

ATTACHMENT #3

STEAMBOAT SPRINGS TRAILS COMMITTEE MINUTES

May 15, 2019

The meeting of the Steamboat Springs 2A Trails Committee was called to order at approximately 11:07 a.m. on Wednesday, May 15, 2019, in the Crawford Room, Centennial Hall, 124 10th Street, Steamboat Springs, Colorado.

Trails Committee members in attendance were: Chair Pete Wither, Dan Bonner and Harry Martin. Absent: Marr, Malia, High, Landers. City staff members present were Assistant to The City Manager Winnie DelliQuadri, Parks, Open Space and Trails Manager Craig Robinson and Open Space and Trails Supervisor Jenny Carey. Kent Foster represented the US Forest Service.

It was noted that there was not a quorum, and that this was a special meeting to enable attendees to hear the presentation on the Trail Use and Economic Impact Study and to ask the consultant questions about the study.

PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA

None.

Approval of Minutes: March 27, May 6

No quorum.

Trail Use and Economic Impact Study Presentation

Gabe Preston, RPI Consulting:

This has not been done very many times. Mesa County did it. It's usually kind of generalized data not based on actual collection. Our primary data sources were the 730 trail intercept surveys and traffic counts.

24% of the people using trails who we were able to intercept are visitors. Quite a few part-time residents. If you added commuters to this mix, that's your peak population in summer. They have different types of economic impacts. There is an impact from local residents, but it's really hard to measure and not as connected to the 2A mission. Part-time residents build new homes here; that's a huge impact for a while. If they really need a lot of services for that home, that's an ongoing economic impact. But visitors are the tangible, immediate impact on the local economy.

Based on survey research methodology, you need about 400 results. This 730 is a sample of sorts. We were here to help train on the first round of survey gathering, and then the crew here handled the rest of it all the way through late September. About 40% of the surveys were taken on the weekend with the remainder taken during the week. Well done in terms of distribution of when and where these were taken. We focused the effort on Spring Creek, Buff Pass and Emerald front and back. Pretty even split in terms of whether people were walking, running, biking, etc.

More bikes on the visitors and full-time residents side; more hikers on the part-time residents side. That could be age related to some degree; part-time residents tend to be more retired than not. A lot of people do both biking and hiking. We have a graph in the report that shows the mileage. Outings tend to be shorter for local residents – probably because most of them have jobs. It's the visitors and part-time residents that go for the more epic journeys. If you're on a bike for 3-4 hours, that's a pretty significant ride. This is also reflected in the mileage.

We had three different survey instruments, one for each population type. You kind of have to ask each of them differently. For the full-time residents, we didn't really ask a lot of economic questions; we did for the visitors and somewhat for the part-time residents – more about how often they're at their home and that sort of thing. But we asked everybody why they picked the route that they were on that particular day. They were allowed to pick multiple choices; there's multiple facets to why people make decisions, and we were trying to capture the dimensions of that.

The thing that pops out here is that almost half of the visitors said that they were on that route because they had found out about it somehow; somebody had either recommended it to them, or in a hotel room they picked up a book and read about it. I think a lot of it is word of mouth or social media. If you Google Steamboat trails, the Grouse trail is the thing that comes up. I think you're on the ramp-up in terms of awareness. I've got tons of friends that are mountain bikers, and some of them know about it now. But it wasn't on the radar five years ago that Steamboat was a place to go ride your bike.

Martin agreed.

Over half of the visitor respondents were from Colorado, so those users are not just showing up; they made a plan; there was a bunch of thinking that went on before they decided this is the place they were going to come to ride their bikes or hike or whatever. The locals are a lot more oriented toward convenience – where the trails are located – that sort of thing. Physical excursion and technical difficulty also register but not as high as the scenery and environment; how beautiful it is, is clearly important across all different user groups. It didn't register as much with the visitors because they're not picking one route versus another because it's beautiful; it's all beautiful.

We asked people whether they were on a single loop or connecting loops, etc. 71% of the folks we talked to were on multiple loops, so loops are important.

Trail ratings came out really good. There's a bunch of criticism about the condition of the trails in Durango. Some of them got built starting in the 90's and they just weren't built right in the first place. They've gotten way better at it; the technology for building trails has gotten better. So we get quite a bit of complaints about the maintenance. Then people ask the trails advocates: You can't maintain what you've got, so why are you building new trails?

Northcut: I had people that gave a trail a 4 instead of a 5 because it was dusty.

DelliQuadri: The poorer scales were later in the season when it was so dry that it was really dusty.

Preston: Nearly everybody said that the trail they picked was on the right level of difficulty. There's two contextual pieces you should think about. 50-65% of the respondents rated their ability level as advanced. That's totally subjective. Most of the trails are intermediate- there are not a ton of advanced trails in your system. We were struggling to find advanced trails so we could really drill into what's the difference between advanced trail usage and intermediate trail usage. But when you combine the factors of most people rating themselves as advanced and that most of the trails are intermediate, and the response is that this trail is at the right difficulty rating, it blurs the line between difficulty rating and satisfaction. It shows you that a lot of people can be satisfied riding trails that are intermediate when they are actually advanced riders.

10% of full-time residents and 15% of part-time residents rated their abilities as the highest among all resident types. These people said that it was too easy and not challenging enough; much less on the visitor part. This should be considered in the context of why people chose their routes.

57% of people said they have no concern with other users. This will probably change as the trails get busier. This is definitely related to how busy it is, but it's also related to the experience at the trailhead. Most of your conflicts happen at trailheads because that's where you have a concentration of people; people with their dogs running around; people that don't look right; being punks; playing loud music. I think it reflects not only on the ability of the trail system to disperse people.

You have 5% of people saying that crowding was an issue. Most of the concerns revolved around mountain biker behavior and safety or perception of safety. If you've never ridden a bike that has hydraulic disc brakes, it's probably hard to understand how quickly you can stop. And then dogs, of course; dogs off leash. Consider that against the fact that 25% of the users have dogs. I would have estimated the concerns about dogs to be much higher given that number. Dog poop and horse poop came up.

We have 30 counters and wildlife cameras; nobody has that. Summit County has five.

Wither confirmed with Meyer that 2A funds bought all but ten of them.

DelliQuadri: The reason for that was that we got direction from City Council that they wanted data around the use.

Preston: I think you probably could use some more of these things because the next time we do this, what I would really like is to have the trail counters at the trailheads – the way they were before we moved them all for 2018 season – and down here. It would be really awesome to have a mobile fleet and not have to move all the ones that are at the trailheads and just keep those running. There's a gap in the 2018 data for the trailhead counts. Putting them at the trailheads in the past was the right thing to do; this was a new thing, and I think we should continue to experiment with it – especially on Buff Pass.

Spring Creek and Emerald are busier right now than Buff Pass. That's something we should continue to track.

All kinds of weird stuff happens with the counters. Through iterations, we can get more accurate with this.

One of the things the steering committee wanted us to figure out was how the difficulty level affects the level of use. This is hard to do because there aren't that many advanced trails; it's hard to find the perfect case study to compare it. But we found in the process of looking at this that distance from trailhead is also another factor. We have some data – particularly on Flash of Gold – that shows you that the use is a lot higher lower down and much lower higher up where it's more difficult. Thinking about this in terms of future development policies, we already saw that the visitors like those long routes and use them. So I guess it's sort of a prioritization thing. If you've got to phase something, you phase in those close-in, nested loops first and then start working your way out on the trails system. This is one way to justify why you phase it this way.

The counters can also tell you what happens with special events on the trails. That becomes an issue on rec paths. We did a study in Summit County where people were getting aggravated by the amount of special events on their rec path system. MGM and Eye to Eye are parallel, but you have much higher use on MGM. Eye to Eye might be hard to find; there's a lot of factors at play here. I think in the future, if we had the fixed fleet at the trailheads – it's really important to keep that counting going because that's overall use.

DelliQuadri: Between now and whenever we do our next study, where would be the important places to put the counters so we have good data to inform the time period in between studies?

Preston: One thing that comes to mind is counting Grouse because that has this awareness out there. People know about that trail because you can scare yourself on it; people like that, apparently, or they want to watch YouTube of other people getting scared. I think that's the kind of thing that gets people thinking about it. Highlands Bowl in Aspen Highlands costs way more money than they make off of the ticket sales from the people that actually hike up there, but it's really important that Highlands Bowl is there. There has to be something radical to capture peoples' imaginations. Then they get there and they're probably riding the groomers.

One of the things we asked about was whether people are connecting front side and back side. There isn't a lot of indication that very many people connect those two; 2% reported connecting front side and back side. Maybe it's just not in peoples' awareness? It's certainly doable. The trail system seems to be mostly oriented towards the access points because people do use the back side, but they start on the back side. We ask that at the trailheads. City Council was saying you should have people in the trail; that would be slow going.

DelliQuadri: We really missed the Ridge Trailhead season. This year, Ridge opened up first; the parking lots were full. But now that the front side is open, my guess is that not as many people are driving around to the back. We didn't start the surveys until the front side was fully open. While we did send some people back to Ridge Trailhead, they would be sitting there for four hours and survey one person.

Preston: We asked the question: What's the difference between the way roads get used and single track? At least on the Emerald side, 76% of the runners and hikers stayed on the road for their entire route. Less than 15% of the mountain bikers used a road at all. That to me is an opportunity to segregate use without actually having a policy that does that. There may be something on Rabbit Ears where you could do that, and I think that's worth thinking about. There's really a desire to have that sight distance steady grade exercise route that's beautiful.

Wither: You're doing these surveys at the trailhead. Most of the people on Blackmere Drive are walkers or hikers or runners. When I ride my bike on the trails out there, I see pedestrians all the time. So I think that's a little bit skewed.

Preston: It might be. You want to have a system where hikers can be on the trails; you'd be sunk if you didn't have that. But it does show you that maybe there's a design factor in future trails where that's something people want. They'll use it if it's there. If it's offered as part of the infrastructure that you're going to attract a certain segment of hikers to that and not the mountain bikers. When we first started that, my theory was that people would ride up the road and descend on the trails. The answer was different; they like to ascend on the trails and descend on the trails. I think if you add that together that less than 15% of the bikers used roads at all. There are roads out there; they just don't prefer to use them, and the hikers do seem to prefer to use them. That's an opportunity to split up the user types without having to do anything other than offering the opportunity to do that.

Economic Impact:

43% are in paid lodging. That's what you more or less expect where there's a lot of camping opportunities and lots of second homes. The per-party spending includes all of it, so we didn't disaggregate how much lodging guest spend versus campers. It includes all the parties surveyed. 97% of the visitors we surveyed were overnight visitors. That reinforces the fact that this is a destination resort, and if people are coming here for trails, you're mainly getting overnight visitors.

There's a lot of visitor economies out there – Summit County, for example – that are day-trip heavy. They're all there at the same time maxing out everything, and you're not capturing as much revenue off of them because they're not staying the night.

This place is pretty far away; I think that's a big part of it. The other thing is it's just a certain type that's going to come here versus a day trip opportunity in the I70 corridor or something else. Visitors are from all over the place; a good portion are from Colorado; it would be really interesting to compare this to skiers. I think you're getting a significantly higher chunk of in-state visitors during the summer.

Martin: We have that data for our store that I can probably share with you. It's all-year round, so it's not broken down for bike and ski, but maybe my son can figure out how to do that.

Preston: How long people are staying is kind of all over the map. Average length of stay is over four nights. That reinforces the fact that this is a destination, not a pass-through.

Those are the best kind of customers. 86% are staying two nights or more. 3% were there for part of the day; that percentage is way higher in other communities.

Why did people come here? 65% said at least part of the reason was trail-related. That's pretty good considering there's a lot of other stuff to do here. Visiting family/friends is always going to be part of it.

What are people doing? Going out to eat. About half are going shopping. A variety of other activities: hot springs, farmers market, rodeo.

Average spending is almost \$1,900 per trip. Between three and four people in a party. We can definitely say that a lot of this money that's coming in, the trails are part of why.

I think the low end of spending is higher than this. We wanted to have one estimate that we had a fair amount of confidence about. Consistent counters that have been working all this time; definitely trail access going on here. 39,000 users at Emerald Mountain and Spring Creek where the data was good enough for us to use. 23% overnight visitors; 9200 trail users at almost \$1,900 per party; \$17.3 million spent for trail season.

Wither: What's the sales tax revenue from that?

DelliQuadri: For the City, it's 4.5% of that. \$765,000 on the low end.

Preston: Part of the reason we did the high-end estimate was to bait you all into thinking about the future and how to do this so that we can be more confident. We had to extrapolate use on Buff Pass. I think we're justified in looking at this high end; it's just that we had to start using some math based on limited counters. There's other access points to Emerald Mountain especially beyond the trailheads where we had good counts, so we did some extrapolation to try to figure out based on people in the intercept survey saying they accessed from a different point other than where the trail counters were. You add another 15,000 users and run the numbers, and it could be up to \$24.1 million. We could be higher.

We ran an input-output analysis on this to show total output. When that new visitor dollar comes in, somebody's getting paid with some of that and they spend some of that money; you have the suppliers for hotels. 290 jobs on the low end generated by those kind of expenditures. \$8.9 million in earnings in peoples' paychecks. The multipliers came from the airport economic impact analysis, which pulled out visitors, business travellers, etc.

For part-time residents, primarily trail-related reasons for their visit comes into the picture. They stay way longer than what I'm used to seeing – at least the people we surveyed. 4.2 months out of the year is really high. When they're here, they're spending money that they didn't make here. So every time they go to the grocery store, that's a different economic impact than when one of you guys does. Pretty even split between those on foot and bikers. Shorter outings for locals; longer for visitors. Locals choose their routes more due to ease of use and time constraints; visitors have a lot more reasons why. Heaviest use on the front side of Emerald and Spring Creek. I think the jury is out on Buffalo Pass because it's so new; we want to keep an eye on that. More use on intermediate trails closer to the trailhead than those that are harder or further out.

Meyer mentioned that on the Core Trail, there were 17% more people than were counted based on an hour or so of observation, so Spring Creek and Blackmere Drive may have had many more people.

Copa: On Flash of Gold, there's always going to be more traffic on the bottom than the top because you have to ride through the bottom to get to the top, and there's multiple ways to leave the trail a third and two thirds the way up. Having lived here for almost 30 years, we used to always ride up Blackmere on our bikes because there wasn't much else. There were a couple of trails down from there that weren't necessarily built as well as trails are built today. Now, with the trails at Emerald having easy grades and grade reversals, it's significantly easier as long as you have the technical skill to stay on a single track, it's easier on the lungs and body to ride up a single track than Blackmere because Blackmere has no breaks.

DelliQuadri: For people on foot, you have to go a shorter distance on Blackmere to get to the viewing point, and you can do side-by-side.

Robinson: I think the Chamber asked about trail use in their surveys. Did this align with what the Chamber found?

DelliQuadri: There's info in the back of the report on that.

Preston: We cherry-picked some results from that RFC downtown study and put it in there.

Soard: We don't specifically ask trail questions; we ask if people are here to hike or bike or that kind of thing. We certainly don't go into this kind of detail about what trail they're using and that kind of thing; it's higher level.

Preston: I think it is really important to come at that from downtown because that's where the money gets made. Coming at it from both angles is a really good way to do it; that's why we wanted to pull in some of that RFC data.

DelliQuadri sent the full report to the Committee.

Frithsen said that the rider who put Grouse on YouTube is one of the most popular with a lot of influence online.

Preston urged people to read the full report because it provides evidence to pursue certain ideas.

Asked by Northcut, DelliQuadri said the next study will probably be in 4-5 years collecting data in the interim.

Next Meeting: June 5

Adjournment

2A Trails Committee Minutes
May 15, 2019

The meeting adjourned at 12:10 p.m.

MINUTES PREPARED, REVIEWED AND RESPECTFULLY SUBMITTED BY: Timothy Keenan and Winnie DelliQuadri. Approved this 5th Day of June, 2019.