
M. TOURISM

1. Valley Tourism Assets and Potentials

With about 80 attractions and points of interest anchored by the Great Sand Dunes, 3.0 million acres of public lands, and spanned the whole distance by the US 160 Kansas to Cortez highway, the Valley is strategically positioned for tourism. The number of tourists passing through the heavily traveled corridor and other routes entering the Valley is subject to conjecture and debate, but we believe something in the ballpark of 1.5 million would be possible. How many of these travelers had the Valley in mind as a destination is also subject to debate, but we would guess as much as a third.

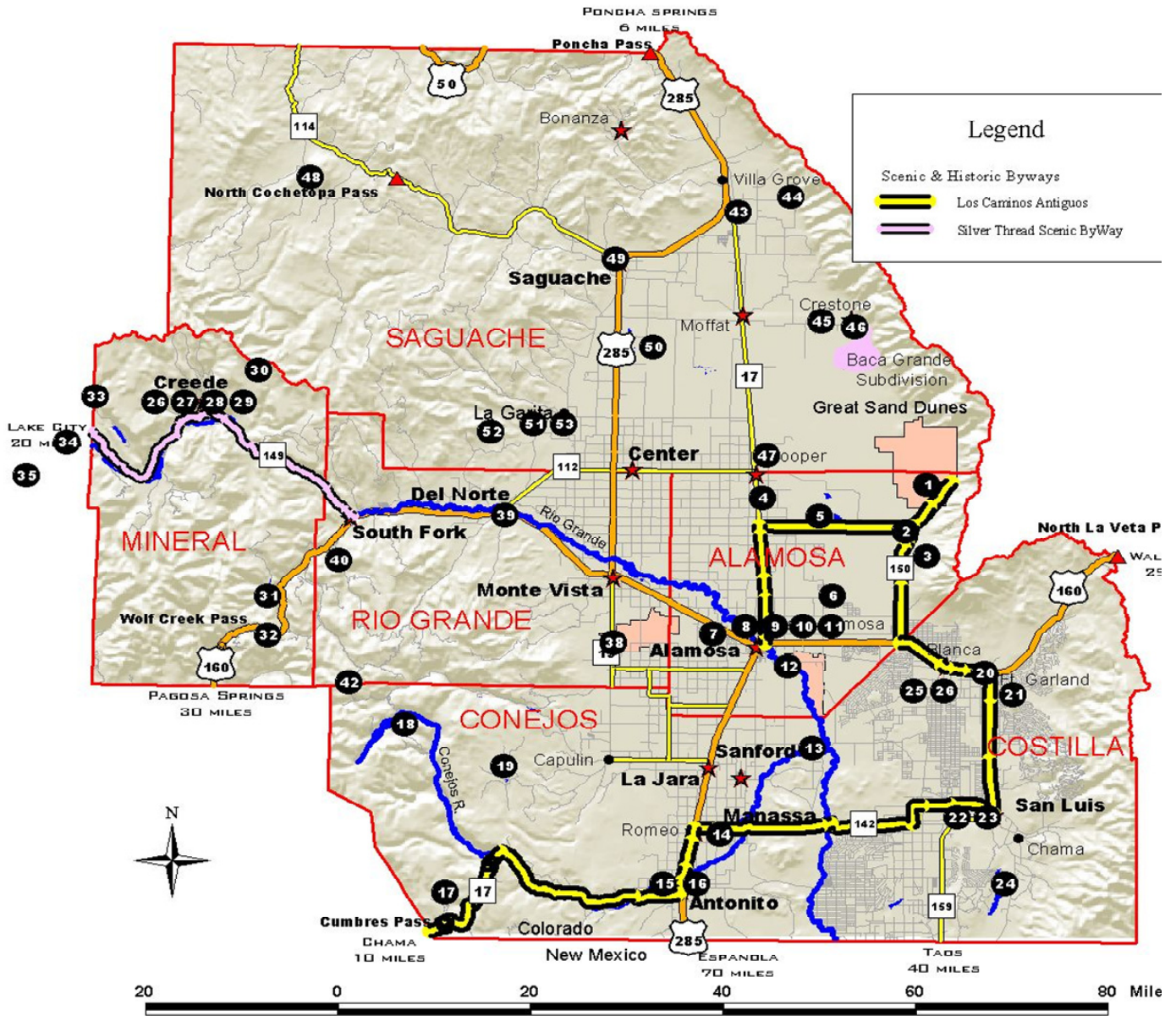
Solid counts of visitation at the national parks gives some idea of the reality of the tourist numbers projected. Visitor tallies in the 275,000-300,000 range have been taken at the Great Sand Dunes National Park & Preserve, and a good share of the 500,000+ visitors heading for Mesa Verde probably pass this way (see Table H-7 for other parks in Colorado).

Because attractions of various types are found throughout the Valley, tourism offers the best opportunity for all communities to work together on development and share in the benefits. Promotion of tourism on a regionwide basis is emphasized, but requires a continuous effort to keep on track due to changing economic and other conditions affecting travel, and varying levels of community resources and enthusiasm.

Many areas in the State and elsewhere would envy the diverse range of existing and potential resources and activities available to the Valley for building tourism themes. Examples include: National and State parks; National Heritage tourism; wildlife refuges and nature-based tourism and events; downhill and cross-country skiing; hiking trails, wilderness, and pack trips; dude ranches; rodeos and horsemanship; bicycle touring and mountain biking; tourist train and railroad heritage; scenic and historic byways; repertory theatre; geothermal springs and spas; museums; arts, crafts, and cultural events; golf courses; big game and duck hunting; stream and lake fishing; rock climbing; agriculture-based tourism; sacred-based tourism; and a host of remote-area qualities such as dark skies and places to find solitude.

In addition to the above, contemporary concepts of tourism now include the whole range of activities associated with second home ownership and seasonal homes, business trips and conventions, and visits to friends or relatives as a significant part of the industry along with its more traditional forms.

Map 15 San Luis Valley Region – Tourist Attractions



Source: San Luis Valley GIS/GPS Authority.

- | | | | |
|---------------------------------|-------------------------------------|--------------------------------|----------------------------|
| 1 Great Sand Dunes | 15 Cumbres & Toltec Scenic Railroad | 29 Bachelor Mine Loop | 43 Mineral Hot Springs |
| 2 Medano-Zapata Ranch | 16 Our Lady of Guadalupe Church | 30 Wheeler Geologic Area | 44 Valley View Hot Springs |
| 3 Zapata Falls | 17 Trujillo Meadows | 31 Big Meadows Reservoir | 45 Los Cumbres Golf Cour |
| 4 Alligator Farm | 18 Platoro | 32 Wolf Creek Ski Area | 46 Baca/Crestone Commu |
| 5 San Luis Lakes SP | 19 La Jara Reservoir | 33 North Clear Creek Falls | 47 Hooper Pool |
| 6 Blanca Wetlands | 20 Ft. Garland Museum | 34 Road Canyon Reservoir | 48 Dome Lakes SWA |
| 7 Playa Blanca SWA | 21 Mountain Home Reservoir | 35 Rio Grande Reservoir | 49 Saguache County Muse |
| 8 Adams State College | 22 Stations of the Cross Shrine | 36 Monte Vista Golf Course | 50 Russell Lakes SWA |
| 9 Trinidad State Junior College | 23 San Luis Cultural Museum | 37 Home Lake SWA | 51 Penitente Canyon |
| 10 Cattails Golf Course | 24 Sanchez Reservoir | 38 Monte Vista NWR | 52 La Ventana Natural Arc |
| 11 Splashland | 25 Game Bird & Trout Club | 39 Rio Grande County Museum | 53 La Garita |
| 12 Alamosa NWR | 26 Smith Reservoir | 40 Beaver Creek Reservoir | |
| 13 Pikes Stockade | 27 Creede repertory Theater | 41 Rio Grande Club Golf Course | |
| 14 Jack Dempsey Museum | 28 Creede Underground Mining | 42 Elwood Pass | |

2. Importance of Tourism to the Economy (Table M-1)

Table M-1 summarizes the Tourism segment of the base industry analysis, which estimates a total base income for the region at \$43,508,000 and base employment at 1,878. As noted in the chapter on economy, tourism with all its potential ranks a distant third in the regional economy, tied with Public Assistance at 11.5%.

Mineral is the only tourism-dependent county, with 60.5% of its base income, and 68.9% of its base employment derived from tourist income streams. Following the closing of its silver mines, Mineral County transformed its economy to tourism and is regarded as one of the State's success stories. Main attractions include Wolf Creek Ski Area; dude ranches; National Forest lands for fishing, camping, and hunting; snowmobiling and cross-country skiing in winter, the Creede Repertory Theatre, and a full schedule of special events.

From the standpoint of the region as a whole, Mineral's \$5,627,000 for tourism represents only 12.2% of the tourism totals. Based on its concentration of lodging, shopping, restaurants, services, and proximity to the Sand Dunes, Alamosa County shows the highest amount of tourism income at \$15,138,000 (34.8% of the region). Rio Grande is second largest (\$13,594,000/31.2%), and Conejos third (\$4,286,000/9.8%). With all its history, culture, and charm, Costilla County's \$932,000/2.1% is hard to accept, and deserves more scrutiny in the estimates. In any case, the eventual designation of the Sangre de Cristo National Heritage Area should provide a significant boost in base income.

A new scenic rail line was recently added to the menu of tourist attractions by the San Luis & Rio Grande Railroad in Alamosa, with a starting ridership of 12,000 and expected to expand significantly. Named as the "Rio Grande Scenic railroad," several routes were initiated including the *San Luis Express* over heretofore unseen portions of La Veta Pass to La Veta, and the *Toltec Gorge Limited* connecting with the Cumbres & Toltec narrow gauge in Antonito.

At the national level, the U.S. travel and tourism industry is America's second largest export, with \$95 billion spent in the U.S., and a net trade surplus of \$14 billion. Tourism generates \$159 billion in income, and employs about one out every 8 people in the U.S. Colorado's tourism in 2000 was on the order of \$6.9 billion, and ranks 17th in the Nation for total tourism spending and 5th on a per capita basis.

3. Tourism Industry Components

The base analysis model recognizes 4 main types of tourism activities, noted as follows:

- Second home construction & real estate --- Includes varying percentages of income and employment representing only the portion of activities dedicated to second homes or seasonal homes in most

- Resorts, restaurants, recreation & lodging --- Includes all of lodging, and appropriate percentages of eating & drinking places; amusement; and recreational services.
- Tourist-related transportation --- Includes appropriate percentages of air transportation and gas stations.
- Tourist goods & services --- Includes tourist-only percentages of food stores; wholesale trade; furniture; apparel; general merchandise; drug stores; and misc retail stores.

4. Attractions and Events (Table M-2)

Selected tourist attractions, points of interest, museums, and historic sites for the Valley as shown on the map are widespread, and to visit them all would probably require several weeks and considerable driving time. Rough estimates on the number of visitors at some of the larger ones are as follows:

- 275,000-300,000 --- Great Sand Dunes National Park; Combined lands of Rio Grande National Forest, Bureau of Land Management, and U.S. Fish & Wildlife Service
- 100,000-125,000 --- Wolf Creek Ski Area
- 30,000-60,000 --- Cumbres & Toltec Scenic Railroad; Alligator Farm; Stations of the Cross Shrine
- 20,000-30,000 --- Fort Garland Museum; Creede Repertory Theatre; Rio Grande County Museum

Table M-2 shows selected events promoted by various communities with estimated total attendance of 108,175, with an economic impact previously estimated at \$5.6 million. These events also capture a fair share of tourist income, and are summarized as follows based on ballpark attendance estimates:

- 15,000-20,000 --- Ski-Hi Stampede
- 10,000-15,000 --- Summerfest on the Rio; Mormon Pioneer Days; Santiago & Santa Ana Fiesta Days; Gatorfest
- 5,000-10,000 --- Loggers Day Festival; Early Iron Festival
- 2,500-5,000 --- Ride the Rockies; SLV Pilot's Assn Airshow; Creede 4th of July; Covered Wagon Days; Monte Vista Crane Festival; Crestone Music Festival; Spring Steam Festival
- 1,000-2,500 --- Colorado Wildfire Academy; La Jara Centennial; Ft. Garland Military Encampment/Reenactment; Colorado Mining Championships

In the Spring of 2007 we conducted an economic impact analysis for the Early Iron Festival, which is a vintage auto and custom street-rod show on Labor Day weekend in Alamosa. Based on 325 registered auto entries and an estimated 6,000 visitors, we calculated direct spending for the event at \$277,492, resulting in a total economic impact of \$443,987. Cumulative impacts over a 26-year period from 1981-2006 were estimated at \$8.6 million.

Spending parameters were studied in making the calculations, and we settled on \$375 as our best approximation of what the average out-of-area rodder party of 2.5 persons spent in the Valley for their Early Iron weekend. National estimates were much higher, and a study by the American Auto Association (AAA) reported a national travel average of \$261 per day for a family of two adults and two children, with a lodging average of \$141 a night and meal costs of \$120. Gasoline costs would be added to this. We also referenced the Longwoods study on the Colorado Tourism Council website which showed "marketable trips" averaging \$91 per person per day.

5. Tourism Trends (Table M-3)

A 1.9% lodging tax collected on motel and hotel spending by tourists and travelers is helping to raise funds in the Valley for tourism promotion and planning, and is also a good indicator of the tourism trends. Table M-3 shows the Valley's total for 2005 at \$208,437, which represents an increase of 6.3% over 2001 --- an average increase of only 1.3%/year. By these numbers, Saguache County had the best gain of 31.5%, followed by Rio Grande (14.0%); and Alamosa (11.7%). The huge losses for Costilla (-45.3%) and Conejos (-20.7%) are hard to justify, and could be due to reporting.

Visitation at the Sand Dunes increased by 10.2% from 2006-2007 to a total of 285,591, which is the highest in recent years and indication that the added attraction of National Park status make be taking hold. The Colorado Tourism Office has not released any reports on county-level data, but several other attractions have also reported a slight up-trend which we hope will continue in the years ahead.

6. Tourism Accommodations (Table M-4)

Estimates in Table M-4 for total lodging accommodations in the Valley of 1,683 including rooms at hotels and motels, bed & breakfast, and resort cabins may be somewhat low. Using CDOT's multiplier of 2.17 persons/vehicle for recreational travel approximates a capacity of 3,650 persons. The largest concentration of lodging is in Alamosa (588); Rio Grande (489); and Mineral (306).

Typical concerns for accommodation besides lodging, campsites, and RV sites include: signage; maps and brochures; shops and downtowns; shuttles and tour buses; rest rooms; 24-hour gas service; telephones; and many more. Hospitality training for tourist and service business employees has also been discussed, and a well-informed and friendly greeting is part of the best practices treatment needed to ensure return visits.

Only one rest area exists, located on US 160 east of South Fork. It maintains an excellent appearance and could be a model for more like it in the Valley and other parts of Colorado. Several focal points for tourist information throughout the Valley exist, but most are not accessible on weekends.

Table M-1

Tourism - 2005 Economic Base Analysis

	Alamosa	Conejos	Costilla	Mineral	Rio Grande	Saguache	San Luis Valley
Total Base Income (\$1,000)	\$151,083	\$60,497	\$28,609	\$9,295	\$175,904	\$55,872	\$379,233
Tourism	\$15,138	\$4,286	\$932	\$5,627	\$13,594	\$3,931	\$43,508
Tourism % of county	10.0	7.0	3.3	60.5	7.7	7.0	11.5
Rank in County	5	5	7	1	4	5	3
County % of SLV	34.8	9.8	2.1	12.2	31.2	9.0	100.0
Total Base Employment	8,961	2,489	1,217	351	5,192	2,237	-
Tourism	746	166	36	242	557	131	1878
Tourism % of county	15.0	6.7	3.0	68.9	10.7	5.8	0.0
Rank in County	4	5	6	1	3	5	-
County % of SLV	39.7	8.8	2.0	12.9	29.6	7.0	100.0

Source: State Demography Office, *2005 Base Industry Analysis*, 11/15/06

Table M-2
Selected Events and Economic Impact

<u>County/City/Town</u>	<u>Event</u>	<u>Month</u>	<u>Duration - Days</u>	<u>Attendance</u>
<u>Alamosa County</u>				
Alamosa	Summerfest on the Rio	June	2	20,000
	Colorado Wildfire Academy	"	7	1,200
	Ride the Rockies	"	2	3,500
	SLV Triathlon	"	1	200
	Earth Day	"	1	200
	SLV Pilots Association Airshow	July	2	2,500
	Kiwanis Annual Meeting	Aug	3	475
Mosca/Hooper	Early Iron	Sept	3	6,000
	Gatorfest	August	2	10,000
Total				44,075
<u>Conejos County</u>				
Antonito	Spring Steam Festival	June	2-3	5,000
	Arco-Iris Arts & Crafts Fair	Sept	2	400
	Arco-Iris Christmas Bazaar	Dec	2	300
La Jara	La Jara Centennial	June	1	1,000
Manassa	Mormon Pioneer Days	July	2	12,000
Total				18,700
<u>Costilla County</u>				
Fort Garland	Ft Garland Military Encamp/Reenactment	May	2	1,200
	Ft Garland Military Encamp/Reenactment	August	2	700
San Luis	Santa Ana/St. James Celebration	July	2	10,000
Total				11,900
<u>Mineral County</u>				
Creede	Taste of Creede	May	2	600
	Wood Carvers Festival	July	7	300
	Colorado Mining Championships	"	2	1,000
	Knife & Tomahawk Throwing Championship	"	2	200
	4th of July	"	2	2,000
	Salsa Festival	Sept	3	200
Total				4,300
<u>Rio Grande County</u>				
Del Norte	Covered Wagon Days	August	3	2,000
Monte Vista	Potato/Grain Conference	February	3	350
	Crane Festival	March	3	3,500
	Ski-Hi Stampede	July	3	15,000
South Fork	Loggers Day Festival	July	2	6,000
Total				26,850
<u>Saguache County</u>				
Saguache	Home Made Tour	Sept	1	300
Crestone	Crestone Music Festival	August	2	2,000
Total				2,300
San Luis Valley				108,125

Source: SLV Development Resources Group, December 2007.

Table M-3

Lodging Tax Trends, 2000-2005

Year	Alamosa		Conejos		Costilla		Mineral		Rio Grande		Saguache		5- County Total	
	\$	% chg	\$	% chg	\$	% chg	\$	% chg	\$	% chg	\$	% chg	\$	% chg
2000	91,081		17,220		13,976				66,375		7,415		196,067	
2001	100,647	10.5	16,326	-5.2	9,490	-32.1			76,556	15.3	7,253	-2.2	210,272	7.2
2002	92,415	-8.2	15,891	-2.7	7,444	-21.6			70,966	-7.3	7,987	10.1	194,703	-7.4
2003	97,633	5.6	15,128	-4.8	9,172	23.2			75,982	7.1	9,756	22.1	207,671	6.7
2004	102,343	4.8	13,568	-10.3	8,282	-9.7			79,210	4.2	9,075	-7.0	212,478	2.3
2005	101,712	-0.6	13,652	0.6	7,643	-7.7			75,676	-4.5	9,754	7.5	208,437	-1.9
Percent chg - 2000-2005		11.7		-20.7		-45.3				14.0		31.5		6.3
Percent chg - avg annual		2.3		-4.1		-9.1				2.8		6.3		1.3

Source: Colorado Department of Revenue, 2006 Annual Report.

*Data for Mineral County not reported due to confidentiality.

Table M-4

Lodging Capacity Estimates

Town	Hotel/Motel Rooms	Bed & Breakfast Rooms	Resort Cabins	RV Sites
ALAMOSA COUNTY				
Alamosa	554	5	2	52
Mosca	4	0	0	0
Sand Dunes - Private	8	0	0	0
Sand Dunes Nat'l Monument - Park Service	0	0	0	91
Zapata	15	0	0	0
Subtotal Alamosa County	581	5	2	143
CONEJOS COUNTY				
Antonito/Conejos Canyon	46	21	26	117
La Jara	0	0	0	0
Subtotal Conejos County	46	21	26	117
COSTILLA COUNTY				
Blanca	8	0	0	37
Fort Garland	32	0	0	0
San Acacio	0	4	0	0
San Luis	22	8	0	0
Subtotal Costilla County	62	12	0	37
MINERAL COUNTY				
Creede	124	15	167	0
Subtotal Mineral County	124	15	167	0
RIO GRANDE COUNTY				
Del Norte	48	4	0	0
Monte Vista	163	0	0	37
South Fork	240	0	34	76
Subtotal Rio Grande County	451	4	34	113
SAGUACHE COUNTY				
Center	0	0	0	0
Crestone	37	10	55	0
Moffat	0	9	0	0
Saguache County	10	0	0	0
Villa Grove	3	9	0	35
Subtotal Saguache County	50	28	55	35
Total San Luis Valley	1,314	85	284	445

Source: San Luis Valley Information Center, and local contacts, 3/4/02.