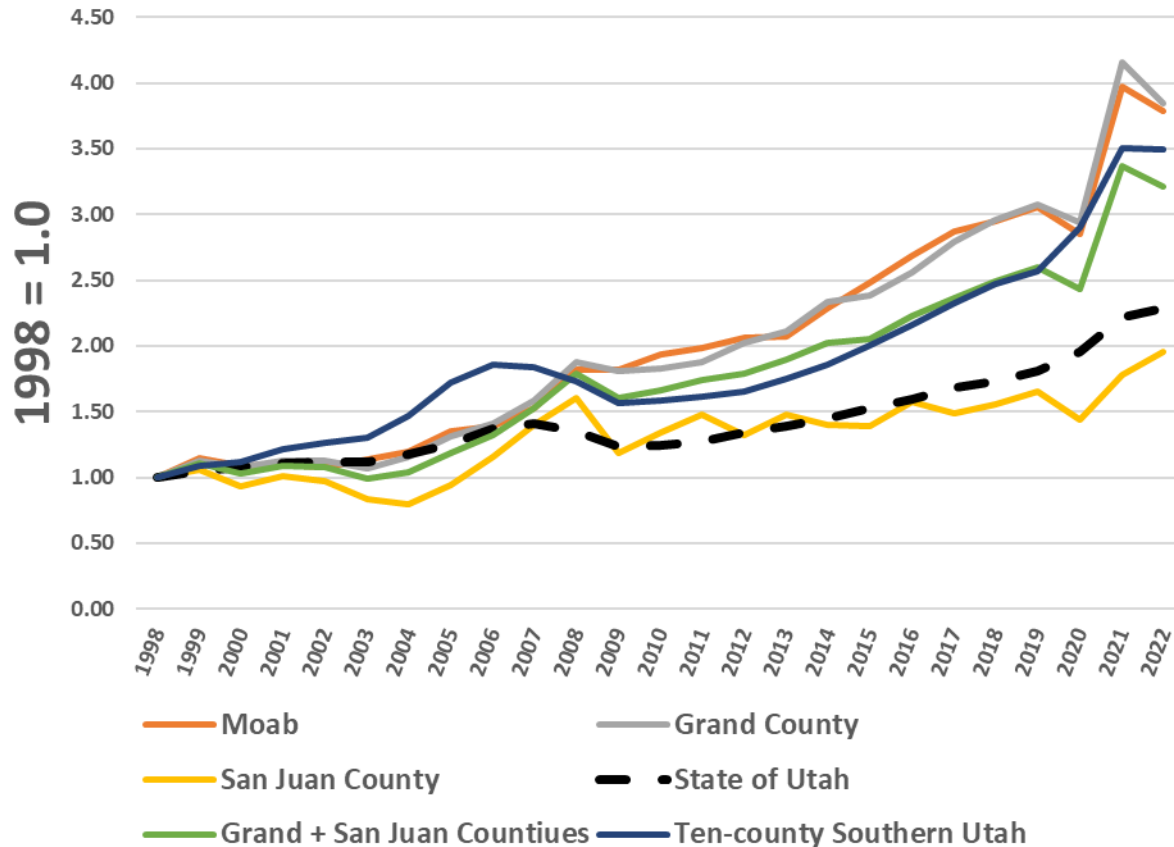
- Visitation was approximately 1.1 million in 2013.
- By 2019, they were at 1.7 Million.



A screenshot of a tweet from Arches National Park (@ArchesNPS) dated May 29, 2020, at 9:18 AM. The tweet text reads: "The park is currently full, and we are temporarily delaying additional entries. Vehicles trying to enter the park will have to come back at another time. Consider returning 3 hours from now or visiting other nearby attractions." The tweet has 125 likes and 6 replies. The interface includes a close button (X) in the top right, an information icon (i) in the bottom right, and a "Read 6 replies" button at the bottom.

Moab, UT & Arches National Park

Comparison of change in real taxable services+retail at Utah State, County and Community Levels



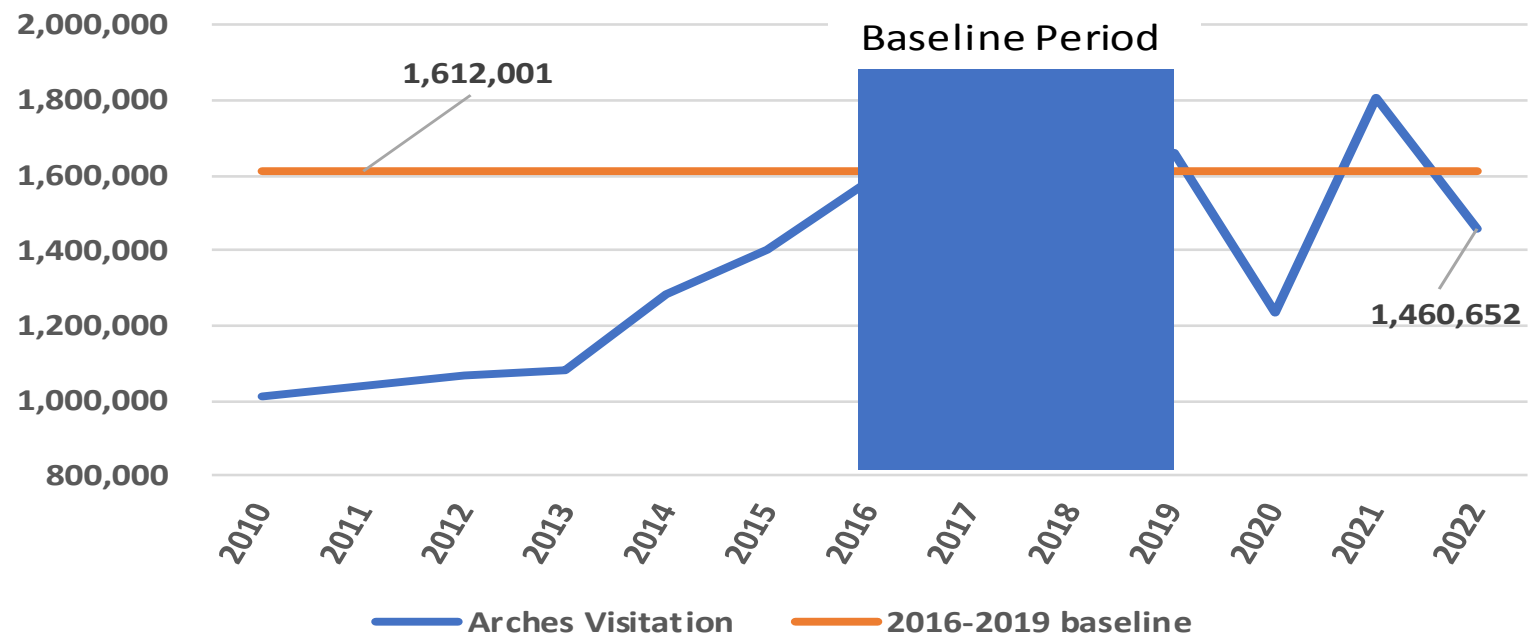
Correlation between Arches visitation and Moab Taxable Sales

0.946

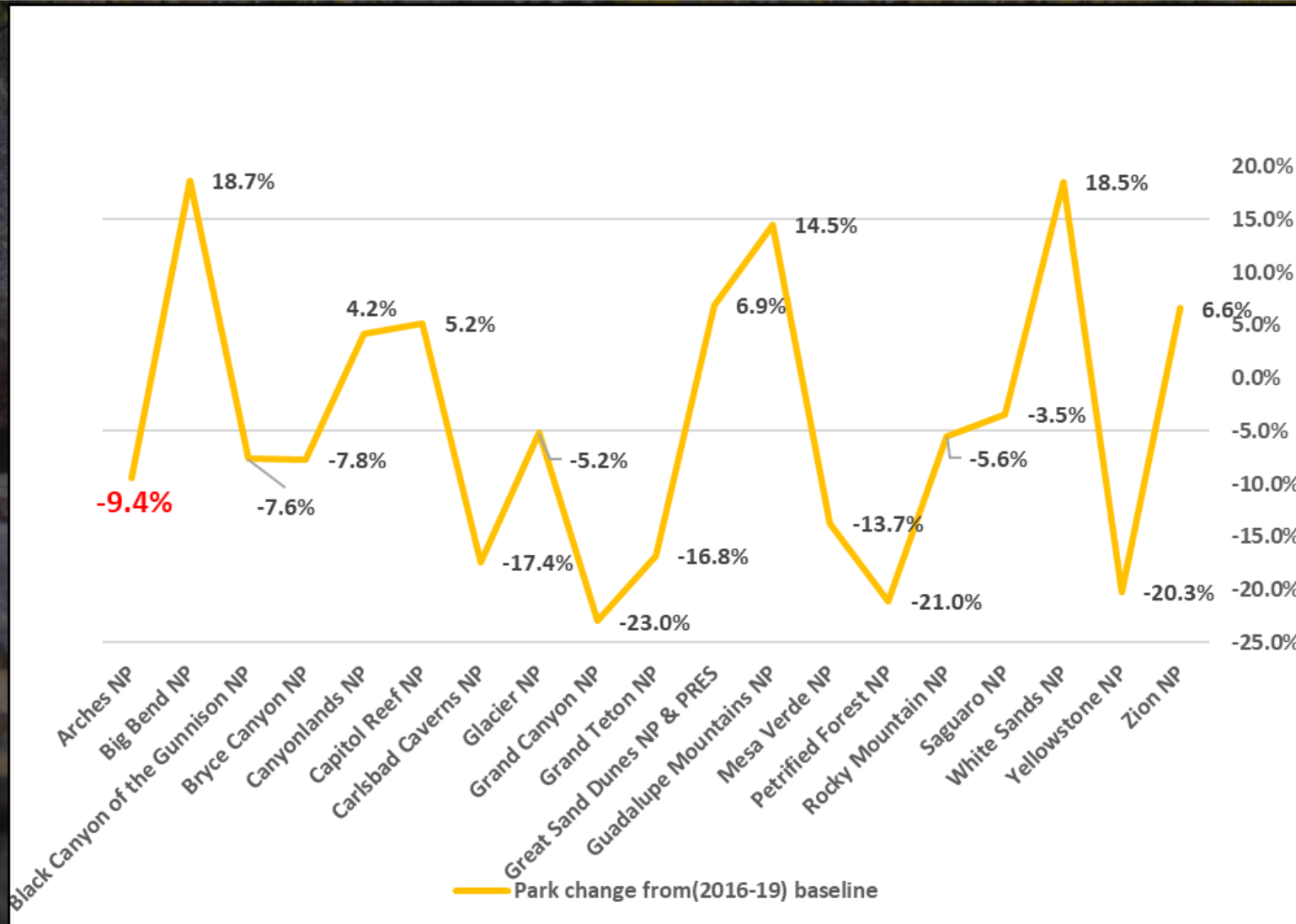
Indicates strong ties between Arches and Moab taxable sales

Moab, UT & Arches National Park

Comparison of Arches annual visitation (2010-2022) to 2016-2019 baseline visitation levels



Moab, UT & Arches National Park



Moab, UT & Arches National Park

National Park Service
U.S. Department of the Interior



Natural Resource Stewardship and Science

Pilot Timed Entry System at Arches National Park in 2022

Comparing visitor use data before and during a pilot managed access system

Natural Resource Data Series NPS/NRSS/NRDS—2023/2297386



Visitor access to the park improved during the pilot timed entry system. ARCH never closed the gate due to full parking lots during the pilot timed entry system.

Visitor experience quality as measured by people per viewscape (PPV) was improved in all locations measured (Windows, Delicate Arch, Devils Garden) during the pilot timed entry system.

Throughout the entire pilot timed entry system duration, less than 3% of hours at all studied locations (Windows, Delicate Arch, Devils Garden) demonstrated conditions where visitors would want the NPS to take action to address the density of people at key locations.

Tendick, A., Meyer, C., & Miller, Z.D. 2023. Pilot Timed Entry System at Arches National Park in 2022. Natural Resource Report NPS/NRSS/ARD/NRR—2023/2490. National Park Service, Fort Collins, Colorado. <https://doi.org/10.36967/2297386>

Other Economic Analyses



Environmental compliance



Value of recreation opportunities



Impact of development projects

A dramatic landscape of a national park at sunset or sunrise, with a yellow-bordered text box overlaid. The scene features rugged, layered rock formations and a sky with warm, orange and yellow hues. The text is centered within the box and reads: National Parks are not necessarily the only game in town.

National Parks are not
necessarily the only
game in town

Parks may be the first draw, but.....

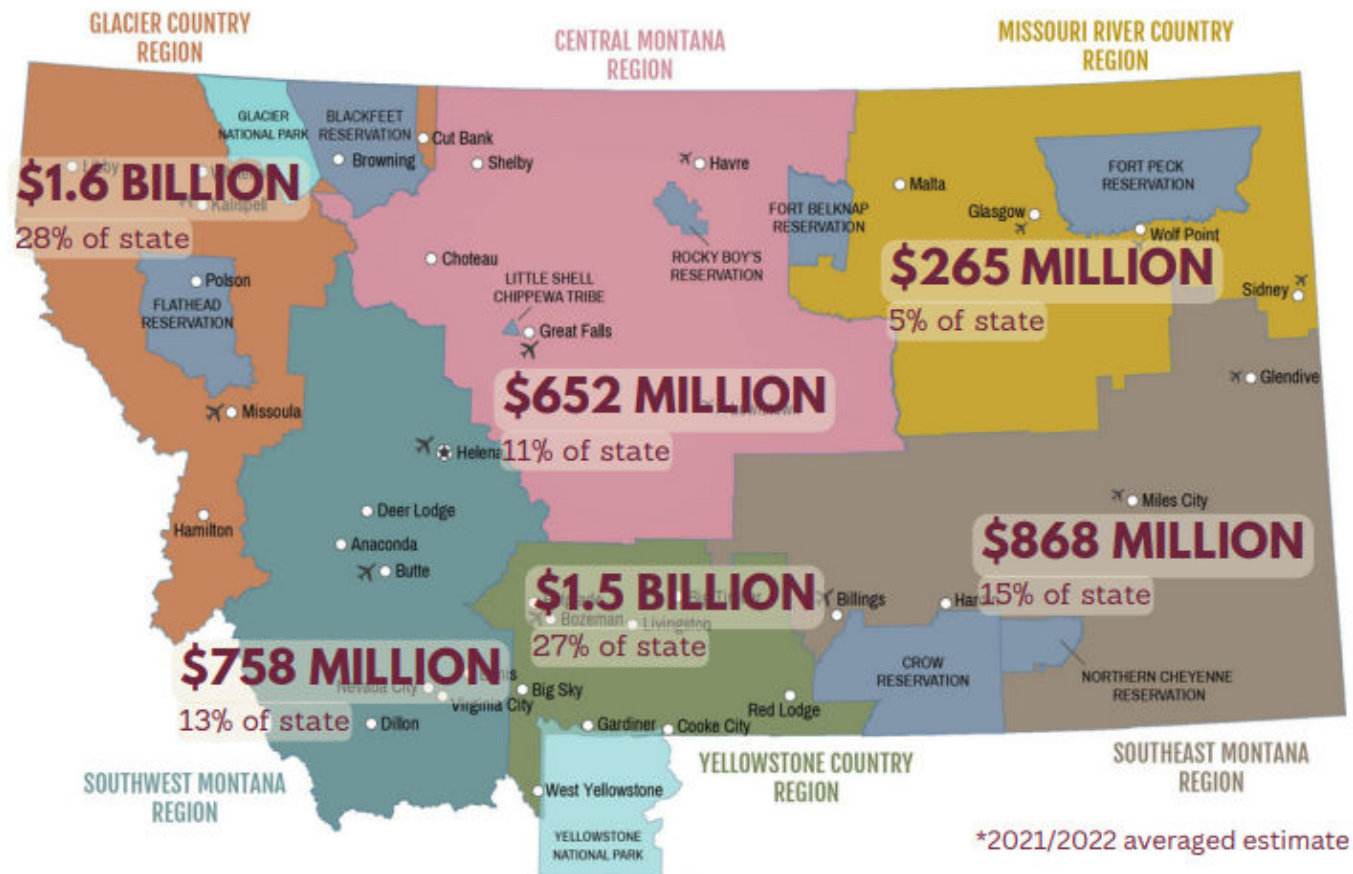
If you indicated vacation/recreation/pleasure as your main purpose of trip, what attracted you/your group to Montana?



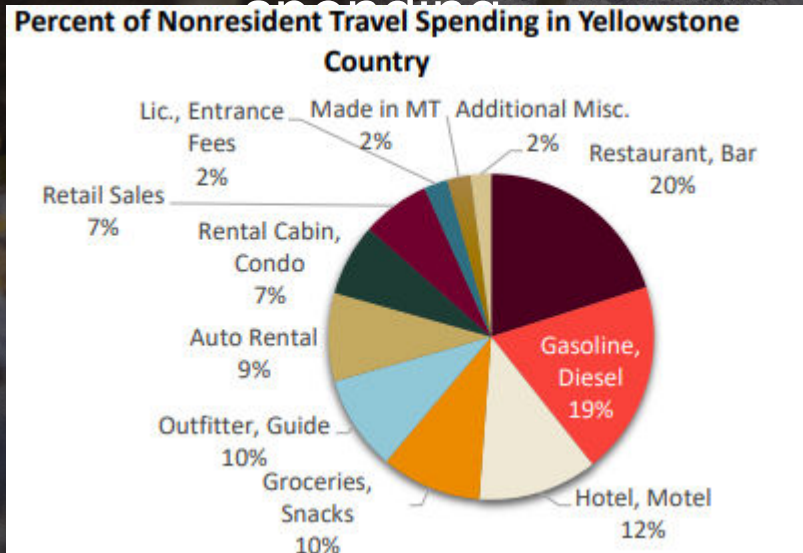
Parks may be the first draw, but.....

While activities diversify, those regions where the National Parks draw visitors remain key hubs of

\$5.68 billion* in Montana



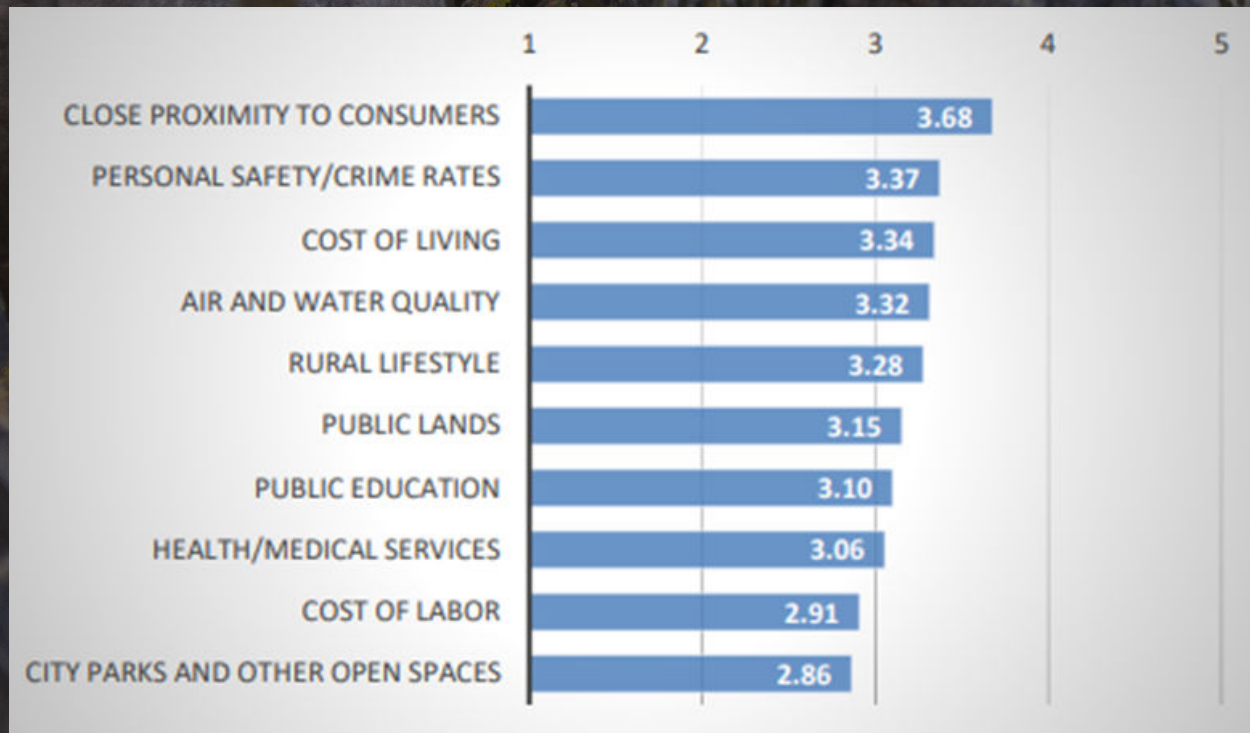
*2021/2022 averaged estimate



Parks may be the first draw, but.....tourism doesn't end there!

When Asked: "How important were the following in your decisions to start or relocate your business in Montana?"

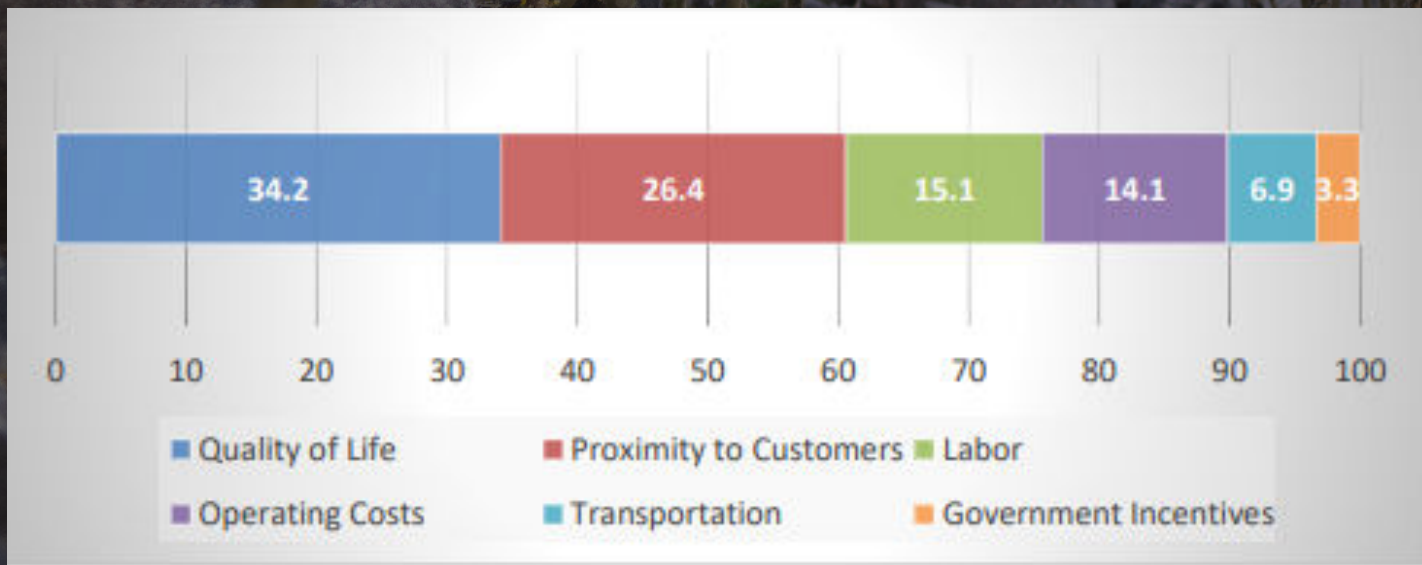
1=Not at all; 2=Slightly; 3=Moderately; 4=Very; 5=Extremely



Attributes related to quality of life tended to rank well above more traditional economic development categories like tax structure and transportation proximity, which had scores <2.5

Parks may be the first draw, but.....tourism doesn't end there!

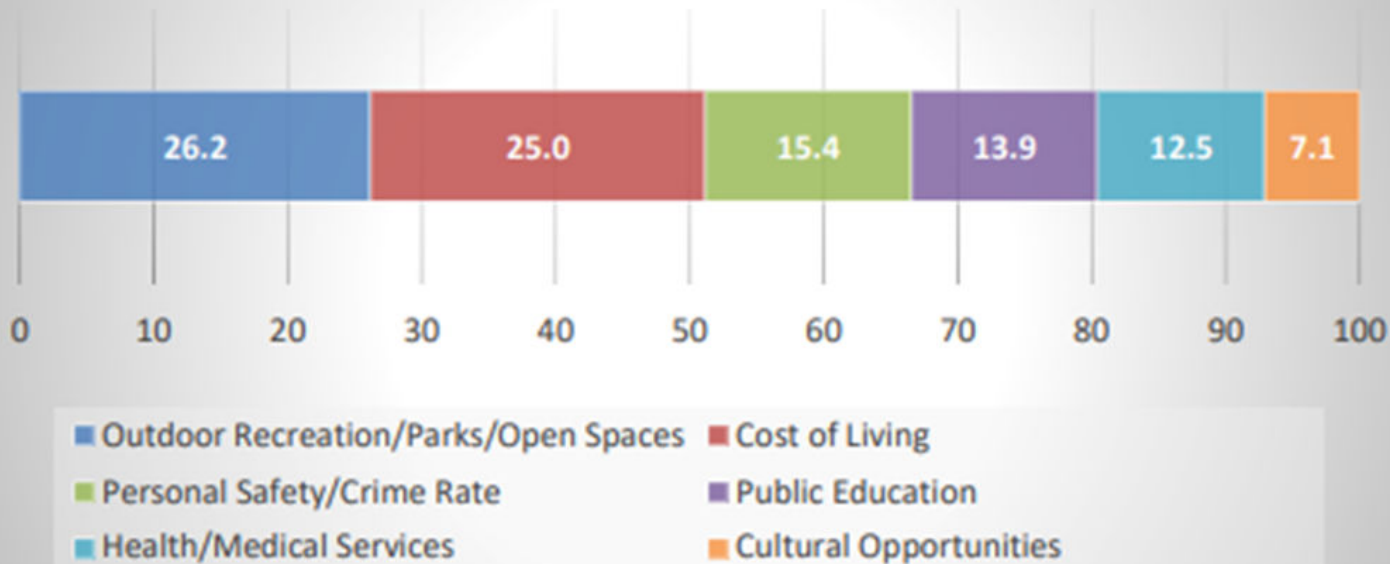
When Asked to: Thinking of the importance of each attribute, allocate 100 points between the six options. More points implies more importance.



Respondents can score many things high, but when asked to assign importance points, 'Quality of Life' jumped well above others.

Parks may be the first draw, but.....tourism doesn't end there!





When Asked to: Thinking of the importance of each attribute, allocate 100 points between the six options. More points implies more importance.



When asked to assign importance points to attributes of 'Quality of Life', Outdoor Recreation stood atop.

Amenity-rich places attract new residents, visitors, and business

Growth changes the community. Every community has a choice.

	PROBLEM	SOLUTION
 HOUSING	Amenity communities are unable to supply sufficient housing for residents at a range of income levels.	Creative approaches can increase supply, such as regional coordination, limiting vacation rentals, or promoting modular construction.
 INFRASTRUCTURE	Infrastructure in fast-growing communities can't keep up, and costs contribute to unaffordability.	Scenario planning and new data methods can better forecast tourism impacts and infrastructure needs.
 FISCAL	Funding local budgets often overburdens tax-paying residents in amenity communities.	Align revenues with local economic drivers, such as tourism. State policy should give local authorities maximum flexibility.
 NATURAL DISASTERS	More frequent disasters are putting housing stock at risk, compounding the challenges faced by amenity communities.	Incentivize durable housing and disaster planning to prevent losses to housing, infrastructure, and revenue.

Amenity Trap

How high-amenity communities can avoid being loved to death

<https://headwaterseconomics.org/outdoor-recreation/amenity-trap/>

Questions?



RRC
ASSOCIATES

Jeremy Sage
Jeremy@rrcassociates.com



INSTITUTE FOR
TOURISM & RECREATION
RESEARCH

Kara Grau
Kara.grau@mso.umt.edu



TTRA
Greater Western Chapter