State of Colorado
Department of Natural Resources
Division of Parks and Outdoor Recreation

Market Assessment Study

PRICEWATERHOUSECOOPERS

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Dear Mr. Laverty:

PricewaterhouseCoopers LLP ("PwC" or "PricewaterhouseCoopers") is pleased to present the 2002 Colorado State Parks' Market Assessment Study. Colorado State Parks encompass over 215,000 land and water acres of natural resources within a system that includes 40 parks. The mission of the Colorado State Parks is to: "To provide a spectrum of safe, quality outdoor recreation experiences for our visitors while effectively managing the natural resources under our authority".

In support of this mission, Colorado State Parks engaged PwC to undertake comprehensive consumer research to assess Colorado State Park's position in the marketplace and to assess resident's future priorities for Colorado State Parks in the areas of facilities, services and programs. The vision of Colorado State Parks in recognizing that future decisions should be firmly based on consumer preferences is to be commended.

PwC's research indicates that the impressions of and satisfaction with Colorado State Parks are both favourable. There are opportunities to convert this favourable impression into increased park visitation through a more deliberate communications strategy focusing on the diversity of recreational and leisure opportunities and through increased investments directed at improving existing parks. The majority of Coloradan's (both users and non-users) would prefer to see increased investment in improving existing parks rather than creating new parks. In particular, investments in creating better quality facilities and equipment, more trail opportunities and more backcountry park area will have broad appeal.

The research and conclusions in this report have identified three priorities for Colorado State Parks to assist them in maintaining and enhancing their favourable brand and product impressions in the minds of Coloradans. These priorities include:

- Refining the Colorado State Parks core brand and product;
- Reassessing strategic investment priorities in light of consumer preferences; and,
- Identifying revenue strategies to allow for responsible program management.

Each of these priorities must be driven by consumer preferences as well as agency mission and budget realities. In embarking on these priorities, Colorado State Parks has an opportunity to enhance the quality of their visitor services in the Parks and preserve the natural resources for which they are given stewardship.

PwC makes no representation of warranty as to the accuracy or completeness of the information contained within this report, including estimates, and shall have no liability for any representations (expressed or implied) contained in, or for any omissions from, this report. The information and analyses provided to you in report form is intended solely for the internal use of Colorado State Parks and should not be relied on for any other purpose, or by any other entity. Neither this report, nor any of its contents, nor any reference to our firm, may be included or quoted in any offering circular or registration statement, prospectus, sales brochures, appraisal, loan or other agreement without prior written authorization.

It has been a pleasure to be of service to Colorado State Parks. If PwC may be of further assistance, please do not hesitate to contact us.

Respectively Submitted,

PricewaterhouseCoopers L.L.P.

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1.0 Introduction

1.1 Background

In June 2002, PricewaterhouseCoopers ("PwC") was commissioned by Colorado State Parks to conduct a comprehensive and systematic market assessment of Colorado's 40 state parks.

The primary objectives of the study were to assess Colorado State Parks' position in the marketplace and to help determine the preferred future direction for Colorado State Parks by identifying the facilities, services and programs valued by citizens of Colorado and visitors to Colorado State Parks.

Additional objectives of the study included the following:

1) To profile key demographic, attitudinal and/or psychographic differences between users and non-users of Colorado State Parks;
2) To ascertain public expectations of Colorado State Parks;
3) To identify information about state park visitation that will be relevant for future policy and planning decisions; and
4) To measure the economic expenditures associated with state park visitation.

1.2 Report Structure

This report is divided into three main sections:

- **Executive Summary:** An overview of the study's key findings and conclusions.

- **Methodology:** A detailed summary of the steps taken to complete this study as well as the methodological assumptions followed and an explanation of the statistical reliability of the data captured.

- **Detailed Findings:** A thorough and comprehensive analysis of the results of this study broken down as follows: visitation behavior, awareness and perceptions of Colorado State Parks, reasons/motivations for visiting state parks, the perceived quality of experience when visiting state parks, economic expenditures associated with state park visitation, psychographic segmentation of visitors and non-visitors, awareness and attitudes toward state park funding, and proposed future directions.

2.0 Executive Summary

The report that follows presents the results of the 2002 Colorado State Parks' Market Assessment Study. The study has been designed to assess Colorado State Parks' position in the marketplace and to provide critical input to future planning decisions around facilities, services and programs. The study focuses on the attitudes, perceptions, motivations and demographic characteristics of both state park users and non-users. In so doing, the study identifies and assesses opportunities for Colorado State Parks in terms of both marketing, future investment, and funding.

2.1 Key Findings

The following section summarizes the key findings of this study.

a) State Park Visitation

Approximately 2 in 5 (43%) of Colorado residents over the age of 18 have visited at least one Colorado State Park during the past two years. While the current state park visitation incidence may not be altogether discouraging it does suggest a significant opportunity for increased market penetration. Indeed, there are over 2.2 million Coloradans over the age of 18 who have not visited a Colorado State Park in the past two years.

In addition to developing strategies for acquiring new visitors to the parks, Colorado State Parks needs to identify ways of increasing the number of visits among those who have visited in the past two years. Despite reporting a high level of satisfaction when visiting state parks, the majority of state park users only visit state parks on an infrequent basis. In fact, 50% of state park users have had fewer than 5 visits to Colorado state parks during the past 2 years, while only 25% have had more than 10. Given the frequency in which state park users participate in outdoor recreational activities (average of 8 times a month) there is a definite opportunity for increasing the state park visitation of current users. Most state park users continue to choose alternative destinations for participating in outdoor recreational activities

b) Profile of Current Users

Coloradans currently visiting state parks are most likely to be in their thirties or early forties, college educated, married with children, working full-time and higher earners (i.e., average gross household income of $46,000/year compared to $37,000 for non-users). For the most part, key acquisition prospects for Colorado State Parks (i.e., non-users with an expressed interest in visiting a state park in the next year) share the same demographic characteristics as current users. However, they tend to have lower annual household incomes than current users ($38,000 compared to $44,000) and are marginally more likely to be single (one quarter versus one fifth).

For most state park users, the primary motivation for visiting a state park is to spend time with family/friends, to participate in a particular recreational activity, and/or unwind and relax. The primary motivation for visiting does vary based on both the age of the visitor and frequency of visitation. Frequent visitors to the state parks (i.e., visiting more than 10 times every 24 months) are more likely to visit a state park to participate in a particular recreation activity while infrequent visitors (i.e., visiting less than 5 times every 24 months) tend to visit a state park to spend time with friends and family. Younger visitors (i.e., under 45 years old) are also more likely to visit in order to spend time with family/friends while the ability to unwind/relax and enjoy the scenery is a particular motivation for older visitors (i.e., over 54 years old).

c) Impressions of Colorado State Parks

The majority of Coloradans (both users and non-users) hold very favorable impressions of Colorado State Parks. In fact, more than 4 in 5 Coloradans (83%) indicate that they have somewhat favorable or very favorable impressions of Colorado State Parks. The perception that Coloradans have towards Colorado State Parks appears to be reinforced by direct experience. Indeed, current users of the parks and/or those who express a higher level of familiarity with Colorado State Parks tend to hold more favorable impressions. Colorado State Parks needs to convert these favorable impressions into actual visits, particularly among non-users where over three quarters (76%) have a positive impression of the parks, despite not having visited any in the past two years.

Users and non-users tend to associate very similar images with Colorado State Parks. In particular, both segments are most likely to describe the parks as having “outstanding scenery”, as being “a great place to enjoy the outdoors” and “a place to spend time with family and friends”. However, current users are also more likely to associate active images with the parks (i.e., specific recreational activities such as camping, fishing and hiking) as well as the parks’ easy access, while non-users tend to have more passive associations (i.e., mountains, beautiful scenery, forests and trees etc.). The passive associations that non-users hold towards the parks may be a manifestation of the current relevance that state parks currently have in the lives of this segment (i.e., no relationship to particular activities/experiences). Colorado State Parks needs to increase the relevance of state parks in the lives of non-users by promoting both the recreational and learning opportunities available through the parks.

d) Visitor Satisfaction

Overall, there is a very high level of satisfaction with the quality of experience provided by Colorado State Parks. More than 9 in 10 state park users (94%) describe the quality of experience on their last visit as either good or excellent. However, there is still significant room for improvement. Only 55% of state park users actually describe their last park experience as excellent. This is particularly important given that those visitors who describe their quality of experience as excellent are 72% more likely to have a strong intention of revisiting that park again in the next three months than those who only rate their experience as good. Increasing customer satisfaction can, therefore, drastically improve re-visitation.

There are a number of factors that contribute to a visitors’ overall satisfaction. In particular, most visitors define cleanliness, the scenery/surroundings, safety, and campgrounds as the features that are most important to them when visiting a Colorado state park. However, the key drivers of visitor satisfaction do vary by age group. Older visitors (i.e., over 54 years old) are more likely to attribute their overall satisfaction to park safety and the quality of facilities and equipment while younger visitors (i.e., under 35 years old) are more likely to consider the range of recreational activities and the quality trails as important aspects of their overall experience.

For the most part, park visitors expressed a high level of satisfaction with the various aspects/features of their state park experience. However, the research shows that there is still significant room for improvement. Those features that should be the focus of performance improvement include facilities/equipment, posted information and signage, trails and park programs. Only a modest number of park visitors indicated that they were "very satisfied" with the state park they visited on these four particular features. The research shows that those visitors who expressed a high level of satisfaction with these features were much more likely to revisit in the next three months as opposed to those who expressed only a modest level of satisfaction. Therefore, improving the performance of the parks on these features could be a critical step towards increasing visitation.

e) Visitor Spending

Most Coloradans feel they are getting very good value for money when visiting Colorado state parks. This includes the price of entrance (annual passes and daily entry fees) and camping fees.

On a typical visit to a state park, an average of $19.98 per vehicle will be spent inside the park and $65.71 within a 50-mile radius of the park. However, nearly half of all park visitors (48%) spend nothing above the price of entrance when visiting a state park. Those spending the most money within the park tend to be infrequent visitors who are visiting the park with children (the majority of this money is spent on food and beverages and camping facilities). Those spending the most money within a 50-mile radius of the park (on a trip linked to a state park visit) tend to be younger visitors (i.e., under 25 years old), or higher income earners (i.e., over $100,000 annual household income).

Those visitors who have purchased an annual pass during the last year tend to be married, middle aged, high earners and frequent visitors to the parks. However, 50% of annual pass holders have visited a state park no more than 4 times in the last year and only 30% have visited more than 10 times during this time frame.

Nearly one half (45%) of state park visitors who do <u>not</u> currently possess an annual state park pass indicate that they are very likely or somewhat likely to purchase one in the next 13 months. A large percentage of non-pass holders who express a likelihood of purchasing an annual pass in the next 13 months are under the age of 35 (50%), which is an age segment that is currently under-represented in the population of current pass holders. Colorado State Parks needs to capitalize on this opportunity to increase the number of annual state park pass holders.

f) Future Directions – Marketing

The research reveals significant opportunities for Colorado State Parks in terms of visitor acquisition, retention and extension (i.e., increasing the number of visits among current visitors). One quarter of non-users (26%) frequently consider visiting a state park when they are deciding how to spend their leisure time. Moreover, 70% of non-users indicate a likelihood of visiting a Colorado State Park in the next year (35% indicate that they would be "very likely" to visit) while more than 9 in 10 (94%) of current visitors indicate that they would likely re-visit in the same time frame. Non-users who express a strong likelihood of visiting a state park in the next year tend to be younger (i.e., under 44 years old), married with children and well educated (i.e., at least a college degree).

In order to identify key targets for visitor acquisition, retention and extension, the research includes a comprehensive segmentation of the marketplace. Current users were segmented according to their frequency of visitation (i.e., *frequent users, occasional users and infrequent users)* and non-users were segmented according to their likelihood of visiting a state park in the next 12 months (i.e., *interested non-users and disinterested non-users*). While *interested non-users* are the "hottest prospect" from the standpoint of future acquisition, *infrequent users* should be the future target of campaigns designed to increase visitation among current users.

Despite not having visited a state park in the past two years, *interested non-users* (40% of the entire adult population of Colorado) participate in an average of 8 outdoor leisure activities a month (this is only one less than current users). Therefore, the fact that *interested non-users* have not visited a state park in the last two years is not a lifestyle issue but rather a decision to choose alterative destinations in which to participate in outdoor recreation. Indeed, only 7% of *interested non-users* attribute their decision not to visit a state park to a general lack of interest in what the parks have to offer.

Both *interested non-users* and *infrequent users* attribute much of the decision not to visit state parks to the lack of available information/advertising about the parks. Many of these individuals consider state parks as providing only a "special occasion experience" which is "fun once in a while". Due to the lack of information about state parks, there is a general sense among both of these segments that Colorado state parks do not provide a diverse experience. Many indicated that a greater awareness of the range of recreational/learning opportunities available at Colorado state parks might encourage them to visit more often. In particular, *interested non-users* are likely to choose an outdoor leisure activity that leads to some form of self-fulfillment (i.e., experiencing and learning about new and different things) and an opportunity to meet new people. The majority of *interested non-users* consider "large parks with a wide range of recreational opportunities" as the best outdoor destination for satisfying this need (compared to current users who demonstrate a stronger preference for "wilderness areas with little to no development").

g) Future Directions – Investment Priorities

Both users and non-users indicated that they would likely visit Colorado state parks more often if certain changes were implemented. Smaller crowds, better quality facilities, more trail opportunities, and more advertising will likely result in the greatest capture of non-users. In fact, 3 in 5 non-users indicated that they would likely visit Colorado state parks in the future if they were better advertised.

Current users of the parks, particularly those visiting on an occasional basis (i.e., between 5 and 10 times in the last two years), would likely visit state parks more often if there were more backcountry parks with minimal development (particularly younger visitors) and/or if a greater range of recreational opportunities including more trails were introduced. While such proposals as swimming pools, cabins and/or yurts with plumbing and electricity and group picnic/group campsites are also likely to increase visitation (particularly among younger users), more aggressive development (e.g. golf courses, theme parks and/or lodges and conference centers) is more likely to decrease the number of visits in the future.

h) Future Directions – Funding

The majority of users and non-users (53% for both) are in support of increased state funding of parks while only 4% of Coloradans feel that there should be less or no state funding of parks. The support for increased state funding of parks is particularly marked amongst younger Coloradans (i.e., 62% of those under 35 years old support increase state funding).

Most Coloradans (67%) feel that the majority of this money should go towards improving existing parks rather creating new ones. More specifically, the majority of Coloradans feel that a lot more money should be spent on ensuring that the parks natural resources are preserved (67%), that the parks are kept clean (39%) and in the general upkeep and maintenance of the parks (37%).

There are some notable differences between users and non-users in how they feel state funding should be invested in Colorado state parks. Users are more likely to feel that there should be a lot more money invested in purchasing new land for the park (particularly frequent users) while non-users would like to see a lot more money spent on keeping the parks clean, informing the public about what state parks offer, and public safety.

Most state park users are prepared to pay for a portion of the bill for these improvements through an increase in the money they pay when visiting the parks. Indeed, the majority of current annual state park pass holders (79%) are prepared to pay up to $5 dollar more for an annual pass (frequent visitors are less price sensitive when it comes to an increase in the price of annual passes). Similarly, most daily fee visitors (72%) are prepared to accept a $1 increase in the price of a daily entrance fee without reducing their number of visits while most visitors (60%) are prepared to accept up to a $2 increase in campsite fees (older visitors are more price sensitive when it comes to campsite fees). Implementing small increases to these three costs will pay for some of the changes recommended by users and non-users. Communicating the park improvements alongside any increases will limit the risk of reduced visitation as a direct result of the increased costs.

2.2 Conclusions

Key Finding:

Colorado State Parks has the opportunity to expand its visitor base to allow for a greater percentage of Coloradan's enjoying the state parks. The research reveals a significant opportunity for increased market penetration, with 7 in 10 non-users indicating a likelihood of visiting a state park in the next year. The favorable impression that non-users possess regarding Colorado state parks provides a solid foundation for future visitor acquisition.

A lack of information about what the parks have to offer has proven to be a greater barrier to visitation than any perceived deficiency in the product itself. Indeed, only 38% of non-users recall seeing, hearing or reading any advertising for Colorado State Parks during the last three months. This is particularly significant given that 82% of non-users who recall Colorado State Parks' advertising express a likelihood of visiting a state park in the next year compared to only 62% of non-users who have no advertising recall. In addition, 3 in 5 non-users indicate they would be more likely to visit Colorado state parks if they were better advertised.

Recommendation 1:

In an effort to expand visitation within the population of Colorado, Colorado State Parks should target current non-users with an effective advertising campaign concentrating on the various benefits of the state park experience. In keeping with the priorities of this segment, future advertising should be designed to create a heightened awareness of the range of parks available as well as the recreational and learning opportunities offered at these parks. Most *interested non-users* are already frequent participants in outdoor recreational activities. Therefore, future marketing efforts should focus on projecting state parks as the preferable destination for outdoor recreation by promoting the most popular images of the state park experience including "a safe place to enjoy the outdoors", "a great place to relax", "a place to spend time with family and friends", and a "place to learn about the outdoors". This last image position is particularly relevant to *interested non-users* who are more likely to select an outdoor leisure destination that enables them to learn about and experience new things.

Key Finding:

The impression that most Coloradans have of Colorado State Parks is based on the limited knowledge and/or limited direct experience they have of the parks. Indeed, most Coloradans are only able to name 2 or 3 different state parks while most visitors have only visited one or two different parks in the last two years.

Recommendation 2:

Colorado State Parks needs to create a greater awareness and recognition of its full product range. Moreover, it needs to inspire Coloradans to visit a greater number of state parks.

In promoting its full product range to Coloradans, attempts should be made to develop the core values/images of the Colorado State Parks' brand (i.e., "outstanding scenery", "a safe way to enjoy the outdoors", and "a place to spend time with family and friends"). These brand values should be reinforced across all 40 state parks such that park visitors know that if they were to visit multiple parks they would, at the very least, be assured of the experience that each of these brand values provide. The research shows that each of these values are relevant to the majority of users and non-users in terms of their choice of outdoors destinations. Further efforts need to be made to demonstrate that they are also unique aspects of the state park experience and not guaranteed elsewhere.

Once these brand values have been established, the unique elements of the individual parks need to be communicated such that users and non-users are assured that they are presented with different opportunities at different locations. The research shows that many *infrequent users* limit their number of state park visits because they perceive the state parks as only a "special occasion experience" – something to do once in a while. Most of these users have only visited one or two parks in the last two years. While the brand values help to establish confidence in the product, promoting individual product characteristics will help to project the diversity of the entire offering. Additionally, this effort will allow for the expansion of the Colorado State Parks offering to a wider base of Coloradans

Key Finding:

Although state park users are typically satisfied with most aspects of the Colorado state park experience, there are opportunities to increase future visitation through specific park improvements. In particular, investing more money on creating better quality facilities and equipment, more trail opportunities and more backcountry parks will have the broadest appeal, while creating a greater range of recreational opportunities may inspire an increase in visitation among younger Coloradans. The majority of Coloradans (both users and non-users) would prefer to see increased investment in improving existing parks rather than creating new parks. Moreover, many of those who favor the purchasing of land for new parks appear unaware of the full range of parks that are currently available.

Recommendation 3:

Colorado State Parks needs to actively communicate the full range of its product offering to existing users and non-users. In so doing, state parks could be bundled or clustered together in terms of their common product characteristics. Coloradans need to be made aware of the park closest to their place of residence from each cluster. This is an important step in stimulating greater usage among both users and non-users. Additionally, Colorado State Parks needs to evaluate its current investment strategies against the findings of this report and ensure that future capital investments are aligned with consumer preferences.

Key Finding:

The majority of Coloradans feel that Colorado state parks are "a good thing for Colorado". As such, more than half of Coloradans feel that there should be an increase in state funding of parks and very few feel that there should actually be a reduction in the amount of state funding.

Recommendation 4:

In order to maintain public support for additional state park funding, Colorado State Parks should actively promote how this additional funding is being invested. Indeed, the research reveals that both users and non-users are very interested in how state parks are being developed and improved. Given that most Coloradans feel that a lot more money should be invested in preserving the parks natural resources, keeping the parks clean and upkeeping and maintaining park facilities and equipment, any additional funding in these areas should definitely be communicated back to the public.

While the population has an understanding of the funding sources for state parks, they are unaware of what resources are spent on investment versus operations. As initiatives are pursued to evaluate revenue enhancements, it is critical that the agency understands what consumers believe are the individual benefits versus societal benefits that are received from Colorado State Parks. This distinction will assist Colorado State Parks in understanding what activities should be funded from user fees versus appropriated state funds.

Communicating the range of opportunities and quality of experience available at the parks will help to establish Colorado State Parks as an optimal destination for Coloradan's participating in outdoor recreation opportunities. Similarly, communicating the fact that much of the money generated through the parks is used for the preservation of the park's natural resources and general upkeep of the park will assist visitors in understanding the role they play in preserving the state's natural resources. Ultimately, visitors will recognize that by visiting Colorado State Parks they are contributing to the state's long-term future.

3.0 Methodology

3.1 Overview

The research for this study was conducted in three phases. In Phase One of the study a number of focus groups were conducted with visitors and non-visitors of Colorado State Parks. Phase Two involved an Attitude and Perception Survey of 1,613 Colorado residents. In Phase Three, an on-site Visitor Assessment Survey involving 4,074 state park visitors was administered across 38 state parks in Colorado. Each phase of the research captured distinct and highly significant demographic, psychographic, attitudinal and behavioral information about our population(s) of interest. The report that follows compiles information collected across all three phases of the study.

3.2 Phase One: Qualitative Research

In Phase One of this study a total of 6 focus groups were conducted with visitors and non-visitors of Colorado State Parks (mixed gender). The groups were carried out between June 24th and June 26th, 2002 in Grand Junction, Denver and Pueblo. Within each location, one group was conducted with state park users and another with non-users. Participants for each group were recruited randomly on the basis of the following qualifying criteria:

1) ***State Park Users*** must be a minimum of 18 years old and must have visited at least <u>one</u> Colorado State Park in the past 24 months.
2) ***Non-users*** must be a minimum of 18 years old and have <u>not</u> visited any Colorado State Park in the past 24 months.

The focus groups were designed to fulfill a number of objectives. First, the groups served as an initial opportunity to test underlying hypotheses about the public's attitude and perception of Colorado State Parks. Secondly, the focus groups served as a basis for developing and refining the concepts to be tested during the quantitative phases of this study. The focus group discussions covered a number of key themes including preferred recreational activities, awareness and perceptions of Colorado State Parks and the programs/services offered, reasons for visiting/not visiting state parks, attitudes toward state park funding and pricing, and proposed future directions. The discussion guide used during the six groups can be found in ***Appendix A*** of this report.

3.3 Phase Two: Attitude and Perception Survey

Phase Two of the study involved an Attitude and Perception Survey of Colorado residents. A primary objective of this survey was to determine Coloradans' statewide priorities for outdoor recreation facilities. In addition, the survey was designed to assess awareness and perceptions of Colorado State Parks among users and non-users of the parks, evaluate reasons for visiting/not visiting state parks, determine attitudes towards Colorado State Parks' current funding structure and identify Coloradans' expectations and preferences in terms of state park facilities, services and programs. The questionnaire used for this survey can be found in ***Appendix B*** of this report. Average interviewing time for the survey was 24.8 minutes.

In support of these objectives, a total of 1,613 interviews were conducted by telephone between July 26th and August 15th, 2002. Survey respondents were recruited on the basis of a stratified random sample with quotas defined for region, gender and state park visitation. For the purpose of this study, the eight Colorado Local Government Planning regions have been grouped as four in the manner outlined below (see ***Appendix D*** for a breakdown of parks by region and by type).

a) **West =** Northwest and Southwest
b) **East =** Northeast and Southeast
c) **Front Range** = North Central and Central
d) **Mountain =** Northern Mountain and South Central

In order to provide a comprehensive analysis of attitudes and perceptions based on frequency of state park visitation, quotas were set for state park users and non-users. State park users were defined as Colorado residents who had visited at least one Colorado State Park in the past 24 months (a "visit" was defined as staying in the park for more than 2 hours, as opposed to transit through the park). Non-users were defined as Colorado residents who had not visited a Colorado State Park in the past 24 months.

The following table provides a detailed breakdown of the Attitude and Perception Survey's sample characteristics.

Table 3.3.1: Sample Characteristics

	Sample Size (N)	% of Total Sample
Total Sample	**1,613**	**100**
Male	746	46
Female	867	54
State Park User	901	56
Non – User	712	44
West	402	25
East	405	25
Front Range	400	25
Mountain	406	25
18 to 24 years old	136	8
25 to 34 years old	233	14
35 to 44 years old	389	24
45 to 54 years old	368	23
55 to 64 years old	276	17
65 years or older	211	13

While the survey sample was recruited randomly from within each defined strata, the sample sizes within each strata are not proportional to the actual population sizes within each strata. Therefore, the survey results have been statistically weighted to reflect actual population parameters reported in the most recent 2001 Colorado Census (i.e., based on population by region). The advantage of recruiting the sample disproportional to actual population parameters is that sample sizes in some of the smaller strata remain large enough to enable comparisons with larger strata. Weighting the final results by actual population data ensures that smaller strata do not have a disproportional influence over the results for the total sample and conversely that larger strata are not under-represented.

Based on a total sample size of 1,613 the sampling error for this survey is plus or minus 2.44% at the 95% confidence interval. In other words, the results obtained from our sample of 1,613 represent those of the entire population of Colorado within 2.44 percentage points, 19 times out of 20. The statistical significance of data obtained within specific strata is slightly less than that of the entire sample given the smaller sample sizes. However, for our primary strata (i.e., region, user/non-user) the sampling error remains within the acceptable realm of statistical tolerance (i.e., less than +/- 5%). The table below shows the sampling error for each of our defined strata.

Table 3.3.2: Sampling Error

	Sample Size (N)	Sampling Error (+/-)
Total	**1,613**	**2.44%**
State Park User	901	3.27%
Non – User	712	3.67%
West	402	4.89%
East	405	4.88%
Front Range	400	4.91%
Mountain	406	4.87%

The results of this survey are reported overall, by region and by state park user/non-user. Additional demographic group differences are reported where relevant.

3.4 Phase Three: Visitor Assessment Survey

In Phase Three of this study an on-site Visitor Assessment Survey was administered across 38[1] individual state parks resulting in a total sample size of 4,074 visitors. The survey was administered between July 8th and September 4th, 2002. In order to ensure that different visitor types were captured by the survey, quotas were established for the number of surveys to be distributed on weekdays versus weekends, and the survey lifecycle was divided into two waves of three weeks, with an equal number of surveys being distributed in each wave. A total of 1,000 surveys were distributed at each state park (500 per wave)[2]. Of the 38,999 surveys distributed across the 38 state parks a total of 8,253 completed surveys were returned resulting in a response rate of 21%. Quotas were then set for the number of surveys to be entered for each park. In cases where the number of returned surveys for a park exceeded the defined quota, the surveys to be included in the final analysis were randomly selected. The following table shows the number of surveys entered for each of the 38 state parks, overall and for each of the two waves.

[1] The survey was not administered at either Harvey Gap or Paonia

[2] An additional 333 surveys were distributed at the three largest state parks (i.e., Cherry Creek, Chatfield and Lake Pueblo)

Table 3.4.1: Sample Size by State Park

	Wave 1 (N)	Wave 2 (N)	Total Sample (N)
Total	**2,110**	**1,964**	**4,074**
Arkansas Headwaters	55	55	110
Barbour Ponds	58	55	113
Barr Lake	57	56	113
Bonny Lake	57	56	113
Boyd Lake	55	56	111
Castlewood Canyon	57	59	116
Chatfield	87	82	169
Cherry Creek	83	83	166
Colorado River	55	65	120
Crawford	7	37	44
Eldorado Canyon	72	40	112
Eleven Mile	59	55	114
Golden Gate Canyon	56	55	111
Highline Lake	55	58	113
Jackson Lake	44	34	78
John Martin Reservoir	55	55	110
Lathrop	78	33	111
Lory	57	58	115
Mancos	15	4	19
Mueller	57	55	112
Navajo	55	56	111
North Sterling	75	36	111
Pearl Lake	55	56	111
Pueblo	25	37	62
Ridgway	55	55	110
Rifle Falls	56	55	111
Rifle Gap	31	75	106
Roxborough	55	58	113
San Luis	55	56	111
Spinney Mountain	55	55	110
Stagecoach	57	55	112
State Forest	55	55	110
Steamboat Lake	55	56	111
Sweitzer Lake	45	41	86
Sylvan Lake	48	64	112
Trinidad Lake	56	55	111
Vega	63	47	110
Yampa River	95	1	96

Visitors to each state park were randomly selected to complete the survey. On arriving at the park, a random selection of visitors (no more than one per vehicle) was issued an envelope containing a survey questionnaire and a letter explaining the purpose of the survey. Participants were asked to complete the survey while on-site and to deposit the completed survey in one of several defined drop-off boxes within the park. In order to increase response rates, Colorado State Parks arranged a draw for prizes to take place once all surveys had been administered. All visitors returning a completed questionnaire automatically became eligible for this draw.

The purpose of the Visitor Assessment Survey was to gather critical visitation data pertaining to frequency of visits, usage of park facilities, services and programs; expectations and priorities of visitors, reasons for visiting, direct spending within the park, and perceptions of the overall quality of experience when visiting the park. In addition, the survey was designed to evaluate the potential impact of different pricing options on future visitation. The questionnaire used for this survey can be found in ***Appendix C*** of this report.

Based on a total sample size of 4,074 visitors the results of this survey are likely to occur 19 times out of 20 with a margin of error of +/- 1.53%. The results of this survey are reported overall, by region and at the individual park level. For analysis purposes, the parks have also been grouped according to three main categories: a) natural resource based; 2) water based; and 3) river based. The report will highlight differences across these three categories where relevant.

The results of the Visitor Assessment Survey have **not** been statistically weighted based on park visitation. The purpose of the survey was to highlight key variations across the individual parks irrespective of total visitation. Weighting the data on the basis of visitation would have allowed the aggregate results to have been dominated by data gathered from three or four parks with exceptionally high visitation counts. The un-weighted data enables a more effective comparison of the individual parks.

3.5 Analysis Format

The detailed findings of this study are presented in table format and are supported by summary text. Key findings are highlighted in red and appear prior to the corresponding data table. The analysis focuses on the results of the total sample as well as key group/segment differences by region, park type, # of visits and demographics. In most cases the tables are structured in descending order with the highest values (based on the total sample) at the top of the table. Important group/segment differences are highlighted, with red circles indicating a value that is significantly higher than average and blue squares indicating a group/segment value that has particularly negative implications for Colorado State Parks. The sample size upon which the results are based appears at the foot of each table along with the actual wording of the question presented to survey respondents.

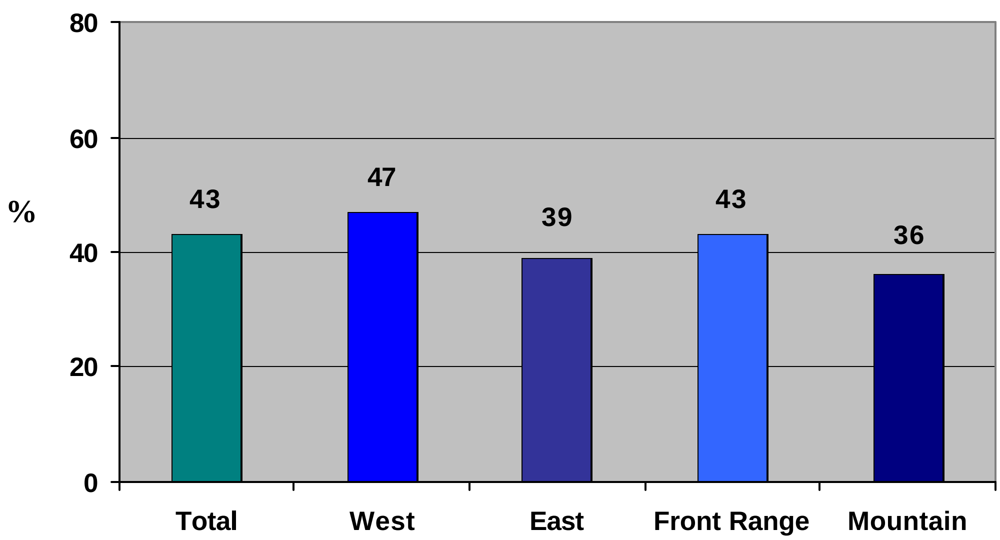
4.0 Detailed Findings

4.1 State Park Visitation

KEY FINDING:
Approximately 2 in 5 (43%) of Colorado residents over the age of 18 have visited at least one Colorado State Park during the past 24 months.

The incidence of State Park visitation varies significantly across the four regions. The highest percentage of Coloradans visiting a State Park in the past two years reside in the West (47%) with the lowest percentage residing in the Mountain region (36%). The greater concentration of state parks and population in the West and Front Range regions is almost certainly contributing to the higher incidence of state park visitation among residents of these two regions (see Table 4.1.1).

Figure 4.1.1: Incidence of State Park Visitation (Past 2 Years)



KEY FINDING:
Based on a statewide visitation incidence of 43%, there are approximately 1,905,293 Coloradans visiting at least one Colorado State Park every two years.

The average number of state park visits made by park users during the past two years is 10 or 5 per year (see Table 4.1.1). However, half of all state park users have visited a state park no more than 4 times during the past two years with a quarter visiting only once or twice. Park users residing in the Mountain region have the highest average number of state park visits over the past two years (18.4 visits) with Front Range users having the lowest (8.7 visits).

Across all users, the average number of days spent in Colorado State Parks over the past two years is 12. However, half of state park users have spent no more than 5 days in a state parks over the past 2 years and a quarter have spent no more than 2 days. Park users residing in the Mountain region have spent, on average, the most days visiting Colorado State Parks over the past two years (18.10 days) and users residing in the Front Range have spent the fewest days (10.7 days).

Table 4.1.1: Visitation Data for Past 2 Years by Region

	Total	West	East	Front Range	Mountain
Average # of visits	10	13.9	13.7	8.7	18.4
Average # of days spent in state parks	11.8	15.1	16.5	10.7	18.1

N=901

On average, younger Coloradans (i.e., 18-24) visit Colorado State Parks more often than any other age group. In terms of state park users, those between 18 and 24 have made an average of 13.9 separate visits to a Colorado State Park during the past two years (see Table 4.1.2). The average number of days spent in state parks by this youngest cohort during the past two years is 14.3 days. While older residents tend to make fewer separate visits to Colorado State Parks they are more inclined to visit a park over several days.

Table 4.1.2: Visitation Data for Past 2 Years by Age

	18-24	25-34	35-44	45-54	55-64	65 +
Average # of visits	13.9	8.5	9.0	10.3	11.6	6.9
Average # of days spent in state parks	14.3	12.2	10.5	13.7	13.6	9.0

N=901

Coloradans are more inclined to visit state parks that are located in closest proximity to their place of residence (see Section 4.6). Therefore, it is of no surprise that the vast majority of Coloradans limit their state park visits to just one park. Indeed, 63% of state park users have visited only one Colorado State Park during the past two years, 76% have visited no more than two state parks and 82% have visited no more than three.

Due to the higher concentration of state parks in the West, those residing within the region tend to visit a greater number of state parks. Two in five park users residing in the West (43%) have visited more than one state park in the past two years, while 15% have visited three state parks and 7% have visited four. State park users residing in the East tend to a fewer number of parks than any other region (i.e., 69% have visited only one state park in the past 2 years)

Table 4.1.3: Number of State Parks Visited During Past 2 Years by Region

	Total %	West %	East %	Front Range %	Mountain %
1 State Park	63	57	69	62	67
2 State Parks	13	15	11	13	10
3 State Parks	6	7	4	6	6
4 State Parks	3	2	2	3	4
5 State Parks	3	1	2	2	3
More than 5 State Parks	12	18	12	14	10

N=901

KEY FINDING:

State parks with the highest overall visitation tend to draw visitors from at least two to three different regions.

Across all 40 Colorado State Parks, Chatfield (17%), Cherry Creek (15%), Eleven Mile (10%), Golden Gate Canyon (10%) and Pueblo (7%) have attracted the highest percentage of state park users. With the exception of Golden Gate Canyon, which is a resource-based park, all of these parks are water-based. While the majority of visitors to these parks reside in the region in which the park is based, they have also succeeded in attracting visitors from all across the state. Table 4.1.4 shows the percentage of state park users visiting each of Colorado's 40 state parks during the past two years overall and by region.

Table 4.1.4: Parks Visited by State Park Users (Past 2 Years)[3]

	Total %	West %	East %	Front Range %	Mountain %
Arkansas Headwaters	2	0	1	2	8
Barbour Ponds	3	0	1	3	0
Barr Lake	5	0	1	6	2
Bonny Lake	4	0	10	4	2
Boyd Lake	5	0	0	7	2
Castlewood Canyon	6	0	0	7	1
Chatfield	17	2	3	20	5
Cherry Creek	15	3	3	17	6
Colorado River	5	22	2	3	6
Crawford	1	9	1	1	1
Eldorado Canyon	3	0	0	4	2
Eleven Mile	10	1	8	8	10
Golden Gate Canyon	10	0	2	12	3
Harvey Gap	1	4	0	0	1
Highline Lake	2	14	1	1	2
Jackson Lake	4	1	5	5	0
John Martin Reservoir	2	0	16	1	3
Lathrop	3	1	9	2	4
Lory	4	0	0	5	1
Mancos	1	3	1	0	0
Mueller	5	1	3	5	2
Navajo	1	8	0	1	3
North Sterling	1	0	11	1	0
Paonia	1	3	0	1	1
Pearl Lake	1	0	2	1	4
Pueblo	7	2	33	5	14
Ridgway	3	27	0	1	1
Rifle Falls	3	7	0	1	3
Rifle Gap	3	14	0	2	3
Roxborough	4	0	0	5	2
San Luis	2	2	2	2	7
Spinney Mountain	2	0	1	2	2
Stagecoach	2	0	0	1	10
State Forest	2	0	1	2	1
Steamboat Lake	2	3	2	3	15
Sweitzer Lake	1	3	0	0	1
Sylvan Lake	2	1	1	1	6
Trinidad Lake	2	0	9	2	2
Vega	1	10	1	0	2
Yampa River	1	3	0	1	3

N= 901

[3] The results in this table show the percentage of state park users visiting each of the 38 different state parks. This is a multiple response variable and therefore the percentages will exceed 100%.

KEY FINDING:
State Park users are most likely to be in their thirties or early forties, well educated, married, working full-time and Caucasian.

There are a number of distinct demographic characteristics that are common among state park users (see Table 4.1.5). Overall, state park users tend to be younger than non-users (i.e., 59% are under the age of 45 compared to 48% of non-users). State park users are also more likely to be college educated (54% have obtained at least one college degree), Caucasian (89%), married or living with partner (71% versus 59% of non-users), working full-time (60% versus 46% of non-users) and have at least one child under the age of 18 living with them (46% compared to 35% for non-users). State park users tend to have higher gross annual household incomes than non-users (i.e., average household income of $46,000 compared to $37,000 for non-users).

Table 4.1.5 Demographic Profiles of Park Users and Non-Users

	Users	Non-Users
Gender		
Male	47	46
Female	53	54
Age		
18 to 24 years old	9	11
25 to 34 years old	18	16
35 to 44 years old	32	21
45 to 54 years old	21	20
55 to 64 years old	14	16
65 years and over	6	16
Education		
Less than high school	2	5
High school	19	28
Some college	24	29
College graduate	32	25
Post graduate	22	13
Ethnicity		
White/Caucasian	89	79
Black/African American	2	4
Hispanic American	5	9
Asian	1	2
Other	3	6
Marital Status		
Single	18	22
Married/Living with Partner	71	59
Divorced/Widowed	11	18
Children under 18		
Yes	46	35
No	54	65
Employment		
Working full-time	60	46
Working part-time	8	8
Self-employed/consultant	12	14
Unemployed	4	3
Retired	8	19
Disabled	2	3
Other	6	7
Gross Annual Household Income (Average)	$46,000	$37,000

N=1,613

4.2 Familiarity with Colorado State Parks

KEY FINDING:
The majority of Coloradans (69%) feel they have a reasonable to high level of familiarity with Colorado State Parks.

Interestingly, despite not visiting any state park during the past two years, nearly three in five non-users (57%) feel that they have a moderate to high level of familiarity with Colorado State Parks. This compares to 78% of park users (see Table 4.2.1). Although familiarity levels are relatively consistent across the four regions, Coloradans residing in the West appear to have a marginally higher level of familiarity.

Table 4.2.1: Familiarity with Colorado State Parks

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Very familiar	16	20	12	22	20	15	17
Somewhat familiar	53	59	45	49	48	53	53
Not very familiar	26	20	34	23	24	27	26
Not at all familiar	5	2	9	6	8	5	4

N=1,608

Despite claiming a reasonable level of familiarity with Colorado State Parks, very few Coloradans are able to identify the correct number of state owned parks in Colorado. Indeed, only 3% of Coloradans are aware that there are 40 state parks in Colorado. With estimates ranging from 1 to over 100, the average state park user estimates that there are 35 state owned parks in Colorado compared to the average non-user who guessed 28.

KEY FINDING:
Not surprisingly, in terms of unaided awareness, Coloradans are more likely to identify state parks with the highest visitation counts and/or are located within close proximity to their place of residence.

Cherry Creek (17%), Chatfield (15%) and Golden Gate Canyon (9%) have the highest top of mind awareness among residents of Colorado. However, awareness of these parks is heavily concentrated in the Front Range region and, therefore, among those Coloradans living in closest proximity to the parks in question. Similarly, Ridgway (22%) and Colorado River (19%) are more likely to be identified by Coloradans living in the West, Pueblo (23%) and John Martin Reservoir (16%) are the state parks most frequently identified by residents of the Eastern region and Pueblo (12%) and Steamboat Lake (10%) have the highest recall among those Coloradans residing in the Mountain region of Colorado.

Pueblo's geographical positioning, on the border between the Eastern and Mountain regions of Colorado, has resulted in a relatively high level of awareness for the park in both of these regions. Cherry Creek and Chatfield are the only two state owned parks that have generated a relatively high level of public awareness across all regions of Colorado.

Table 4.2.2: Top of Mind Awareness in Colorado State Parks (% Mentioning Park)

	Total %	West %	East %	Front Range %	Mountain %
Arkansas Headwaters	2	1	1	2	6
Barbour Ponds	3	1	0	4	1
Barr Lake	6	2	1	7	2
Bonny Lake	4	1	10	5	2
Boyd Lake	6	1	2	7	2
Castlewood Canyon	4	0	1	5	1
Chatfield	15	3	4	18	6
Cherry Creek	17	4	6	20	8
Colorado River	3	19	1	2	4
Crawford	1	9	0	1	0
Eldorado Canyon	3	1	0	3	1
Eleven Mile	7	1	10	6	8
Golden Gate Canyon	9	2	1	11	3
Harvey Gap	1	5	0	1	1
Highline Lake	2	12	0	1	2
Jackson Lake	4	2	6	4	1
John Martin Reservoir	3	1	16	3	2
Lathrop	3	0	10	2	4
Lory	4	1	0	5	1
Mancos	1	3	0	1	1
Mueller	5	1	2	6	3
Navajo	1	6	1	1	2
North Sterling	1	0	7	1	1
Paonia	1	3	0	1	1
Pearl Lake	2	2	1	2	4
Pueblo	7	2	23	5	12
Ridgway	3	22	0	1	2
Rifle Falls	2	7	1	1	3
Rifle Gap	3	12	1	3	3
Roxborough	6	1	1	7	2
San Luis	1	1	1	7	2
Spinney Mountain	2	0	1	2	3
Stagecoach	2	1	1	2	7
State Forest	1	0	0	1	0
Steamboat Lake	4	4	1	4	10
Sweitzer Lake	1	3	0	0	1
Sylvan Lake	1	1	1	1	5
Trinidad Lake	2	1	9	2	2
Vega	1	11	0	0	2
Yampa River	1	4	1	1	2

N= 1,610

4.3 Impressions of Colorado State Parks

KEY FINDING:
More than 4 in 5 Coloradans (83%) claim to have a favorable impression of Colorado State Parks.

The impression of most Coloradans toward Colorado State Parks is very positive. Indeed, both users (89%) and non-users (76%) describe their overall impressions of Colorado State Parks as either favorable or very favorable. While these positive impressions appear the norm irrespective of region, they are marginally more prominent among residents of the Front Range and Mountain regions (see Table 4.3.1). Younger Coloradans (i.e., 18 to 24) are also more likely to hold favorable impressions of Colorado State Parks (88% compared to an average of 82% across all other age groups).

Table 4.3.1: Impressions of Colorado State Parks by Visitation and Region

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Very favorable	50	53	47	46	49	50	50
Somewhat favorable	33	36	29	31	29	33	31
Neutral	14	7	22	20	17	14	16
Some what unfavorable	2	2	3	1	5	3	2
Very unfavorable	1	1	0	2	1	1	1

N=1,602

KEY FINDING:
The more familiar Coloradans are of Colorado State Parks the more favorable they seem to be of the parks in general.

Coloradans who express a high level of familiarity with Colorado State Parks are much more likely to possess favorable opinions of the parks. Nearly 6 in 10 Coloradans (58%) who claim to be very familiar with Colorado State Parks describe their impressions of the state parks as very favorable and another 33% describe their impressions as favorable. On the other hand, over half of Coloradans (54%) who have a low level of familiarity with Colorado State Parks describe their impression of the parks as only neutral. Therefore, increasing familiarity with Colorado State Parks either through trial (i.e., usage) or increased advertising may be a critical step toward improving the impressions that some Coloradans have of the parks.

Table 4.3.2: Impressions of Colorado State Parks by Familiarity (Total)

	Very familiar %	Somewhat familiar %	Not very familiar %	Not at all familiar %
Very favorable	58	58	39	18
Somewhat unfavorable	33	28	39	26
Neutral	7	8	22	54
Somewhat unfavorable	2	4	1	1
Very unfavorable	1	2	0	0

N= 1,602

KEY FINDING:
Both users and non-users hold very similar perceptions of Colorado State Parks.

When asked to reveal what first comes to mind when hearing the name "Colorado State Parks" most users and non-users of the parks mentioned camping (15%), mountains (12%), beautiful scenery (9%), forests/trees (9%), fishing (8%), lakes/water (7%), recreation (7%) and open spaces (6%). These "top of mind" responses reflect consumer's individual thoughts on the Colorado State Park system. The similarities between users and non-users in terms of their perception of Colorado State Parks suggests that the public's overall impression of the parks typically lives up to the actual experience of visiting. The greater tendency of users to associate Colorado State Parks with specific recreational activities (i.e., camping, fishing, hiking, boating) is a reflection of their active experiences when visiting. By contrast, non-users are more likely to associate passive images with Colorado State Parks (i.e., mountains, beautiful scenery, forests/trees).

The public's perception of Colorado State Parks does vary marginally by region. Residents of the West and East regions are more likely to associate Colorado State Parks with lakes/water (10%). On the other hand, Eastern residents are also more likely than average to perceive Colorado State Parks in terms of mountains (15%) and fishing (13%). See Table 4.3.3.

Table 4.3.3: "Top of Mind" Impressions of Colorado State Parks (Top 2 Mentions)

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Camping	15	17	12	13	12	15	16
Mountains	12	10	15	9	15	13	7
Beautiful Scenery	9	10	9	9	8	9	8
Forests/trees	9	6	12	5	7	9	9
Fishing	8	10	6	10	13	7	10
Lakes/water	7	9	5	10	10	6	6
Recreation	7	7	7	8	9	6	9
Open spaces	6	6	6	1	4	7	6
Wildlife	4	3	6	4	4	4	6
Hiking	4	6	3	3	2	4	5
Park fees	4	4	4	5	4	4	5
Nature	3	4	1	2	1	3	2
Rest and relaxation	3	3	3	2	4	3	1

N=1,577

KEY FINDING:
A quarter of Colorado residents consider accessibility and/or beautiful scenery to be the most attractive features of Colorado State Parks.

Coloradoans were asked what they liked most about Colorado State Parks and their "top of mind" responses were recorded. Cleanliness (10%) and the variety of recreational activities available are considered to be some of Colorado State Parks' most appealing qualities by large numbers of Coloradans (see Table 4.3.4). Interestingly, while park users are much more likely to identify the parks' easy access as their most preferred feature (28% versus 21% of non-users), non-users are more likely to mention the overall beauty/splendour of the parks (32% versus 18% of users). While there is little regional variation in terms of the park features considered most attractive by Coloradans, residents of Front Range are markedly more likely to mention accessibility as the most alluring characteristic of Colorado State Parks (26% versus an average of 22% across the other three regions).

For the most part, Coloradans have a more difficult time identifying features that they dislike the most about Colorado State Parks. However, over one quarter identified the crowdedness of the parks as the feature they disliked the most while a large number of others mentioned the size of the entrance fees (13%) or lack of maintenance/unkept (8%). Entrance fees are a particular problem for park users (16% versus 9% of non-users) while non-users are more likely perceive a problem with the overall maintenance of the parks (11% versus 6% of users).

Table 4.3.4: Features Liked the Most and Least About Colorado State Parks

5 Features Liked the Most	User %	Non-User %	5 Features Liked the Least	User %	Non-User %
Easy access	28	21	Too crowded	26	26
Beautiful scenery	18	32	Entrance fees/too expensive	16	9
Cleanliness	9	10	Not maintained/unkept	6	11
Variety of recreation	3	5	Poor washroom facilities	6	3
Wide selection of parks	6	1	Lack of information/ advertising	4	4
Preservation/natural state	2	4	Too many rules/regulations	3	3

N=1,444

Perceived crowdedness within the parks appears to be a much larger problem for those residing in Front Range than in any other region of the state. Indeed, 28% of those residing in Front Range identified crowdedness as the feature of the parks they dislike the most compared with 22% in the Mountain, 19% in the West and 16% in the East. On the other hand, entrance fees are much more likely to be cited as a problem by those living in the West (21% compared to 15% across the other three regions).

KEY FINDING:

Despite similar perceptions of Colorado State Parks, users are more likely to consider the parks as a "good place to enjoy the outdoors" while non-users are more critical of the lack of available information about the parks as well as the perceived crowdedness.

In order to gauge the images that Coloradans associate with Colorado State Parks, survey respondents were given, "aided images" to indicate their level of agreement/disagreement with a number of statements applied to the parks (see Table 43.4). Overall, Coloradans hold very positive images of Colorado State Parks in terms of both scenery and as an outdoor recreation destination. Specifically, residents of Colorado are most likely to describe Colorado State Parks as having "outstanding scenery" (83%), and as being "a great place to enjoy the outdoors" (80%), "a place to spend time with the family" (78%), "a safe way to enjoy the outdoors" (73%) and "a great place to relax" (73%).

Both users and non-users expressed very positive attitudes toward Colorado State Parks as identified through their "aided images". The tendency of park users to agree more strongly with statements concerning the perceived direct benefits of Colorado State Parks (i.e., "a great place to spend time with family", "a safe place to enjoy the outdoors", and "a great range of recreational opportunities") is a reflection of the greater relevance that Colorado State Parks has in the lives of this segment. Non-users seem to share the same positive associations with Colorado State Parks (i.e., in terms of natural beauty and wildlife) but do not perceive the same personal benefits from the standpoint of outdoor recreational opportunities. While part of this disparity may be due to lifestyle differences between users and non-users, there may also be a disconnection between perception and reality. Indeed, nearly two in five non-users (38%) feel that there is not enough available information on Colorado State Parks. Moreover, one in five (21%) consider the state parks to be too expensive.

There are a number of interesting regional differences in terms of the way in which Coloradans perceive Colorado State Parks. Residents of the West and East regions are more likely than the other two regions to perceive the parks in terms of the personal benefits they provide (i.e., "a great place to spend time with family", and "one of the best aspects of living in Colorado". Coloradans living in the East region also perceive Colorado State Parks as a great form of escape (i.e., "a back country solitude", "a great place to relax", and "outstanding fishing"). On the other hand, residents of the Mountain region are more likely than other Coloradans to perceive the state parks as being overcrowded (38% versus an average of 31% across the other three regions).

Table 4.3.5: "Aided Image" Associations with Colorado State Parks (Top 2 Boxes)[4]

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Outstanding scenery	83	82	85	81	85	83	88
Great way to enjoy the outdoors	80	82	77	80	84	79	80
Great place to spend time with family	78	82	72	82	84	77	83
Safe way to enjoy the outdoors	73	80	64	72	73	73	73
A great place to relax	73	73	72	74	80	72	73
A place to learn about the outdoors	61	59	64	63	65	60	62
Something for everyone	58	60	56	59	62	58	57
One of the best aspects of living in Colorado	58	58	57	60	68	57	57
A great range of recreational opportunities	55	59	51	55	56	55	56
Back country solitude	48	45	51	47	55	47	43
Outstanding fishing	36	35	37	38	46	34	43
Not enough information about parks	31	25	$\boxed{38}$	30	30	31	32
Too crowded	30	29	33	32	33	30	38
Different every time I visit	25	23	27	29	31	24	27
RV haven	25	24	27	42	38	23	29
Too expensive	18	16	21	25	27	16	21

N=1,613

[4] The bold line within the table symbolizes the average "aided image" association with Colorado State Parks

KEY FINDING:

Coloradans appear to have fairly similar perceptions of Colorado State Parks irrespective of age as indicated by their "aided images" associations.

The perceived natural beauty and personal benefits provided by Colorado State Parks are recognized and appreciated by Coloradans of all age groups. However, younger residents (i.e., 18 to 34) are more likely to perceive Colorado State Parks as a "great way to enjoy the outdoors" (86% versus 77% across all other age groups). The appeal of the state parks to younger residents appears to be rooted in the "great range of recreational opportunities" which they feel provide "something for everyone". Older Coloradans (i.e., over 65) are more likely to perceive Colorado State Parks as "being different every time they visit", and as a "back country solitude". However, they are more likely to consider the parks as expensive and are less likely to perceive the parks as safe.

Table 4.3.6: "Aided Image" Associations with Colorado State Parks by Age[5] (Top 2 Boxes)

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 years + %
Outstanding scenery	81	87	85	79	84	83
Great way to enjoy the outdoors	84	88	83	74	73	76
Great place to spend time with family	82	76	82	72	78	77
Safe way to enjoy the outdoors	74	72	72	76	81	62
A great place to relax	82	75	75	66	71	74
A place to learn about the outdoors	58	60	64	57	60	64
Something for everyone	72	67	53	47	60	64
One of the best aspects of living in Colorado	57	60	59	54	57	60
A great range of recreational opportunities	59	60	54	58	49	51
Back country solitude	48	52	52	38	43	55
Outstanding fishing	42	38	37	27	42	31
Not enough information about parks	30	$\boxed{39}$	22	31	32	$\boxed{38}$
Too crowded	20	24	34	35	33	29
Different every time I visit	27	17	27	18	31	37
RV haven	25	32	21	22	25	36
Too expensive	9	18	17	20	19	24

N=1,613

[5] The bold line within the table symbolizes the average "aided image" association with Colorado State Parks

KEY FINDING:

Only 39% of Colorado residents can recall seeing, hearing or reading advertisements for Colorado State Parks during the past 3 months.

Users (40%) and non-users (38%) have very similar levels of advertising recall for Colorado State Parks (see Table 4.3.6). Similarly, there is very little regional variation in terms of advertising recall. However, Coloradans residing in the Eastern region (44%) and in the West (42%) have a greater awareness for Colorado State Parks' advertising than those residing in other areas of the state (i.e., 39% in Front Range and 38% in Mountain).

Table 4.3.7: Advertising Recall for Colorado State Parks (Last 3 Months)

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Recall seeing advertising	39	40	38	42	44	39	38
Do not recall seeing any advertising	61	$\boxed{60}$	$\boxed{62}$	58	56	$\boxed{61}$	$\boxed{62}$

N=1,613

KEY FINDING:

Non-users who recall advertising for Colorado State Parks during the last three months are much more likely to intend visiting a state park in the next year.

Colorado State Parks appears to be missing a critical opportunity to deliver strong, effective advertising to target customers. Although low advertising recall for Colorado State Parks does not translate into low familiarity for the parks in general, it does suggest that Colorado State Parks may be failing in its attempt to deliver clear messages on specific products and services (i.e., either the message is not getting through or it is failing to have a lasting impact on its intended target). This is reinforced by the fact that non-users who recall seeing, hearing or reading advertising for Colorado State Parks during the past three months are much more likely to intend visiting a Colorado state park in the next year (82%) than those who have no advertising recall (62%). Among current users, the intention to re-visit state parks is much less likely to be influenced by advertising recall.

Table 4.3.8: Likelihood of Visiting A State Park by Advertising Recall (Non-Users)

	Recall Advertising %	Do Not Recall Advertising %
Very likely	35	35
Somewhat likely	47	27
Not very likely	11	24
Not at all likely	8	13

N=707

KEY FINDING:

Television is the most frequently recalled source of advertising (66%) by those Coloradans claiming to have seen, heard or read advertising for Colorado State Parks within the past 3 months.

Across all four regions television advertising has a significantly higher recall level than any other advertising medium (see Table 4.3.9). Newspapers rank second behind television in every region except the West where the radio has proved to be a much more effective source of advertising. The radio and magazines have also proved to be more effective in reaching park users, while non-users are more likely to recall adverting for Colorado State Parks that has been delivered through television and/or newspapers. Survey respondents may have interpreted this question to include any information received regarding Colorado State Parks, which could include news reports or articles.

Table 4.3.9: Source of Advertising Recall (Last 3 Months)

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Television	66	63	71	64	65	67	55
Newspapers	27	24	30	18	34	27	27
Radio	22	24	19	37	27	21	27
Brochures	17	17	17	19	17	16	21
Magazines	9	12	6	10	14	8	17
Billboards	7	7	6	6	8	7	7
Internet	5	7	1	3	3	5	8
Through the Lottery	2	2	1	1	1	2	3
Word of Mouth	1	0	3	0	1	1	1
Visitor Centers	1	2	0	1	2	1	1
Other	3	3	2				

N=649

4.4 Reasons for Visiting/Not Visiting Colorado State Parks

KEY FINDING:

Despite not having visited a Colorado State Park in the past two years, over one quarter of non-users (26%) frequently consider visiting a state park when deciding how to spend their leisure time.

An additional 35% of non-users claim that they occasionally consider visiting a Colorado State Park when deciding what to do in their spare time, which means that Colorado State Parks are considered a realistic recreational option for at least 3 in 5 non-users (see Table 4.4.1). By way of contrast, 42% of users claim that they always or often consider Colorado State Parks when planning their leisure time while an additional 43% occasionally consider visiting the parks.

The frequency in which Coloradans consider Colorado State Parks when planning their leisure time suggests a significant opportunity for increased market penetration. In particular, the high level of consideration for Colorado State Parks among non-users presents a strong foundation for future acquisition efforts. Colorado State Parks needs to concentrate on the key drivers of recreational choice for this segment and develop a solid understanding of the alternative activities that this segment is currently participating on. In so doing, Colorado State Parks will be in a position to identify "hot prospects" from an acquisition standpoint and determine the optimal method for capture – whether it be product, service, message or a combination of the three.

Table 4.4.1: Consideration of State Parks When Deciding Leisure Time

	Total %	User %	Non-User %
Always	5	6	3
Often	30	36	23
Occasionally	40	43	35
Rarely	22	14	31
Never	4	1	7

N=1,606

Consideration for Colorado State Parks, among both users and non-users, is relatively consistent across all four regions. Those living in the West are slightly more likely than average to consider Colorado State Parks when planning their leisure time while residents of Front Range consider visiting the parks least often (see Table 4.4.2). For the most part, consideration of Colorado State Parks is consistent across all age groups. However, older Coloradans (i.e., 65 years and over) consider visiting the parks much less often than the rest of the population. Indeed, only 1 in 5 Coloradans over the age of 65 consider the state parks always or often when deciding how to spend their leisure time.

Table 4.4.2: Consideration of State Parks When Deciding Leisure Time (Region)

	West %	East %	Front Range %	Mountain %
Always	7	8	4	6
Often	30	32	30	31
Occasionally	33	35	41	39
Rarely	20	17	22	20
Never	10	7	3	4

N=1,606 Q

KEY FINDING:

When planning previous visits to Colorado State Parks, the majority of visitors have either reported calling the park direct before hand (61%), consulted a guidebook or brochure (49%) and/or visited the Colorado State Park's official website (39%).

State Park visitors living in Front Range are more likely than other Coloradans to consult the Colorado State Park website (43%) and/or refer to guidebooks or brochures when planning a visit to a state park. Those residing in the Mountain region of Colorado are more likely to contact the Chamber of Commerce when planning a state park visit (26%) while residents of the Eastern region have a greater tendency to consult magazines/newspapers and/or the radio before finalizing their state park visit.

Table 4.4.3: Information Sources Consulted When Planning State Park Visit

	Total %	West %	East %	Front Range %	Mountain %
Call park direct	61	58	58	62	62
Guidebook or brochure	49	35	43	51	47
Colorado State Park website	39	21	27	43	30
Magazines or newspapers	25	23	31	25	29
Chamber of Commerce	20	20	23	18	26
Other website	14	8	10	15	13
Television	11	17	18	10	14
Radio	7	11	16	6	12
Tour Operator	3	4	2	3	5
Travel Agent	1	1	1	1	1

N=901

KEY FINDING:

When planning a recreation trip to a public land in Colorado, non-users of state parks are most inclined to consult guidebooks/brochures (58%), magazines/newspapers (46%) and/or the Internet (42%).

Non-users are very similar to state park users in terms of the information sources they typically consult when planning a recreation trip to a public land (see Table 4.4.4). While guidebooks/brochures and magazines/newspapers have universal appeal across all age groups, younger residents (i.e., 18 to 34) are also likely to consult the Internet (46%), television (31%) and/or the radio (28%) when planning a recreation trip to a public land. On the other hand, older Coloradans (i.e., 45 and over) are more likely to use the Chamber of Commerce (28%).

From a regional standpoint, those Coloradans living in Front Range are more likely than other Coloradans to use the Internet when planning a recreation trip to a public land (46% versus an average of 28% across the other three regions). Residents of the Eastern region are more likely to draw information from television (35%) and/or the radio (22%) while more than a quarter of those living in the West do not use any information sources at all when planning a visit to public land in Colorado.

Table 4.4.4: Information Sources Consulted When Planning Visit to Public Lands

	Total %	West %	East %	Front Range %	Mountain %
Guidebooks or brochures	58	55	50	59	57
Magazines or newspapers	46	38	46	47	42
Internet	42	25	26	46	33
Television	28	20	35	28	23
Chamber of Commerce	27	29	23	27	26
Radio	17	14	22	17	19
Travel agents	5	6	6	5	4
Word of mouth	5	2	8	5	7
Local tour operators	4	6	6	3	7
Maps	1	3	0	0	1
Park/Forest Service	1	1	1	1	2
Other	1	1	2	1	1
None of the above	12	28	21	10	19

N=712

Primary Reasons for Visiting Colorado State Parks (Users)

KEY FINDING:
The majority of Coloradans primarily visit Colorado State Parks in order to spend time with family/friends and/or to participate in a particular recreational activity.

For one in three park users (30%), the primary reason for visiting Colorado State Parks is to spend time with family/friends, while just less than a quarter (23%) of park users visit the parks mainly to participate in a particular recreational activity (see Table 4.4.5). While geography remains a key determinant of park selection (see Section 4.5) a person's choice of park is also influenced by the personal benefits being sought after. Coloradans visiting river or water-based parks are more likely to do so in order to unwind (20%) or to participate in a recreational activity (25%) while visitors to resource-based parks are more likely to be motivated by the scenery (10%) and/or ability to be close to nature (10%).

Table 4.4.5: Primary Reason(s) for Visiting Colorado State Parks by Type of Park

	Total %	River-based %	Water-based %	Resource-based %
Spend time with family/friends	30	26	31	30
Participate in a particular recreational activity	23	24	25	18
To unwind/relax	18	22	18	15
To view the scenery	7	4	6	10
To get away from the usual demands of life	6	6	8	6
To be close to nature	6	6	4	10
To do something different	4	7	4	2
To stay fit/exercise	3	1	2	7
To spend time alone/away from crowds of people	2	3	2	3
To blow off steam	1	1	1	1

N=3,447

While spending time with family/friends is the primary motivation for visiting Colorado State Parks across all age groups (see Table 4.4.6), Coloradans between the ages of 25 and 34 are also motivated by the recreational opportunities provided by the parks (26%). On the other hand, older Coloradans (i.e., 54 and over) are more likely than other Coloradans to visit the parks for their natural beauty (11%) and the ability to be closer to nature (9%). The primary motivations for visiting state parks is relatively consistent across all four regions. However, those living in the Mountain region are more likely to visit for specific recreational activities (28% versus 21% across the other three regions).

Table 4.4.6: Primary Reason(s) for Visiting Colorado State Parks by Age

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Spend time with family/friends	33	35	34	29	23	26
Participate in a particular recreational activity	19	26	22	24	22	19
To unwind/relax	18	16	17	18	20	17
To view the scenery	8	5	6	5	10	12
To get away from the usual demands of life	6	4	7	7	9	8
To be close to nature	3	5	6	6	8	9
To do something different	5	4	4	5	3	4
To stay fit/exercise	3	4	3	3	3	1
To spend time alone/away from crowds of people	4	1	2	3	3	4
To blow off steam	2	0	0	0	0	0

N=3,447

KEY FINDING:

For frequent visitors to state parks, the primary motivation for visiting as often as they do is to participate in a favorite recreational activity and/or to stay fit.

There is an interesting disparity in the visitation motivations of those who visit Colorado state parks on a frequent basis (i.e., more than 12 times a year), from those who visit on an occasional basis (i.e., 4 to 12 times a year) and those who visit infrequently (i.e., fewer than 4 times a year). Frequent visitors are much more likely to visit the parks in order to participate in a favorite recreational activity (particularly fishing, hiking, camping and boating) and to stay fit. Infrequent visitors are more likely to be lured to a state park as an opportunity to spend time with family, to view the scenery, to do something different and/or to escape the everyday demands of life.

Table 4.4.7: Primary Reason(s) for Visiting Colorado State Parks by # of visits

	1 to 3 visits/year %	4 to 8 visits/year %	9 to 12 visits/year %	More than 12 visits/year %
Spend time with family/friends	34	29	24	18
Participate in a particular recreational activity	18	29	34	38
To unwind/relax	18	19	18	15
To view the scenery	7	3	3	4
To get away from the usual demands of life	8	7	7	3
To be close to nature	6	3	4	6
To do something different	4	3	2	2
To stay fit/exercise	2	3	6	10
To spend time alone/away from crowds of people	2	3	1	4
To blow off steam	0	0	1	1

N=3,447

Primary Reasons for *Not* Visiting Colorado State Parks (Non-Users)

KEY FINDING:

Very few non-users are beyond capture for Colorado State Parks. Indeed, only 12% of non-users have stayed away from state parks during the last two years due to a lack of interest in what the parks have to offer or because of a clear preference for alternative forms of recreation.

The majority of non-users (42%) claim not to have visited a state park in the last two years due a lack of available time and/or work obligations (see Table 4.4.8). Since these individuals appear to have as much discretionary leisure time as other Coloradans (see Section 4.13) the issue of whether or not to visit appears to be more a matter of choice than available time. Other reasons cited for not visiting state parks during the last two years include a lack of information/advertising about the parks (12%), personal reasons such as illness or family problems (12%), the distance required to travel to the parks and/or a lack of available transportation (10%), cost (6%), and crowdedness within the parks (6%).

From a regional standpoint, Coloradans residing in the West are more likely to avoid visiting state parks through a lack of interest (15%) than residents of any other region. As the qualitative research for this study revealed, much of this disinterest may be due to the availability of other outdoor recreational activities within the area. The cost associated with visiting state parks is a greater deterrent for residents of the East than any other region (10%), while the inconvenience/distance associated with driving to a state park acts as a primary barrier for residents of the Mountain region (12%). An additional 11% of Mountain residents indicated that they prefer to participate in recreational activities closer to home (i.e., "in their own backyard"). The lack of available information/advertising about state parks is cited as one of the primary reasons for not visiting the parks by 13% Coloradans living in Front Range.

Table 4.4.8: Primary Reason(s) for *Not* Visiting Colorado State Parks by Region

	Total %	West %	East %	Front Range %	Mountain %
No time/too busy	42	33	42	43	40
Lack of interest/prefer doing other things	12	15	11	11	10
Personal (illness, family problems)	12	12	13	13	6
Lack of information/no advertising	12	8	8	13	10
Distance/too far	10	11	10	9	12
Too crowded	6	8	5	6	7
Cost	6	7	10	5	3
Other	0	6	1	0	12

N=712

The greatest opportunity for Colorado State Parks to expand its market may be among younger Coloradans. Indeed, only 7% of non-users under 35 years old and 8% under 44 years old cited lack of interest as their primary reason for not visiting a state park in the past two years. A lack of information about the parks themselves may be a major contributor to this lack of interest. In fact, more than 1 in 5 Coloradans between the ages of 24 and 34 (22%) indicate that the lack of available information about the state parks was their primary reason for not visiting during the past two years. On the other hand, personal factors (i.e., illness, physical disabilities, family problems) are more likely to be a barrier for older Coloradans. Nearly one in three non-users over the age of 64 (32%) cited personal factors as been the primary reason for not visiting a state park during the past two years.

Table 4.4.9: Primary Reason(s) for Not Visiting Colorado State Parks by Age

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
No time/too busy	47	38	51	53	39	23
Lack of interest/prefer doing other things	6	8	10	9	12	17
Personal (illness, family problems)	6	10	6	2	18	32
Lack of information/no advertising	6	22	11	14	8	8
Distance/too far	13	2	12	11	10	9
Too crowded	12	7	4	5	8	4
Cost	0	11	4	7	5	1
Other	10	2	2	0	0	6

N=712

4.5 Future Visitation Likelihood

KEY FINDING:
Seventy Percent of Non-Users indicate that it is at least somewhat likely that they will visit at least one Colorado State Park in the next 12 months.

More than 8 in 10 Coloradans (83%) indicate that they are very likely or somewhat likely to visit at least one Colorado State Park in the next 12 months (see Table 4.5.1). The high percentage of current users who intend to visit in the next 12 months (95%) is further evidence of the favorable impressions that park users tend to possess in terms of Colorado State Parks. Moreover, the high percentage of non-users who express an intention to visit at least one state park in the upcoming year (70%) presents Colorado State Parks with a significant opportunity for increasing its market penetration.

Table 4.5.1: Likelihood of Visiting a State Park Within Next 12 Months (Total)

	Total %	User %	Non-User %
Very likely	56	73	35
Somewhat likely	27	21	35
Not very likely	11	4	20
Not at all likely	6	2	11

N=1,613

KEY FINDING:

Non-Users residing in Front Range declare a much greater intention of visiting a Colorado State Park in the next 12 months than those residing in other regions of the state.

The majority of non-users, across all regions of Colorado, indicate that it is at least somewhat likely that they will visit at least one Colorado State Park within the next year. Non-users residing in Front Range appear to provide the greatest single opportunity for Colorado State Parks with 37% indicating that they are very likely to visit a state park during the upcoming year and an additional 35% suggesting that they are somewhat likely to make such a visit.

Table 4.5.2: Likelihood of Visiting a State Park Within Next 12 Months (Non-Users)

	West %	East %	Front Range %	Mountain %
Very likely	26	27	37	30
Somewhat likely	34	36	35	37
Not very likely	25	21	19	22
Not at all likely	15	17	10	11

N=712

KEY FINDING:

Non-users under the age of 44 are clearly the hottest prospects for Colorado State Parks from the standpoint of future acquisition.

In terms of non-users, there is a strong relationship between age and future visitation intention. Non-users between the ages of 18 and 24 have the highest stated likelihood of visiting a state park in the upcoming months (89%) followed closely by non-users 25-34 (80%) and 35 to 44 (82%). Older non-users, particularly 65 and over, have a much lower stated likelihood of visiting a state park in the future. While some of this reluctance may be down to a lack of knowledge about the parks, results from this survey suggest that personal factors (i.e., illness, disability) and a general disinterest in the opportunities provided by state parks may be acting as a bigger barrier to future visitation for older non-users.

Table 4.5.3: Likelihood of Visiting a State Park Within Next 12 Months (Non-Users)

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Very likely	31	46	48	33	29	16
Somewhat likely	58	34	34	33	26	25
Not very likely	11	14	14	24	17	36
Not at all likely	0	7	4	10	18	23

N=712

KEY FINDING:
Coloradans with a favorable impression of Colorado State Parks are much more likely to intend visiting a state park within the next 12 months.

Two-thirds of Coloradans who describe their impression of Colorado State Parks as very favorable indicate that they are very likely to visit a state park within the next 12 months. This compares with less than one half (46%) of Coloradans who describe their overall impression as somewhat unfavorable and one in three (36%) of Coloradans who describe their impression as very unfavorable.

Table 4.5.4: Likelihood of Visiting a State Park in the Next 12 Months by Overall Impression of Colorado State Parks

	Very favorable %	Somewhat favorable %	Neutral %	Somewhat unfavorable %	Very unfavorable %
Very likely	66	54	29	46	36
Somewhat likely	23	29	40	14	36
Not very likely	6	13	17	30	9
Not at all likely	4	3	13	11	$\boxed{18}$

N=1,602

KEY FINDING:
Reducing the size of crowds at state parks along with the introduction of better quality features will have the greatest positive affect on future park visitation for both users and non-users.

As part of the attitude and perception survey, respondents were asked whether certain features, if introduced to Colorado State Parks, would greatly increase their future visitation, slightly increase their future visitation or make no difference to their future visitation (see Table 4.5.4). For the majority of Coloradans, reducing the size of crowds at state parks (82%), providing better quality features (70%), creating more backcountry parks with minimal development (69%) and providing more trail opportunities (67%) are likely to have the greatest impact on future visitation.

Current users of state parks, particularly those visiting on an infrequent basis (i.e., no more than four times a year), are likely to visit state parks more often if they were to provide a more diverse set of opportunities including more trail opportunities (71%), a better range of recreation opportunities (64%), and outdoor education programs/naturalist led trail hikes (59%). These same features are also likely to stimulate increased visitation among current non-users. However, the research reveals that the lack of knowledge/information possessed by non-users about state parks may be a greater barrier to future visitation than the product itself. Indeed, nearly 3 in 5 non-users (58%) indicate that they would likely visit state parks more often if the parks were better advertised.

Table 4.5.5: Increased Visitation on the Basis of Proposed Features (Total)

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Smaller crowds	82	84	80	74	80	85	78
Better quality facilities	70	70	70	60	73	72	58
More backcountry parks with minimal development	69	77	60	69	63	70	73
More trail opportunities	67	71	62	60	57	69	63
Better range of recreational opportunities	60	64	55	56	59	60	55
More outdoor education programs and naturalist led trail hikes	57	59	54	55	55	57	57
More advertising	54	51	58	48	50	56	49
Theme based parks	35	36	35	39	50	34	37
Building of lodges and conference centers	34	32	36	25	41	34	27
Golf courses	19	18	21	15	23	19	20

N=1,613

For the most part, younger and middle aged non-users are more likely to be influenced by the introduction of additional park features. In particular, nearly 4 in 5 non-users under the age of 24 (77%) indicate that they would visit state parks more often if a greater range of recreational opportunities were offered. Non-users between the ages of 25 and 34 are more likely to be attracted to backcountry parks (78%) and more trail opportunities (77%) while 35 to 44 year olds would prefer to see better quality facilities.

Table 4.5.6: Increased Visitation on the Basis of Proposed Features by Age (Total)

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Smaller crowds	81	83	88	85	75	72
Better quality facilities	63	71	75	71	69	62
More backcountry parks with minimal development	76	78	72	76	60	43
More trail opportunities	74	77	73	67	57	44
Greater range of recreational opportunities	77	71	67	57	54	28
More outdoor education programs and naturalist led trail hikes	60	67	61	51	53	40
More advertising	53	70	58	45	55	39
Theme based parks	49	46	39	28	29	16
Building of lodges and conference centers	30	28	38	35	35	28
Golf courses	30	23	16	19	18	13

N=712

KEY FINDING:

Coloradans are divided on their preferred outdoor destinations.

Survey respondents were asked to choose their first choice outdoor destination from a list of five options (see Table 4.5.7). Coloradans are divided on their preferred outdoor destination with 28% favoring wilderness areas with little to no development and 28% preferring large parks with a wide range of camping, trails, boating and fishing. Another 21% of Coloradans indicate that they favor forests and lakes with limited trails, camping, boating and fishing over all other types of outdoor destinations.

Park users and non-users are both divided on their choice of outdoor destinations. However, users are more inclined to prefer wilderness areas with little to no development while non-users are more likely to favor large parks with a wide range of recreational options. At the regional level, less developed wilderness areas is more likely to be preferred by residents of the West and Mountain regions while large parks with plenty of recreational options is a more favored destination of those living in the East or Front Range.

Table 4.5.7: First Choice Outdoor Destination

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Wilderness areas with little to no development	28	30	27	33	21	28	33
Large parks with wide range of camping, trails, boating and fishing	28	24	31	20	29	29	25
Forests and lakes with limited trails, camping, boating and fishing	21	22	19	27	21	20	25
Rivers with boating and fishing	15	18	22	13	14	15	17
Community trails and community parks with ball fields and recreation centers	7	6	11	7	14	9	0

N=1,613

Preferences for outdoor destinations does not vary significantly by age. However, younger Coloradans (i.e., under 25 years old) are more likely to favor less developed wilderness areas (35%) and older Coloradans (i.e., over 54 years old) tend to prefer large parks (34%).

4.6 State Park Visitation Behavior

KEY FINDING:

Coloradans travel an average distance of 38 miles (76 miles round trip) when visiting a Colorado state park.

The average distance travelled by Coloradans when visiting a Colorado state park varies significantly by region. Residents of the Eastern region typically travel the furthest distances when visiting a Colorado state park (average of 64 miles or 128 miles round trip) followed by Coloradans living in the Mountain region (average of 56 miles or 112 miles round trip). Residents of Front Range typically travel the shortest distances when visiting a Colorado state park (average of 17 miles or 34 miles round trip),

Table 4.6.1: Average Distance Travelled by Visitors to Colorado State Parks

	Total %	West %	East %	Front Range %	Mountain %
10 miles or less	14	10	8	22	12
11 to 20 miles	14	15	7	22	9
21 to 50 miles	20	21	12	34	11
51 to 100 miles	16	19	21	11	15
101 to 200 miles	17	11	28	2	30
More than 200 miles	19	25	23	8	23
Average distance travelled	**38 miles**	**43 miles**	**64 miles**	**17 miles**	**56 miles**

N=4,041

KEY FINDING:
The average length of stay when visiting a state park is 6 to 8 hours.

A visitor's length of stay at a Colorado state park during a single visit ranges anywhere from less than fours hours (29%) to more than 2 days (34%). Those visiting Colorado State Parks in the Eastern and Mountain regions tend to have the greatest lengths of stay (average of 9 to 12 hours) whilst visitors to parks in the Front Range region have the shortest lengths of stay (average of 4 to 5 hours).

Table 4.6.2: Average Length of State Park Visit

	Total %	West %	East %	Front Range %	Mountain %
Less than 2 hours	11	12	7	15	10
2 to 3 hours	18	15	9	33	10
4 to 5 hours	15	16	10	20	11
6 to 8 hours	9	11	6	7	10
9 to 12 hours	3	3	5	2	4
13 to 24 hours	11	10	21	4	12
2 to 3 days	23	22	32	15	28
More than 3 days	10	10	10	5	16

N=4,041

There are a number of factors that appear to influence the length of a visitor's stay at a Colorado state park. People who visit the parks alone tend to have shorter visits (i.e., between 4 and 5 hours) than those who visit with one or more people (6 to 8 hours). The type of activities that a visitor participates in when visiting a state park also appears to be linked to their length of stay. Indeed, those visitors who participate in water based activities such as fishing and motorized boating tend to have a longer duration of stay within the park (typically over 12 hours) than those who participate in only land based activities (typically under 8 hours).

The distance that a person travels to a state park has a marked influence over the length of time that they spend within the park. Those who travel no more than 10 miles to visit a state park tend to visit for approximately 2 to 3 hours at a time. By contrast, visitors who travel between 21 and 50 miles stay an average of 5 hours in the park and those who travel more than 200 miles tend to stay for a minimum of 13 hours in the park.

KEY FINDING:
Most people that visit a Colorado state park do so with one other person (44%) or in a group of 3 or 4 (31%).

When visiting a Colorado state park, only 11% of Coloradans do so alone. The majority visit with one other person or in a larger group of 3 or 4. An additional 11% of the population visit in groups of 5 to 7 persons. Coloradans over the age of 44 are more likely than the rest of the population to visit a state park alone while younger visitors (particularly between the ages of 25 and 34) are more likely to visit a Colorado state park in groups of 4 or 5.

KEY FINDING:
Nearly 2 in 3 Coloradans over the age of 54 (63%) stay overnight in the park when visiting a Colorado state park.

Overall, 45% of Coloradans stay overnight in a state park when visiting. Coloradans over the age of 54 are much more likely to stay overnight in the park (63%) than any other age group. Indeed, on an average visit only 31% of those under the age of 35 stay overnight in the park.

Not surprisingly, the decision to stay overnight in the park is determined largely by the distance required to travel to the park in question. As such, residents of the Eastern and Mountain regions, who typically travel greater distances to visit a state park, are more inclined to stay in the park overnight. Indeed, 66% of Eastern residents and 55% of Mountain residents tend to stay overnight in the park when visiting compared to only 32% of those residing in other regions of the state.

Table 4.6.3: Staying Overnight in the Park

	Total %	**West** %	**East** %	**Front Range** %	**Mountain** %
Yes	45	43	66	25	55
No	55	57	34	75	45

N=4,041

KEY FINDING:

For most Coloradans, recreational vehicles (63%) and tents (33%) are the most popular modes of accommodation when staying overnight in state parks.

While tents are the preferred mode of accommodation for younger state park visitors (68% under the age of 35) recreational vehicles are preferred by most older overnight visitors to the parks (87% of those 55 years and over).

Table 4.6.4: Type of Overnight Accommodation Preferred by Age

	Total	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Recreational vehicle	63	21	33	53	61	82	91
Tent	33	74	62	41	33	17	8
Cabin	3	2	3	5	4	2	0
Yurt	1	1	2	1	1	0	1
Boat at marina	1	1	1	1	1	0	1

N=1,754

The type of accommodation preferred by Coloradans also varies by type of park. Indeed, 68% of those staying overnight at river-based or water-based parks do so in recreational vehicles compared to only 40% of those staying at resource-based parks. Visitors to resource-based parks are more likely to stay overnight in tents (47%). They are also more likely to stay in cabins (9%) or yurts (4%) than overnight visitors to other parks.

Table 4.6.5: Type of Overnight Accommodation Preferred by Type of Park

	River-based	Water-based	Resource-based
Recreational vehicle	67	69	40
Tent	31	29	47
Cabin	1	1	9
Yurt	1	1	4
Boat at marina	1	1	0

N=1,754

Most overnight visitors to state parks stay for an average of 1 to 3 nights at a time (84%). The length of stay does appear to be influenced by the mode of accommodation in which the visitor is staying. Those staying in recreational vehicles, cabins or yurts are inclined to stay for more nights than those camping in tents. Indeed, 29% of those staying in yurts, 23% of those staying in cabins and 19% of recreational vehicle owners tend to stay in excess of 3 nights in the park on any given visit. This compares to 10% of those staying in tents and 8% of those staying on a boat at a marina.

KEY FINDING:

Hiking (54%), camping (37%), fishing (35%), nature/wildlife observation (33%) and picnicking (30%) are the activities most frequently participated in by Coloradans when visiting a Colorado state park.

Most Coloradans participate in at least three separate activities on a typical visit to a Colorado state park (56%). Only 25% of park visitors participate in a single activity when visiting a state park while 12% participate in five or more activities.

The types of activities participated in by visitors to Colorado state parks varies by age group and by type of park visited. While hiking (82%), wildlife/nature observation (46%) and photography (28%) are three of the most popular activities enjoyed by visitors to resource-based parks, visitors to water-based parks are more inclined to fish (40%) or participate in motorized-boating (25%). Non-motorized boating is a more popular activity at river-based parks (11%) than at any other type of park (see Table 4.6.6)

Table 4.6.6: Activities Participated in at Colorado State Parks by Type of Park

	Total %	River-based %	Water-based %	Resource-based %
Hiking	54	42	44	82
Camping	37	37	39	30
Fishing	35	24	40	26
Nature/wildlife observation	33	27	27	46
Picnicking	30	32	30	30
Swimming	22	25	29	7
Photography	20	16	17	28
Motorized boating	17	4	25	2
Dog walking	17	18	18	17
Looking at visitor's centers	14	15	11	19
Bicycling	10	9	10	11
Non-motorized boating	6	11	6	6
Naturalist led programs	5	7	4	5
Rock climbing	3	5	1	7
Running	3	1	2	4
Hunting	1	1	1	0
Horseback riding	1	2	1	2
Rollerblading	1	1	1	1
Dirt bike riding	1	3	1	1

N= 4,040

KEY FINDING:

Younger Coloradans are inclined to participate in more active forms of recreation when visiting Colorado state parks.

When visiting Colorado state parks, younger Coloradans (i.e., under 35 years old) are more likely than older visitors to participate in active forms of recreation such as swimming (34%) and rock climbing (7%) as well as motorized and non-motorized boating (21% and 8% respectively). On the other hand, older Coloradans (i.e., over 44 years old) tend to enjoy a more passive recreational experience including fishing (37%), nature/wildlife observation (35%), viewing the visitor's center (16%) and naturalist led programs (7%). Coloradans over the age of 54 are more likely than the rest of the population to camp overnight in the park (47% versus 33%).

Table 4.6.7: Activities Participated in at Colorado State Parks by Age

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Hiking	48	51	55	57	60	52
Camping	24	28	36	38	45	48
Fishing	29	31	37	36	37	37
Nature/wildlife observation	27	29	33	34	37	33
Picnicking	35	34	35	28	26	22
Swimming	38	30	29	21	10	5
Photography	20	20	20	21	22	17
Motorized boating	22	20	20	17	11	9
Dog walking	15	16	18	19	20	22
Looking at visitor's centers	8	8	15	14	17	16
Bicycling	10	8	12	11	8	8
Non-motorized boating	9	6	7	7	5	2
Naturalist led programs	2	2	5	5	8	7
Rock climbing	9	4	4	3	1	0
Running	5	3	3	3	2	0
Hunting	1	1	1	1	1	1
Horseback riding	3	0	1	2	1	0
Rollerblading	3	1	1	0	1	0
Dirt bike riding	3	2	1	1	1	1

N= 4,040

4.7 Perceived Quality of Experience with State Park Visit

KEY FINDING:
Colorado State Parks has achieved very high levels of visitor satisfaction with 94% of visitors describing the quality of experience on their most recent visit to a state park as either excellent or good.

The majority of Colorado state parks have generated very high levels of visitor satisfaction. Indeed, 55% of visitors describe the quality of experience on their last state park visit as excellent while another 39% describe it as good. While these scores are very encouraging they also reveal significant opportunity for improvement. Those visitors who describe the quality of experience on their last state park visit as excellent are 72% more likely to have a strong intention of revisiting that park again in the next three months than those who only rate their experience as good. Increasing customer satisfaction can, therefore, drastically improve visitor re-visitation. The following table shows the percentage of state park visitors who describe the quality of experience on their last state park visit as excellent, broken down by park.

Table 4.7.1: Visitor Satisfaction by Park (% Rating Park as Excellent)[6]

	%
Roxborough	82
Golden Gate	80
Mueller	79
Steamboat Lake	75
Pearl Lake	73
Rifle Falls	71
Eldorado Canyon	70
Lory	70
Castlewood Canyon	69
Mancos	68
Colorado River	67
Ridgeway	62
Arkansas Headwaters	61
State Forest	60
Trinidad	60
Lathrop	59
Crawford	58
Vega	58
Yampa River	58
Cherry Creek	57
Stagecoach	56
Highline Lake	55
Navajo	53
Sylvan Lake	48
Barr Lake	46
Spinney Mountain	45
Eleven Mile	44
San Luis	44
Chatfield	43
Sweitzer Lake	43
Boyd Lake	39
Bonny Lake	38
North Sterling	37
Rifle Gap	37
Pueblo	36
Barbour Ponds	34
Jackson Lake	33
John Martin Reservoir	18

N= 4,041

[6] The bold line represents the average satisfaction score across all parks

KEY FINDING:
Overall, resource-based parks score higher on visitor satisfaction than any other type of park.

More than 2 in 3 (67%) of visitors to resource-based parks describe the quality of experience on their most recent visit as excellent. This compares to 62% of river-based visitors and 49% of water-based visitors.

Table 4.7.2: Visitor Satisfaction by Type of Park (% Rating Park as Excellent)

Total %	River-based %	Water-based %	Resource-based %
55	62	49	67

N- 4,041

KEY FINDING:
Park visitors who rate their state park experience as either excellent or good have a much greater likelihood of revisiting the parks within the next three months.

Nearly three quarters (73%) of state park visitors who rate their most recent state park experience as excellent indicate that they are likely to revisit the park again within the next three months. This compares with 63% of those who rate their last state park visit as good and 50% of those who rated it as only fair. Only 1 in 5 of those who were dissatisfied with their last state park visit intend to visit the park again in the next three months. Therefore, ensuring visitor satisfaction is a critical step toward increasing park re-visitation.

Table 4.7.3: Likelihood of Revisiting State Park by Park Rating

	Excellent %	Good %	Fair %	Poor %	Very poor %
Very likely	53	36	23	16	14
Somewhat likely	20	27	27	4	5
Not very likely	14	21	23	16	14
Not at all likely	13	16	27	64	68

N=4,039

KEY FINDING:

Park cleanliness, the scenery/surroundings and general safety of the parks have the greatest impact on the quality of experience for the majority of state park visitors.

Survey respondents were asked to assess the importance of a number of state park features in terms of their impact on the overall quality of experience when visiting a state park. The majority of park visitors indicated that park cleanliness (78%), the scenery surroundings (73%), safety (64%) and campgrounds (55%) are all very important aspects of the overall visitor experience.

The park features that are considered to be the most important by park visitors, varies by park type. The scenery/surroundings (88%), trails (72%) and posted information and signage (53%) are more important to resource-based park visitors while safety (69%), facilities and equipment (56%) and recreational activities (55%) are considered more important to visitors of water-based parks.[7]

Table 4.7.4: Importance of Park Features to Overall Quality of Experience by Park Type (% Rating Feature as "Very Important")

	Total %	River-based %	Water-based %	Resource-based %
Cleanliness	78	77	81	72
Scenery/surroundings	73	70	66	88
Safety	64	53	70	52
Campgrounds	55	56	60	44
Facilities & equipment	49	46	56	33
Posted information & signage	49	40	48	53
Recreational activities	47	38	55	30
Trails	47	38	36	72
Customer service	31	29	35	22
Park programs	12	10	12	12
Marinas	13	8	17	4
Cabins and yurts	7	5	6	8
Snack bar	4	2	5	2

N=3,995

[7] The percentages are based on those visitors who described the feature as being a "very important" aspect of their overall experience when visiting a state park.

KEY FINDING:

While younger park visitors place greater value on recreational activities and park trails, older visitors are more likely to be concerned with park safety and facilities and equipment (i.e., restrooms, boat ramps, visitor's center etc.)

For the most part, the park features considered most important by park visitors are consistent across all age groups. However, there are a number of notable exceptions. In particular, older visitors (i.e., over the age of 54) are more likely to identify safety, cleanliness, campgrounds and facilities and equipment as being very important to their overall quality of experience when visiting a state park. On the other hand, younger visitors (i.e., under 35 years old) place a greater deal of importance on recreational activities and trails.

Table 4.7.5: Importance of Park Features to Overall Quality of Experience by Age (% Rating Feature as "Very Important")

	18 to 24 %	25 to 34 %	35 to 44 %	45 to 54 %	55 to 64 %	65 + %
Cleanliness	73	79	77	77	81	81
Scenery/surroundings	74	75	72	74	74	64
Safety	58	60	64	61	68	64
Campgrounds	47	45	52	56	63	72
Facilities & equipment	45	43	47	48	56	56
Posted information & signage	46	54	47	46	51	50
Recreational activities	54	51	49	47	41	37
Trails	52	52	50	47	44	28
Customer service	31	24	29	30	35	37
Park programs	14	12	12	9	12	13
Marinas	13	10	11	12	12	11
Cabins and yurts	11	6	8	6	6	3
Snack bar	8	3	4	4	3	1

N=3,995

KEY FINDING:

State park visitors are very satisfied with those aspects of the state park that they consider to be most important in terms of their overall quality of experience.

Visitors to Colorado state parks have a very high level of satisfaction with the majority of park features available. More importantly, the parks are performing very strongly on those aspects of the park that matter most to visitors in terms of their overall quality of experience (i.e., cleanliness, safety and campgrounds). Nearly three quarter of park visitors (72%) indicate that they were very satisfied with the cleanliness of the park they most recently visited, 70% were very satisfied with the level of safety, 67% were very satisfied with the campgrounds and just under two in three visitors (63%) were very satisfied with the facilities and equipment (see Table 4.7.6).

Overall, the level of visitor satisfaction with the different park features do not vary markedly across the different park types. However, resource-based parks are performing above average on safety and the quality of its cabins/yurts while its visitors are more likely to express a high level of satisfaction with the scenery and surroundings. On the other hand, river-based parks have achieved exceptional levels of satisfaction on cleanliness and facilities/equipment.

While more than 9 in 10 visitors expressed satisfaction across the majority of park features listed, there is still significant room for improvement. The research shows that visitors who are very satisfied with the park features that are most important to them (typically cleanliness, safety, and facilities/equipment) are much more likely to intend visiting the park again within the next three months than those visitors who only indicate that they are somewhat satisfied with the feature in question. There are a number of features that should be the focus of performance improvement – particularly facilities/equipment, posted information and signage, trails and park programs. Only a modest number of park visitors indicated that they were very satisfied with the state park they visited on these four particular features. Therefore, the performance of the park on these features could be a critical step toward increasing visitation.

Table 4.7.6: Satisfaction with Park Features Ranked by Importance of Individual Feature

	Total		River-based		Water-based		Resource-based	
	Very Satisfied %	Somewhat Satisfied %	Very Satisfied %	Somewhat Satisfied %	Very Satisfied %	Somewhat Satisfied %	Very Satisfied %	Somewhat Satisfied %
Cleanliness	72	25	84	15	67	27	77	20
Scenery/surroundings	73	25	71	28	66	31	89	11
Safety	70	27	70	26	68	28	73	24
Campgrounds	67	27	72	24	64	29	73	21
Facilities & equipment	63	29	73	23	62	30	64	28
Posted information & signage	58	36	57	35	57	37	60	33
Recreational activities	59	34	51	42	59	34	60	31
Trails	63	31	55	36	56	36	75	22
Customer service	74	22	75	22	72	23	78	18
Park programs	54	35	51	38	53	36	57	33
Marinas	46	37	38	33	47	39	41	29
Cabins and yurts	48	32	32	44	43	35	63	21
Snack bar	35	38	30	35	36	39	34	33

N=3,995

KEY FINDING:

Adding more trails, providing more natural/primitive experiences and building more developed campsites will likely have the greatest positive impact on future visitation for current park visitors.

Park visitors were asked to assess whether the introduction of a number of park features to the park they had most recently visited would likely increase or decrease their future visitation to the park (see Table 4.7.7). While adding more trails, providing more natural/primitive experiences and building more developed campsites will likely stimulate more repeat visitation across the various state parks, the introduction of swimming pools, lodges/conference centers and golf courses may actually reduce repeat visitation.

The impact of the different proposed features on future park visitation varies across the different park types. Visitors to resource-based parks are more likely to favor "improvements" that create a more natural/primitive experience. This includes support for more primitive campsites and more trails and strong opposition to such features as swimming pools, golf courses and lodges/conference centers. On the other hand, visitors to water-based parks prefer a more developed/structured experience and are more likely to favor developed campsites, easier/improved boating access, swimming pools and golf courses.

Table 4.7.7: Increased/Decreased Visitation on the Basis of Proposed Park Features by Park Type

	Total		River-based		Water-based		Resource-based	
	Increase Visits %	Decrease Visits %	Increase Visits %	Decrease Visits %	Increase Visits %	Decrease Visits %	Increase Visits %	Decrease Visits %
More trails	53	2	49	1	47	2	68	2
More natural/primitive experiences	50	2	47	1	55	2	63	3
More developed campsites	47	9	43	7	52	6	37	18
Easier/improved boating access	33	5	21	5	39	2	14	13
More primitive campsites	32	8	32	6	30	7	36	9
Swimming pools	31	30	34	28	35	23	20	49
Cabins and/or yurts with plumbing & electricity	28	12	21	14	29	9	29	17
More group picnic and group campsites	27	14	26	13	28	10	23	23
Lodge/Conference Center	13	21	15	22	13	17	12	29
Golf courses	13	44	14	40	15	36	6	63

N=4,020

The impact of proposed park features on future visitation also varies by age. Younger visitors (i.e., under 35) are very supportive of proposals to create more primitive/natural experiences and more primitive campsites. They are also likely to visit more often if more group picnic and group campsites were created. On the other hand, creating more developed campsites is likely to increase repeat visitation for older visitors (i.e., over 54 years old)

Table 4.7.8: Increased/Decreased Visitation on the Basis of Proposed Park Features by Age

	18 to 34 years old		35 to 54 years old		55 years and over	
	Increase Visits %	Decrease Visits %	Increase Visits %	Decrease Visits %	Increase Visits %	Decrease Visits %
More trails	61	2	55	2	41	1
More natural/primitive experiences	61	2	51	2	36	3
More developed campsites	43	11	47	9	52	7
Easier/improved boating access	37	5	31	6	26	3
More primitive campsites	45	6	33	7	17	9
Swimming pools	36	33	32	32	23	24
Cabins and/or yurts with plumbing & electricity	34	12	30	12	19	10
More group picnic and group campsites	36	13	26	14	20	12
Lodge/Conference Center	16	19	12	22	11	18
Golf courses	16	$\boxed{47}$	13	$\boxed{47}$	12	$\boxed{35}$

N=4,020

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4.8 Visitor Spending

KEY FINDING:

Frequent visitors to Colorado state parks typically spend less money on a single visit than those who visit on an infrequent basis.

Survey respondents were asked how much money they spend on an average visit to a Colorado state park. The amount of money spent was broken down into money spent within the park itself (not including the price of entrance) and money spent within 50 miles of the park that was directly related to the state park visit.

Across all regions of the state, the average amount of money spent per vehicle within the park on a single visit is \$19.98 and the average amount spent with 50 miles of the park is \$65.71. From a regional standpoint, Coloradans residing in the West and Mountain regions tend to spend more money than those living elsewhere in the state. This is largely explained by the fact that residents of these two regions tend to drive greater distances when visiting a state park and a more likely to camp overnight in the park once they arrive.

As would be expected, state park visitors with children spend more money on an average visit to a state park than their single counterparts. Interestingly, single visitors with children spend less than average outside the park but considerably more within the park.

The relationship between family status and park expenditure is reinforced when looking at money spent by age group. Those age groups more likely to have dependants under the age of 16 (i.e., 35 to 54 years old) spend more money on a typical trip to a state park than any other age group while older visitors (i.e., over 54years old) spend less than average. However, it is important to note that the difference in expenditure across the various age groups is more pronounced in terms of money spent outside the park (i.e., within 50 mile radius) than within the park itself.

This same pattern is reflected when looking at the relationship between park expenditure and household income. Higher income earners do not necessarily spend more money inside the state park than those visitors from lower income households. This is not surprising given that high earners tend to spend an equal length of time within the park on a single visit than lower earners. However, those from high income households spend considerably more money within a 50 mile radius of the park, resulting in a much greater overall expenditure.

Perhaps the most interesting relationship exists between the number of annual visits to the park and the average expenditure linked to a single visit. Those visiting state parks on a regular basis (i.e., more than 8 times a year) spend significantly less money on a single visit than those who visit infrequently (particularly those visiting less than 4 times a year). This relationship is particularly pronounced when looking at within park expenditure. The amount of money spent within the park appears to drop off steadily the more the person visits the park. Therefore, those who visit the park on a frequent basis may not always be the most profitable for Colorado State Parks.

Table 4.8.1 Direct Spending on Most Recent State Park Visit

	Average Amount of Money Spent per Vehicle within Park[8] ($)	Average Amount of Money Spent per Vehicle within 50 miles of the Park[9] ($)	Total Amount Spent ($)
Total	19.98	65.71	85.69
Region			
West	29.49	83.43	112.92
East	17.98	56.89	74.87
Front Range	8.28	40.02	48.30
Mountain	25.25	82.34	107.59
Park Type			
River-based	28.31	102.86	131.17
Water-based	21.38	66.91	88.29
Resource-based	14.69	53.23	67.92
Age			
18 to 24	22.76	80.02	102.78
25 to 34	14.83	56.61	71.14
35 to 44	20.95	72.41	93.36
45 to 54	24.52	69.68	94.20
55 to 64	17.23	57.76	74.99
65 and over	18.05	55.92	73.97
# of State Park Visits in Last 12 Months			
1 to 3 visits	20.66	73.86	94.52
4 to 8 visits	13.94	44.01	57.95
9 to 12 visits	12.76	52.80	65.56
More than 12 visits	10.28	30.84	41.12
Annual Household Income (before taxes)			
Less than $20,000	21.25	67.38	88.63
$20,000 to $39,999	20.53	46.01	66.54
$40,000 to $74,999	18.00	64.09	82.09
$75,000 to $99,999	19.72	87.35	107.07
$100,000 and over	22.33	77.74	100.07
Family Status			
Single (no children)	11.72	59.68	71.40
Single (children under 16 years old)	47.74	45.11	92.85
Married (no children)	22.06	63.11	85.17
Married (children under 16 years old)	21.84	67.08	88.92

N,3,806

[8] Does not include price of entrance
[9] Includes total amount of money spent within 50 miles of the park that was directly related to the trip to the park. Does not include money spent within the park

KEY FINDING:

Nearly half of park visitors (48%) spend nothing above the price of entrance when visiting a state park.

Those visitors who choose to spend money within the park are most likely to spend money on food and beverages (33%) and camping facilities (22%). The nature of visitor expenditure does not vary dramatically across the different age groups. However, younger visitors are more likely to spend money on food and beverages and boat/canoe rental while older visitors spend more money on camping facilities. Overall, those visitors who spend the most money in the park are significantly more likely to have paid for camping facilities and/or cabin/yurt rental.

Table 4.8.2: Nature of Visitor Expenditure (Multiple Mention)

	Total	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Food and beverages	33	35	37	34	34	29	24
Camping facilities	22	18	18	22	22	25	28
Boat/canoe rental	7	7	8	9	8	4	2
Gas/fuel	5	6	4	5	6	4	2
Gift store purchases	4	1	3	4	4	4	4
Cabin/yurt rental	3	2	2	5	3	2	2
Fishing supplies	2	1	2	2	3	2	2
Other	2	1	2	3	3	2	2
Nothing above the price of entrance	48	52	49	46	46	49	53

N=3,806

KEY FINDING:

More than 8 in 10 (81%) of state park visitors feel they are getting excellent or good value for money from the state parks they visit.

Colorado State Parks are positively perceived by the majority of visitors in terms of providing good value for money. This perception applies to the overall value for money of the parks as well as individual features including the daily vehicle entrance fee, annual pass and campsite fees.

Table 4.8.3: Perceived Value for Money

	Overall Value for Money of State Park %	Daily Vehicle Entrance Permit %	Annual Permit %	Campsite Fees %
Excellent	42	42	38	29
Good	39	37	35	44
Fair	16	16	20	23
Poor	3	5	8	5

N=4,041

KEY FINDING:
Middle aged visitors (i.e., 35 to 54) tend to perceive Colorado State Parks as providing greater value for money than other visitors.

Visitors between the ages of 35 and 54 are more likely to visit a state park with children under 16 (52%) than other visitors (average of 28% across all other age groups). The good value for money that middle aged visitors associate with Colorado state parks may be a product of the family experience that they seek when visiting. When visiting with an entire family, the value for money may be perceived as greater than when visiting alone or exclusively with other adults.

Table 4.8.4: Perceived Value for Money by Age (% Rating Value for Money as Excellent or Good)

	Total	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 and over %
Overall Value for Money of State Park	81	79	81	82	83	77	81
Daily vehicle entrance fee	79	71	77	82	82	77	72
Annual pass	73	71	75	75	74	69	67
Campsite fees	72	70	67	76	73	71	70

N=4,041

KEY FINDING:
Annual pass holders are more likely to be married, middle aged, high earners and frequent visitors to the state parks.

The majority of state park visitors (63%) enter the park using a daily vehicle entrance fee. Only 1 in 5 visitors (21%) have purchased an annual pass while 10% are Aspen Leaf pass holders.

Visitors to state parks in the Mountain (26%) and East (23%) regions are more likely to be holders of annual passes. Not surprisingly, the decision to purchase an annual state park pass is strongly linked to the number of visits made to the park in a single year. Indeed, over half (54%) of Coloradans who visit state parks in excess of 12 times a years have purchased a state park pass compared to only 18% of those who visit fewer than 4 times a year. State Park annual pass holders also tend to be married and between the ages of 35 and 64 years old. Higher income earners are also more likely to purchase annual state park passes (i.e., 28% of visitors with annual household incomes of at least $75,000 have purchased a annual state park passes).

The percentage of park visitors purchasing annual state park passes is disappointingly low. However, with a high level of awareness in the passes (86%) and perceived good value for money (71%), the foundation has been laid for increasing the number of annual pass sales in the future.

Table 4.8.5: Type of Park Pass Used

	Daily %	Annual %	Disabled/veteran %	Aspen Leaf %	Columbine Pass %	None %
Total	63	21	1	10	1	5
Region						
West	64	17	1	12	1	6
East	62	23	1	8	1	6
Front Range	69	19	4	8	1	3
Mountain	58	26	3	11	1	6
Age						
18 to 24	74	18	0	0	0	7
25 to 34	79	16	0	0	0	4
35 to 44	73	23	0	0	0	3
45 to 54	66	27	0	1	1	6
55 to 64	49	24	1	21	2	4
65 and over	25	8	1	58	1	7
# State Park Visits (year)						
1 to 3 visits	65	18	1	11	1	5
4 to 8 visits	60	24	0	12	1	2
9 to 12 visits	47	41	0	10	0	3
13 + visits	30	54	0	11	1	4
Household Income						
Less than $20,000	60	14	1	14	2	10
$20,000 to $39,999	61	16	1	18	1	4
$40,000 to $74,999	66	20	1	9	1	4
$75,000 to $99,999	64	27	0	3	1	5
$100,000 +	65	29	0	3	0	3
Family Status						
Single (no children)	66	19	0	8	0	6
Single (children)	79	17	1	0	0	3
Married (no children)	56	22	1	16	1	5
Married (children)	73	23	0	1	0	3

N=4,020

KEY FINDING:

The value for money that visitors typically associate with annual state park passes is largely driven by the frequency by which they visit the parks.

While most park visitors associate good value for money with annual state park passes, the extent to which they do so is largely determined by the number of visits they make to a state park in a given year. Coloradans who visit state parks more than 12 times a year are much more likely to describe annual state park passes as "excellent" value for money (54%). However, it is notable that nearly one in three Coloradans (29%) who visit the parks 9 to 12 times a year only describe the value for money of the passes as fair or poor. This is may be considered particularly high given that there is an economic saving for anyone that visits a state park in excess of 10 times a year.

Table 4.8.6: Perceived Value for Money of Annual Pass by # of Annual Visits

	1 to 3 visits %	4 to 8 visits %	9 to 12 visits %	More than 12 visits %
Excellent	36	38	40	54
Good	35	33	32	27
Fair	21	23	22	14
Poor	8	6	7	4

N=4,041

KEY FINDING:

Despite the perceived value for money of Annual State Park Passes, the majority of current annual pass holders visit state parks fewer than 10 times a year.

One-half of current annual pass holders visit Colorado state parks fewer than 5 times a year while 20% visit the parks between 5 and 10 times a year. For the most part, this suggests that Colorado State Parks are currently generating more revenue from annual pass holders than if they were to pay based on separate visits (i.e., daily entrance fees). Only 9% of current annual pass holders visit the Colorado state parks in excess of 30 times a year. However, this small sample of high-use pass holders affects the average (mean) usage. The average number of times that an annual pass holder visits the park is 18 times. The standard deviation from the mean is large indicating there is significant variance in the usage of annual passes. The median number of visits is four times which more appropriately represents the typical annual pass holder.

Table 4.8.7: Number of Annual State Park Visits for Annual Pass Holders (Total)

	%
1 to 4 visits	50
5 to 10 visits	20
11 to 15 visits	8
16 to 20 visits	5
21 to 30 visits	8
More than 30 visits	9

N=800

KEY FINDING:

Nearly one half (45%) of state park visitors who do not currently possess an annual state park pass indicate that they are very likely or somewhat likely to purchase one in the next 13 months.

The large percentage of state park visitors who express a high or moderate intention to purchase an annual park pass in the next thirteen months is a basis for optimism.
While 94% of current pass holders indicate that they will likely renew their pass in the next thirteen months, 45% of non-pass holders also express an interest in acquiring a pass during this time period.

For the most part, non-pass holders who express a likelihood of acquiring an annual state park pass in the next 13 months tend to match the demographic profile of current pass holders (i.e., married, high earners, frequent visitors). However, they also tend to be a little younger than the current pass holders. This is particularly interesting given that younger non-holders tend to have a much lower awareness of these passes than other age groups (79% versus an average of 87% across the other age groups). Increasing the awareness of younger visitors in terms of annual state park passes may help to increase sales of these passes within this particular segment.

Table 4.8.8: Likelihood or Purchasing an Annual State Park Pass in the Next 13 Months by Age (Current Non-Annual Pass Holders)

	Total %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 + %
Very likely	20	20	22	22	17	23	17
Somewhat likely	25	24	33	28	30	19	8
Not very likely	28	33	29	30	28	23	22
Not at all likely	27	23	17	20	25	35	52

N=2,983

KEY FINDING:

Nearly 4 in 5 (79%) of park visitors who express a likelihood of purchasing/repurchasing an annual state park pass in the next 13 months would continue to purchase the pass following as much as a 5 dollar price increase.

Survey respondents who expressed an interest in purchasing an annual state park pass within the next 13 months were asked whether they would still purchase the pass if the price were to increase during this time. Respondents were asked to indicate their likelihood of purchasing/repurchasing a pass following a 3, 5, 10 and 15 dollar increase.

Most visitors (79%) were prepared to accept as much as a 5 dollar price increase but the interest dropped below 50% after the price increase to 10 dollars. Visitors who do not currently possess an annual state park pass were the most price sensitive with only 38% indicating that they would likely purchase a pass if the price increased to 10 dollars compared to 50% of current pass holders (see Table 4.8.9)

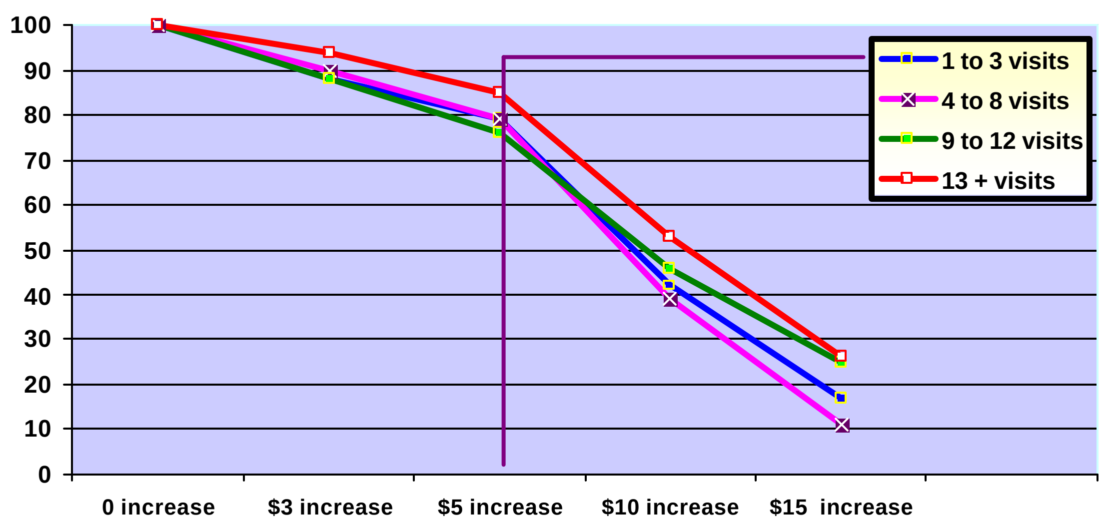
The 5 dollar threshold for increasing the price of annual passes is relatively consistent irrespective of the number of annual visits to the park. Those visitors who make more than 12 annual visits to the park are most tolerant of a 5 dollar increase (85%) but only half (53%) would continue to purchase the pass if the price were to increase by 10 dollars. This compares with 42% of those visiting 1 to 3 times a year and 39% of those visiting 4 to 8 times a year.

Table 4.8.9: Price Elasticity of Annual State Park Pass (% Indicating that they would purchase pass following defined price increases)[10]

	Total %	Current Pass Holders %	Non-Pass Holders %	1 to 3 visits %	4 to 8 visits %	9 to 12 visits %	More than 12 visits %
$3 increase	89	91	88	88	90	88	94
$5 increase	79	83	77	79	79	76	85
$10 increase	43	50	38	42	39	46	53
$15 increase	10	21	13	17	11	25	26

N=1,175

Figure 4.8.1: Price Elasticity of Annual State Park Passes by # of Visits (% Purchasing Pass)



[10] The results are based on those visitors who indicating that they are at least somewhat likely to purchase/repurchase an annual state park pass within the next 13 months.

KEY FINDING:

Most park visitors are extremely price sensitive when it comes to daily entrance fees, with the majority likely to reduce their number of visits with as little as a $2 increase.

Those visitors who are currently using daily entrance fees for entering Colorado state parks were asked what impact an increase in the price of this daily entrance fee would have on their future visitation. Survey respondents were asked to indicate their future visitation likelihood on the basis of 5, one dollar increments (i.e., $1 to $5).

While the majority of visitors (72%) indicated that a $1 increase in the price of a daily entrance fee would not likely impact their frequency of visitation, this number dropped to 44% with a 2 dollar increase and 22% with a 3 dollar increase. Nearly one in three visitors (31%) indicated that they would likely not visit state parks at all if the daily entrance fee increased by 4 dollars. The data suggests that 1 dollar is the most the daily entrance fee could be increased at one time without resulting in a significant reduction in repeat visitation.

Table 4.8.10: Price Elasticity of Increase in Daily Entrance Fees (Total)

	Come as often %	Come a bit less %	Come much less %	Not come at all %
$1 increase	72	18	6	4
$2 increase	44	35	14	8
$3 increase	22	31	31	17
$4 increase	15	17	37	31
$5 increase	15	11	31	43

N=1,391

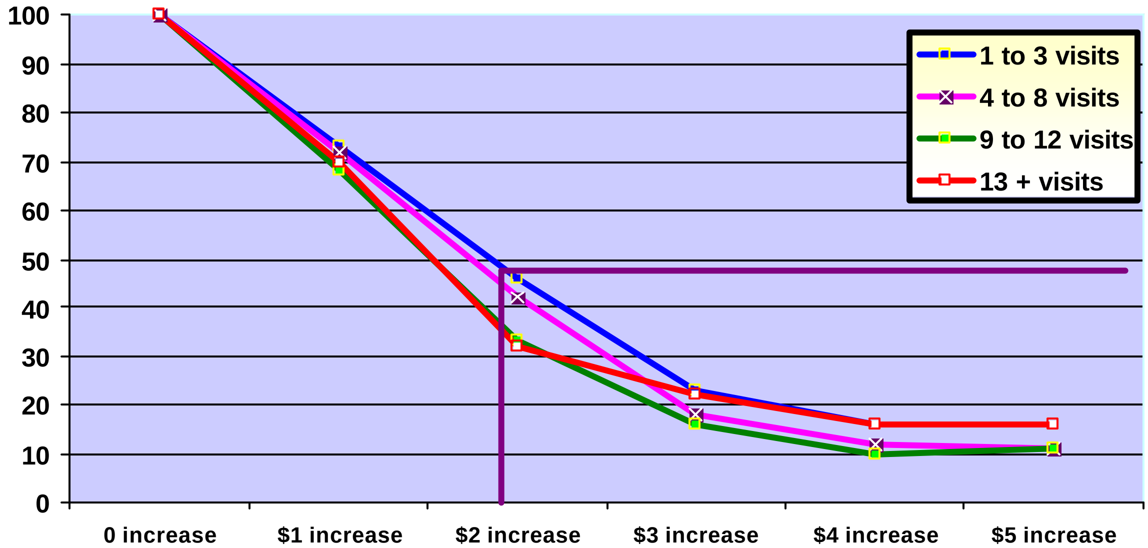
KEY FINDING:

Frequent visitors are the most price sensitive when it comes to increases in the price of daily entrance fees.

While most frequent visitors (i.e., more than 12 times a year) will continue to visit state parks as often as they do currently, should the price be increased by 1 dollar (70%), the percentage drops off considerably with each further increase. Indeed, only one-third of frequent visitors indicate that they will continue to visit state parks as often as they do now should the daily entrance fee be increased to two dollars. Although 16% of frequent visitors indicated that they will still continue to visit state parks at their current rate if the price of daily entrance fees was increased to 5 dollars, more than 2 in 5 (42%) said that they would not visit at all following an increase of this magnitude.

The following price elasticity curve diagram shows the most pronounced curve at the $2 increment for almost all visitors irrespective of # of visits. The slope is steepest for those visiting more than 8 times a year indicating that these visitors are most likely to be affected by increases in the price of daily entrance fees.

Figure 4.8.2: Price Elasticity of Daily Entrance Fees by # of Visits (% Visiting Just as Often Following Incremental Price Increases



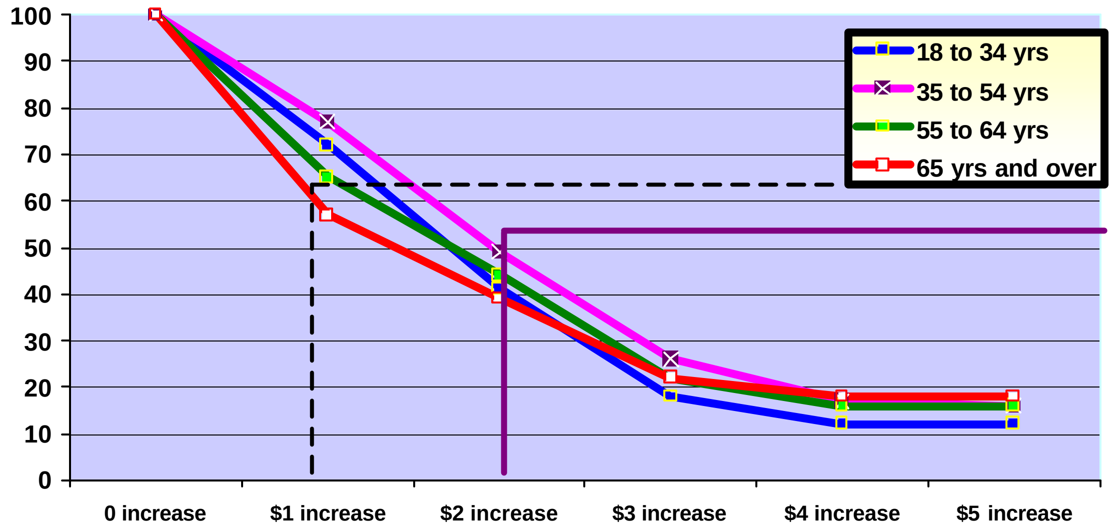
KEY FINDING:

Older visitors to state parks (i.e., over 54 years old) tend to be more price sensitive when it comes to daily entrance fees.

In terms of visitation frequency, only 57% of park visitors over the age of 64 would be unaffected by a price increase in daily entrance fees. In fact, 16% of visitors over the age of 64 indicated that they would not visit the parks at all if the price of daily entrance fees were increased by as much as one dollar. Younger visitors would be more accepting of a small/1 dollar increase (i.e., 72% of those under 35 would not alter their visitation habits). However, only 41% would continue to visit at their current level if the price were increased by $2 and less than 1 in 5 (18%) if the price were increased by 3 dollars. As many as 17% of visitors under the age of 35 would stop visiting all together subsequent to a 3 dollar increase in the daily entrance fee, compared to 14% of visitors between 35 and 54 and 27% of those over the age of 54.

The following price elasticity curve diagram shows the steepest slope for visitors under the age of 55 between the $1 and $2 increments. This indicates that while a 1 dollar increase may not have too dramatic an effect on future visitation for this age segment, a 2 dollar increase will. On the other hand, a large percentage of older visitors, particularly those over 64 years old, are likely to churn if the price is increased by as little as $1 (43%).

Figure 4.8.3: Price Elasticity of Daily Entrance Fees by Age (% Visiting Just as Often Following Incremental Price Increases



KEY FINDING:

There is a high level of price elasticity for campsite fees with only 60% of visitors prepared to camp as often as they do currently following a 2 dollar increase in fees and less than 1 in 3 (32%) prepared to camp as often following a 3 dollar increase.

State park visitors who have previously camped at a state park were asked what impact increases in campsite fees would have on their likelihood of camping at a state park in the future. While 77% of visitors indicated that a 1 dollar increase in campsite fees would unlikely alter their decision to camp at a state park, this number fell to 60% following a 2 dollar increase and to 32% following a 3 dollar increase. In fact, 14% of visitors indicated that they would not camp at a state park at all should campsite fees increase by as much as 3 dollars. This suggests that even a small increase in campsite fees in the recent future may have a strong, diminishing effect on the number of people choosing to camp at Colorado state parks.

Table 4.8.11: Price Elasticity of Increase in Campsite Fees (Total)

	Camp as often %	Camp a bit less %	Camp much less %	Not camp at all %
$1 increase	77	12	5	6
$2 increase	60	23	9	8
$3 increase	32	32	23	14
$4 increase	20	26	30	25
$5 increase	18	18	30	34

N=1,391

4.9 Economic Impact Assessment

KEY FINDING:
Visitors to Colorado State Parks have invested approximately $193 million dollars in the local communities surrounding the parks during the past year.

Survey respondents were asked how much they spent within 50 miles of the state park on their trip to the park. The amount spent is directly linked to the park visit and includes such expenditures as food/beverages, entertainment, hotels/motels, gas and supplies. As documented in Section 4.8, the average per vehicle expenditure within a 50-mile radius of the park is $65.71. This amount varies by region with visitors to parks in the West and Mountain regions spending considerably more money outside the park than in the other two regions.

Based on the average per vehicle expenditure within 50 miles of the park it is possible to calculate the gross expenditure of all state park visitors within the local communities surrounding the Colorado state parks. This is calculated by multiplying the average outside park expenditure per vehicle for each park by the total number of vehicles visiting each park.

Based largely on the high influx of visitors to state parks in the Front Range region, the economy of this region has benefited the most from the existence of state parks. Indeed, over $77.1 million dollars has been invested in Front Range communities surrounding Colorado state parks by those visiting the parks during the past year. This amounts to 40% of the total investment made by visitors to the parks in the local communities surrounding the park.

Based on projected rates of inflation and increased visitor counts in the state of Colorado, during 2003 to 2004 it is estimated that the total visitor expenditure within 50 miles of the parks will increase by 4% to over $200 million dollars.

Table 4.9.1 Economic Expenditure (within 50 mile radius of state park)

	Average per Vehicle Expenditure within 50 miles	Projected Total Expenditure FY 02-03 ($)	Projected Total Expenditure FY 03-04 ($)
Total		**192,938,766**	**200,601,902**
Arkansas Headwaters	57.24	10,767,067	10,896,276
Barbour Ponds	37.93	1,728,422	1,785,460
Barr Lake	9.67	341,990	349,853
Bonny Lake	55.96	1,393,076	1,404,214
Boyd Lake	53.43	7,082,947	7,224,604
Castlewood Canyon	11.55	822,477	857,018
Chatfield	34.52	20,076,128	20,578,023
Cherry Creek	41.90	28,899,619	29,217,512
Colorado River	59.24	10,181,468	10,384,664
Crawford	45.05	1,466,369	1,645,250
Eldorado Canyon	27.24	2,566,408	2,604,897
Eleven Mile	42.23	6,249,645	6,818,366
Golden Gate Canyon	58.07	9,443,072	9,561,109
Highline Lake	47.92	3,418,040	3,486,406
Jackson Lake	21.26	1,865,985	1,899,573
John Martin Reservoir	47.94	2,350,000	4,700,000
Lathrop	48.93	3,595,115	3,656,225
Lory	24.34	648,817	661,785
Mancos	90.29	1,671,100	1,704,521
Mueller	54.50	3,198,332	3,291,081
Navajo	100.73	10,503,234	10,933,878
North Sterling	59.51	4,659,633	4,766,816
Pearl Lake	83.90	1,239,136	1,268,864
Pueblo	44.33	16,477,067	16,658,313
Ridgway	90.32	8,368,130	9,456,008
Rifle Falls	49.17	1,104,706	1,240,582
Rifle Gap	54.75	1,884,003	1,927,330
Roxborough	9.69	310,425	323,463
San Luis	46.32	340,675	346,123
Spinney Mountain	29.67	504,522	550,430
Stagecoach	60.58	2,882,076	2,948,362
State Forest	45.53	2,637,620	2,679,821
Steamboat Lake	97.40	10,742,051	10,989,118
Sweitzer Lake	44.23	777,203	794,309
Sylvan Lake	76.18	2,017,302	2,061,683
Trinidad Lake	65.94	4,749,280	4,853,763
Vega	41.25	2,081,284	2,131,244
Yampa River	59.19	3,894,342	3,944,958
Regional Totals			
West		52,222,604	
East		35,507,369	
Front Range		75,118,637	
Mountain		30,507,369	

N=4,074

4.10 Segmentation

Segmentation is generally acknowledged as a fundamental component of understanding one's market. The basic purpose of segmentation is to identify segments that react differently to marketing mixes – "one size does not fit all". Segmentation is the process of categorizing or clustering customers on the basis of known or estimated characteristics in order to achieve strategic advantage and increase profitability.

- **How** – by meeting their needs better and providing value to customers
- **Who** – by knowing who to concentrate upon – this means concentrating on customers who are valuable to your organization and serviceable.
- **What** – by knowing what marketing initiatives and service improvements to make.

There are three primary reasons for dividing the market into segments:

1. Easier marketing: It is easier to address the needs of smaller groups of customers, particularly if they have many characteristics in common (i.e., seek the same benefits)

2. Find niches: Identify underserved or un-served markets.

3. Efficient: More efficient user of marketing resources by focusing on the best segments for your current offering – product, price, and promotion. Segmentation can help you avoid sending the wrong message or sending your message to the wrong people.

The objective of segmentation is to generate target segments that conform to the following criteria:

1. **Size** – are the target segments large enough to justify the expenditure for marketing efforts required to serve it;
2. **Clarity** – the target segments must be meaningful in demographic, attitudinal and/or behavioural terms in order to develop a coherent marketing strategy;
3. **Differentiation** – are the target segments distinguishable from other segments and the population at large;
4. **Reach** – can the target segments be communicated to in a direct manner; and
5. **Compatible** – are the target segments harmonious in attitudinal and behavioural terms with your product and/or service offering.
6. **Interested in different benefits** – do the target segments differ in terms of the benefits they seek from your product/service. If everyone ultimately wants the same things from your product/service there is no reason to segment.
7. **Profitable** – the expected profits of developing a strategy around different segments must exceed the costs of developing multiple marketing programs, re-designing existing products/services and/or creating new products to reach those segments.

Segmenting the Colorado State Parks' Marketplace

In order to identify opportunities for future acquisition (i.e., attracting non-users to state parks), retention (i.e., maintaining the current level of visitation among frequent visitors), and extension (i.e., increasing visitation among occasional visitors) a segmentation has been generated among users and non-users of Colorado state parks. The purpose of the segmentation is to reveal "hot prospects" for future acquisition/extension and to continue to grow Colorado State Parks' position in the marketplace by better understanding the perceptions, preferences, characteristics and desired benefits of different groups of users and non-users.

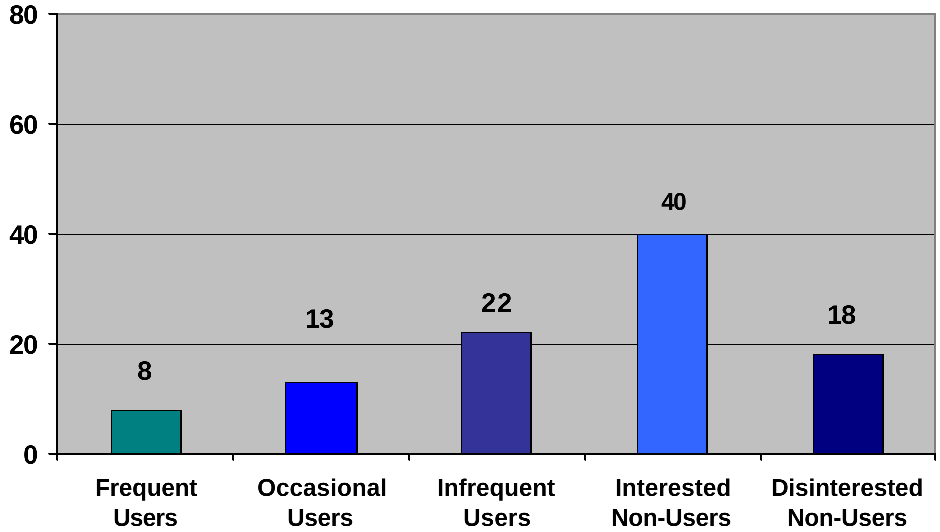
In support of these objectives a five segment solution has been generated. Current users of the state parks have been segmented according to their frequency of visitation: 1) 1 to 4 visits; 2) 5 to 10 visits; and 3) More than 10 visits. Non-users have been segmented according to their expressed likelihood of visiting a state park within the next 12 months: 1) very likely/somewhat likely to visit in the next year; 2) not very likely/not at all likely to visit in the next year.

Table 4.10.1: Segment Definitions

	Defining Characteristic
1. Frequent Users	More than 10 visits during last 24 months
2. Occasional Users	5 to 10 visits during last 24 months
3. Infrequent Users	1 to 4 visits during last 24 months
4. Interested Non-Users	No visits during last 24 months – moderate to high likelihood of visiting in next year
5. Disinterested Non-Users	No visits during last 24 months – low likelihood of visiting in next year

Figure 4.10.1 displays the estimated size of each of the five segments within the Colorado marketplace. Of the 43% of the Colorado population that have visited a state park in the past 24 months 22% have visited fewer than 5 times and are therefore classified as Segment 3. *Infrequent Users* should be the focus of initiatives designed to increase visitation among current users. On the other hand, 40% of non-users express a moderate to high likelihood of visiting a state park in the next year (i.e., *Interested Non-Users*). Members of this segment should be the focus of campaigns designed to stimulate trial/usage among current non-users. This segment in particular provides a significant opportunity for Colorado State Parks from the standpoint of future acquisition.

Figure 4.10.1 Segment Sizes within Colorado Marketplace (Estimated % of Population)



The three user segment also differ significantly in terms of the number of days that they spend in Colorado state parks within a given year. *Frequent Users* spend an average of 22 days in Colorado state parks each year compared to 12 days for *Occasional Users* and 4 days for *Infrequent Users*. Clearly, all three segments provide an opportunity from the standpoint of increased visitation.

KEY FINDING:
Young college graduates with children provide a significant acquisition opportunity for Colorado State Parks.

The segmentation analysis reveals that among non-users, younger (i.e., under 45 years old) college graduates with children are the most likely to visit a Colorado state park in the next 12 months (see Table 4.10.3). As such they provide the greatest single acquisition opportunity for Colorado State Parks. Ironically, this demographic profile closely resembles that of the more frequent visitor segments.

Table 4.10.2 Demographic Profile of Segments

	Frequent Users	Occasional Users	Infrequent Users	Interested Non-Users	Disinterested Non-Users
Gender					
Male	48	53	42	45	47
Female	52	48	58	55	53
Age					
18 to 24 years old	12	10	9	13	3
25 to 34 years old	19	25	16	17	10
35 to 44 years old	31	33	29	25	13
45 to 54 years old	19	18	22	20	23
55 to 64 years old	12	13	13	15	20
65 years and over	8	2	10	10	30
Education					
Less than high school	4	3	2	4	7
High school	19	20	22	27	30
Some college	31	20	28	28	33
College graduate	31	40	24	27	17
Post graduate	15	18	23	13	13
Region					
West	12	8	7	7	10
East	8	5	6	7	10
Front Range	73	82	83	79	73
Mountain	8	5	4	7	7
Marital Status					
Single	22	20	16	26	13
Married/Living with Partner	63	68	69	59	60
Divorced/Widowed	15	13	14	15	17
Children under 18					
Yes	50	44	45	40	26
No	50	56	55	60	74
Employment					
Working full-time	56	63	56	53	32
Working part-time	8	8	7	7	10
Self-employed/consultant	12	11	13	15	16
Unemployed	4	3	3	4	0
Retired	12	5	12	15	29
Disabled	0	3	2	2	3
Other	8	7	7	5	10
Gross Annual Household Income	45k	44k	43k	38k	35k

N=4,074

KEY FINDING:

***Frequent* and *Occasional Users* tend to enjoy more out-of-home entertainment experiences each month than any other consumer segment.**

In addition to visiting Colorado state parks more often than any other segment of the population, frequent visitor segments (i.e., *Frequent Users* and *Occasional Users*) also spend more time participating in other leisure activities. As such their average monthly entertainment expenditure is considerably higher than any other segment ($85 and $80/month respectively).

The most popular leisure activities for frequent visitor segments include outdoor recreational activities (camping, fishing, etc.), surfing the Internet, working in the garden and participating in recreational activities for exercise. Given that the number of outdoor recreational/leisure activities enjoyed by members of these segments in an average month greatly exceed the number of visits that they make to a state park, there may be an opportunity to extend the number of visits for both segments. Moreover, the tendency for *Infrequent Users* and *Interested Non-Users to* invest a large portion of their discretionary leisure time to outdoor recreational pursuits also presents an exciting opportunity for Colorado State Parks. Despite not having visited a Colorado state park for at least the last two years, *Interested Non-Users* participate very actively in both outdoor recreational activities for exercise and leisure activities (i.e., camping, fishing etc).

Table 4.10.3: Participation in Leisure Activities (Average # of Times /Month)

	Frequent Users	Occasional Users	Infrequent Users	Interested Non-Users	Disinterested Non-Users
Surfing the Internet	13.8	14.1	11.2	11.7	10.1
Participate in recreational activities for exercise	7.4	6.5	5.7	7.1	4.8
Working in the garden	11.3	9.0	7.5	8.2	7.4
Go to the gym/indoor fitness activities	7.4	6.5	5.7	7.1	4.8
Outdoor leisure activity such as camping, fishing, hunting	11.0	9.9	8.5	8.6	6.1
Go for dinner	5.5	6.1	5.2	5.6	5.0
Off road driving	2.3	1.7	1.5	2.0	1.5
Go to shopping mall	3.5	2.3	2.7	3.1	2.4
Play team sports	1.9	2.0	1.5	1.8	1.4
Go to bar/night club	1.4	1.6	1.0	1.0	0.8
Go to movies	1.6	1.4	1.2	1.6	1.1
Museum/art gallery	1.0	1.0	1.0	0.9	1.1
Go to concert or live theatre	1.0	0.8	0.7	0.9	0.7
Casino, racetrack or other gaming venue	0.4	0.3	0.4	0.4	0.3
Average Monthly Entertainment Expenditure	**$85**	**$80**	**$61**	**$51**	**$43**

N=4,074

KEY FINDING:
Those who visit Colorado state parks on a regular basis tend to enjoy a greater range and greater frequency of outdoor recreational activities.

Most F*requent* and O*ccasional Users* to Colorado state parks have participated in as many as 11 or 12 different recreational activities during the past 2 years. Many of these activities are carried within Colorado state parks. The most popular recreational activities for *Frequent* and *Occasional Users* include picnicking, trail recreation (hiking, biking etc.), water recreation (swimming, sailing etc), tent camping and fishing. While most *Infrequent Users* have also participated in these activities over the last two years (the majority have participated in 8 different recreational activities during the past 2 years) they have done so on a much less regular basis. Interestingly, most *Interested Non-Users* have participated in 4 to 6 different recreational activities over the past 2 years but have chosen to do so outside the confines of Colorado state parks.

Table 4.10.4: Outdoor Recreation Activities Participated in During Last 2 Years

	Frequent Users %	Occasional Users %	Infrequent Users %	Interested Non-Users %	Disinterested Non-Users %
Picnicking	90	89	86	82	62
Trail recreation (hiking, biking etc)	81	83	74	71	48
Water recreation (swimming, sailing etc)	79	71	61	57	32
Tent camping	76	71	61	58	28
Fishing	77	72	61	57	37
Visiting historical sites	69	75	64	63	34
Motorized water recreation	51	41	30	27	13
RV/car camping	46	49	44	33	20
Bird/wildlife watching	56	63	53	54	42
Hunting	38	28	25	23	18
Winter sports such as downhill skiing/snowboarding	43	40	33	28	15
Ball sports (golf, baseball, tennis)	45	50	40	37	27
Motorized water recreation	34	24	15	18	12
Motorized trail recreation	54	42	36	39	24
Motorized winter sports	34	24	15	18	12

N=4,074

KEY FINDING:

In choosing out-of-home leisure activities the majority of *Interested Non-Users* are more likely than other segments to be motivated by desires of self-fulfillment and meeting new people.

Survey respondents were asked to indicate how important a number of attributes were to them in choosing their out-of-home leisure activities. *Frequent Visitors* are more likely than other segments to attribute their motivations for planning leisure activities to a need to unwind/escape and/or experience new, exciting challenges. Compared to other segments, *Frequent Users* are more likely to choose leisure activities that enable them to escape the crowds, release tensions and anxieties and be alone. In contrast, *Occasional Users* are more likely to be motivated by social factors such as spending time with friends or family.

While being able to unwind/escape and spend time with family and friends is also important to *Interested Non-Users,* they are also likely to be influenced by a sense of self-fulfillment that can be achieved by participating in a particular activity. Specifically, *Interested Non-Users* are more likely to choose activities that enable them to experience and learn about new things. Communicating the diversity (i.e., range of activities) and learning experience aspects of the Colorado state parks' experience may be an effective message for encouraging individuals to try out the parks among this segment of the population.

Table 4.10.5: Motivations for Choosing Out-of-Home Leisure Activities[11]

	Frequent Users %	Occasional Users %	Infrequent Users %	Interested Non-Users %	Disinterested Non-Users %
Unwind/Escape (Average)	**71**	**68**	**64**	**63**	**51**
Give my mind a rest	71	70	62	64	48
Release tensions and anxieties	72	67	64	62	48
Get away from demands of life	77	75	70	69	50
To relax	80	80	77	76	71
Experience peace and calm	76	77	72	72	61
Get away from crowds	72	67	64	63	55
Be alone	41	31	34	35	32
To be close to nature	76	78	69	64	43
Self-fulfillment (Average)	**45**	**46**	**44**	**51**	**32**
Learn about new things	49	50	49	56	40
Develop my skills and abilities	40	33	32	37	20
To exercise and keep fit	38	47	47	49	32
Experience new and different things	54	54	49	61	35
Thrill seeking (Average)	**41**	**36**	**32**	**36**	**22**
To take risks	24	18	17	22	14
To have thrills and excitement	39	33	29	32	13
To experience new challenges	44	39	31	34	17
Be my own boss	55	52	49	55	42
Socialize (Average)	**51**	**53**	**50**	**55**	**40**
To spend time with family	77	79	76	75	59
Be with friends	56	62	54	61	40
To meet new people	19	17	19	29	20

N=4,074

KEY FINDING:

Word of mouth recommendation, newspapers and television are the primary information sources used by members of all five segments when planning out-of-home leisure activities.

Most Coloradans rely on a variety of different information sources when planning their leisure activities. While word of mouth recommendation and newspapers are the two most frequently used information sources across all segments, the popularity of other information sources does vary. In particular, *Occasional Users* are more likely to use the Internet (54%) for entertainment planning and *Infrequent Users* are more inclined to rely on radio advertising (44%).

[11] A factor analysis was conducted across all 19 attributes, which produced four distinct motivational factors (unwind/relax, self-fulfillment, thrill seeking, socialize). The average segment score achieved on each of these factors is presented in bold within the table.

Table 4.10.6: Information Sources Used when Planning Leisure Activities

	Frequent Users %	Occasional Users %	Infrequent Users %	Interested Non-Users %	Disinterested Non-Users %
Friends/Family Recommendation	88	93	88	86	74
Newspapers	63	63	66	67	56
Television	48	38	46	49	36
Radio ads	38	30	44	37	26
Internet	42	54	44	39	27
Entertainment magazines	24	21	23	23	10
Billboards	16	18	23	19	10

N=1,612

KEY FINDING:

Most *Frequent* and *Occasional Visitors* typically visit Colorado state parks in order to participate in particular recreational activities.

Survey respondents were asked to cite their primary reason(s) for visiting Colorado state parks. The opportunity to participate in specific recreational activities is the primary motivation for most *Frequent* and *Occasional Users* of the parks. In particular, *Frequent Users* usually visit a state park to participate in boating and/or hiking while *Occasional Users* are more inclined to be inspired by a desire to fish and/or camp. While these activities are not without motivation for *Infrequent Visitors*, they are more likely to visit a state park as a way of escaping the hustle and bustle of the city. Not surprisingly, many of these individuals live within the Front Range region of Colorado.

Table 4.10.7: Primary Reason(s) for Visiting Colorado State Parks (User Segments)

	Frequent Users %	Occasional Users %	Infrequent Users %
Fishing	11	13	9
Get away from the city	11	13	16
Convenient location	11	10	9
Recreation	11	10	9
Family outing	5	7	9
To view the scenery	5	7	4
Camping	5	14	11
Experience the outdoors	5	7	9
Boating/water sports	21	3	4
Hiking	12	7	4
Relaxation/solitude	0	3	2
Other	4	7	14

N=900

KEY FINDING:
Only 7% of *Interested Non-Users* have avoided visiting Colorado state parks due to a general lack of interest in what the parks have to offer.

A large percentage of *Interested Non-Users* who have not visited a Colorado state park in the past two years attribute their decision not to visit to a general lack of time/job obligations (42%) and/or lack of information/advertising about the parks (12%). On the other hand, nearly 1 in 5 *Disinterested Non-Users* cite lack of interest as the primary reason for not having visited the parks. A lack of time/job obligations is also a major obstacle for this segment (32%).

The reasons cited by *Interested Non-Users* for not having visited a state park in the past two years is encouraging from the standpoint of Colorado State Parks. Informing this segment about the recreational options/services available at Colorado state parks may be the most effective method for capturing this segment

Table 4.10.8: Primary Reason(s) for *Not* Visiting Colorado State Parks (Non-User Segments)

	Interested Non-Users %	Disinterested Non-Users %
Too busy/job obligations	42	32
Not interested/prefer doing other things	7	$\boxed{18}$
Personal (family problems, illness)	5	7
Lack of information/no advertising	12	6
No car/no one to travel with	5	7
Cost	6	5
Too crowded	5	4
Too far to travel	3	7
Live near by/in my back yard	2	5
Other	14	9

N=703

KEY FINDING:
More effective advertising and improved facilities will assist in attracting *Interested Non-Users* to Colorado state parks.

Reducing the size of crowds and providing more trail opportunities at Colorado state parks will likely have the greatest impact on future visitation across all segments. Both key target segments (i.e., *Infrequent Users* and *Disinterested Non-Users*) are also likely to increase their future visitation following improvements to the quality of facilities (i.e., campsites, cabins etc.) and through more effective advertising. Both of these segments demonstrate a significant interest in learning more about the opportunities available at existing state parks. Due to their interest in trying new things (a particular characteristic of Interested *Non-Users),* future advertising should focus on the variety of activities/opportunities available at the different state parks.

The *Frequent* and *Occasional User* segments should not be ignored from the standpoint of increasing future visitation. Although both segments have already demonstrated a willingness to visit Colorado state parks on a moderate to frequent basis, the average number of annual visits to state parks is much less than the number of outdoor recreational experiences recorded by both segments. Clearly, the majority of outdoor recreational activities enjoyed by both segments are experienced at destinations other than Colorado state parks. In addition to smaller crowds, both *Frequent* and *Occasional User* segments indicated that an increase in the number of backcountry parks with minimal development and more trail opportunities would likely result in increased state park visitation in the future.

Table 4.10.9: Increased Visitation on the Basis of Proposed Features

	Frequent Users %	Occasional Users %	Infrequent Users %	Interested Non-Users %	Disinterested Non-Users %
Smaller crowds	78	85	87	85	71
More backcountry parks with minimal development	73	80	68	66	55
Better quality facilities	69	75	74	78	57
More trail opportunities	73	78	67	71	44
Greater range of recreational options	64	70	59	63	32
More education programs	50	63	59	56	45
More advertising	48	49	58	64	43
Theme parks	49	33	48	39	29
Lodges/conference centers	35	28	36	40	27
Golf courses	17	15	20	22	19

N-1,610

KEY FINDING:

Both non-user segments identify "large parks with a wide range of camping, boating and fishing" as their first choice outdoor destination.

The preference of current state park users in terms of outdoor destinations is for "wilderness areas with little to no development". However, while both *Frequent* and *Infrequent Visitors* defined "large parks with a wide range of recreational options as their second choice destination, *Occasional Visitors* were more likely to select "forests and lakes with limited trails, fishing , camping etc." This choice of outdoor destination is a reinforcement of the preference that this segment demonstrates for more out of the way, backcountry solitude.

Non-user segments appear to prefer a more structured, developed mode of outdoor recreation. Indeed, the majority of non-users selected "large parks with a wide range of recreational options" as their first choice destination. *Disinterested Non-Users* also expressed an interest in "Community Trails and Community Parks with ball fields and recreation centers".

Table 4.10.10: Preferred Outdoor Destinations (Rank Order)

	Frequent Users %	Occasional Users %	Infrequent Users %	Interested Non-Users %	Disinterested Non-Users %
Wilderness areas with little to no development	1	1	1	2	2
Large parks with wide range of camping, trails, boating and fishing	2	3	2	1	1
Forests and lakes with limited trails, camping, boating and fishing	4	2	3	3	5
Rivers with boating and fishing	3	4	4	4	3
Community trails and community parks with ball fields and recreation centers	5	5	5	5	3

4.11 Attitudes Toward Funding of Colorado State Parks

KEY FINDING:
The majority of Coloradans believe that Colorado State Parks is funded equally by lottery funds, visitor fees and taxpayers.

There is a general consensus across Colorado about how Colorado State Parks are funded. Both users and non-users believe that the state parks' funding base draws evenly from lottery funds, visitor fees and taxpayers (see Table 4.11.1). This view of how Colorado State Parks is funded is relatively consistent across all regions and all age groups.

Table 4.11.1: Perceived Breakdown of State Park Funding by Source

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Lottery funds	35	37	33	37	35	35	35
Visitor fees	33	32	34	32	32	33	32
Taxpayers	31	31	33	31	33	32	34

N=1,613 Q: What percentage of state park funding in Colorado comes from taxpayers, what percentage comes from lottery funds, and what percentage comes from visitor fees?

KEY FINDING:

More than half (53%) of Coloradans are in favor of increased state funding for Colorado State Parks.

The majority of users and non-users are in favor of increasing the amount of state funding for Colorado State Parks (see Table 4.11.2). Indeed, only 4 percent of Coloradans believe that state parks should receive less state funding or no state funding at all. Two in five Coloradans (43%) feel that the level of state funding for Colorado State Parks should remain the same as it is currently. The large percentage of non-users supporting the concept of increased state funding for Colorado State Parks is testimony that, despite not visiting the parks in recent years, non-users still feel that state parks are a good thing for Colorado. Residents of Front Range are more likely than the rest of Colorado to support the concept of increased state funding for Colorado State Parks (55% versus an average of 47% across the other three regions).

Table 4.11.2: Future Funding of Colorado State Parks (Visitation and Region)

	Total %	**User** %	**Non-User** %	**West** %	**East** %	**Front Range** %	**Mountain** %
More State Funding	53	53	53	46	46	55	49
Less State Funding	2	1	3	3	2	2	4
Same Amount of State Funding	43	44	42	50	51	42	44
No State Funding	2	1	2	2	1	2	3

N=1,613 Q: Do you feel that Colorado State Parks should receive more state funding, less state funding about the same amount of funding as they already receive or no state funding?

KEY FINDING:

More than three in five Coloradans under the age of 35 (62%) believe that Colorado State Parks should receive more state funding than is currently the case.

Residents over the age of 64 are least supportive of increased state funding for Colorado State Parks (39%). However, very few Coloradans over the age of 64 actually feel that state funding should be reduced (1%) or cut all together (5%).

Table 4.11.3: Continued Funding of Colorado State Parks (Age)

	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65 + %
More State Funding	62	62	56	48	50	39
Less State Funding	3	2	0	6	1	1
Same Amount of State Funding	36	37	43	44	47	55
No State Funding	0	0	2	3	2	5

N=1,613 Q: Do you feel that Colorado State Parks should receive more state funding, less state funding about the same amount of funding as they already receive or no state funding?

KEY FINDING:

More than 2 in 3 Coloradans (67%) believe that future state park funding should go toward improving existing state parks rather than creating new ones.

Non-users (72%) are particularly firm in their view that future state park funding should be put toward improving existing state parks rather than creating new ones (see Table 4.11.4). This is indication that many non-users feel that Colorado State Parks are generally "on the right track" but perhaps have not fulfilled their true potential. Improving the quality of Colorado State Parks in terms of amenities and/or recreational opportunities may stimulate added interest and/or visitation among current non-users.

The preference for improving existing state parks over creating new ones is shared by Coloradans across all four regions. Those residing in the East (76%) and West (75%) regions are particularly solid in this view.

Table 4.11.4: Investment of Future State Park Funding

	Total %	User %	Non-User %	West %	East %	Front Range %	Mountain %
Improving existing state parks	67	63	72	74	76	65	69
Creating new state parks	33	37	28	26	24	35	31

N=1,537 Q: In terms of state park funding do you feel that there should be more money spent in improving existing state parks or in creating new state parks?

KEY FINDING:

Most Coloradans believe that the state's priority in terms of state park funding should be on the overall preservation, upkeep and maintenance of park lands and facilities.

Overall, Coloradans support either a slight or substantial increase in funding for a number of state park features and proposed improvements ranging from the general maintenance of park facilities to the development of more signs, pamphlets and exhibits on the parks' natural resources (see Table 4.11.5). However, the majority of Coloradans feel that the greatest increases in funding should be directed toward ensuring the parks' natural resources are preserved, keeping the parks clean, and the general maintenance and upkeep of park facilities.

The majority of Coloradans also feel that a little more money should be spent on the development of recreational trails (69%), picnic grounds and campgrounds (54%) and in creating opportunities for people to work and/or learn in outdoor programs. On the other hand, most feel that there should be no more money spent on cabins and yurts (40%) or on water recreation (33%).

Table 4.11.5: Investment in Improving State Parks (Total)

	A lot More Money %	A Little More Money %	No More Money %
Ensuring the parks natural resources are preserved	63	30	8
Keeping the parks clean	39	45	16
Upkeep and maintenance of park facilities and equipment	37	51	13
Purchasing Land for the park	37	43	20
Public Safety	30	44	27
Informing the public about what state parks offer	30	49	21
Water recreation	22	45	33
Signs, exhibits and pamphlets on park's natural resources	20	54	27
Picnic grounds and campgrounds	18	61	21
Opportunities for you to work and/or learn in outdoor programs	17	54	29
Cabins/yurts to rent	14	46	40
Recreation Trails	12	69	19

N=1,585

KEY FINDING:
In terms of general park improvements, non-users are more supportive of increasing state funding than users.

In particular, the majority of non-users are strongly in favor of the state investing a lot more money in keeping the parks clean, ensuring public safety and providing the public with more information on what the parks offer. Current users of the parks are more likely to favor a large increase in the amount of money used for purchasing new land for Colorado State Parks.

Table 4.11.6: Investment in Improving State Parks (User vs. Non-User)

A Lot More Money			
	Total %	**User** %	**Non-User** %
Ensuring the parks natural resources are preserved	63	63	62
Keeping the parks clean	39	35	44
Upkeep and maintenance of park facilities and equipment	37	36	37
Purchasing Land for the park	37	42	30
Public Safety	30	25	36
Informing the public about what state parks offer	30	24	37
Water recreation	22	22	23
Signs, exhibits and pamphlets on park's natural resources	20	18	23
Picnic grounds and campgrounds	18	18	18
Opportunities for you to work and/or learn in outdoor programs	17	16	19
Cabins/yurts to rent	14	13	16
Recreation Trails	12	10	14

N=1,585

There are some notable regional variations in how Coloradans feel that future state park investments should be prioritized. Specifically, residents of Eastern Colorado are more likely to support much large expenditures in improving public safety an in keeping the parks clean. Residents of the Eastern region are also in favor of increasing the amount of money invested in picnic areas and campgrounds, water recreation and cabins and yurts. Coloradans living in Front Range feel that the state should invest much more money in purchasing land for the park. They are also united with residents of the Mountain region in their support for an increase in the amount of money spent toward ensuring that the parks natural resources are preserved.

Table 4.11.7: Investment in Improving State Parks by Region

	A Lot More $				A Little More $			
	West %	East %	Front Range %	Mountain %	West %	East %	Front Range %	Mountain %
Ensuring the parks natural resources are preserved	58	59	63	64	29	34	30	29
Keeping the parks clean	35	46	39	40	45	38	46	43
Upkeep and maintenance of park facilities and equipment	32	42	37	32	47	44	52	51
Purchasing Land for the park	25	26	39	31	47	43	43	49
Public Safety	27	35	30	28	43	44	44	44
Informing the public about what state parks offer	26	32	30	29	46	49	50	48
Water recreation	23	30	22	21	45	46	44	44
Signs, exhibits and pamphlets on park's natural resources	19	21	20	19	51	54	54	56
Picnic grounds and campgrounds	21	32	17	16	59	51	62	60
Opportunities for you to work and/or learn in outdoor programs	23	25	16	23	49	51	55	46
Cabins/yurts to rent	12	25	14	14	37	38	48	40
Recreation Trails	17	22	10	15	58	53	72	59

N=1,585

Appendix A: Qualitative Research Discussion Guide

FOCUS GROUP DISCUSSION GUIDE – 2 hours

Introduction – Warm-up (5 minutes)

- Explain purpose of focus group (i.e., layout of room, role of moderator, role of participant, opportunity to solicit customer feedback on product/services – opportunity for customers to "make a difference")
- Purpose of group is to talk about participant's leisure activities in general and to discuss their perception of Colorado State Parks as a recreational activity in particular
- Ask participants to introduce themselves (i.e., first name, marital status/children, employment, hobbies)

Lifestyle and Recreational Activities (15 minutes)

- How do participants typically spend their leisure time?
    - Probe on in-home versus out-of-home entertainment
- What types of activities do they engage in on weekends?
- How do they choose what do to do on weekends?
- How much time do they have for recreational activities? Do they feel they have more or less time for recreation than in previous years?
- What type of recreational activities do they participate in?
- Do they typically participate in groups, alone or with family members?

- What do participants find motivational about particular types of recreational activities?
    - Probe on likes and dislikes
    - What type of experience are they looking for – what defines the "ideal" recreational experience
- How many weeks vacation do participants have each year?
- How do participants typically spend their vacations/long weekends?
    - Where do they go on their vacations?
    - What do they typically do?
- What do participants consider the "ideal vacation"?
    - What motivates their choice of vacation location and activity
    - Probe on outdoor, less structured activities versus structured activities
    - Active versus passive entertainment
- What are participants planning do for vacation this year?
    - Have the events of September 11th had any impact on their choice of recreational activities and/or vacation planning

Awareness of Colorado State Parks (15 minutes)

- What do participants think of when they hear reference to Colorado State Parks?
- How many state parks do they think exist in Colorado?
- Which state parks are participants able to name (Probe on State Parks versus National Parks)?
- Which parks are participants most familiar with – least familiar with?
- What range of recreational opportunities do they think exist at Colorado State Parks
- How do the Parks differ in terms of the types of recreational activities offered (Probe for specific examples)
    - Are some Parks better than others in terms of recreational opportunities – Which ones
- What specific programs (i.e., recreational/educational etc.) are participants aware of?
- How do participants know what they know about State Parks (i.e., word of mouth, proximity, news coverage, advertising, web presence, personal experiences)?

Perception of Colorado State Parks (25 minutes)

- What images come to mind when participants think of Colorado State Parks?
- Are these images positive or negative? What do participants like the most and like the least about the state parks? – search for specific examples?
- What is participants' perception of types of recreation offered by Colorado State Parks?
- What comes do mind when they think of Colorado State Parks (i.e., backcountry solitude or powerboat and RV heaven; hunting or wildlife watching, active or passive recreation)?
- Does a certain park typify their perception of state parks in Colorado?
- What types of people do participants typically associate with Colorado State Parks (i.e., families, hunters, wildlife lovers) – Are the parks for all types of people or do they cater to some interest/demographic groups more than others?
- Are parks perceived to be overcrowded or a place of solitude?
- How do participants perceive Colorado State Parks as a recreational haven?
- Do participants consider State Parks a safe place for recreation? For families? For the elderly?
- What is the participants opinion of the media's coverage of the Park fires?
    - What impact if any do they feel that the fires will have on tourists visiting the State Parks this summer – What impact will the fires have on visitation by locals?

Park Visitation (25 minutes)

- How often do participants visit Colorado State Parks in an average year (Probe on seasonality – which months are most popular for visiting the parks)?
- Which State Parks do they visit – which ones most often?
- Do they ever visit State Parks outside Colorado (if so, which ones and how often)?
- What are the primary reasons for visiting State Parks (Probe on full range of motivations)?
  - For non-visitors why do they not visit – what are they doing instead?
- Do participants always visit the Parks for the same reason or do the reasons vary – do they visit different parks for different reasons?
- Has the frequency of visitation changed in recent years, if so why?
- Who do participants typically visit with (i.e., family, friends, alone)?
- What do participants do on a typical visit to a State Park (Moderator: Encourage participants to talk through a typical visit)
  - What recreational activities do they typically participate in
  - What is their duration of stay on a typical visit
  - Do they ever stay overnight in the Park – if so, how often
- What do participants like the most and like the least when visiting State Parks – Do their likes and dislikes vary by park?
  - Probe on customer service, resources, regulatory enforcement
  - Is their a visible staff presence at the parks and are the parks sufficiently policed (do the participants feel safe when visiting the parks)
- Are participants planning to visit any of the Parks this summer? If so, which ones?
- Have the events of September 11th had any impact on their vacation planning for the summer – (Moderator: Probe on whether participants are they more likely to visit the State Parks this summer)

Pricing/Funding (10 minutes)

- Do participants feel that the fees at State Parks is reasonable? If not, why not? (Probe on different types of fees; i.e., camping fees, entry fees)
- What is the participants awareness and opinion of the different passes offered?
- Is the price Colorado State Parks charges for entrance fees commensurate with the experience?
- How much do participants typically spend when visiting a State Park?
  - On what do they spend their money
  - Do they feel that the amount they spend on a typical visit equals the quality of the overall experience
- Do participants know how Parks are funded? What are the various sources of funding (i.e., lottery revenue, Park fees, taxes)
- How should the Parks be funded? Who should pay for what (what should Park fees go towards, taxes, lottery money etc.)
- What are participant prepared to pay for?

Future Directions (25 minutes)

- What changes would participants like to see implemented in the State Parks in the future?
- What needs to be done to increase awareness/visitation in the State Parks (Moderator: If time permits ask participants to assume the role of marketing coordinator/director for Colorado State Parks – what would they do to improve marketing of parks, what would they do to increase awareness and stimulate greater visitation)
- What types of parks should be developed in the future?
    - More developed parks in accessible areas (Golf courses, more lodges, water recreation park) or less developed parks in less accessible areas)
    - What additional recreational activities should be developed – should the number of available recreational activities be reduced?
    - Should there be more or less development of facilities (i.e., fishing opportunities, boating, RV sites, cabins & yurts)
    - Should the Parks become more specialized around specific recreational activities or should they have broader appeal

- Should Colorado State Parks focus on the creation of new parks or maintaining existing parks?
    - (Moderator: Examine interest in improving facilities, providing more recreational opportunities, introducing more educational/interpretive opportunities)
- What additional services should Parks be offering (i.e., Web access, satellite service)?

- Would participants be prepared to pay higher entrance fees to improve the quality of Parks?
- Should more money be invested by State in improving quality of Parks – how should these improvements be funded (i.e., lottery money, in-park fees)
- What should be the focus of additional spending – Who should pay for what?

Appendix B: Attitude and Perception Survey – Questionnaire

Colorado State Parks' Attitude and Perception Survey

Hello, may I please speak with________________

Available .... **(CONTINUE)**
Not available .... **(ARRANGE CALL BACK)**

Good afternoon/evening. My name is __________. I'm calling from PricewaterhouseCoopers, an independent research firm. We are conducting a brief 15 to 20 minute survey on behalf of Colorado State Parks. I would like to ask you a number of questions regarding your choice of recreational activities and your attitudes toward state parks in Colorado. Your answers to the questions will help us to improve the overall quality of Colorado State Parks. You've been randomly selected to participate and your responses will be confidential. Let me assure you that we are not trying to sell you anything.

Continue ....
Call-back... **(ARRANGE TIME FOR CALLBACK)**

Note to individual conducting survey:

POPULATION: 18 years and over.

Quotas: 50% female/50% male, CHECK GEOGRAPHIC QUOTAS

SCREENER

A. Gender: Do not ask
50/50 split

B. Do you or anyone in your household work for a: **(IF YES TO ANY THANK AND TERMINATE)**

- ❑ Market or opinion research firm
- ❑ Advertising agency
- ❑ Public relations firm
- ❑ The media
- ❑ A National Park, the U.S. Forest Service or Bureau of Land Management
- ❑ Colorado State Parks

C. Which of the following age categories do you fall into? (**READ LIST, CHECK QUOTAS)**

- ❑ Under 18 years ➔ **THANK AND TERMINATE**
- ❑ 18 to 24 years
- ❑ 25 to 34 years
- ❑ 35 to 44 years
- ❑ 45 to 54 years
- ❑ 55 to 64 years
- ❑ 65 years or over

D. Have you visited a Colorado State Park in the last 24 months (and by "visit" we mean staying in the park for more than 2 hours, as opposed to transit through the park)?

- ☐ Yes **(GO TO Q.E))**
- ☐ No **(CODE AS NON-USER AND SKIP TO Q. A1)**

E. Approximately, on how many separate occasions have you visited a Colorado state park in the last 24 months?

RECORD NUMBER 1 – 712

F. Approximately, how many days have you spent at a Colorado state park in the last 24 months? **(RECORD NUMBER)**

G. Which Colorado State Parks have you visited in the last 24 months? Any others? **(INTERVIEWER: PROBE FOR ANY OTHERS, RECORD ALL PARKS MENTIONED – CHECK LIST, IF NO STATE PARK CORRECTLY IDENTIFIED CODE AS NON-USER, IF STATE PARK CORRECTLY IDENTIFIED CODE AS USER)**

H. Approximately how many times have you visited **(READ EACH PARK MENTIONED IN Q.E)** in the last 24 months? **RECORD NUMBER OF VISITS FOR EACH PARK MENTIONED IN Q.E 1-712**

Section A: Awareness and Perception

A1. Overall, would you say that you are very familiar, somewhat familiar, not very familiar or not at all familiar with state parks in Colorado?

- ❑ Very familiar
- ❑ Somewhat familiar
- ❑ Not very familiar
- ❑ Not at all familiar
- ❑ Don’t know/NA

A2. How many state owned parks do you think exist in the State of Colorado? **RECORD NUMBER**

A3. Which Colorado State Parks are you aware of? Any others? **(INTERVIEWER: PROBE FOR NAMES OF STATE PARKS, CHECK LIST)**

A4. Please tell me what first comes to mind when you hear the words Colorado State Parks? Any others? **(INTERVIEWER: RECORD UP TO TWO MENTIONS)**

A5. Overall, would you say that your impression of Colorado State Parks is very favourable, somewhat favourable, neutral, somewhat unfavourable or very unfavourable?

- ❑ Very favourable
- ❑ Somewhat favourable
- ❑ Neutral
- ❑ Somewhat unfavourable
- ❑ Very unfavourable
- ❑ Don’t Know/NA

A6. Why would you describe your impression of Colorado State Parks as **(READ RESPONSE FROM Q. A5)**? **(ACCEPT FIRST MENTION ONLY)**

A7a. What would you say you like the <u>most</u> about Colorado State Parks? **RECORD FIRST MENTION ONLY**

A7b. And what would you say you like the <u>least</u> about Colorado State Parks? **RECORD FIRST MENTION ONLY**

A8. Please tell me how strongly you agree with each of the following statements about Colorado State Parks on a seven point scale where 7 means you strongly agree with the statement and 1 means you strongly disagree with the statement. **ROTATE LIST exuded**

	Disagree Strongly 1	**2**	**3**	**4**	**5**	**6**	**7**	**DK/NA**
Different every time I visit								
A great place to relax								
Something for everyone								
RV haven								
Outstanding fishing								
Backcountry solitude								
Great range of recreational opportunities								
Outstanding scenery								
Too crowded								
One of the best aspects of living in Colorado								
Too expensive								
A place to learn about the outdoors								
A wonderful place to spend time with the family								
A safe place to enjoy the outdoors								
Not enough available information about parks								
A great way to enjoy the outdoors								

A9. In the last 3 months can you remember seeing or hearing any advertising for Colorado State Parks?

- ❑ Yes **(GO TO Q. A. 10)**
- ❑ No **(SKIP TO SECTION B)**

A10. Where do recall seeing or hearing this advertising? Any others? **(READ LIST IF NECESSARY, CHECK ALL THAT APPLY)**

- ❑ Newspaper
- ❑ Internet
- ❑ Radio
- ❑ Television
- ❑ Billboards
- ❑ Brochures
- ❑ Magazines
- ❑ Other (please specify) ____________________

Section B: State Park Visitation

ASK B1 and B2 TO USERS ONLY

B1. There are many reasons why people choose to visit state parks. Please tell me the primary reasons why you have visited Colorado State Parks in the past. Any other reasons? **(PROBE IF NECESSARY, RECORD UP TO TWO MENTIONS)**

B2. When visiting a Colorado State Park please tell me if you have ever used any of the following information sources to plan your visit. **(READ LIST, ROTATE, CHECK ALL THAT APPLY)**

- ❑ Chamber of Commerce or tourism bureaus
- ❑ Colorado State Parks website
- ❑ Other websites
- ❑ Radio
- ❑ Television
- ❑ Calling park directly or visiting park visitor's center
- ❑ Magazines or Newspapers
- ❑ Guidebooks or brochures
- ❑ Travel Agents
- ❑ Local Tour Operators
- ❑ Other (please specify) _____________________

ASK B3 and B4 TO NON-USERS ONLY

B3. There are several reasons why people do not visit state parks. Please tell me the primary reasons why you have not visited a Colorado State Park in the past two years. Any other reasons? **(PROBE IF NECESSARY, RECORD UP TO TWO MENTIONS)**

B4. When planning a recreation trip to any public land in Colorado have you ever used any of the following information sources? **(READ LIST, ROTATE, CHECK ALL THAT APPLY)**

- ❑ Chamber of Commerce or tourism bureaus
- ❑ Internet
- ❑ Radio
- ❑ Television
- ❑ Magazines or Newspapers
- ❑ Guidebooks or brochures
- ❑ Travel Agents
- ❑ Local Tour Operators
- ❑ Other (please specify) ______________________

ASK ALL RESPONDENTS

B5. When you are deciding what to do in your spare time would you say that you always, often, occasionally, rarely or never consider visiting a state park?

- ❑ Always
- ❑ Often
- ❑ Occasionally
- ❑ Rarely
- ❑ Never
- ❑ Don't know/NA

B6. How likely are you to visit a Colorado State Park in the next 12 months – very likely, somewhat likely, not
very likely, or not at all likely?

- ❑ Very likely
- ❑ Somewhat likely
- ❑ Not very likely
- ❑ Not at all likely
- ❑ Don't know/NA

B7a. I am now going to read you a list of features that could be introduced at Colorado State Parks in the future. For each feature mentioned please tell me, if it were introduced in the future, whether it would greatly increase the number of times you visit state parks, slightly increase the number of times you visit, decrease the number of times you visit or whether it would make no difference to the number of times you visit. **(READ LIST, ROTATE)**

	Greatly increase my visits	**Slightly increase my visits**	**No Difference to my visits**	**Decrease my visits**	**Don't Know/Not sure**
More advertising about park features and available activities	❑	❑	❑	❑	❑
A greater range of recreational activities	❑	❑	❑	❑	❑
Better quality facilities including campsites, restrooms and snack bars	❑	❑	❑	❑	❑
Smaller crowds	❑	❑	❑	❑	❑
Building of lodges or conference centers	❑	❑	❑	❑	❑
Higher entrance fees	❑	❑	❑	❑	❑
More outdoor education programs and naturalist led trail hikes	❑	❑	❑	❑	❑
Theme based parks such as water parks or equestrian parks	❑	❑	❑	❑	❑
Golf courses	❑	❑	❑	❑	❑
Higher service fees including camping and facility usage fees	❑	❑	❑	❑	❑
More trail opportunities	❑	❑	❑	❑	❑
More backcountry parks with minimal development	❑	❑	❑	❑	❑

B7b. Are there any other features, not already mentioned, that would increase the number of times you visit Colorado State Parks if introduced? Any others? **RECORD UP TO TWO MENTIONS**

B8. There are a number of different outdoor destinations available in Colorado. Of the following five possible destinations, please tell me which would be your first, second, third, fourth and fifth choice outdoor destination when planning an outdoor activity. **(READ LIST, ROTATE)**

Rank Order (1-5)

a) Rivers with boating and fishing
b) Wilderness areas with little to no development
c) Large parks with wide range of camping, trails, boating and fishing
d) Forests and lakes with limited trails, camping, boating and fishing
e) Community trails and community parks with ball fields and recreation centers

Section C: State Park Funding

C1. What percentage of state park funding in Colorado do you think comes from taxpayers, what percentage comes from lottery funds and what percentage comes from visitor fees? **(MUST ADD TO 100%)**

a) Taxpayers ______%
b) Lottery funds ______%
c) Visitor fees ______%

C2. Do you feel that Colorado State Parks should receive more state funding, less state funding, about the same amount of funding as they already receive or no state funding?

- ❑ More state funding
- ❑ Less state funding
- ❑ The same amount of state funding
- ❑ No state funding
- ❑ Don't know/NA

C3. In terms of state park funding, do you feel that more money should be spent in improving existing state parks or in creating new state parks?

- ❑ Improving existing state parks
- ❑ Creating new state parks
- ❑ Don't know/NA

C4. People have many opinions about how Colorado State Parks should invest money in improving state parks. I am going to read you a list of features. For each feature, please tell me whether you feel that Colorado State Parks should invest a lot more money in improving this feature, a little more money or no more money. **(READ LIST, ROTATE)**

	A lot more money	A little more money	No more money	Know/ NA
Purchasing land for the park				
Ensuring the parks natural resources are preserved				
Picnic grounds and campgrounds				
Recreation trails				
Water recreation such as swimming, beaches and boat ramps				
Cabins/yurts to rent				
Signs, exhibits and pamphlets in the park that tell us about the park's natural resources				
Public safety				
Upkeep and maintenance of park facilities and equipment				
Informing the public about what state parks offer				
Opportunities for you to work and/or learn in outdoor programs				
Keeping the parks clean				

Section D: Lifestyle

D1. In an average month, on how many separate occasions do you **(READ LIST, RANDOM)**?

RESPONSE = 1-31

Play team sports such as baseball, football or basketball
Surf the Internet
Visit a museum or art gallery
Participate in an outdoor leisure activity such as camping, fishing, hunting or boating
Go to the movies
Go to the gym or participate in indoor forms of exercise such as aerobics or yoga

Participate in recreational activities for exercise such as running, hiking, swimming or tennis
Go to a bar or nightclub
Work in the garden
Go off road driving
Go out for dinner
Go to a casino, racetrack or other gaming venue
Go to a concert or live theatre
Go to a shopping mall

D2. Approximately, how much money would you say you spend on out of home entertainment in an average month? **(READ LIST)**

- ❑ Less than $25
- ❑ $26 to $50
- ❑ $51 to $100
- ❑ $101 to $200
- ❑ $201 to $350
- ❑ $351 to $500
- ❑ $501 to $750
- ❑ $751 to $1,000
- ❑ $1,000 to $2,500
- ❑ More than $2,500
- ❑ Don’t know/NA

D3. When you are trying to decide what you will do for entertainment or leisure do you frequently, occasionally, rarely or never use (READ MEDIA – RANDOM) for ideas?

	Frequently	**Occasionally**	**Rarely**	**Never**	**Don’t know/NA**
The Newspaper					
The Internet					
Radio ads					
Television advertising					
Billboards					
Entertainment magazines					
Other people (friends, family)					
Other (specify) _______					

D4. When deciding how to spend your leisure time please tell me how important each of the following factors are to you on a scale of 1 to 7 where 7 means that the factor is very important to you when choosing an outdoor leisure activity and 1 means that the factor is not at all important to you when choosing a leisure activity.

	Not at all important **1**	**2**	**3**	**4**	**5**	**6**	**Very important** **7**	**DK/NA**
Give my mind a rest								
Be away from crowds of people								
To exercise and keep physically fit								
Learn about new things								
To have thrills and excitement								
Be my own boss								
Be with friends								
Experience new and different things								
Release tensions and anxieties								
Be close to nature								
Experience peace and calm								
Be alone								
Develop my skills and abilities								
To experience new challenges								
To get away from the usual demands of life								
To take risks								
To meet new people								
To relax								
To spend time with family								

D5. As I read the following outdoor activities, please tell me if you have taken part in the activity during the last 2 years. **(READ LIST, ROTATE)**

Yes
- ❑ Tent camping
- ❑ Picnicking
- ❑ Trail recreation such as hiking, biking and horseback riding
- ❑ Motorized trail recreation such as four-wheel driving and motorbike riding
- ❑ Fishing
- ❑ Visiting historical sites
- ❑ RV/car camping
- ❑ Bird and wildlife watching
- ❑ Hunting
- ❑ Water recreation such as swimming, sailing, canoeing, kayaking or rafting
- ❑ Motorized water recreation such as water or jet skiing and power boating
- ❑ Winter sports such as downhill skiing or snowboarding
- ❑ Winter sports such as cross-country skiing or snowshoeing
- ❑ Motorized winter sports such as snowmobiling
- ❑ Ball sports such as golf, baseball, tennis and soccer

Section E: Demographics

The following questions will be used for analysis purposes. Your answers to these questions are confidential and cannot be traced back to you individually in any way.

E1. What is your home zip code ______________?

E2. What is the highest level of education you have attained? **(READ LIST)**

- ❑ Less than high school
- ❑ High School diploma
- ❑ Some college
- ❑ College graduate
- ❑ Post graduate

E3. Other than being an American, what is your main ethnic or racial heritage? **(READ LIST)**

- ❑ White (Caucasian)
- ❑ Hispanic American
- ❑ Black (African/American)
- ❑ Asian American
- ❑ Native American
- ❑ Native Hawaiian or other Pacific Islander
- ❑ Other (please specify) ________________

E4. Which of the following best describes your family situation? **(READ LIST)**

- ❑ Single
- ❑ Married
- ❑ Living with life partner
- ❑ Divorced
- ❑ Widowed

E5. What is your total household income before taxes last year? **(READ LIST)**

- ❑ Under $10,000
- ❑ $10,000 - $19,999
- ❑ $20,000 - $29,999
- ❑ $30,000 - $39,999
- ❑ $40,000 - $49,999
- ❑ $50,000 - $74,999
- ❑ $75,000 - $99,999
- ❑ Over $100,000

E6. Which of the following best describes your current employment situation? **(READ LIST)**

- ❑ Working full-time for pay
- ❑ Working part-time for pay
- ❑ Self-employed/consultant
- ❑ Currently seeking work/unemployed
- ❑ Retired
- ❑ Permanently disabled
- ❑ Homemaker/caregiver
- ❑ Student
- ❑ Other (please specify) ______________

E7. How many children under the age of 18 are living in your household? **RECORD NUMBER 0-9**

E8. How long have you lived in Colorado? **(DO NOT READ LIST)**

- ❑ Less than 5 years
- ❑ 5 to 10 years
- ❑ 11 to 15 years
- ❑ 16 to 30 years
- ❑ More than 30 years but not entire life
- ❑ Native/Whole Life/Born Here

Thank you very much for participating in this survey.

Appendix C: Visitor Assessment Survey – Questionnaire

Colorado State Parks' Visitor Assessment Survey Introduction

Dear Park Guest,

Welcome! You are one of a select number of park visitors who is being asked to complete our State Parks' Visitor Assessment Survey. The survey will ask you about your visit to the park today. Colorado State Parks wants your opinion on how well we are serving your needs. We are also interested in understanding if you believe you are receiving good value for your fees paid. The results of this survey will help Colorado State Parks in their efforts to improve the quality of the State Parks experience.

Please read the questions and instructions carefully and answer questions by placing a check mark "√" in the correct box. The survey should take you no more than 15 minutes to complete. When completed, please deposit the questionnaire in our designated DROP OFF BOX at the park exit. All completed questionnaires will become eligible for a prize drawing in September. All of your questions are kept strictly confidential, and will not be associated with your name.

Thank you very much for your assistance.

Section A

A1. What form of transportation did you use to get to the park today?

- ❑ Car
- ❑ Walk
- ❑ Bicycle
- ❑ Recreation Vehicle (RV)
- ❑ Bus
- ❑ Horse
- ❑ Motorbike
- ❑ Other (please specify) ______________________

A2. If you drove, how many people were in your vehicle including yourself? __________________

A3a. How many people in your vehicle on this trip are under 16 years old? _____________________

A3b. How many people, including yourself, are over 65 years old? ________________

A4. What is your home zip code? _________________________

A5. Approximately, how far did you have to travel to visit the park today?

- ❑ 10 miles or less
- ❑ 11 to 20 miles
- ❑ 21 to 50 miles
- ❑ 51 to 100 miles
- ❑ 101 to 200 miles
- ❑ More than 200 miles

A6. Are you in a group other than those in your vehicle?

- ❑ Yes
- ❑ No **(Skip to Question A8)**

A7. Including yourself, how many people are in your group? ___________________________

A8. About how long did you or do you plan to stay in the park on **this visit**?

- ❑ Less than 2 hours
- ❑ 2 to 3 hours
- ❑ 4 to 5 hours
- ❑ 6 to 8 hours
- ❑ 9 to 12 hours
- ❑ 13 to 24 hours
- ❑ 2 to 3 days
- ❑ More than 3 days

A9. Is today's visit to the park on a weekend or weekday?

- ❑ Weekend (i.e., Saturday or Sunday)
- ❑ Weekday (i.e., Monday to Friday)
- ❑ Both (i.e., the visit will cover several days including weekday and weekend days)

A10. Including this visit, how many visits have you made to **this state park**

a) in the last month? ____________________ b) in the last 12 months? _________________

A11. What other Colorado state parks have you visited in the **last 12 months**? **(Please check all that apply)**

❑ Arkansas	❑ Eldorado Canyon	❑ Mancos	❑ Roxborough
❑ Barbour	❑ Eleven Mile	❑ Mueller	❑ San Luis
❑ Barr Lake	❑ Golden Gate	❑ Navajo	❑ Spinney Mountain
❑ Bonny	❑ Harvey Gap	❑ North Sterling	❑ Stagecoach
❑ Boyd Lake	❑ Highline	❑ Paonia	❑ State Forest
❑ Castlewood	❑ Island Acres	❑ Pearl	❑ Steamboat
❑ Chatfield	❑ Jackson Lake	❑ Pueblo	❑ Sweitzer
❑ Cherry Creek	❑ John Martin	❑ Ridgway	❑ Sylvan
❑ Colorado River	❑ Lathrop	❑ Rifle Falls	❑ Trinidad
❑ Crawford	❑ Lory	❑ Rifle Gap	❑ Vega

Section B

In this section of the questionnaire you will be asked a number of questions regarding your current visit to **this state park**

B1. What would you say was the primary reason to visit the park today? **(Check one box only)**

- ❑ To unwind/relax
- ❑ Spend time with family/friends
- ❑ To spend time on my own/away from crowds of people
- ❑ To stay fit/exercise
- ❑ To blow off steam
- ❑ To be close to nature
- ❑ To view the scenery
- ❑ To participate in a recreational activity that I love
- ❑ To do something different
- ❑ To get away from the usual demands of life

B2. What activities did you or do you plan to participate in while visiting the park on this trip? **(Check all that apply)**

❑ Hiking/walking for pleasure	❑ Swimming	❑ Running
❑ Fishing	❑ Motorized boating (i.e., jet skiing, motor boats)	❑ Rollerblading
❑ Hunting	❑ Bicycling	❑ Nature/wildlife observation
❑ Picnicking	❑ Horseback riding	❑ Camping
❑ Photography	❑ Rock climbing	❑ Dirt bike riding
❑ Dog walking	❑ Non-motorized boating (i.e., canoeing, kayaking)	❑ Other (please specify) ______________
❑ Looking at visitors' center exhibits	❑ A naturalist-led program	

B3. On this visit, have you or are you planning to stay overnight in the park?

❑ No **(Skip to Question B5)**

❑ Yes If so, how many nights ____________

B4. What type of overnight accommodation did you/will you be staying in?

❑ Cabin
❑ Yurt
❑ Boat at marina
❑ Recreational vehicle (RV)
❑ Tent

B5. How important are each of the following features to you in terms of your overall quality of experience when visiting a **state park**? For each feature please indicate whether it is very important, somewhat important, not very important or not at all important to your overall quality of experience when visiting a **state park**.

	Very Important	Somewhat Important	Not Very Important	Not at all Important	Don't Know/Not Applicable
Scenery/ Surroundings	❑	❑	❑	❑	❑
Cleanliness	❑	❑	❑	❑	❑
Facilities and equipment (i.e., restrooms, boat ramps, visitors' center etc.)	❑	❑	❑	❑	❑
Customer service	❑	❑	❑	❑	❑
Snack bar	❑	❑	❑	❑	❑
Marinas	❑	❑	❑	❑	❑
Safety	❑	❑	❑	❑	❑
Recreational activities (i.e., boating, fishing)	❑	❑	❑	❑	❑
Campgrounds	❑	❑	❑	❑	❑
Trails	❑	❑	❑	❑	❑
Park programs	❑	❑	❑	❑	❑
Cabins and/or yurts	❑	❑	❑	❑	❑
Posted information and signage	❑	❑	❑	❑	❑

B6. How would you describe your overall quality of experience at the state park on this visit?

- ❑ Excellent
- ❑ Good
- ❑ Fair
- ❑ Poor
- ❑ Very Poor

B7. Overall, how satisfied were you with each of the following features of the state park you visited today?

	Very Satisfied	**Somewhat Satisfied**	**Not Very Satisfied**	**Not at all Satisfied**	**Don't Know/Not Applicable**
Scenery/ Surroundings	❑	❑	❑	❑	❑
Cleanliness	❑	❑	❑	❑	❑
Facilities and equipment (i.e., restrooms, boat ramps, visitors' center etc.)	❑	❑	❑	❑	❑
Customer service	❑	❑	❑	❑	❑
Snack bar	❑	❑	❑	❑	❑
Marinas	❑	❑	❑	❑	❑
Safety	❑	❑	❑	❑	❑
Recreational activities (i.e., boating, fishing)	❑	❑	❑	❑	❑
Campgrounds	❑	❑	❑	❑	❑
Trails	❑	❑	❑	❑	❑
Park programs	❑	❑	❑	❑	❑
Cabins and/or yurts	❑	❑	❑	❑	❑
Posted information and signage	❑	❑	❑	❑	❑

B8. What would you describe as the most positive aspect or feature of the state park you are currently visiting?

____

B9. What would you describe as the most negative aspect or feature of the state park you are currently visiting?

____

B10. How likely are you to visit this park again in the next 3 months?

- ❑ Very likely
- ❑ Somewhat likely
- ❑ Not very likely
- ❑ Not at all likely

B11. The following table lists a number of features that could be introduced at this state park in the future. For each feature mentioned please indicate, if it were introduced in the future, whether it would greatly increase the number of times you visit the park, slightly increase the number of times you visit, decrease the number of times you visit or whether it would make no difference to the number of times you visit.

	Greatly increase my visits	Slightly increase my visits	No Difference to my visits	Decrease my visits	Don't know/Not sure
Lodge/Conference Center	❑	❑	❑	❑	❑
Cabins and/or yurts with plumbing & electricity	❑	❑	❑	❑	❑
More trails	❑	❑	❑	❑	❑
Easier/improved boating access	❑	❑	❑	❑	❑
More developed campsites	❑	❑	❑	❑	❑
More primitive campsites	❑	❑	❑	❑	❑
More natural/primitive experiences	❑	❑	❑	❑	❑
More group picnic and group campsites	❑	❑	❑	❑	❑
Golf courses	❑	❑	❑	❑	❑
Swimming pools	❑	❑	❑	❑	❑

Section C

C1. Not including the price of admission, approximately how much money have you/will you spend inside the park during this visit?

$______________________

C2. On this visit to the state park, how much money did you spend within 50 miles of the park that was related to your trip to the state park, not including money you spent at the park itself?

$______________________

C3. Please indicate how you have or intend to spend money on your current visit to the park above the price of admission? **(Check all that apply)**

- ❑ Nothing (I won't spend anything above the price of admission)
- ❑ Cabin/yurt rental
- ❑ Camping facilities (showers etc.)
- ❑ Food/beverages
- ❑ Boat/canoe rental
- ❑ Other (please specify) ______________________

C4. What type of park pass did you use for today's visit? **(Check one box only)**

- ❑ Daily
- ❑ Annual **(Skip to Question C6)**
- ❑ Disabled veteran (free admission)
- ❑ Aspen Leaf (**Skip to Question C6)**
- ❑ Columbine Pass ($10.00/year)
- ❑ None

C5. Are you aware of annual state park passes offered by Colorado State Parks?

- ❑ Yes
- ❑ No

C6. How likely would you be to purchase an annual pass for Colorado state parks at the current price of $50.00 during the next 13 months?

- ❑ Very likely
- ❑ Somewhat likely
- ❑ Not very likely
- ❑ Not at all likely

C7. For the money paid for a daily vehicle entrance permit at Colorado state parks (i.e., $5.00), do you feel that you are getting excellent, good, fair or poor value?

❑ Excellent
❑ Good
❑ Fair
❑ Poor

C8. The current daily permit price to Colorado state parks is $5.00. How would the following price increases, **above** the current price of $5.00, affect your current visitation levels? **(Please check one box for each price increase)**

Daily Permit Price Increase	**Come just as often**	**Come a bit less**	**Come much less**	**Not come at all**
$1.00	❑	❑	❑	❑
$2.00	❑	❑	❑	❑
$3.00	❑	❑	❑	❑
$4.00	❑	❑	❑	❑
$5.00	❑	❑	❑	❑

C9. For the money paid for an annual permit to Colorado state parks, that is $50.00, do you feel you are getting an excellent, good, fair, or poor deal?

❑ Excellent
❑ Good
❑ Fair
❑ Poor

C10. How would the following price increases, **above** the annual permit price of $50.00, affect your willingness to purchase the annual permit? **(Please check one box for each price increase)**

$3.00	❑	❑	❑
$5.00	❑	❑	❑
$10.00	❑	❑	❑
$15.00	❑	❑	❑
$20.00	❑	❑	❑

C11. Camping fees include $6 for primitive, $10 for basic, $14 for electrical and $16 for full hookup. An additional $2 is charged for certain sites during the summer months. Given these fees, do you feel the prices for the campsites are excellent, good, fair or poor value for money?

❑ Excellent
❑ Good
❑ Fair
❑ Poor

C12. As explained above, state park campsite fees range from $6 to $18 (including a $2 premium fee during summer months at certain sites). How would the following price increases, **above** the current camping fees, affect your willingness to purchase a campsite at this state park? **(Please check one box for each price increase)**

Camping Fee Increases	**Camp just as often**	**Camp a bit less**	**Camp much less**	**Not Camp at all**	**Don't Know/ Not applicable**
$1.00	❑	❑	❑	❑	❑
$2.00	❑	❑	❑	❑	❑
$3.00	❑	❑	❑	❑	❑
$4.00	❑	❑	❑	❑	❑
$5.00	❑	❑	❑	❑	❑

C13. Taking into consideration the total cost of visiting the state park today do you feel you are getting excellent, good, fair or poor value for money?

- ❑ Excellent
- ❑ Good
- ❑ Fair
- ❑ Poor

Section D

The following questions will be used for analysis purposes. Your answers to these questions are confidential and cannot be traced back to you individually in any way.

D1. Are you?

- ❑ Male
- ❑ Female

D2. What age category do you fall into?

- ❑ 18 to 24
- ❑ 25 to 34
- ❑ 35 to 44
- ❑ 45 to 54
- ❑ 55 to 64
- ❑ 65 and over

D3. What is the highest level of education you have attained? **(Check one)**

- ❑ High school or less
- ❑ Some college
- ❑ College graduate
- ❑ Post graduate

D4. Which of the following best describes your ethnicity?

- ❑ White (Caucasian)
- ❑ Hispanic
- ❑ Black (African/American)
- ❑ Asian
- ❑ Native American
- ❑ Other (please specify) ________________

D5. Which of the following best describes your family situation?

- ❑ Married/children under 16 years old
- ❑ Married/children 16 years and over
- ❑ Married/no children
- ❑ Single/no children
- ❑ Single/children under 16 years old
- ❑ Single/children 16 years and over

D6. Please indicate below your total household income before taxes last year **(Please Check one)**

- ❑ Under $10,000
- ❑ $10,000 - $19,999
- ❑ $20,000 - $29,999
- ❑ $30,000 - $39,999
- ❑ $40,000 - $49,999
- ❑ $50,000 - $74,999
- ❑ $75,000 - $99,999
- ❑ Over $100,000

D7. How long have you lived in Colorado?

- ❑ 0 years (I do not live in Colorado)
- ❑ 1 to 3 years
- ❑ 4 to 6 years
- ❑ 7 to 10 years
- ❑ 11 to 15 years
- ❑ 16 to 20 years
- ❑ 21 to 30 years
- ❑ More than 30 years

Thank you for participating in this survey. Your time and assistance is very much appreciated.

Please deposit your completed questionnaire in the designated DROP OFF BOX at the park exit.

In order to become eligible for our grand draw for prizes in September, 2002 please provide us with your name, telephone number and/or email address. Please print clearly.

Name: ____

Telephone Number: ______________________________

Email address: __________________________________

Appendix D: Breakdown of State Parks by Region and Type

Regional and Park Type Breakdown		
STATE PARK	***Region***	***Park Type***
Arkansas Headwaters	West	river
Barbour Ponds	Front Range	water-based
Barr Lake	Front Range	resource-based
Bonny Lake	East	water-based
Boyd Lake	Front Range	water-based
Castlewood Canyon	Front Range	resource-based
Chatfield	Front Range	water-based
Cherry Creek	Front Range	water-based
Colorado River	West	river
- *Island Acres*	West	river
- *Corn Lake*	West	river
- *Connected Lakes*	West	river
- *Fruita*	West	river
Crawford	West	water-based
Eldorado Canyon	Front Range	resource-based
Eleven Mile	Mountain	water-based
Golden Gate	Front Range	resource-based
Highline Lake	West	water-based
Jackson Lake	East	water-based
John Martin Reservoir	East	water-based
Lathrop	East	water-based
Lory	Front Range	resource-based
Mancos	West	resource-based
Mueller	Front Range	resource-based
Navajo	West	water-based
North Sterling	East	water-based
Pearl Lake	Mountain	resource-based
Pueblo	East	water-based
Ridgway	West	water-based
Rifle Falls	West	resource-based
Rifle Gap	West	water-based
Roxborough	Front Range	resource-based
San Luis	Mountain	water-based
Spinney Mountain	Mountain	water-based
Stagecoach	Mountain	water-based
State Forest	Mountain	resource-based
Steamboat Lake	Mountain	water-based
Sweitzer Lake	West	water-based
Sylvan Lake	Mountain	resource-based
Trinidad Lake	East	water-based
Vega	West	water-based
Yampa River	Mountain	river
-- *Elkhead Reservoir*	Mountain	river

Appendix E: Colorado Census Data

Table E.1: Colorado Census Data

Population, 2001 estimate	4,417,714
Population percent change, April 1, 2000-July 1, 2001	2.7%
Population, 2000	4,301,261
Population, percent change, 1990 to 2000	30.6%
Persons under 5 years old, percent, 2000	6.9%
Persons under 18 years old, percent, 2000	25.6%
Persons 65 years old and over, percent, 2000	9.7%
Female persons, percent, 2000	49.6%
White persons, percent, 2000 (a)	82.8%
Black or African American persons, percent, 2000 (a)	3.8%
American Indian and Alaska Native persons, percent, 2000 (a)	1.0%
Asian persons, percent, 2000 (a)	2.2%
Native Hawaiian and Other Pacific Islander, percent, 2000 (a)	0.1%
Persons reporting some other race, percent, 2000 (a)	7.2%
Persons reporting two or more races, percent, 2000	2.8%
Persons of Hispanic or Latino origin, percent, 2000 (b)	17.1%
White persons, not of Hispanic/Latino origin, percent, 2000	74.5%
Living in same house in 1995 and 2000, pct age 5+, 2000	44.1%
Foreign born persons, percent, 2000	8.6%
Language other than English spoken at home, pct age 5+, 2000	15.1%
High school graduates, percent of persons age 25+, 2000	86.9%
Bachelor's degree or higher, pct of persons age 25+, 2000	32.7%
Persons with a disability, age 5+, 2000	638,654
Mean travel time to work, workers age 16+ (minutes), 2000	24.3
Housing units, 2000	1,808,037
Homeownership rate, 2000	67.3%
Housing units in multi-unit structures, percent, 2000	25.7%
Median value of owner-occupied housing units, 2000	$166,600
Households, 2000	1,658,238
Persons per household, 2000	2.53
Median household money income, 1999	$47,203
Per capita money income, 1999	$24,049
Persons below poverty, percent, 1999	9.3%

Table E.2: Population by Region

Region 1: Northwest		Region 2: Northeast		Region 3: Central		Region 4: South Central	
County	**Population**	**County**	**Population**	**County**	**Population**	**County**	**Population**
Delta	28,709	Cheyenne	2,228	Arapahoe	501,846	Alamosa	15,282
Garfield	45,931	Kit Carson	8,007	Clear Creek	9,485	Chaffee	16,522
Gunnison	14,012	Lincoln	6,117	Denver	559,610	Conejos	8,401
Hinsdale	794	Logan	21,920	Douglas	200,385	Costilla	3,723
Mesa	119,968	Morgan	27,623	El Paso	533,526	Custer	3,686
Moffat	13,190	Phillips	4,511	Elbert	21,441	Fremont	47,209
Rio Blanco	5,986	Sedgwick	2,722	Jefferson	531,155	Lake	7,878
		Washington	4,898	Teller	21,827	Mineral	843
		Yuma	9,900			Rio Grande	12,518
						Saguache	6,100
Total	**228,590**	**Total**	**87,926**	**Total**	**2,379,275**	**Total**	**122,162**

Region 5: Southwest		Region 6: Southeast		Region 7: North Central		Region 8: Northern Mountain	
County	**Population**	**County**	**Population**	**County**	**Population**	**County**	**Population**
Archuletta	10,548	Baca	4,514	Adams	375,450	Eagle	43,497
Dolores	1,844	Bent	5,865	Boulder	297,838	Grand	12,909
La Platta	45,475	Crowley	5,446	Gilpin	4,845	Jackson	1,620
Montezuma	23,999	Huerfano	7,857	Larimer	259,707	Park	15,301
Montrose	34,601	Kiowa	1,598	Weld	194,382	Pitkin	15,227
Ouray	3,888	Las Animas	15,550			Routt	20,551
San Juan	560	Otero	19,976			Summitt	24,335
San Miguel	6,956	Prowers	14,240				
		Pueblo	144,383				
Total	**127,871**	**Total**	**219,429**	**Total**	**1,132,222**	**Total**	**133,440**

West		**East**		**Front Range**		**Mountain**	
Northwest	228,590	Northeast	87,926	North Central	2,379,275	Northern Mountain	122,162
Soutwest	127,871	Southeast	219,429	Central	1,132,222	South Central	133,440
Totals	**356,461**	-	**307,355**	-	**3,511,497**	-	**255,602**

The above regions are based upon Colorado's eight Local Government Planning Regions. We have collapsed these eight into the four regions outlined below for analysis purposes.

Appendix F: State Park Visitation Data

AREA NAME	FY 00-01 (ACTUAL)	FY 01-02 (ACTUAL)	FY 02-03 (ESTIMATE)	FY 03-04 (ESTIMATE)
BARR LAKE	86,501	81,587	83,464	85,383
CASTLEWOOD	187,119	201,512	210,782	219,634
CHATFIELD	1,242,575	1,475,226	1,512,107	1,549,909
CHERRY CREEK	1,531,202	1,376,976	1,531,197	1,548,040
ELDORADO	239,227	271,969	276,049	280,189
GOLDEN GATE	445,680	481,823	487,846	493,944
ROXBOROUGH	90,106	86,061	90,020	93,801
STAUNTON	0	0	0	0
METRO SUBTOTAL	3,822,410	3,975,154	4,191,463	4,270,901
BARBOUR PONDS	130,742	128,245	132,605	136,981
BONNY	90,320	76,065	76,674	77,287
BOYD LAKE	408,797	360,005	367,205	374,549
JACKSON	223,859	231,064	235,223	239,457
LORY	59,878	65,334	66,641	67,973
NORTH STERLING	198,345	211,043	216,108	221,079
PEARL LAKE	42,729	37,940	42,683	43,707
PICNIC ROCK	38,213	5,685	0	0
STAGECOACH	152,693	159,665	163,657	167,421
STATE FOREST	186,217	173,908	176,691	179,518
STEAMBOAT	398,867	349,694	358,436	366,680
YAMPA	81,101	138,992	140,799	142,629
NORTH SUBTOTAL	2,011,761	1,937,640	1,976,721	2,017,281
ARKANSAS RIV.	761,983	761,705	771,226	780,481
ELEVEN MILE	280,094	316,162	347,778	379,426
LATHROP	206,888	204,978	208,668	212,215
JOHN MARTIN		25,332	150,000	300,000
MUELLER	149,243	139,313	160,210	164,856
PUEBLO	1,326,415	1,156,944	1,170,827	1,183,706
SPINNEY	32,205	31,381	34,519	37,660
SAN LUIS LAKES	22,658	22,563	22,947	23,314
TRINIDAD	198,667	168,268	172,138	175,925
SOUTH SUBTOTAL	2,978,153	2,826,646	3,038,313	3,257,584
COLORADO RIVER/FRUITA	439,926	460,000	469,200	478,584
CRAWFORD	92,931	71,338	85,606	96,049
HARVEY GAP	33,498	36,266	37,100	37,916
HIGHLINE	204,929	251,746	256,781	261,917
MANCOS	34,742	46,769	47,751	48,706
NAVAJO	258,933	318,912	332,625	346,263
PAONIA	11,122	14,887	15,244	15,595
RIDGEWAY	205,853	228,710	236,257	266,971
RIFLE FALLS	65,585	71,586	73,018	81,999
RIFLE GAP	130,714	114,703	115,621	118,280
SWEITZER	52,191	51,874	53,067	54,235
SYLVAN/BRUSH CREEK	83,834	84,645	86,592	88,497
VEGA	101,668	119,124	122,102	125,033
WEST SUBTOTAL	1,715,926	1,870,560	1,930,964	2,020,044
STATE TOTAL	10,528,250	10,610,000	11,137,461	11,565,810
	FY 00-01	FY 01-02	FY 02-03	FY 03-04

Appendix G: Visitor Assessment Survey Data by Individual Park

Table G.1: Average Travel Distance to State Park (Miles)

	Average Miles
Arkansas Headwaters	74
Barbour Ponds	26
Barr Lake	15
Bonny Lake	48
Boyd Lake	19
Castlewood Canyon	16
Chatfield	13
Cherry Creek	10
Colorado River	40
Crawford	100
Eldorado Canyon	16
Eleven Mile	58
Golden Gate Canyon	38
Highline Lake	18
Jackson Lake	51
John Martin Reservoir	66
Lathrop	77
Lory	12
Mancos	55
Mueller	48
Navajo	53
North Sterling	48
Pearl Lake	112
Pueblo	39
Ridgway	80
Rifle Falls	53
Rifle Gap	52
Roxborough	12
San Luis	76
Spinney Mountain	65
Stagecoach	47
State Forest	90
Steamboat Lake	87
Sweitzer Lake	12
Sylvan Lake	89
Trinidad Lake	86
Vega	48
Yampa River	47

N=3,995

Table G.2: Average Number of Visitors per Vehicle

	Average # of Visitors Per Vehicle (Mean)
Arkansas Headwaters	4.1
Barbour Ponds	2.9
Barr Lake	2.4
Bonny Lake	3.1
Boyd Lake	2.8
Castlewood Canyon	3.0
Chatfield	2.6
Cherry Creek	2.2
Colorado River	2.7
Crawford	2.6
Eldorado Canyon	2.9
Eleven Mile	2.4
Golden Gate Canyon	3.0
Highline Lake	3.6
Jackson Lake	2.4
John Martin Reservoir	3.1
Lathrop	2.8
Lory	2.5
Mancos	2.6
Mueller	2.7
Navajo	3.2
North Sterling	2.8
Pearl Lake	2.9
Pueblo	3.2
Ridgway	2.6
Rifle Falls	3.3
Rifle Gap	3.4
Roxborough	2.8
San Luis	3.1
Spinney Mountain	2.0
Stagecoach	3.4
State Forest	3.1
Steamboat Lake	3.3
Sweitzer Lake	3.0
Sylvan Lake	3.3
Trinidad Lake	2.4
Vega	2.4
Yampa River	2.1

N=3,995

Table G.3: Average Number of Times Visiting State Park

	# of Visits in Last Month	# of Visits in Last 12 Months
Arkansas Headwaters	4.5	14.1
Barbour Ponds	1.9	4.2
Barr Lake	2.6	9.1
Bonny Lake	2.9	6.9
Boyd Lake	3.4	12.5
Castlewood Canyon	1.6	3.5
Chatfield	4.3	13.6
Cherry Creek	7.8	54.3
Colorado River	2.4	6.4
Crawford	1.2	2.1
Eldorado Canyon	5.1	20.1
Eleven Mile	2.8	9.6
Golden Gate Canyon	1.7	3.9
Highline Lake	3.0	6.7
Jackson Lake	2.1	7.6
John Martin Reservoir	3.0	6.4
Lathrop	2.5	7.3
Lory	3.2	9.0
Mancos	3.6	32.0
Mueller	1.5	3.7
Navajo	2.4	6.4
North Sterling	2.3	5.1
Pearl Lake	1.9	2.4
Pueblo	2.6	8.8
Ridgway	3.7	4.7
Rifle Falls	1.7	2.9
Rifle Gap	2.8	6.2
Roxborough	2.6	5.2
San Luis	2.2	2.9
Spinney Mountain	2.9	6.3
Stagecoach	3.4	7.0
State Forest	1.6	3.8
Steamboat Lake	1.6	2.9
Sweitzer Lake	3.1	9.3
Sylvan Lake	1.1	2.2
Trinidad Lake	2.8	13.1
Vega	2.0	5.2
Yampa River	1.9	3.7

N=3,995

Table G.4: Economic Expenditure

	Average Amount of Money Spent within the Park per Vehicle (excluding entrance fees) ($)	Average Amount of Money Spent within 50 Mile Radius of the Park per Vehicle ($)
Arkansas Headwaters	11.59	57.24
Barbour Ponds	3.14	37.93
Barr Lake	2.49	9.67
Bonny Lake	41.63	55.96
Boyd Lake	8.13	53.43
Castlewood Canyon	2.10	11.55
Chatfield	15.75	34.52
Cherry Creek	24.52	41.90
Colorado River	57.34	59.24
Crawford	13.43	45.05
Eldorado Canyon	3.92	27.24
Eleven Mile	19.64	42.23
Golden Gate Canyon	23.64	58.07
Highline Lake	53.08	47.92
Jackson Lake	13.07	21.26
John Martin Reservoir	4.00	47.94
Lathrop	13.48	48.93
Lory	2.96	24.34
Mancos	41.61	90.29
Mueller	13.81	54.50
Navajo	63.13	100.73
North Sterling	22.06	59.51
Pearl Lake	23.18	83.90
Pueblo	25.14	44.33
Ridgway	21.30	90.32
Rifle Falls	9.24	49.17
Rifle Gap	7.56	54.75
Roxborough	4.28	9.69
San Luis	4.58	46.32
Spinney Mountain	6.76	29.67
Stagecoach	33.06	60.58
State Forest	41.46	45.53
Steamboat Lake	51.75	97.40
Sweitzer Lake	20.87	44.23
Sylvan Lake	31.02	76.18
Trinidad Lake	9.08	65.94
Vega	15.19	41.25
Yampa River	12.38	59.19

N=3,832

Table G.5: Type of Park Pass Used

	Daily %	Annual %	Aspen Leaf %	Disabled %	Columbine %	None %
Arkansas Headwaters	59	12	3	0	0	26
Barbour Ponds	58	20	17	1	1	5
Barr Lake	78	11	8	1	0	3
Bonny Lake	67	23	8	0	1	1
Boyd Lake	55	23	16	0	1	5
Castlewood Canyon	89	9	0	1	0	1
Chatfield	71	17	7	0	1	4
Cherry Creek	35	49	10	0	1	5
Colorado River	55	17	17	1	1	9
Crawford	63	20	8	0	1	8
Eldorado Canyon	70	22	0	0	0	8
Eleven Mile	46	23	26	1	1	3
Golden Gate Canyon	57	25	13	0	1	4
Highline Lake	71	20	6	0	1	2
Jackson Lake	69	24	3	0	1	3
John Martin Reservoir	58	22	5	1	1	13
Lathrop	53	23	13	0	0	11
Lory	76	25	0	0	0	9
Mancos	90	0	10	0	0	0
Mueller	65	15	17	0	0	8
Navajo	65	27	4	0	0	4
North Sterling	51	35	10	0	1	3
Pearl Lake	67	27	5	0	0	1
Pueblo	95	5	0	0	0	0
Ridgway	47	12	34	0	2	5
Rifle Falls	82	12	6	0	0	0
Rifle Gap	66	19	14	0	2	0
Roxborough	71	26	2	0	0	1
San Luis	79	9	6	2	0	3
Spinney Mountain	61	32	6	0	0	0
Stagecoach	42	42	12	0	1	3
State Forest	75	11	11	0	0	3
Steamboat Lake	68	18	10	0	0	4
Sweitzer Lake	84	13	0	0	1	2
Sylvan Lake	68	23	8	0	0	1
Trinidad Lake	61	20	13	0	2	4
Vega	50	19	25	0	3	3
Yampa River	43	10	12	0	0	35

N=3,962

Table G.6.1: Importance of Park Features (Very Important/Somewhat Important)

	Scenery %	Cleanliness %	Facilities & Equipment %	Customer Service %	Snack Bar %	Marinas %	Safety %	Recreational Activities %
Arkansas Headwaters	99	99	78	45	10	18	84	76
Barbour Ponds	98	99	89	63	13	25	92	91
Barr Lake	98	97	90	62	9	20	84	54
Bonny Lake	97	99	96	77	27	50	92	92
Boyd Lake	97	99	90	75	18	40	99	76
Castlewood Canyon	99	98	73	53	5	13	81	47
Chatfield	98	99	88	69	21	35	91	85
Cherry Creek	97	100	91	76	26	41	92	71
Colorado River	97	99	87	72	10	17	82	64
Crawford	100	100	93	61	0	10	88	54
Eldorado Canyon	99	100	70	49	6	15	82	65
Eleven Mile	97	98	91	77	16	41	91	74
Golden Gate Canyon	100	100	87	78	13	10	92	58
Highline Lake	97	100	96	73	21	41	93	86
Jackson Lake	98	100	89	77	19	51	93	78
John Martin Reservoir	95	96	90	66	21	55	95	90
Lathrop	100	100	94	82	10	24	94	78
Lory	100	94	62	45	4	7	74	45
Mancos	95	95	79	84	0	6	94	79
Mueller	100	98	88	74	3	12	94	46
Navajo	95	99	97	85	27	87	96	94
North Sterling	92	99	93	77	34	64	91	84
Pearl Lake	99	97	81	66	9	23	79	75
Pueblo	97	98	91	82	29	71	99	95
Ridgway	100	100	93	87	9	19	94	76
Rifle Falls	100	99	89	64	7	26	89	72
Rifle Gap	96	99	91	68	5	33	95	85
Roxborough	100	100	80	70	9	12	85	42
San Luis	100	99	91	68	15	27	93	76
Spinney Mountain	95	97	90	47	10	27	82	96
Stagecoach	96	100	87	75	27	52	93	91
State Forest	97	99	78	58	8	14	89	76
Steamboat Lake	100	99	91	77	19	35	91	85
Sweitzer Lake	90	95	91	68	18	36	89	89
Sylvan Lake	98	98	82	65	6	16	86	77
Trinidad Lake	98	98	92	86	9	30	95	74
Vega	99	100	87	67	14	25	81	88
Yampa River	97	99	85	72	5	27	88	75

N=3,853

Table G.6.2: Importance of Park Features (Very Important/Somewhat Important)

	Campgrounds %	Trails %	Park programs %	Cabins/yurts %	Information + Signage %
Arkansas Headwaters	77	79	42	22	84
Barbour Ponds	88	68	47	24	86
Barr Lake	53	92	55	27	90
Bonny Lake	91	57	40	23	91
Boyd Lake	87	84	44	20	78
Castlewood Canyon	62	97	49	30	88
Chatfield	68	74	39	18	87
Cherry Creek	63	78	53	30	89
Colorado River	86	72	38	11	90
Crawford	100	81	39	2	79
Eldorado Canyon	70	96	41	29	86
Eleven Mile	91	76	51	22	87
Golden Gate Canyon	86	95	69	32	89
Highline Lake	78	69	39	26	73
Jackson Lake	97	76	60	12	84
John Martin Reservoir	89	65	41	30	81
Lathrop	92	79	63	15	85
Lory	55	97	38	25	91
Mancos	95	79	55	26	89
Mueller	85	94	66	14	93
Navajo	82	53	32	18	75
North Sterling	89	63	44	28	79
Pearl Lake	95	92	35	26	79
Pueblo	85	67	35	31	77
Ridgway	97	83	53	14	81
Rifle Falls	89	98	48	32	88
Rifle Gap	92	76	44	25	89
Roxborough	51	99	61	32	92
San Luis	89	86	41	20	88
Spinney Mountain	75	51	34	18	83
Stagecoach	85	81	48	26	84
State Forest	92	94	42	24	90
Steamboat Lake	90	92	55	27	89
Sweitzer Lake	69	65	41	27	75
Sylvan Lake	94	97	55	32	86
Trinidad Lake	94	78	60	13	85
Vega	82	77	51	36	84
Yampa River	91	77	49	23	83

N=3,853

Table G.7: Quality of Experience when Visiting Colorado State Park

	Excellent %	Good %	Fair %	Poor %	Very Poor %
Arkansas Headwaters	61	34	5	0	0
Barbour Ponds	34	51	15	0	0
Barr Lake	46	43	11	0	0
Bonny Lake	38	56	6	0	0
Boyd Lake	39	50	6	4	1
Castlewood Canyon	69	29	1	1	0
Chatfield	43	47	10	0	0
Cherry Creek	57	39	2	1	1
Colorado River	67	27	6	0	0
Crawford	58	37	5	0	0
Eldorado Canyon	70	26	4	0	0
Eleven Mile	44	50	5	1	0
Golden Gate Canyon	80	19	1	0	0
Highline Lake	55	41	4	0	0
Jackson Lake	33	53	9	5	0
John Martin Reservoir	18	43	27	4	8
Lathrop	59	39	0	1	1
Lory	70	30	0	0	0
Mancos	68	32	0	0	0
Mueller	79	19	2	0	0
Navajo	53	45	2	0	0
North Sterling	37	51	11	0	1
Pearl Lake	73	26	1	0	0
Pueblo	36	54	7	0	3
Ridgway	62	38	9	1	0
Rifle Falls	71	28	1	0	0
Rifle Gap	37	49	4	0	0
Roxborough	82	17	1	0	0
San Luis	44	46	10	0	0
Spinney Mountain	45	46	9	0	0
Stagecoach	56	39	4	0	1
State Forest	60	38	2	0	0
Steamboat Lake	75	24	1	0	0
Sweitzer Lake	43	53	4	0	0
Sylvan Lake	49	47	3	0	1
Trinidad Lake	60	36	4	0	0
Vega	58	36	6	0	0
Yampa River	58	36	5	0	1

N=3,962

Table G.8.1: Types of Activities Participated in by Visitors

	Hiking %	Fishing %	Picknicking %	Photography %	Visitors Center %	Swimming %	Motorized Boating %	Bicycling %
Arkansas Headwaters	36	29	39	20	5	21	3	6
Barbour Ponds	32	79	22	7	2	1	0	3
Barr Lake	69	25	23	17	28	2	1	6
Bonny Lake	33	54	45	12	10	61	52	9
Boyd Lake	49	22	27	10	4	24	13	14
Castlewood Canyon	90	1	32	17	13	6	0	4
Chatfield	23	21	24	7	1	41	35	11
Cherry Creek	39	10	20	5	4	23	19	14
Colorado River	42	23	29	17	9	39	1	11
Crawford	60	21	29	38	17	14	0	14
Eldorado Canyon	82	2	29	26	10	13	0	2
Eleven Mile	46	82	22	19	12	5	16	9
Golden Gate Canyon	86	20	41	33	29	1	1	16
Highline Lake	19	14	56	12	2	73	45	5
Jackson Lake	51	31	36	13	23	44	10	10
John Martin Reservoir	32	47	22	13	2	30	29	5
Lathrop	61	31	32	24	24	25	21	15
Lory	66	2	12	13	11	2	0	21
Mancos	47	71	12	6	0	6	0	0
Mueller	86	5	28	24	30	1	0	17
Navajo	26	37	27	23	9	61	74	8
North Sterling	33	48	22	11	5	46	51	7
Pearl Lake	87	57	39	37	21	11	11	19
Pueblo	22	29	28	14	7	64	64	5
Ridgway	78	31	30	25	17	12	6	16
Rifle Falls	96	16	38	43	7	22	1	5
Rifle Gap	44	56	36	21	9	32	27	8
Roxborough	92	0	7	22	28	0	0	0
San Luis	48	22	28	25	6	14	14	6
Spinney Mountain	15	95	14	13	1	2	9	2
Stagecoach	55	57	31	25	6	35	29	16
State Forest	75	69	44	47	25	4	4	10
Steamboat Lake	78	53	38	34	38	30	21	23
Sweitzer Lake	15	15	51	12	2	55	55	0
Sylvan Lake	88	68	35	32	16	11	2	25
Trinidad Lake	69	41	26	23	29	7	9	7
Vega	46	67	38	16	24	4	5	4
Yampa River	48	21	26	9	36	15	10	10

N=3,962

Table G.8.2: Types of Activities Participated in by Visitors (cont'd)

	Camping %	Wildlife/Nature Observation %
Arkansas Headwaters	36	30
Barbour Ponds	27	23
Barr Lake	0	51
Bonny Lake	54	17
Boyd Lake	35	19
Castlewood Canyon	0	36
Chatfield	18	11
Cherry Creek	17	26
Colorado River	36	25
Crawford	83	43
Eldorado Canyon	0	28
Eleven Mile	52	35
Golden Gate Canyon	59	56
Highline Lake	15	14
Jackson Lake	70	23
John Martin Reservoir	34	22
Lathrop	56	39
Lory	2	31
Mancos	59	41
Mueller	53	54
Navajo	34	20
North Sterling	54	28
Pearl Lake	77	44
Pueblo	24	14
Ridgway	73	44
Rifle Falls	20	49
Rifle Gap	50	33
Roxborough	0	48
San Luis	30	26
Spinney Mountain	3	15
Stagecoach	52	26
State Forest	75	64
Steamboat Lake	54	43
Sweitzer Lake	4	7
Sylvan Lake	65	55
Trinidad Lake	65	38
Vega	31	38
Yampa River	40	28

N=3,962

Table G.9: Perceived Value for Money of Daily Entrance Fee

	Excellent %	Good %	Fair %	Poor %
Arkansas Headwaters	32	41	20	7
Barbour Ponds	35	45	14	5
Barr Lake	42	43	11	5
Bonny Lake	43	32	22	3
Boyd Lake	27	38	25	10
Castlewood Canyon	54	39	6	1
Chatfield	38	40	17	6
Cherry Creek	42	37	18	4
Colorado River	47	26	15	11
Crawford	41	28	23	8
Eldorado Canyon	42	41	14	3
Eleven Mile	42	33	19	7
Golden Gate Canyon	59	33	6	2
Highline Lake	37	39	18	6
Jackson Lake	33	44	14	8
John Martin Reservoir	26	39	20	15
Lathrop	35	44	16	6
Lory	52	35	12	1
Mancos	47	47	5	0
Mueller	60	26	12	2
Navajo	39	34	22	6
North Sterling	25	45	24	6
Pearl Lake	48	35	16	1
Pueblo	38	33	22	7
Ridgway	45	39	10	7
Rifle Falls	46	33	17	4
Rifle Gap	32	40	20	8
Roxborough	65	28	7	1
San Luis	36	35	24	5
Spinney Mountain	43	33	22	3
Stagecoach	40	35	19	7
State Forest	55	27	15	3
Steamboat Lake	52	35	10	3
Sweitzer Lake	32	47	19	3
Sylvan Lake	48	36	15	1
Trinidad Lake	41	36	14	9
Vega	44	37	13	6
Yampa River	34	45	14	8

N=3,869

Table G.10: Perceived Value for Money of Annual Pass

	Excellent %	Good %	Fair %	Poor %
Arkansas Headwaters	27	41	27	6
Barbour Ponds	38	36	20	7
Barr Lake	37	32	25	6
Bonny Lake	27	37	22	15
Boyd Lake	34	35	22	9
Castlewood Canyon	46	39	13	2
Chatfield	30	43	22	5
Cherry Creek	53	26	14	8
Colorado River	31	38	21	10
Crawford	33	31	22	14
Eldorado Canyon	43	38	16	3
Eleven Mile	37	34	22	8
Golden Gate Canyon	41	42	13	3
Highline Lake	33	35	21	11
Jackson Lake	43	32	21	6
John Martin Reservoir	29	29	26	16
Lathrop	35	40	16	9
Lory	44	32	20	5
Mancos	12	59	29	0
Mueller	52	24	18	6
Navajo	25	39	25	11
North Sterling	24	38	27	12
Pearl Lake	38	40	16	6
Pueblo	22	40	29	9
Ridgway	41	31	16	11
Rifle Falls	35	40	18	7
Rifle Gap	33	36	23	9
Roxborough	55	26	16	3
San Luis	37	26	23	14
Spinney Mountain	38	34	25	3
Stagecoach	44	30	19	7
State Forest	44	23	22	11
Steamboat Lake	53	29	13	5
Sweitzer Lake	21	45	26	9
Sylvan Lake	49	35	11	5
Trinidad Lake	36	36	20	8
Vega	42	29	18	11
Yampa River	27	55	10	8

N=3,563

Table G.11: Perceived Value for Money of State Park Visit

	Excellent %	Good %	Fair %	Poor %
Arkansas Headwaters	41	41	15	3
Barbour Ponds	33	44	19	4
Barr Lake	49	36	12	4
Bonny Lake	35	46	15	4
Boyd Lake	27	41	24	8
Castlewood Canyon	58	34	6	2
Chatfield	35	45	18	3
Cherry Creek	49	32	15	3
Colorado River	45	34	17	4
Crawford	37	26	30	7
Eldorado Canyon	48	42	8	2
Eleven Mile	41	39	18	2
Golden Gate Canyon	59	37	4	0
Highline Lake	33	45	18	4
Jackson Lake	36	42	16	7
John Martin Reservoir	24	30	29	17
Lathrop	39	45	13	4
Lory	53	35	12	0
Mancos	53	47	0	0
Mueller	62	26	9	3
Navajo	26	47	24	3
North Sterling	25	37	32	6
Pearl Lake	49	39	13	0
Pueblo	29	48	19	5
Ridgway	44	41	11	4
Rifle Falls	52	26	22	0
Rifle Gap	30	48	17	6
Roxborough	69	30	1	0
San Luis	39	37	19	6
Spinney Mountain	40	39	17	4
Stagecoach	44	41	15	0
State Forest	48	34	16	2
Steamboat Lake	52	36	10	1
Sweitzer Lake	32	58	8	3
Sylvan Lake	36	49	14	1
Trinidad Lake	45	32	18	5
Vega	38	44	13	5
Yampa River	42	38	17	3

N=3,915

Table G.12.1: Demographic Profile of Visitors (Age)

	18 –24 years old %	25-34 years old %	35-44 years old %	45-54 years old %	55-64 years old %	65 years + %
Arkansas Headwaters	7	19	28	25	10	11
Barbour Ponds	7	13	22	18	19	21
Barr Lake	5	14	32	26	16	8
Bonny Lake	10	18	26	22	13	11
Boyd Lake	8	19	21	21	14	19
Castlewood Canyon	6	29	31	25	6	3
Chatfield	4	22	32	22	10	9
Cherry Creek	6	18	23	26	13	14
Colorado River	8	10	26	19	16	21
Crawford	0	12	27	22	27	12
Eldorado Canyon	13	26	29	23	8	1
Eleven Mile	5	8	28	15	24	21
Golden Gate Canyon	11	12	38	18	12	10
Highline Lake	22	16	25	22	10	6
Jackson Lake	7	12	30	30	16	7
John Martin Reservoir	7	16	23	22	21	11
Lathrop	6	6	21	27	18	18
Lory	20	27	25	24	5	0
Mancos	5	26	31	26	16	5
Mueller	1	7	30	27	18	18
Navajo	7	11	29	32	16	6
North Sterling	4	15	30	27	14	10
Pearl Lake	10	17	21	35	12	6
Pueblo	9	25	42	15	7	2
Ridgway	2	1	14	26	25	33
Rifle Falls	10	19	32	20	15	4
Rifle Gap	10	16	27	24	11	13
Roxborough	6	16	27	29	15	6
San Luis	10	22	28	20	13	7
Spinney Mountain	4	20	25	25	16	10
Stagecoach	8	10	22	26	28	6
State Forest	6	10	32	22	20	9
Steamboat Lake	5	14	29	30	16	6
Sweitzer Lake	15	21	25	30	8	1
Sylvan Lake	3	16	39	20	15	7
Trinidad Lake	1	12	17	20	28	22
Vega	3	8	24	24	23	18
Yampa River	5	12	24	32	10	17

N=3,931

Table G.12.2: Demographic Profile of Visitors (Education and Income)

	High School or Less %	Some College %	College Graduate %	Post-Graduate %	Average Annual Household Income
Arkansas Headwaters	19	24	31	27	43k
Barbour Ponds	34	30	27	9	38k
Barr Lake	18	33	30	19	44k
Bonny Lake	28	36	26	11	42k
Boyd Lake	27	30	28	15	41k
Castlewood Canyon	5	32	39	25	53k
Chatfield	20	29	35	16	47k
Cherry Creek	12	30	30	28	49k
Colorado River	18	43	28	11	39k
Crawford	26	29	21	24	45k
Eldorado Canyon	5	20	42	34	47k
Eleven Mile	23	33	28	16	43k
Golden Gate Canyon	9	29	31	32	50k
Highline Lake	34	36	23	8	35k
Jackson Lake	16	38	29	16	44k
John Martin Reservoir	24	40	24	11	37k
Lathrop	21	41	28	19	43k
Lory	6	32	46	26	39k
Mancos	16	24	47	11	41k
Mueller	3	26	32	30	51k
Navajo	12	35	30	20	49k
North Sterling	31	38	18	11	46k
Pearl Lake	6	40	40	28	54k
Pueblo	21	25	30	7	48k
Ridgway	26	42	28	16	42k
Rifle Falls	18	30	32	15	44k
Rifle Gap	29	35	34	17	41k
Roxborough	3	27	42	38	50k
San Luis	19	17	25	21	39k
Spinney Mountain	14	35	32	16	47k
Stagecoach	21	39	35	21	47k
State Forest	17	23	32	24	63k
Steamboat Lake	10	27	43	20	48k
Sweitzer Lake	42	27	26	4	35k
Sylvan Lake	14	28	36	30	53k
Trinidad Lake	19	21	31	12	42k
Vega	27	38	28	10	36k
Yampa River	23	39	32	24	42k

N=3,907

Table G.12.3: Demographic Profile of Visitors (Family Status)

	Married/with children %	Married/no children %	Single/with children %	Single/no children %
Arkansas Headwaters	25	36	21	18
Barbour Ponds	23	53	17	7
Barr Lake	25	47	18	10
Bonny Lake	40	47	12	1
Boyd Lake	25	53	14	8
Castlewood Canyon	47	32	16	5
Chatfield	33	39	17	11
Cherry Creek	25	43	24	8
Colorado River	31	50	10	9
Crawford	27	56	12	5
Eldorado Canyon	36	30	29	5
Eleven Mile	24	49	12	15
Golden Gate Canyon	39	39	14	8
Highline Lake	38	35	17	10
Jackson Lake	39	42	15	4
John Martin Reservoir	21	51	16	12
Lathrop	26	55	15	4
Lory	24	27	44	5
Mancos	32	37	32	0
Mueller	18	69	8	5
Navajo	42	45	8	5
North Sterling	28	51	11	10
Pearl Lake	39	48	11	2
Pueblo	44	40	6	10
Ridgway	17	75	4	12
Rifle Falls	40	35	13	12
Rifle Gap	33	43	16	8
Roxborough	23	50	22	5
San Luis	38	32	21	9
Spinney Mountain	21	49	22	8
Stagecoach	34	54	9	3
State Forest	34	48	12	6
Steamboat Lake	41	35	22	2
Sweitzer Lake	27	43	15	15
Sylvan Lake	47	37	14	2
Trinidad Lake	21	48	13	18
Vega	13	65	8	14
Yampa River	30	56	9	5

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