



Economic Development Report

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TOURISTS' VALUE OF ROUTT COUNTY'S WORKING LANDSCAPE, 2005

Lindsey Ellingson, Andrew Seidl, and C.J. Mucklow^{1,2}

- *The typical summer visitor spends an average of \$153 per day in the local economy*
- *The natural environment, ranch open space, western historical preservation and recreation amenities are local assets that strongly add to the tourists' experience.*
- *50% of Routt's summer tourists would reduce their expenditures and time spent if existing ranch lands were converted to urban uses.*
- *This reduction would cost the county about \$36 million per year in direct annual tourist revenues*

Introduction

Steamboat Springs, the county seat of Routt County, Colorado is a unique community and tourist destination, possessing a distinctive Rocky Mountain landscape, plentiful outdoor recreation, culinary and cultural opportunities and a long tradition of the "Old

West." Cattle ranching and its related industries has long been a central feature of Routt County's private land use and community culture. In recognition of the contribution of working landscapes to the well being of the community, Routt County implemented a voluntary purchase of development rights program in order to help to preserve this traditional lifestyle in the county's vast valleys in 1995.

The purpose of this study is to estimate the support for open lands preservation and the contribution of Routt County's working landscapes to the local summer tourism industry. Rosenberger and Loomis (1999) conducted similar research in conjunction with the Routt County Board of Commissioners during the summer of 1993 to determine if tourists supported the preservation of ranch open space. The study concluded that there was no overall effect of converting ranch open space to resort and urban uses. They found that 25% of the sample would reduce visitation and 23% of the sample

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- 2 Ellingson is Graduate Research Assistant and Seidl is Associate Professor and Extension Specialist—Public Policy with the Department of Agricultural and Resource Economics at Colorado State University (CSU-DARE). Mucklow is Director, Routt County Cooperative Extension. Questions and/or comments can be directed to Seidl at: (T) 970-491-7071; (F) 970-491-2067; or (E) Andrew.Seidl@colostate.edu. For other work from DARE agricultural and resource economists designed for outreach audiences, please see: <http://dare.agsci.colostate.edu/csuaecon/extension/pubstools.htm>

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would increase visitation after developing existing ranch open space. Here, the study is largely replicated a decade after the public policy to protect ranch open space in Routt County was enacted.

This report explains the type of tourist that visits the Steamboat Springs area during the summer months. Tourists' attitudes toward natural and man-made assets provided within Routt County are discussed. In addition, the characteristics of the respondents' trips to the Steamboat Springs area are examined, specifically the type of activities tourists partake in, how far they travel to Steamboat Springs and how much they spend within the Steamboat Springs local economy. Lastly, tourists' behavior contingent on potential urban development in the Steamboat Springs area is analyzed.

Methodology

The intent of the sample frame is to represent summer tourists to Routt County. Summer tourists were randomly intercepted at seven different locations throughout Routt County from early July through mid September of 2005. Surveys were randomly distributed during weekends and weekdays. Survey collection areas were equally distributed among three main locations: the airport, the visitor center at Steamboat Lake and locations around the town of Steamboat Springs (Table 1). The survey crew consisted of Colorado State University graduate students, who were visibly identifiable as such. Potential survey respondents were filtered by a series of introductory questions in order to establish that they were adults and non-resident of Routt County. The survey was four pages in length and was

completed by the tourist in approximately 15 minutes. A total of 420 surveys were completed.

Tourist Demographics

In order to determine what type of tourist visits the Steamboat Springs area, respondents were asked various socio-demographic questions. In addition, they were asked where they permanently reside to get a better idea of the portion of tourists from out of state that are attracted to the Steamboat Springs area. This section explains the typical tourist that visits Routt County during the summer tourist season.

Of the 420 survey respondents, 53% were male and 47% were female. The mean age of a Routt County tourist was approximately 45 yrs and the median age was 43 yrs old, indicating little skewness in the age data. The mean level of educational attainment of Routt County tourists is a 4-yr college degree (Figure 1). Some 75% of respondents have a bachelor's degree or greater, with over half having received a master's or professional degree (39% of total respondents).

Respondents were asked to choose from the following employment status categories: employed, retired, unemployed or work in home. The majority of the respondents are employed outside of their homes (80.6%), while 6.6% of the respondents work in their home, 10.8% are retired and 2.1% are unemployed (Figure 2). The mean and median number of income earners per household during 2004 is 1.7 and 2, respectively, typical of a US household.

Table 1: Location of Survey Distribution

Location	Count	Percentage
Airport	131	32.3%
Visitor's Center	117	28.8%
Mt Werner Village	89	21.9%
Baseball Fields	52	12.8%
Rodeo Grounds	13	3.2%
Art Depot	4	1.0%
Total	406	100.0%

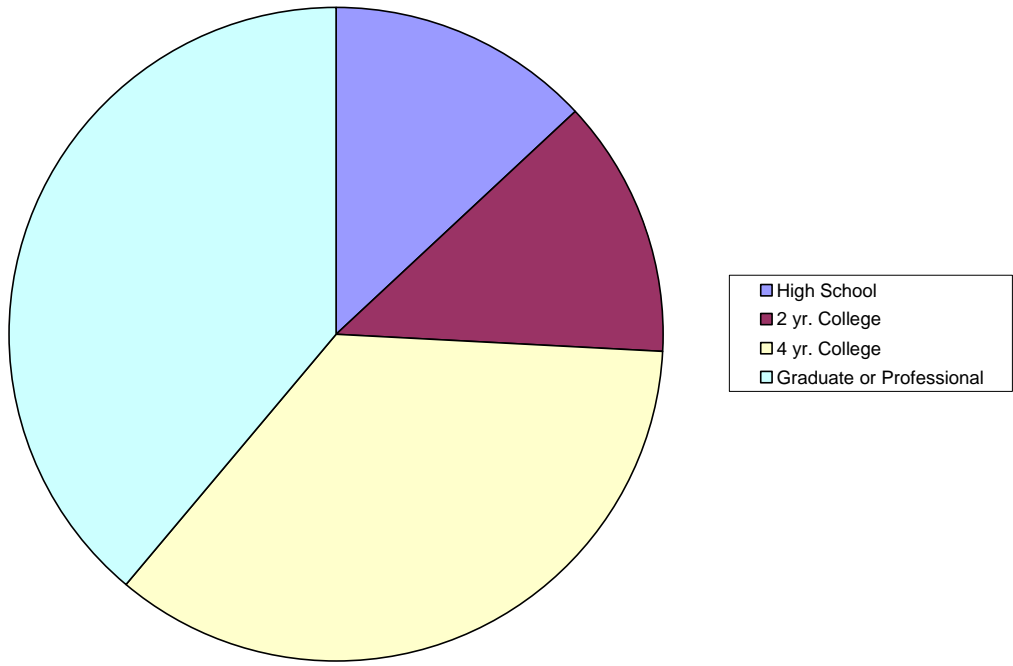


Figure 1: Rouff County Tourists' Highest Level of Education Completed

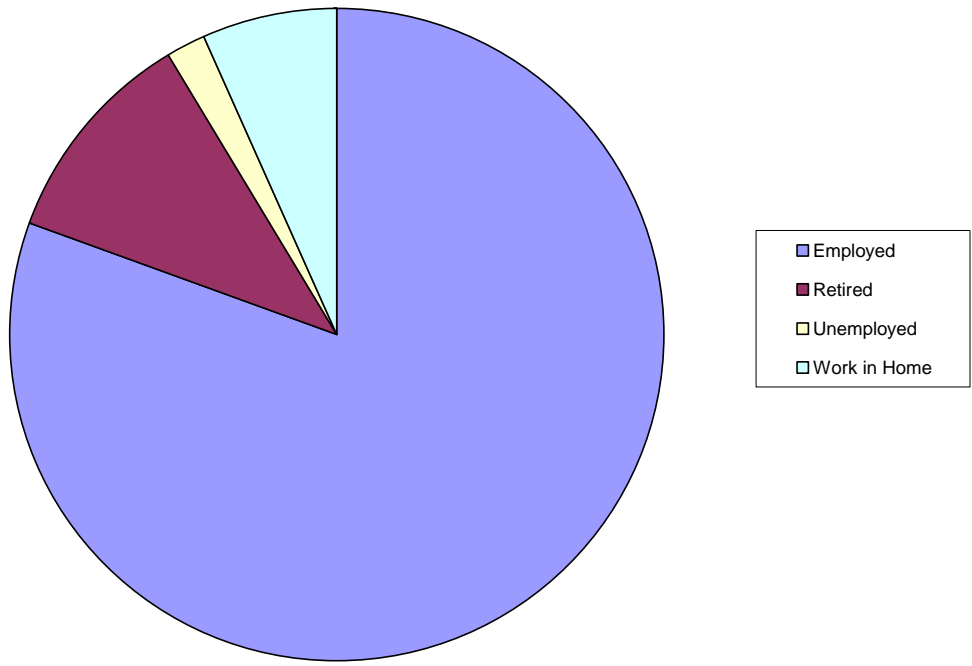


Figure 2: Rouff County Tourists' Employment Status

Respondents were asked to select their 2004 household income before taxes from a range of annual income levels. The mean and median annual household income range was \$100,000 to \$129,999. Approximately 60% of Routt County tourists earn at least \$100,000 per year. Almost 15% of the total respondents earn over \$300,000 a year, while 18% earn less than \$60,000 per year (Figure 3). Higher income levels of the respondents coincide with higher education levels. This household income levels far exceed median income in Colorado and the US.

The vast majority of the Routt County summer tourists reside in the United States, while 1.2% resides in foreign countries such as England, Mozambique, Netherlands and Switzerland. Routt County summer tourists in our sample traveled from 44 of the 50 United States. Nearly half of the respondents reside in Colorado. Tourists from Texas and California each contribute about 7% of the summer tourist population. Florida, Pennsylvania, New York, Missouri and Minnesota residents each make up about 3% of Routt County tourists (Table 2).

Of the 45.8% of the respondents from Colorado, 54.6% reside in the Denver metropolitan area. Larimer County, (includes the cities of Fort Collins and Loveland) the nearest large population center to Routt County, residents account for approximately 14% of the Colorado residents. Boulder County (includes the cities of Boulder and Longmont) and Weld County (includes the city of Greeley) residents comprise 9.7% and 5.9% of Colorado residents, respectively (Table 3).

In summary, the typical summer tourist to Steamboat Springs is a male in his mid-40's with a college degree and an annual household income of at least \$100,000. A tourist selected at random is most likely to reside in the Front Range of Colorado.

Tourists' Trip Length, Activities and Expenditures

In order to further understand the typical Steamboat Springs summer tourist, their trip characteristics need to be analyzed. Specifically, the length of their stay in Routt County, the activities they participate in while in the area and where they spend their money. This section explains the characteristics of a summer trip to Steamboat Springs.

Trip Length

Visitors to the Steamboat Springs area expected to stay an average of approximately eleven days during 2005, with a median of six days. In addition, they plan on spreading those days over a mean of 2.7 trips with a median of one trip to the Steamboat Springs area. So, the average summer tourist trip to Routt County is about 4 days. On average, a Routt County tourist traveled approximate 857 miles and about 6.5 hrs travel time one way for their current trip to the Steamboat Springs area. In addition, 90% of the respondents stated that their current trip to the Steamboat Springs area was the sole purpose of their travel.

Trip Activities

To determine what summer tourists do while on their trip to Routt County, survey respondents were asked to select from a list of primary activities he or she participated in during their most recent trip to the Steamboat Springs area. Respondents were allowed to select as many activities that pertained to their current trip (Table 4). The most frequent activity participated in during the summer by tourists is hiking and walking. Approximately half of the respondents partake in shopping, sightseeing/photography or driving for pleasure. Between 20% and 40% of the respondents' state that wildlife viewing, fishing, bicycling or picnicking is among their primary activities. While only 9.8% of the respondents stated that a ranch visit was a primary activity during their most recent trip to the Steamboat Springs area, 43.9% stated that they had visited a western ranch at some time. Fewer than 7% of the respondents stated that there were other activities that they would have liked to enjoy in the Steamboat Springs area that were not available to them.

Trip Expenditures

In order to derive tourists' trip expenditures, respondents were asked to approximate how much they expect to spend on their current trip and what proportion of their spending they expect will be spent within Routt County by specified expenditure categories. Table 5 displays mean and median trip expenditures by expenditure categories. In general, the expenditures were in the following categories, in descending order: lodging, food and drink, transportation, entertainment and other expenditures. Of the total trip expenditure, the mean percent and the median percent of expenditures spent within Routt County is 83.3% and 92.7%,

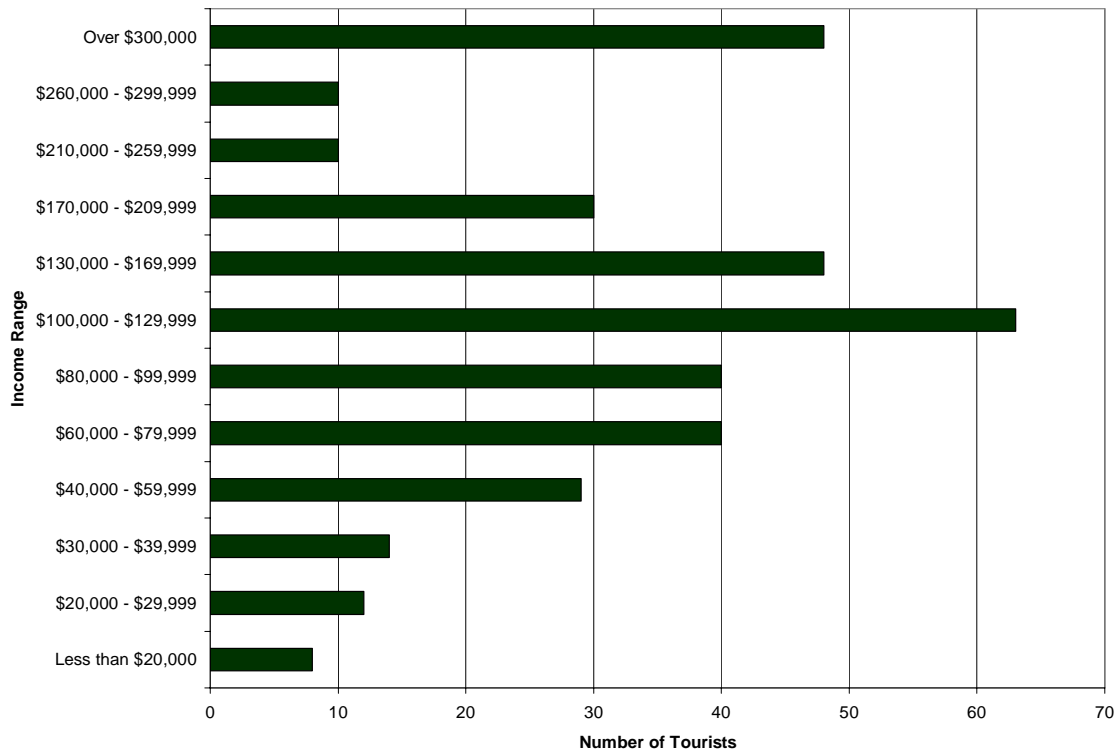


Figure 3: Routt County Tourists' 2004 Household Income (Before Taxes)

Table 2: State of Residence of Routt County 2005 Summer Tourists*

State	Count	Percentage	State	Count	Percentage
Colorado	185	45.8%	North Dakota	4	1.0%
Texas	29	7.2%	Virginia	4	1.0%
California	26	6.4%	Wyoming	4	1.0%
Florida	15	3.7%	Arkansas	3	0.7%
Pennsylvania	14	3.5%	Georgia	3	0.7%
New York	13	3.2%	Idaho	3	0.7%
Missouri	12	3.0%	Massachusetts	3	0.7%
Minnesota	11	2.7%	Nebraska	3	0.7%
Utah	9	2.2%	Wisconsin	3	0.7%
Illinois	8	2.0%	Kansas	2	0.5%
Arizona	6	1.5%	Montana	2	0.5%
Connecticut	6	1.5%	North Carolina	2	0.5%
Ohio	5	1.2%	New Hampshire	2	0.5%
Washington	5	1.2%	Oregon	2	0.5%
Michigan	4	1.0%	Tennessee	2	0.5%

N=404

*NOTE: Alabama, Delaware, Indiana, Kentucky, Louisiana, Maryland, New Jersey, New Mexico, Nevada, Oklahoma, Rhode Island, South Carolina, Vermont and Washington, D.C. have one observation each.

Table 3: County of Residence for In-State Routt County 2005 Summer Tourists

City	Count	Percentage
Denver Metro Area	101	54.6%
Larimer County	26	14.1%
Boulder County	18	9.7%
Weld County	12	6.5%
El Paso County	9	4.9%
Summit County	6	3.2%
Moffat County	4	2.2%
Eagle County	2	1.1%
Grand County	2	1.1%
Douglas County	1	0.5%
Gunnison County	1	0.5%
Lake County	1	0.5%
Logan County	1	0.5%
Mesa County	1	0.5%
Total	185	100.0%

Table 4: Primary Activities Tourists Participated in During Their Most Recent Trip to the Steamboat Springs area

<i>Primary Activities</i>	<i>Percentage</i>	<i>Primary Activities</i>	<i>Percentage</i>
Hike/ Walk	62.7%	Alpine tundra/ Flower viewing	15.0%
Shop	49.3%	Camp	14.5%
Sightsee/ Photography	46.6%	Attend a Music Concert	13.0%
Drive for pleasure	41.4%	Horseback Ride	11.0%
Wildlife Viewing	37.0%	Backpack	11.0%
Fish	29.7%	Mountain/ Rock Climbing	10.0%
Bicycle/ Mt. Bike	25.0%	Ranch Visit	9.8%
Picnic	24.3%	Bird Watch	8.3%
River Raft	17.4%	Hunt	6.1%
Attend a Rodeo	16.9%	Swim/ Hot Springs	4.7%
Golf	16.7%	Wedding	3.7%
Attend Other Sporting Event	16.4%	Business/ Conference	2.9%
Visit historic sites	15.7%	Visit Family/ Friends	1.2%

N=408

Table 5: Routt County Tourists' Trip Expenditures

Expenditure Category	Per Group Per Trip (N=187)		Per Person Per Trip (N=187)		Per Person Per Trip Day (N=179)	
	Total	Local	Total	Local	Total	Local
	Transportation					
Mean	\$295.78	\$129.76	\$134.86	\$59.43	\$36.66	\$18.74
Median	\$100.00	\$50.00	\$37.50	\$15.00	\$9.52	\$4.17
Lodging						
Mean	\$520.64	\$503.38	\$219.67	\$212.43	\$79.30	\$78.11
Median	\$206.00	\$200.00	\$75.00	\$75.00	\$20.00	\$20.00
Food and Drink						
Mean	\$298.10	\$268.58	\$124.07	\$112.25	\$29.38	\$27.00
Median	\$200.00	\$180.00	\$75.00	\$60.00	\$16.67	\$15.00
Entertainment						
Mean	\$196.93	\$184.89	\$68.42	\$63.05	\$12.64	\$11.93
Median	\$60.00	\$50.00	\$20.00	\$15.00	\$5.00	\$3.75
Other						
Mean	\$156.76	\$138.50	\$97.28	\$92.16	\$18.56	\$16.98
Median	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total						
Mean	\$1,465.86	\$1,225.12	\$642.61	\$539.33	\$176.78	\$152.76
Median	\$800.00	\$600.00	\$300.00	\$251.50	\$75.00	\$59.58

respectively. Further, transportation expenditures have the largest deviation between total and local trip expenditures due to the fact that tourists either buy plane tickets or gasoline for their automobiles prior to arriving in the Steamboat Springs area.

Per group per trip expenditures are calculated based on the values provided by the respondents. Respondents were asked how many people were represented by the trip expenditure information they provided. The average reported group size was 4.4 people. Per person expenditure values were calculated by dividing per group expenditures by the average group size. Per person per day expenditures were calculated by dividing the per person per trip expenditures by the average days per trip (5.4 days) to Steamboat Springs in 2005. These calculations represent the mean number of days per trip for the respondents who reported their expenditures and not the mean number of days per trip for the entire sample.

On average, a group of tourists spent \$1,466 for their current trip to the Steamboat Springs area, while they

spent \$1,225 of that total within Routt County. On average, each tourist spent \$643 for their current trip, \$539 locally. A tourist spends an average of \$177 per day to vacation in Routt County. They spend about \$153 per day in the Steamboat Springs area.

Tourists' Contingent Trip Behavior

Although we now know what tourists spent in Routt County, we don't know what they might have spent given the opportunity to increase their local expenditures. That is, we know the minimum value tourists place on a Routt County vacation based on what they did actually spend, but not the maximum they might have spent had there been a need or the sensitivity of tourist expenditures to changes in conditions in the local tourism experience. This section addresses these issues.

Respondents were asked how they would change the length of their trip to the Steamboat Springs area if the cost of traveling increased, for example, due to an increase in gasoline prices or hotel rates by a given

bid amount. Respondents were faced with a yes-no choice, or referendum, as to whether they would reduce the number of days they would choose to visit Routt County under the new cost structure or not. Contingent upon a 'yes' choice to a reduction in visitation due to higher costs, respondents were asked by how many days or fraction of days they would reduce the length of their visit in order to gain an improved measure of the sensitivity of tourists to trip costs.

Each survey was assigned one randomly selected bid amount from among 12 alternatives. The bid amounts had the following values: \$10, \$25, \$50, \$75, \$100, \$200, \$300, \$500, \$750, \$1,000, \$1,500 or \$2,000. An equal number of surveys (approximately 35) were completed for each given bid amount. The percentage of respondents who stated that they would reduce the length of the trip due to an increase in trip expenditures is shown in Figure 4 by bid amount. As the bid amount increases, the percent of respondents who would reduce the length of their trip also increases. The mean willingness to absorb additional costs under current conditions is \$122.57 per visitor, which represents \$17,936,337 of additional value in a Routt County vacation and potential revenue not currently finding its way into local hands.

What if valuable features of the Routt County tourism experience change? Will tourists stay more or less time, spend more or less money locally? Respondents were asked how their trip length and trip expenditures might change contingent on if existing ranch lands around Steamboat Springs had changed to urban uses. Table 6 illustrates the percentage of respondents who would change their expenditures and trip length due to a reduction of ranch open space in Routt County. In a 1993 survey of Routt County visitors, Rosenberger and Loomis (1999) found that 25% of the sample would reduce visitation while 23% of the sample would increase visitation if ranch open space in the Steamboat Springs area were converted to urban and resort uses. The 2005 results show that approximately 50% of the respondents would reduce both their expenditures and number of days spent in the Steamboat Springs area if existing ranch lands were converted to urban uses. The average trip would be reduced by approximately 2.3 days and the average reduction in expenditures would be approximately \$100 per person per day. On average, about \$230 per person per trip would not be spent in the Steamboat Springs area due to existing ranch lands converting to urban uses.

In order to extrapolate the per person per trip values to an annual impact value, the total number of summer tourists needs to be estimated. Based on Steamboat Springs Chamber of Commerce estimates, there are approximately 224,770 tourists who stay in hotels during a summer tourist season (Evans Hall, 2006). To arrive at the number of tourists who camp, we divided the total visitor days at Routt County State Parks by the average length of a trip derived from our sample and found that there are 134,242 total camp visitors (Colorado State Parks, 2005). For simplicity, it is assumed that half of the visitors were Routt County residents, so only 67,121 of the total camp visitors are considered non-resident tourists to Routt County. Therefore, approximately 291,891 tourists visit Routt County during the summer months. Since 54.7% of the survey respondents stated they would reduce their trip expenditures to Steamboat if existing ranch lands were converted to urban uses, it results in approximately 159,664 tourists per year.

To obtain the mean estimated loss of summer tourist revenue, the median value of reduction in spending is multiplied by the total number of tourists changing their trip behavior. Therefore, the estimated loss of summer tourist revenue due to the development of ranch open space is \$36,373,940 per year. Since approximately 92.7% of tourists' expenditures are spent locally, \$36 million of total loss in tourist revenue would be lost within Routt County's economy per year.

Tourists' Attitudes Toward Routt County's Natural and Man-Made Assets

Understanding tourists' motivations for visiting Routt County can shed some light on these responses to potential land use change. Respondents were asked to rate how natural and man-made assets contributed to their enjoyment of a Steamboat Springs vacation. The rating was based on a nine point Likert scale where nine represented the asset strongly contributed to their enjoyment and one represented the asset strongly detracting to their enjoyment of a Steamboat Springs vacation (Table 7). In addition, Table 7 shows the percentage of respondents who rated each amenity as either adding to (a rating between 6 and 9), detracting from (a rating between 1 and 4), or having a neutral (no) effect (a rating equal to 5) on their enjoyment of their Steamboat Springs vacation.

The natural environment is rated as the asset that most strongly adds (average rating of 8) to the tourists' experience in the Steamboat Springs area. Ranch open space, western historical preservation and recreation amenities, in rank order, are local assets that strongly add (average rating of 7) to the tourists' experience. Community services followed by urban development also contribute (average rating of 6) to the tourists' enjoyment of their trip to the Steamboat Springs area.

Respondents were asked to weigh various reasons for preserving ranch open space within Routt County. Specifically, the respondent was asked to allocate a percent of their total annual value towards each of the seven given reasons where their total must sum to 100 percent (Table 8). Although allocations were relatively similar across categories, the highest value was placed on the protection of working ranches for conserving soil, water, wildlife, and western cultural heritage

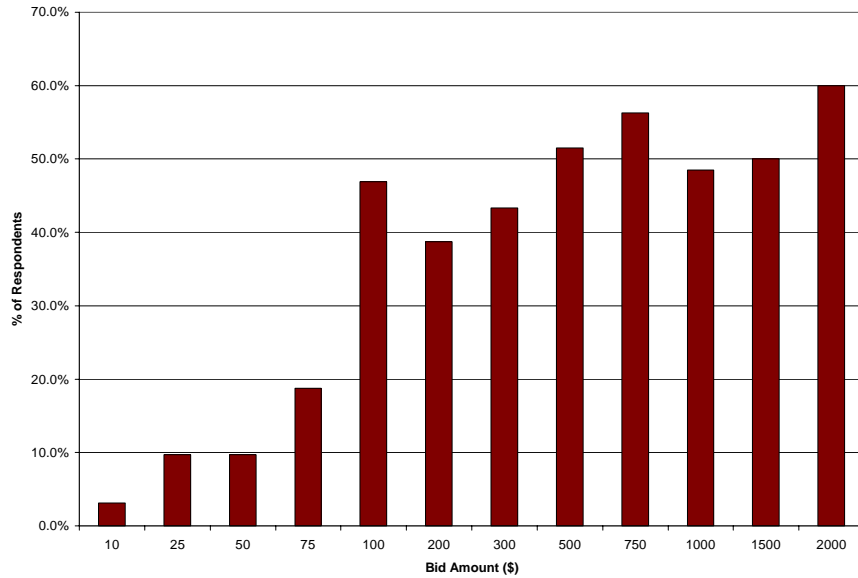


Figure 4: Percentage of Respondents Who Would Visit the Steamboat Springs area for Fewer Days During the Summer Season if the Cost of Travel Increased by \$

Table 6: Tourists' Responses If Ranch Lands Around Steamboat Springs were Changed to Urban Uses (i.e. housing and other resort development)

Would this change your vacation experience in the Steamboat Springs area to be worth fewer (or more) dollars per day during the summer season?			Would this change cause you to visit the Steamboat Springs area fewer (or more) days during the summer season?		
	N	Percent		N	Percent
Fewer	192	54.7%	Fewer	177	50.6%
No Change	157	44.7%	No Change	172	49.1%
More	2	0.6%	More	1	0.3%
Total	351	100.0%	Total	350	100.0%
Per Person Per Day Values			Days Per Trip Values		
Mean Reduction		\$99.05	Mean Reduction		2.3

Table 7: Contribution of Natural and Man-Made Assets to Tourists' Enjoyment of a Steamboat Springs Vacation

Natural and Man-Made Assets 9 point scale: 1=strongly detracts, 5=neutral, and 9=strongly adds	Mean Score	Percent of Respondents Reporting		
		Adds	Neutral	Detracts
<i>Recreation Amenities</i>	7.0	64.5	28.1	7.5
Trails to walk, bike, ride horseback	7.9	88.9	7.9	3.3
Campgrounds, picnic sites, playgrounds	7.1	73.2	23.6	3.2
Golf courses, tennis courts	6.1	49.1	37.4	13.5
Hot springs, swimming pools	7.2	80.8	15.2	4.0
Water recreation sports	6.8	69.2	26.0	4.7
Access roads, parking	6.9	72.3	22.5	5.2
Equipment rental, guide services	6.5	63.6	30.6	5.8
Ball diamonds, ice rinks, rodeo arenas	6.0	45.8	41.8	12.4
Ski lifts, slopes	7.3	72.5	22.2	5.3
Other snow sports	6.8	63.7	30.9	5.4
Fishing opportunities	6.8	61.9	32.3	5.9
Hunting opportunities	5.4	32.9	46.3	20.8
<i>Western Historical Preservation</i>	7.0	70.8	26.4	2.8
Historical barns, buildings, structures	6.9	71.6	25.4	3.0
Protection of historical working ranches	7.0	73.8	23.2	3.1
Protection of traditional ranch family ownership	7.0	68.9	28.6	2.5
Local museums	6.7	68.2	29.0	2.8
Local western, landmarks, statues, art	6.8	71.4	25.9	2.8
<i>Urban Development</i>	6.00	58.7	29.2	12.2
Restaurants, Bars, Motels, Hotels	7.0	80.6	13.0	6.5
Other retail businesses	6.5	70.9	21.8	7.4
Theater, Concert Hall, Other Cultural Amenities	6.3	62.6	29.6	7.9
Historic Buildings	6.8	75.1	20.1	4.8
Condos, Apartment Buildings	5.6	47.6	29.1	23.3
Houses on Small and Medium-sized Lots	5.2	32.0	47.7	20.4
Houses on Large Lots, 15 Acres or More	5.6	41.9	43.2	14.9
<i>Community Services</i>	6.0	42.9	51.5	5.6
Medical and Dental Services	6.2	52.8	43.1	4.1
Schools, Educational Services, Library	5.8	35.1	60.8	4.2
Religious Organizations	5.3	24.6	66.0	9.4
Youth Programs	5.6	31.2	62.7	6.2
Government (Law Enforcement, Road Maintenance)	6.1	47.6	47.6	4.8
Jobs (Working Conditions, Pay, Benefits)	5.8	39.2	55.3	5.5
Housing (Availability, Price, Rent, Quality)	6.1	48.9	44.1	7.0
Repair Services (Auto, House, Appliance)	5.8	40.7	55.5	3.9
Shopping (Price, Quality, Availability)	6.5	66.1	28.8	5.2
<i>Natural Environment</i>	8.0	96.2	3.2	0.6
Climate	8.3	94.8	4.1	1.1
Air and water quality	8.4	96.1	3.3	0.6
Rivers, Lakes, Streams, Waterfalls	8.5	96.2	3.3	0.6
Mountains, Forests, Wildlife	8.6	97.5	2.2	0.3
<i>Ranch Open Space</i>	7.0	80.1	17.6	2.3
Meadows	7.9	90.1	8.2	1.7
Birds, Wildlife	7.9	90.6	8.0	1.4
Viewing Cattle, Horses, Sheep	7.2	77.3	20.1	2.6
Hayland, Hay Stacks, Corrals, Ranch Buildings	7.0	71.7	24.8	3.5
Working Ranch Hands, Cowboys	6.9	70.8	26.8	2.4

Table 8: Reasons for Protecting Ranch Open Space in Routt County, Colorado

Reasons for Protecting Ranch Open Space	Avg. Percentage
The value of your experience <i>actually viewing</i> ranch open space (hay meadows, pastures, cattle, horses, wildlife, etc.)	14.5%
The value to retain <i>your opportunity</i> to view ranch open space in the <i>future</i> .	12.2%
The future potential for <i>upcoming generations</i> to enjoy viewing ranch open space.	15.1%
The value to you from knowing that ranch open space <i>exists for its own sake</i> , whether or not you, visitors, or future visitors actually see it.	12.9%
The value to you of conserving soil, water, wildlife, and the basis for our western cultural heritage due to <i>the protection of working ranches</i> on private lands.	15.8%
The value to you of <i>managing growth</i> to reduce dispersed rural residential development due to the continued presence of large acreage working ranches on private lands.	14.4%
The value to you from knowing that ranch land is protected as a source of <i>private enterprise</i> for ranchers and to <i>maintain agriculture</i> as part of the <i>local economy</i> .	15.1%
Total	100.0%

(15.8%). Next, protecting ranches for potential viewing by future generations and for private enterprise received equal annual value weights (15.1%). The value of personally viewing (as opposed to passing along the opportunity to future generations) ranch open space and managing rural development growth held values of approximately 14% each. Lastly, the value of knowing the ranch open space exists without having to experience it personally and the value for the personal opportunity to view open space in the future were each given 12-13% of the total annual value (Table 8).

Summary and Conclusions

The average Routt County summer tourist is a 45-year-old male with a college degree and an annual household income ranging from \$100,000 to \$129,999. The majority of tourists are United States residents and half of the tourists are from within the state of Colorado.

Tourists stated that the natural environment, ranch open space, western historical preservation and recreation amenities strongly add to their trip experience in the Steamboat Springs area. Community services and urban development are the lowest rated Steamboat Springs area amenities that add to a tourist's trip experience. Of the reasons for protecting ranch open space in Routt County, the highest values were placed on protection of working ranches, potential ranch open space viewing of upcoming generations and private enterprise to maintain agriculture as part of the local economy.

Visitors to the Steamboat Springs area expected to stay an average of approximately eleven days spanned over almost 3 trips during 2005. Respondents spend six and half hours traveling almost 860 miles one way to Steamboat Springs. While in the Steamboat Springs area, the majority of tourists hikes or walks, shops, sightsees or takes photographs, or drive for pleasure as their primary summer activities. Less than 10% of the tourists visit a ranch. However, nearly half the respondents have visited a western ranch. Of the total expenditures spent on their current trip to the Steamboat Springs area, 83.3% of spending occurs within Routt County. The typical visitor spends an average of \$153 per day in the local economy with the majority of expenditures attributed to lodging and food and drink.

If the cost of traveling were to increase, regardless of development on existing ranch lands, respondents would reduce the length of their trip to the Steamboat Springs area. However, if ranch lands were to be converted to urban uses, half of the respondents stated they would reduce their expenditure level by \$100 per person per day and reduce their trip length by approximately 2.3 days. Compared to the 1993 summer survey results, support for preserving ranch open space in Routt County has increased from 25% to 50% of tourists stating they would reduce their travel to the Steamboat area if ranch open space were converted to urban uses. This proves to imply large potential losses to the Steamboat Springs area economy, equating approximately \$36 million, annually.

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