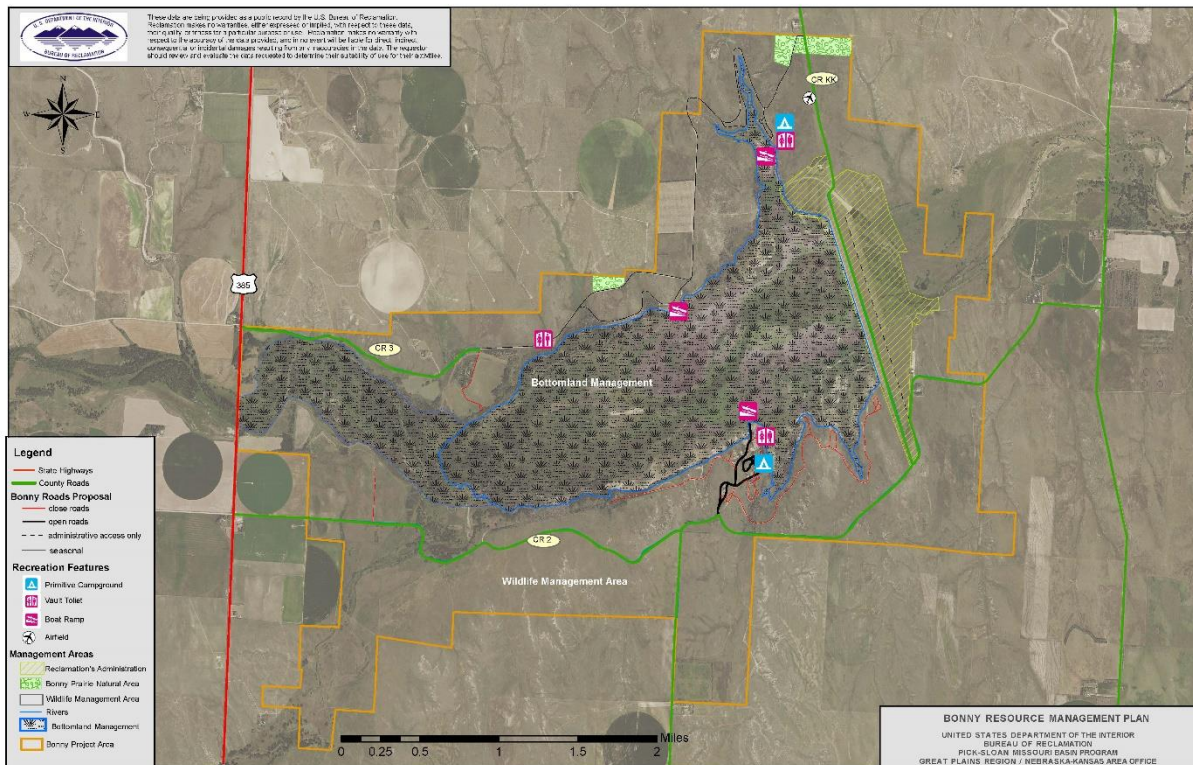


South Fork Republican Restoration Coalition: Recreation Market Analysis

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Tel 978.232.3609

8 Essex Center Drive ■ Peabody, MA 01960

www.chmgov.com

March 7, 2019

South Fork Republican Restoration Coalition
410 Main Street, Suite 8
Wray, CO 80758

Dear Coalition Members

In accordance with our contract with the South Fork Republican Restoration Coalition ("SFRRRC"), CHM Government Services ("CHMGS") is pleased to present our observations and findings as contained within this Draft Recreation Market Analysis. It has been a pleasure to be of service to SFRRRC. If we may be of further assistance, please do not hesitate to contact your Project Manager Margaret Bailey at mbailey@chmgov.com.

Respectfully Submitted,

DRAFT

Geoff Baekey
Managing Director
CHM Government Services
P: 978.232.3609

gbaekey@chmgov.com

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A. EXECUTIVE SUMMARY

PURPOSE AND SCOPE OF ENGAGEMENT

The South Fork Republican Restoration Coalition (“SFRR”) engaged CHM Government Services (“CHMGS”) in undertaking Recreation Market Analysis to explore alternatives for recreational opportunities at the former Bonny State Park site along the South Fork Republican River. Hereafter, in discussions about the future site, it will be referred to as, “Proposed Recreation Subject Area”.

This recreation market analysis is a sub component of a Memorandum of Understanding (“MOU”) between the Nature Conservancy, Colorado Parks and Wildlife, Three Rivers Alliance, Yuma County and Kit Carson County, as part of the South Fork Republican River Restoration Plan.

RECREATION FEASIBILITY

Recreation Market Analysis is one phase of a multi-phase analysis process. It will result in identifying if recreational uses have market support and the demand outstrips the supply of existing facilities. It provides an opportunity for focusing future planning efforts and lays the foundation for financial, investment analysis and a determination if there is a future business opportunity. This report will NOT address overall business opportunity for recreational opportunities; however, it WILL identify what recreational activities are market supportable and could be considered for moving to the next phase of analysis.

LOCATION AND SITE HISTORY

The former Bonny State Park site was an important public recreation asset to both local and regional visitors. It was one of the few public recreation areas in the region and drew visitors from across the region including the states of Kansas and Nebraska. It was considered an important water based recreational resources as well as location for camping and picnicking. As the Reservoir was drawn down, Colorado Parks and Wildlife focused on developing alternative uses for a short period of time to maximize the existing land area. These included trail-based recreation as well as camping. Additionally, hunting was and has continued to be an important part of Bonny State Park. Currently, Hunting has become the primary recreational use and the existing seasons appear to be supportive of other recreational activities outside of the hunting season.

Reclamation has completed its Resource Management Plan for the site and its recommended option is, “A combination of Alternatives A and B which includes managing the federal lands around Bonny Dam for wildlife habitat emphasis and provide for dispersed (limited development) recreational opportunities as well as decommissioning facilities on site.

ECONOMIC AND DEMOGRAPHIC PROFILE OF MARKET

The market drawing area for the Proposed Recreation Subject Area includes residents within a one, two- and three-hour drive time including populations of the state of Colorado, Kansas and Nebraska. The immediate market population represents approximately 21,000 people which is small and triples to 65,000 for two hours and over 1.9 million for 3 hours. A general challenge for any recreation market destination is having a large enough population to sustain it year-round including both weekdays and weekends. Absent the large local population, there needs to be unique recreational amenities to draw from a regional market.

RECREATION TRENDS

Both national and regional recreation trends provide insight as to future market opportunities for recreational activities at the Proposed Recreation Subject Area. In reviewing trends, the most important indicators are those that are based upon local and regional participation while evaluating emerging trends that are occurring nationally. Due to the location of the Proposed Recreation Subject Area's proximity to two other states and recognizing that the CPW lease is with Reclamation a federal asset, it is critical that these neighboring states recreation activities and needs be reviewed as well.

The data indicates that within the direct market area (e.g. 0 to 120-minute drive) the Colorado recreation activities with the highest levels of participation were walking, followed by hunting, wildlife viewing, hiking, target and skeet shooting, RV and tent camping and road biking. It is important to note however, that recreation participation is in part a function of available supply and in this area, there is an absence of water-based activities and trail systems for both motorized and non-motorized activities. The Kansas and Nebraska recreation participation data were not provided on a county level basis. However, data from their statewide SCORP's indicated favorable participation rates for trail, picnicking, wildlife viewing, fishing, hunting, shooting and ATV'ing. Additionally, when queried about additional facilities desired, Kansas residents indicated preference for multi-recreational resorts and hunting and Nebraska residents indicates trails, fishing and campsites. All these recreational uses are possible at the Proposed Recreation Subject Area.

MOTORIZED RECREATION TRENDS

The market for motorized recreation supports recreational hunting activities as well as provides for unique trail based recreational uses. This market includes both OHV/ATV vehicles as well as off road motorcycles. The uses can be trail based as well as support unique tracks for special events. While the growth rate for OHV/ATV manufacturing is stable or slightly declining, the registration of OHV permits within the state of Colorado has consistently grown over the last ten years. This indicates that usage of OHV's on public land for recreation continues to be an important component of outdoor recreation within the State of Colorado.

COLORADO HUNTING TRENDS

The Northeast Colorado hunting data highlights the importance of the SWA's within Yuma and Kit Carson County for overall hunting benefit to the state. Therefore, maintaining hunting as a recreational demand component of the Proposed Recreation Subject Area is important. However, as future recreational needs are evaluated, it is important to note that while hunting is the second most frequently participated recreation activity in the Northeast region (e.g. Exhibit 17), within the Northeast, Wildlife- Related Recreation represents only 14 percent of the regions in bound recreation compared to 23 percent for Trail/Road and 39 for other Outdoor Activities (e.g. Exhibit 18).

COLORADO TOURISM TRENDS

Northeast, Colorado is a region that visitors drive through on their way to the Front Range or Western Slope. However, both the Julesburg and Burlington Welcome Center's experience some of the highest visitations due to their location as the western entrance to the state. The proximity of the Proposed Recreation Subject Area to these visitor centers positions them well for future promotion if development occurs at the site. The favorable opportunity for the South Fork Republican Restoration Coalition, is that this regions' Tourism Profile is at the beginning of its "Destination Profile". This means that if a new recreational entity is created at the Proposed Recreation Subject Area, it can be integrated into the "DNA Drivers" for the area. Then the site can be leveraged to expand overall tourism to the recreation site as well as other important tourism assets within Yuma and Kit Carson County.

RECREATIONAL SUPPLY INVENTORY

The stakeholder engagement process assisted CHMGS in identifying the types of recreational activities that would potentially be desired for the Proposed Recreational Subject Area. From this, CHMGS undertook comprehensive supply analysis to ascertain the geographic location as well as characteristics of the competitive market supply for recreation facilities.

The analysis identified the distribution of sites within and outside the competitive market. This provides insight as to areas of possible recreation market opportunities. The analysis results indicate that there is an absence of motorized trail options as well as specialized venues for OHV, Motorcycle and Biking in the market area.

RECREATION DEMAND ANALYSIS CONCLUSIONS

The resulting quantitative recreation demand analysis ranks the following activities as those that would have highest recreation demand at the Proposed Recreation Subject Area.

1. Camping
2. Fishing
3. Birding
4. OHV/ATV/Motorcycling
5. Hiking
6. Hunting (Rifle/Shotgun Combined)
7. Mt. Biking
8. Target Shooting
9. Horseback Riding
10. Canoe/Kayaking

Note, CHMGS has not included recreation aviation field in its ranking, since BOR has already approved this future recreation use in its RMP FONSI. It is important to note that demand for each of these activities assumes that there are facilities, amenities and venues available to accommodate them. Presently, there is only primitive camping, and hunting available at the site.

CHMGS notes that camping is the top ranked activity. However, CHMGS's review of public campground occupancy at the surrounding state park and reservoirs indicates that demand is highly seasonal and is based upon a unique recreational amenity (e.g. water). Therefore, CHMGS notes that camping should only be developed to support other recreation uses, since camping alone at the Proposed Recreation Subject Area, will not unto itself provide a destination draw.

For those recreational land uses that are not currently available, the analysis assumes that the future demand would be primarily induced demand. Induced demand is additional demand created by the existence of a new demand generator or the addition to the competitive supply of new recreational facilities. Induced demand occurs with specialized facilities designed to cater to a specialized segment and attract demand that previously did not exist in the area.

MARKET ANALYSIS CONCLUSIONS

The recreation market analysis process results in an identification of possible recreation uses for the Proposed Recreation Subject Area. The recreation market analysis has concluded with addressing the answers to following questions introduced at the beginning of this report.

1. What is the market opportunity for the specific recreation land use?

- a. The market supply and demand analysis has identified the Proposed Recreation Subject Area as having favorable market demand for a specialized motorized/non-motorized area with support amenities including camping and either a bunkhouse and/or special event venue.

2. How does this recreation land use potentially fit within the subject site?

- a. Preliminary discussions with CPW and BOR as well as individuals who undertake planning for comparable facilities, identified that leveraging the eastern portion of the site above the reservoir to include both North Cove and Wagon Wheel, would be a suitable area for consideration. The seasonality of use would be outside of hunting season with a focus on the summer months of June, July and August.

3. How do the existing facilities support the proposed recreation land uses?

- a. The FONSI identified continued use as a SWA, support for primitive camping and potential use of the northeast corner for reestablishment of a Recreational Airfield. The proposed recreational activities support the existing land use in that their season and potential area of operation would not overlap with the hunting seasons. How the recreational land uses can be planned to provide for the least impact on species would be determined during the Planning Feasibility process.

4. What additional facilities are required to support the proposed recreation land use?

- a. The proposed recreational uses would require the re-establishment of several facilities that are currently shuttered, and which have experienced vandalism. (e.g. Visitor Center, Camping Sites, Camping Shower Facility). Additionally, parking areas as well as adjacent open space would be required for use in the development of a special venue for OHV Safety Training, and a potential Motocross, BMX, or Mt. Bike Course. Additionally, County Roads would need to be incorporated into a future design and would need formal approval for OHV riding.

CONCEPTS FOR PROPOSED RECREATIONAL SUBJECT AREA: SPECIALIZED MOTORIZED/NON-MOTORIZED SAFETY AND TRAINING VENUE

CHMGS's recreation market analysis has identified that leveraging a portion of the Proposed Recreation Subject Area for use as a specialized motorized/non-motorized venue including support facilities would be a suitable proposed recreational use profile for this site. CHMGS notes that existing recreational amenities are available that could support the future proposed recreational land uses. Additionally, these areas would only be used outside the existing hunting seasons and could support hunters during the hunting seasons. CHMGS has assumed that these areas would primarily be used during the summer months and other periods outside hunting seasons.

NEXT STEPS

Recreation Feasibility Planning includes four phases:

1. Market Feasibility
2. Planning Feasibility
3. Financial Feasibility
4. Investment Feasibility

This report fulfills the objectives market feasibility and the statement of work from SWRRC for the Recreation Market Analysis. The next critical phase in the process would be identifying if the recreational activities identified are physically possible and legally allowable to occur on the parcel. (e.g. Planning Feasibility). Additionally, understanding the costs for adapting existing facilities for other uses as well as rehabilitation existing facilities (e.g. campgrounds) for future use needs to be understood. Details of the next steps are contained within the body of the main report.

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B. INTRODUCTION & PURPOSE AND SCOPE OF ENGAGEMENT

The South Fork Republican Restoration Coalition (“SFRRRC”) engaged CHM Government Services (“CHMGS”) in undertaking Recreation Market Analysis to explore alternatives for recreational opportunities at the former Bonny State Park site along the South Fork Republican River. Hereafter, in discussions about the future site, it will be referred to as, “Proposed Recreation Subject Area”.

This recreation market analysis is a sub component of a Memorandum of Understanding (“MOU”) between the Nature Conservancy, Colorado Parks and Wildlife, Three Rivers Alliance, Yuma County and Kit Carson County, as part of the South Fork Republican River Restoration Plan.

The MOU identifies the objectives of all parties and three parties have stated objectives directly tied to recreation:

- Colorado Parks and Wildlife (“CPW”): The Mission of CPW is to perpetuate the wildlife resources of the state, to provide for a quality state park system and to provide enjoyable and sustainable outdoor recreation opportunities that educate and inspire current and future generations.
- Yuma & Kit Carson County’s: Missions include protecting, growing and sustaining, their respective economies by encouraging efforts to improve the environment, encourage recreational opportunities and to protect their water resources.

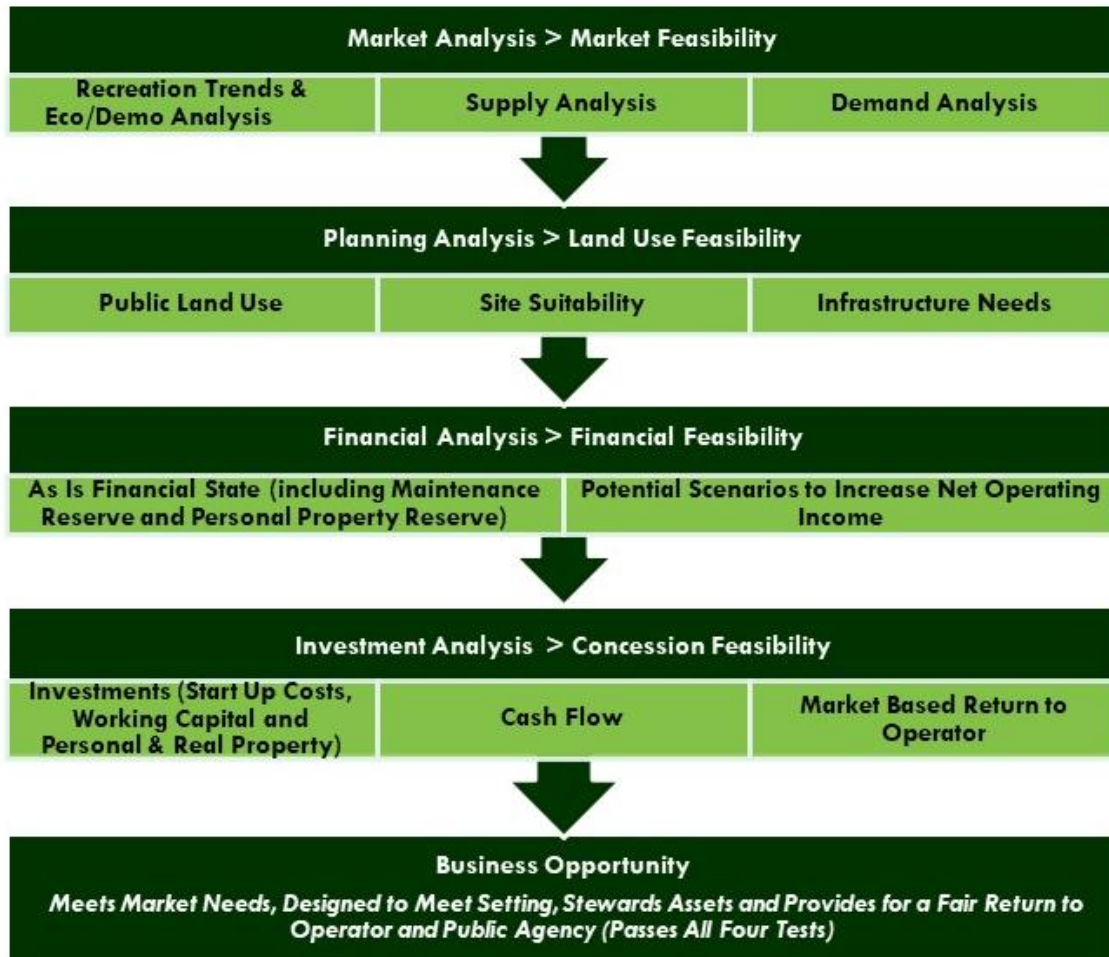
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C. FEASIBILITY ANALYSIS PROCESS

RECREATIONAL PLANNING FEASIBILITY ANALYSIS

CHMGS notes that Market Analysis is a foundational phase of recreational planning feasibility analysis but is only one phase of a four-part process. The following visual outlines the entire process that is needed to ascertain feasibility of a proposed recreation development.

Exhibit 1. - Recreational Planning Feasibility Analysis Process



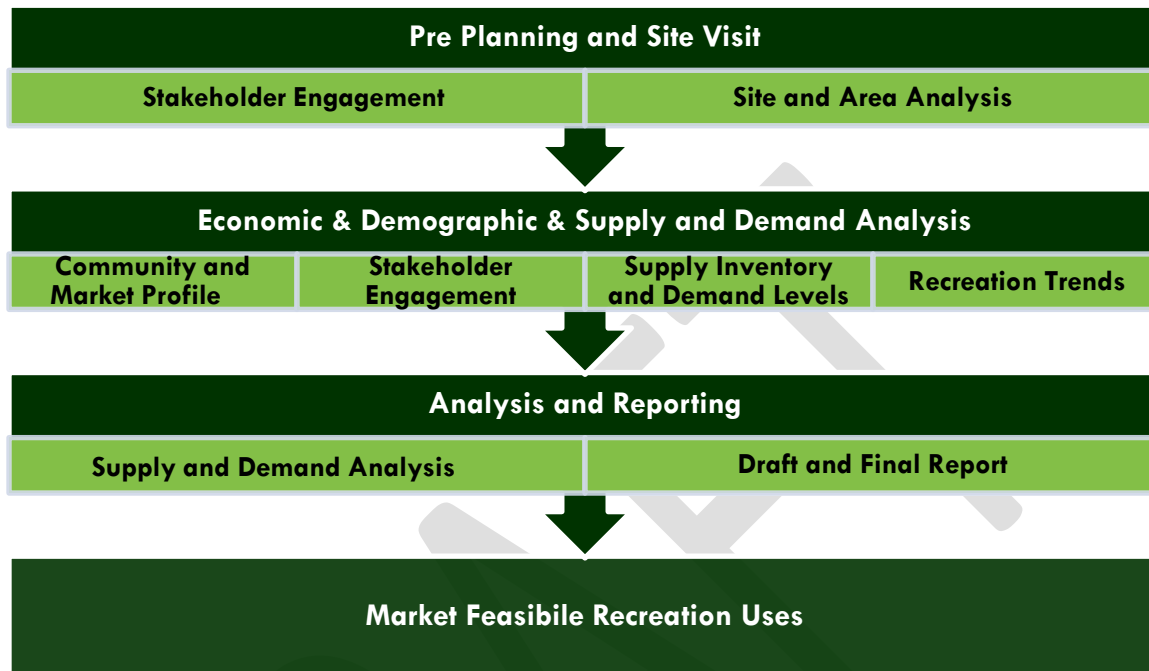
Source: CHMGS

The four-phase process outlined above results in a full understanding of whether a recreational land use(s) provides a viable business opportunity for either a private, public or nonprofit entity.

MARKET FEASIBILITY ANALYSIS

The scope of this engagement is focused on Recreation Market Analysis. For this process, the following three phases are included.

Exhibit 2. - Market Analysis Framework



Source: CHMGS

A key component of the supply and demand analysis was extensive stakeholder engagement. A full listing of all stakeholders interviewed is provided in the Appendix. Recreation Market Analysis answers the following questions:

1. What is the market opportunity for the specific recreation land use?
2. How does this recreation land use potentially fit within the subject site?
3. How do the existing facilities support the proposed recreation land uses?
4. What additional facilities are required to support the proposed recreation land use?

RECREATION FEASIBILITY CONCLUSION

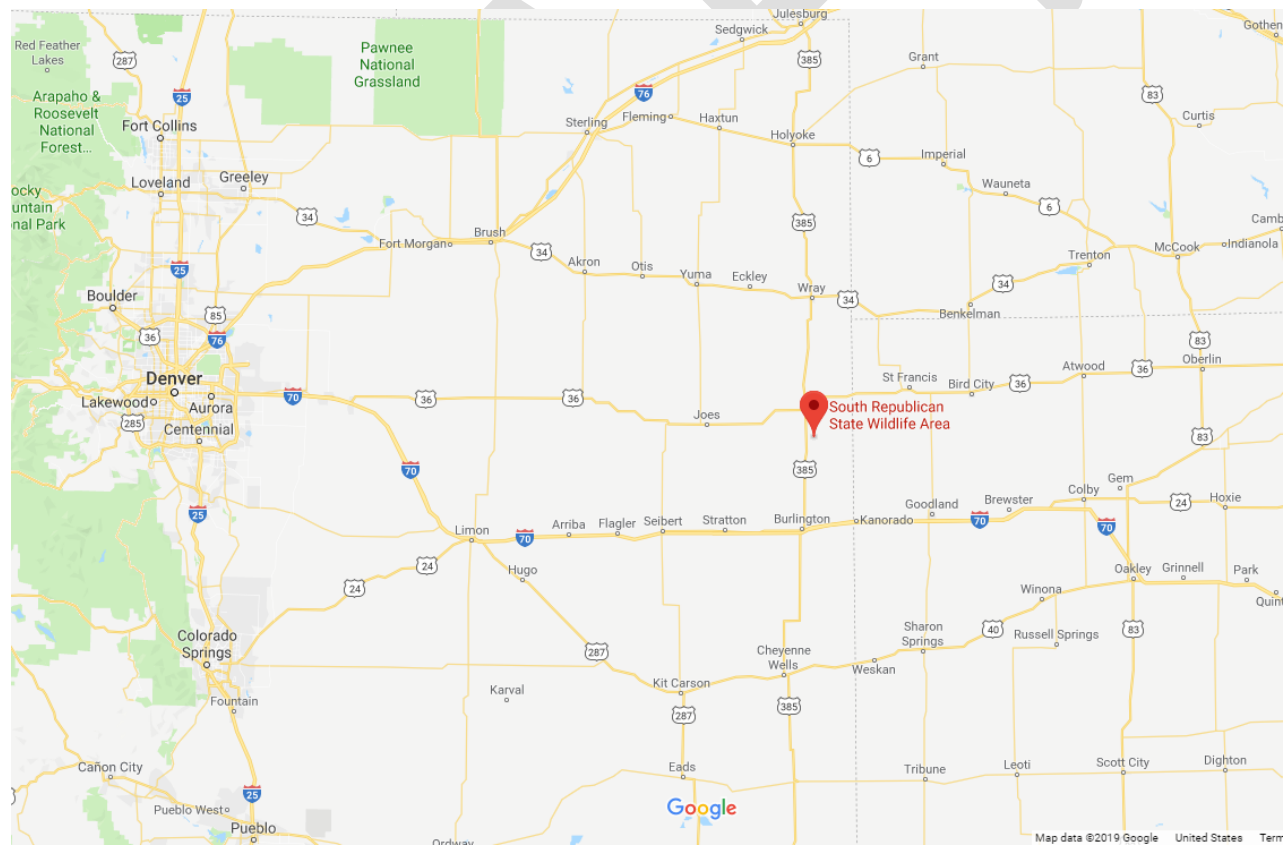
Recreation Market Analysis is one phase of a multi-phase analysis process. It will result in identifying if recreational uses have market support and the demand outstrips the supply of existing facilities. It provides an opportunity for focusing future planning efforts and lays the foundation for financial, investment analysis and a determination if there is a future business opportunity. This report will NOT address overall business opportunity for recreational opportunities; however, it WILL identify what recreational activities are market supportable and could be considered for moving to the next phase of analysis.

D.LOCATION AND SITE HISTORY

GEOGRAPHIC SETTING

The former Bonny Lake State Park is located in the southwest corner of Yuma County in eastern Colorado, on the south fork of the Republican River.¹ The dam and reservoir are approximately 36 miles south of the Town of Wray and twenty miles north of the City of Burlington, Colorado.² The site is under the formal jurisdiction of the Bureau of Reclamation’s (“Reclamation”) Arnel Unit of the Pick-Sloan Missouri Basin Program. The Federal Water Project Recreation Act of 1965 along with other legal authorities, provides Reclamation the authority to plan, develop and manage recreation and fish/wildlife with a managing partner. ³ Since 1952, Reclamation has had a Memorandum of Understanding (“MOU”) with Colorado Parks and Wildlife (“CPW”) to manage the lands for recreation and fish and wildlife opportunities. The current 25-year agreement expires in 2027. ⁴ CPW has full authority to enforce state fishing and hunting regulations in the Project Area. Hunting is not permitted in any designated primitive recreation areas where camping, picnicking and other activities take place.⁵

Exhibit 3. - Location of Former Bonny Lake State Park Currently South Republican SWA



Source: Google Maps and CHMGS

¹ U.S. Department of Interior. BOR RMP/EA Draft- October 2018, 1-4

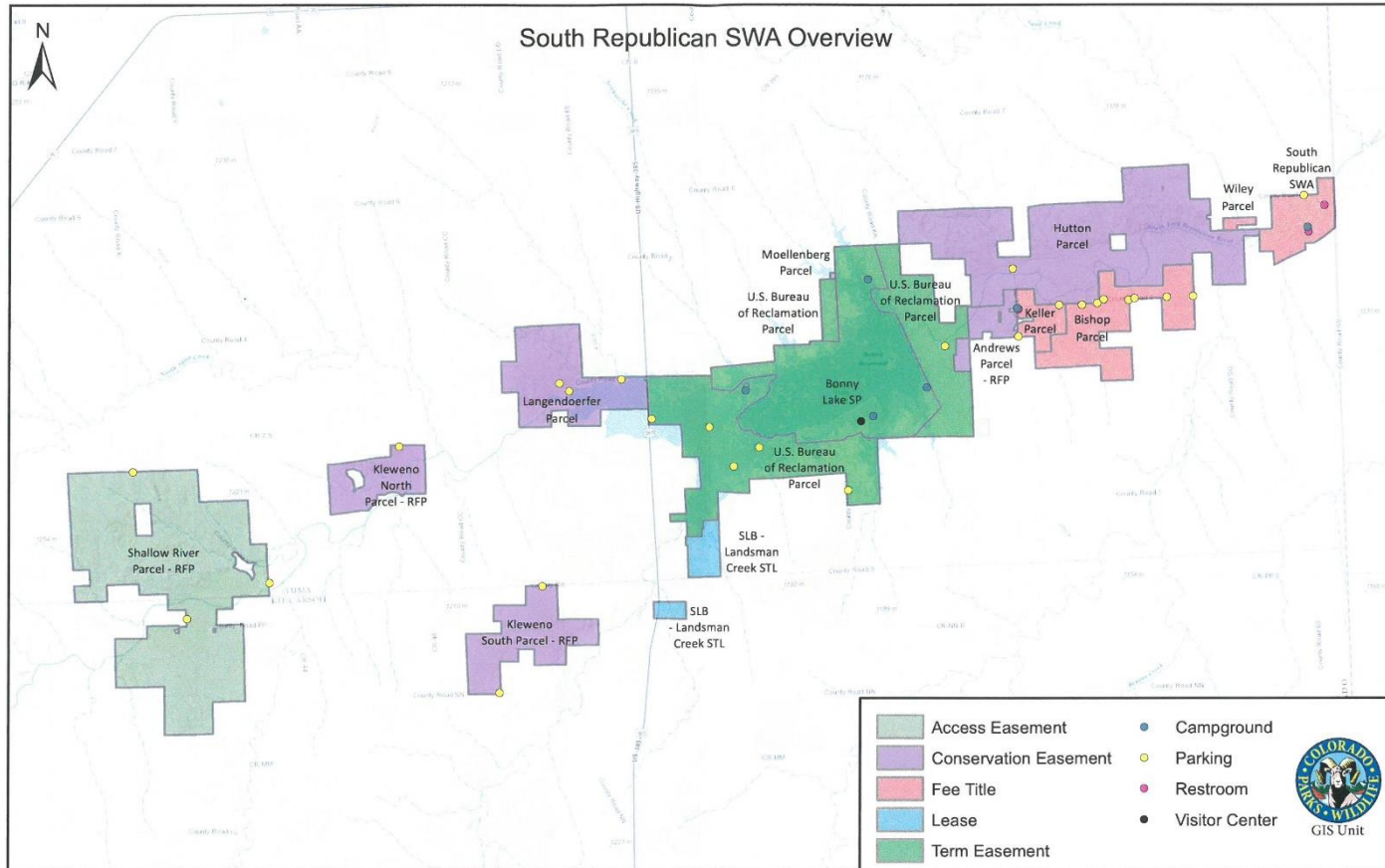
² Ibid, 1-5

³ Ibid, 1-2

⁴ Ibid, 1-3

⁵ Ibid, 1-3

Exhibit 4. - Current South Republican State Wildlife Area Overview



Source: Colorado Parks and Wildlife

In 1966, Bonny Reservoir became a Colorado State Park and the lands surrounding the site were managed as the South Republican State Wildlife Area. ⁶ From 1996 to 2002, the water levels were maintained at an elevation of between 3,665 and 3,670 feet amsl (35,300-acre feet). From 2002 to 2011 the reservoir dropped annually until 2011 when the dead pool elevation reached 3,639 feet amsl (100-acre feet). Presently, the reservoir remains essentially empty except for rainfall or runoff. Reclamation continues to maintain the Bonny Dam for flood control. ⁷

Reclamation completed a Resource Management Plan for the Bonny Dam and its surrounding lands. The Findings of Non-Significant Impact (“FONSI”) for the Final Environmental Assessment were agreed to on January 31, 2019. The recommended options are a combination of Alternatives A and B as identified in the following map. The findings include managing the federal lands around Bonny Dam for wildlife habitat emphasis and provide for dispersed (limited development) recreational opportunities.⁸ The map included in the record of decision is provided in the following exhibit. This map will be referenced later in the document but represents the currently approved plan for Bonny.

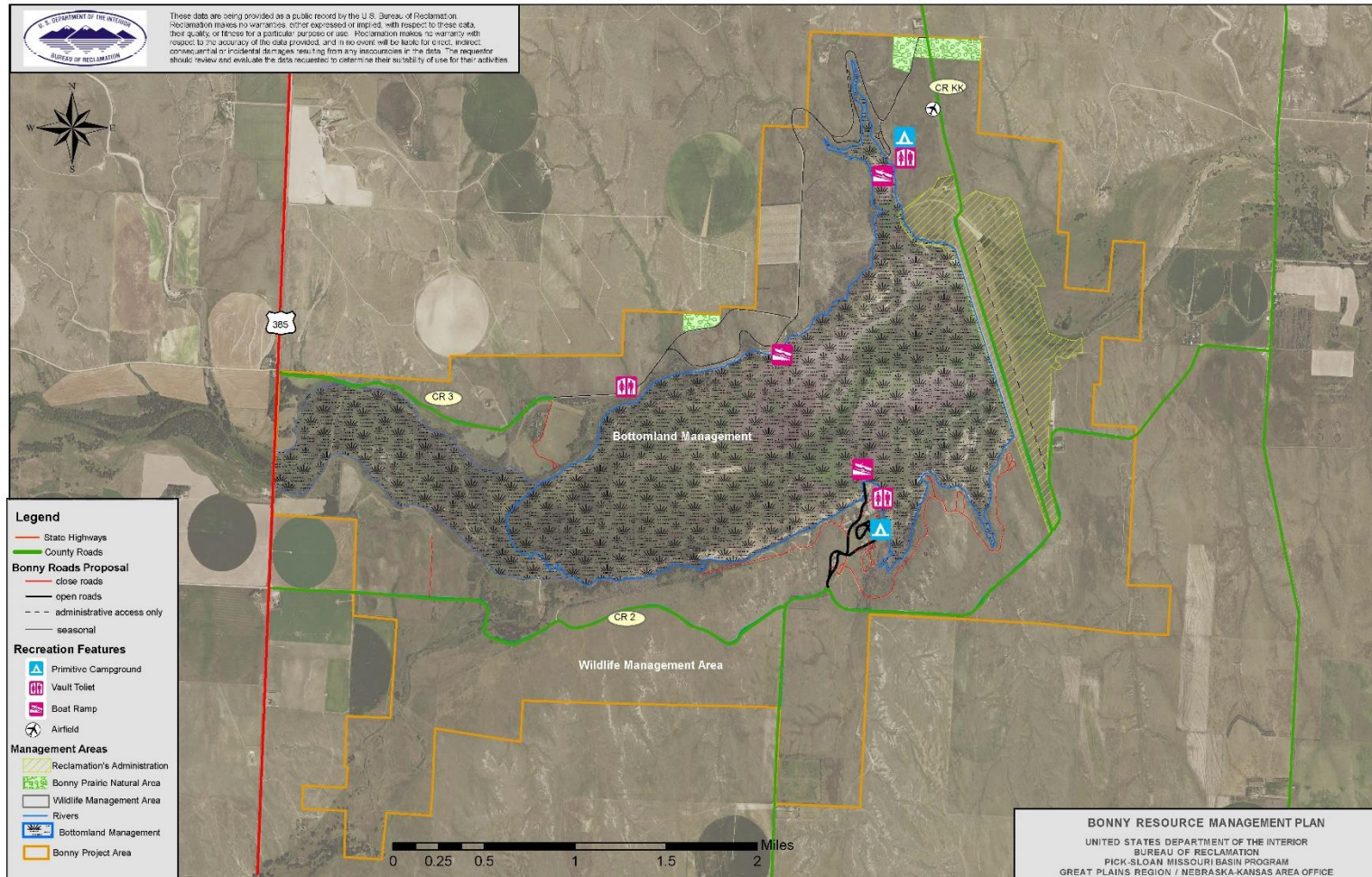
CHMGS notes that the Recreation Market Assessment began at the time that the FONSI was signed. However, CHMGS was informed by both Reclamation and CPW that the analysis undertaken for the Recreation Market Analysis should be informed and guided by the RMP, but not constrained by the RMP at this stage. Reclamation and CPW indicated that the RMP can be amended later through the standard amendment process should all parties agree with future alternatives.

⁶ U.S. Department of Interior. BOR RMP/EA Draft- October 2018, 1-7

⁷ Ibid, 1-7

⁸ U.S. Department of Interior. BOR FONSI-Final Bonny RMP/EA, January 2019, 4

Exhibit 5. - Reclamation Resource Management Plan Record of Decision Map for Bonny Site.



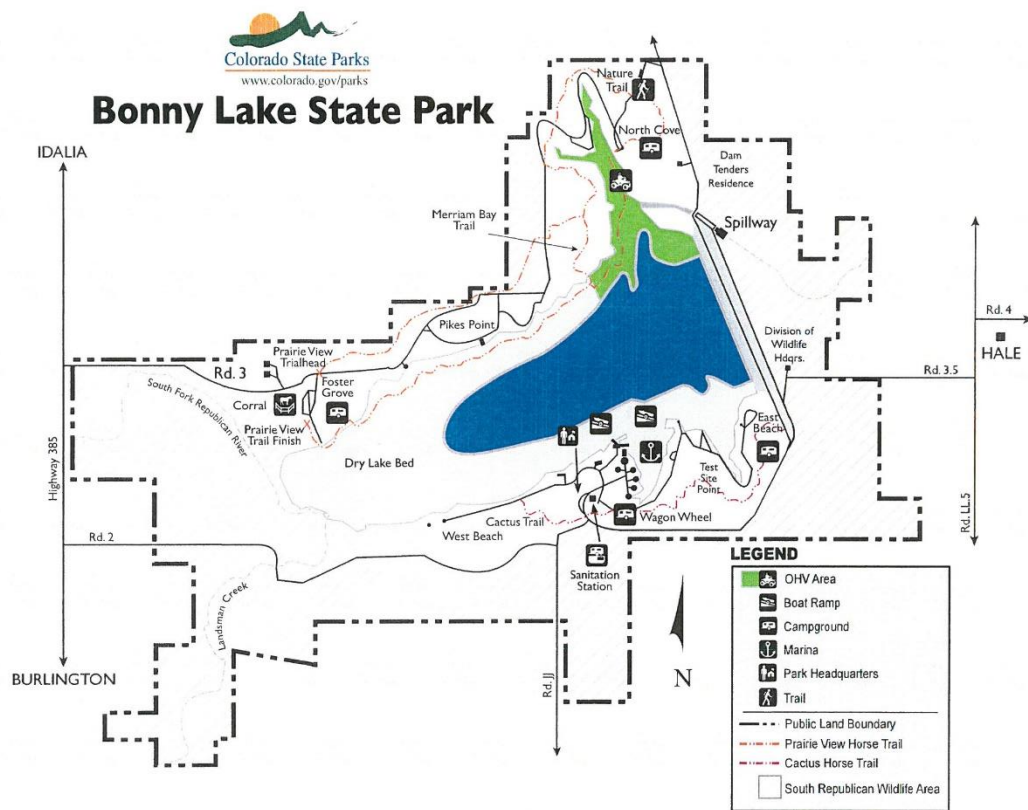
Source: U.S. Department of Interior, Bureau of Reclamation Great Plains Region, Bonny Resource Management Plan, FONSI Map

EXISTING PARK LAYOUT AND FACILITIES

To understand future recreational opportunities, it is important to understand the layout of the former Bonny State Park hereafter identified as: “**Proposed Recreation Subject Area**” when it was in existence and what evolved as site features as the reservoir was drawn down. The following map outlines the layout of the park during the State Park’s existence from 2007 to 2011 during the drawdown. These maps will be useful in the discussion of future recreation opportunities.

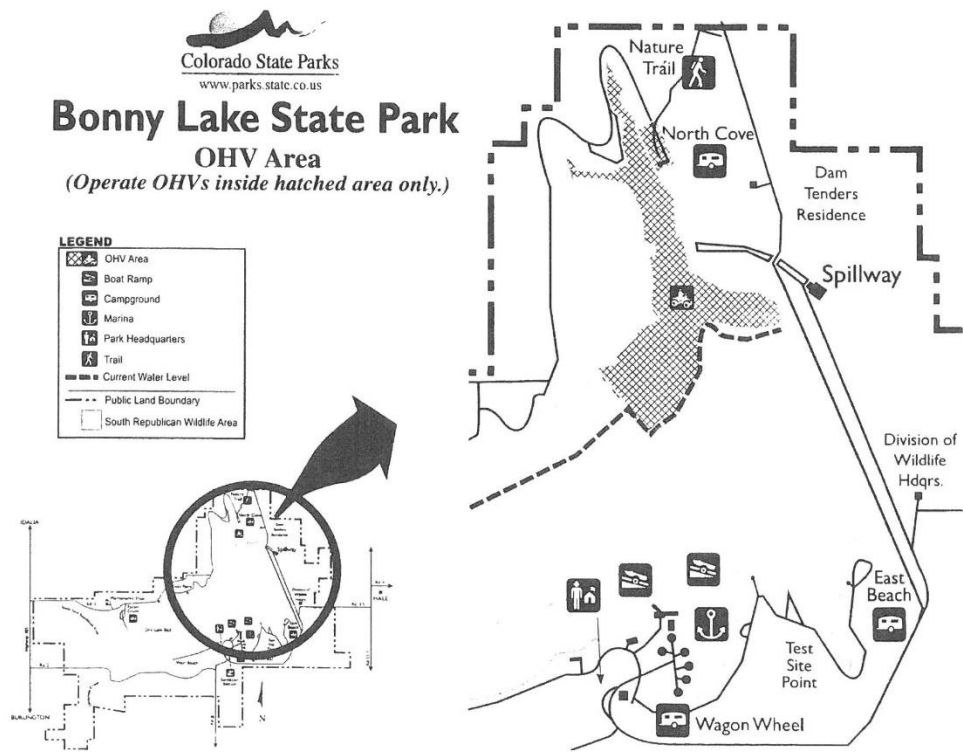
CHMGS notes that as the water levels were drawn down an emphasis on trail-based recreation emerged. As evidenced by the following exhibits, both equestrian and motorized recreation in the form of OHV trails were developed.

Exhibit 6. - Bonny State Park Layout 2007 to 2011



Source: Colorado Parks and Wildlife

Exhibit 7. - Bonny State Park Layout 2007 to 2011 Detail – OHV Area.



Source: Colorado Parks and Wildlife

The Reclamation RMP FONSI discusses the elimination of facilities that no longer provide a public service. However, considering the recreation market analysis shall focus on all possible uses for the site, including adaptive reuse of existing facilities, a listing of facilities is also provided. Note, many of the facilities and infrastructure elements have experienced vandalism. The provision of the listing is to inform the opportunity and not suggest maintenance of said facilities.

Exhibit 8. - Bonny State Park Facilities Inventory as of 3/2/2011

WEST BEACH		
West Beach dbl. brick vault toilet		
(27) West Beach picnic sites		
MARINA AREA		
Marina road and parking lot		
Marina jetty		
Marina flush comfort station		
Marina concession building		
Marina tool shed		
Marina dry storage fencing		
SOUTH SIDE		
Dump Station		
Boat house		
Group picnic/CG area shelter		
Group picnic dbl brick vault toilet		
Fish cleaning station and shelter		
Test dam single CXT		
Brenthauer single CXT		
Center Beach dbl brick vault toilet		
21 South side picnic sites		
17 miles of gravel road		
1.9 miles of paved road		
(3) concrete boat ramps		
South Side Electrical utilities		
Landsman Creek Crossing		
Main Park Wastewater System		
Sewage treatment plant		
Main Park Domestic Water System		
VISITOR CENTER		
Visitor Center building		
Interpretive displays		
WAGON WHEEL CAMPGROUND		
(87) electrical campsites		
Camper services - laundry, showers,		
Wagon Wheel dbl brick vault toilet		
Watchable Wildlife kiosk		
Wagon Wheel flush comfort station		
Gazebo and amphitheater		
EAST BEACH CAMPGROUND		
(35) non electrical sites		
East Beach dbl brick vault toilet - west		
East Beach dbl brick vault toilet - east		
NORTH COVE CAMPGROUND		
(21) non electrical campsites		
Double CXT - North		
North Cove dbl brick vault toilet - south		
North Cove CG Wastewater System		
North Cove CG Water System		
NORTH SIDE FACILITIES		
Punk's Point single CXT		
Pike's Point single CXT		
Boat house single fiberglass vault toilet		
(13) picnic sites		
West entrance station		
OHV Track		
CABINS		
Morrow seasonal cabin		
Vratil seasonal cabin		
Mullison seasonal cabin		
Cabins Wastewater System		
FOSTER GROVE CAMPGROUND		
(13) electrical campsites		
(29) non electrical campsites		
Foster Grove shower house		
Interpretive displays		
Dump station		
Foster Grove dbl brick vault toilet		
Foster Grove CG Water System		
Foster Grove CG Wastewater System		
PARK RESIDENCE		
House with attached garage		
Carport		
Storage shed		
Attached Garage		
Residence Wastewater System		
MAINTENANCE COMPOUND		
Shop building with water treatment plant		
Line storage shed		
Storage building		
Shop Wastewater System		
OTHER		
19 permitted wells		

Source: Colorado Parks and Wildlife

HISTORIC STATE PARK USAGE

CHMGS evaluated visitation for the former Bonny State Park from 2000 to 2010, which covered the prior to the draw down (e.g. 2002) and prior to the final closure (e.g. 2011). This chart is being presented to identify:

- How recreational demand was distributed amongst recreational activities;
- How this demand correlated to water levels; and,
- How usage trends varied in relation to water levels.

The analysis in the following exhibit identifies several recreation use trends at Bonny State Park. Using 2010 as the basis for evaluation the following is evident:

- Camping was the predominant use at the park, even with the decreasing water levels, camping remained the highest use at 35%
- Water based activities, as would be anticipated, were the second largest use at 32%
- General Activities which included sightseeing, wildlife viewing, and hunting was the third highest use at 20%
- Trail and Picnicking Use each represented five percent of demand. CPW did not include OHV Trail Use in their trail use participant counts, though this use did exist from 2007 to 2011.

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Exhibit 9. - Bonny State Park Facilities Inventory as of 3/2/2011

Recreation Participants	CAGR	% of Total	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001
Camping	-8%	35%	14,473	12,029	8,874	11,658	15,214	19,538	31,464	19,560	21,660	30,369
Group Camping	-100%	0%			50	70	130	390	18	10	92	245
Electrical	10%	29%	12,281	9,450	6,250	8,793	10,782	12,149	14,169	6,249		
Basic	-24%	5%	2,190	2,579	2,574	2,795	4,213	6,086	16,247	12,648	20,344	26,993
Aspen Leaf	-100%	0%					89	913	1,030	653	1,224	3,131
Primitive		0%	2									
Trail Use	2%	5%	2,104	1,259	1,278	1,003	1,128	1,174	1,226	871	641	1,763
Walking	0%	2%	815	430	624	418	488	427	437	347	359	792
Biking	-4%	2%	650	429	333	429	475	591	434	349	276	931
Horse Riding	-100%	0%									6	40
Hiking	20%	2%	639	400	321	156	165	156	355	175		
Picnicking	-6%	5%	1,905	1,560	1,480	2,105	1,907	3,052	2,525	2,808	1,424	3,365
Picnic	-7%	4%	1,817	1,560	1,441	2,068	1,796	2,617	2,287	2,661	996	3,344
Group Picnic	17%	0%	88		39	37	111	435	238	147	428	21
Interpretation	4%	4%	1,617	1,200	1,328	1,476	1,508	2,076	1,286	962	1,007	1,116
Personal Interpretation	9%	2%	717	511	664	537	508	676	452	399	379	339
Non-Personal Interpretation	5%	1%	409	304	320	448	389	728	338	217	288	263
Environmental Education	-1%	1%	491	385	344	491	611	672	496	346	340	514
Water Activities	-7%	32%	13,544	10,884	5,995	8,153	9,939	9,222	12,043	11,234	12,553	25,193
Water Skiing	-2%	6%	2,659	1,289		811	1,209	1,702	1,935	1,183	2,337	3,313
PWC Use	-1%	5%	2,030	1,121	112	699	964	837	1,034	896	1,161	2,131
Swimming	-34%	0%	81	942	850	882	1,657	1,689	1,984	1,445	2,761	3,650
Fishing	-8%	17%	6,995	6,414	4,823	5,065	5,298	3,844	6,006	6,250	5,775	14,742
Pleasure Boating	29%	4%	1,779	1,118	210	696	811	1,150	1,084	1,460	235	
Windsurfing	-100%	0%									29	73
Motor Other	-100%	0%									113	796
Motor Non Other	-100%	0%									142	488
General Activities	3%	20%	8,242	11,337	9,272	8,903	8,896	11,676	9,999	6,520	6,947	6,509
Sight Seeing	-8%	6%	2,442	1,962	1,665	2,026	1,987	2,215	2,594	1,861	3,449	5,360
Special Events	74%	0%		520	165		80	183	0	19		
Wildlife Viewing	7%	4%	1,859	1,705	1,761	1,263	1,258	1,866	1,852	1,138		
Hunting	5%	4%	1,681	2,391	1,840	2,144	2,328	2,591	2,673	1,255	1,687	1,123
Visitor Center	60%	4%	1,807	3,374	3,024	3,192	3,243	4,821	2,865	2,245	1,811	26
Other	117%	1%	453	1,385	817	278			15	2		
Total	-5%	100%	41,885	38,269	28,227	33,298	38,592	46,738	58,543	41,955	44,232	68,315
Average Water Quantity (Acre Feet)			12,200	10,600	8,670	9,650	11,370	13,500	15,650	19,000	22,080	29,950

Note: CAGR, represents Compound Annual Growth/Decrease Rate.

Source: Colorado Parks and Wildlife

HISTORIC AND CURRENT SOUTH REPUBLICAN WILDLIFE AREA USAGE

The South Republic Wildlife Area has historically surrounded Bonny State Park. CHMGS notes that's the hunting participants in the former Bonny State Park participation data were related to the hunting areas that were within the park. CHMGS also evaluated historical usage of hunting licenses issued for the two species for which specific hunting licenses are required to hunt in the South Republican SWA. CPW is unable to identify the total hunting participation within the SWA since outside the specific licenses for Deer and Turkey, all other hunting can be done with a general license.

Exhibit 10. - Historical Licenses Issued and Sold for Deer and Turkey in South Republican SWA 2015 to 2018

	Deer		Turkey	
	# of Licenses	# of Lics Sold	# of Licenses	# of Lics Sold
2015	1,370	1,155	260	260
2016	1,330	1,134	260	260
2017	1,415	1,100	260	260
2018	1,810	1,211	260	260
CAGR	9.73%	0.01%	0.00%	N/A

Source: Colorado Parks and Wildlife

CHMGS discussed with CPW the hunting seasons that are in effect within the South Republican SWA. This was done to understand the availability of the Proposed Recreation Subject Area for use outside of the hunting season. The following chart illustrates the hunting seasons that are in effect for the South Republican SWA.

Exhibit 11. - Hunting Seasons for South Republican SWA

GMU 103/109	April	May	June	July	August	Sep	Oct	Nov	Dec	Jan	Feb	March
Deer												
Archer							Green	Green	Green			
Muzzeloader							Yellow					
Rifle							Red	Red	Red	Red		
Waterfowl												
Duck							Purple	Purple	Purple	Purple		
Goose								Red	Red	Red	Red	
Dove							Green	Green				
Pheasant								Blue	Blue	Blue		
Quail								Cyan	Cyan	Cyan		
Most Other Small Game							Yellow	Yellow	Yellow	Yellow	Yellow	
Turkey	Blue	Blue				Blue	Blue					
Prairie dog												
Coyote	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown	Brown

Source: CPW

CHMGS notes that the Proposed Recreation Subject Area could potentially be used for recreation activities during the summer season. Additionally, depending on the habitats for each of these species, there may be other seasons that other recreation activities could occur.

LOCATION AND SITE HISTORY CONCLUSION

The former Bonny State Park site was an important public recreation asset to both local and regional visitors. It was one of the few public recreation areas in the region and drew visitors from across the region including the states of Kansas and Nebraska. It was considered an important water based recreational resources as well as location for camping and picnicking. As the Reservoir was drawn down, Colorado Parks and Wildlife focused on developing alternative uses for a short period of time to maximize the existing land area. These included trail-based recreation as well as camping. Additionally, hunting was and has continued to be an important part of Bonny State Park. Currently, Hunting has become the primary recreational use and the existing seasons appear to be supportive of other recreational activities outside of the hunting season.

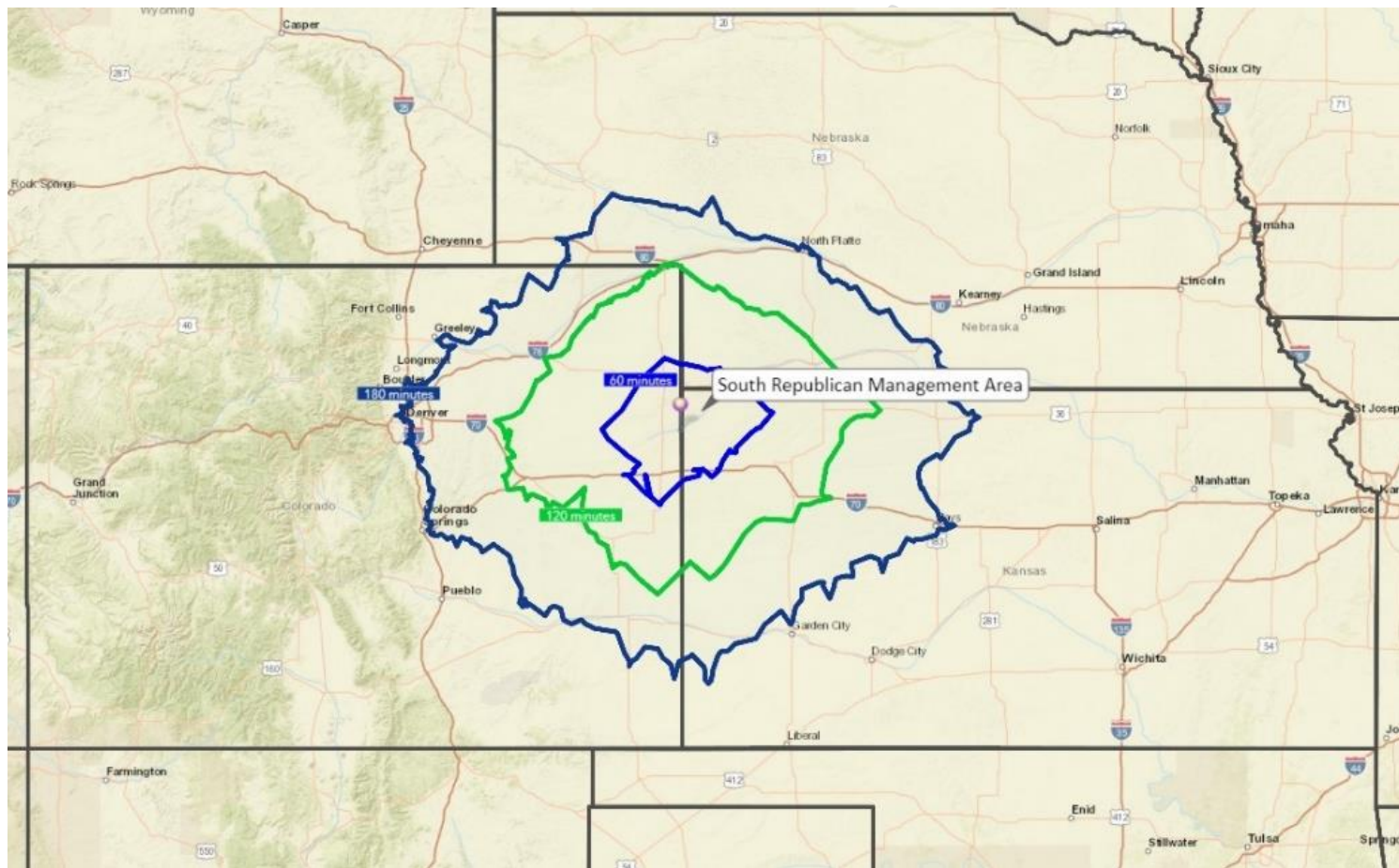
Reclamation has completed its Resource Management Plan for the site and its recommended option is, "A combination of Alternatives A and B which includes managing the federal lands around Bonny Dam for wildlife habitat emphasis and provide for dispersed (limited development) recreational opportunities as well as decommissioning facilities on site.

F. ECONOMIC AND DEMOGRAPHIC PROFILE OF MARKET

To understand future recreation market opportunities requires an understanding of the economic and demographic profile of the market area. Recreational market demand is a function of both the number of people in a market area but also the age, income and recreational interest of the market population. The market drawing area for recreational activities varies based upon the site location in relation to other recreational opportunities.

For this engagement, based upon interviews within the local market, it was determined that a 60, 120 and 180 (e.g. one, two- and three-hour) drive time market should be considered. The one-hour market provides for an understanding of local demand for midweek as well as weekend activities. The two- and three-hour drive time market, provides insight to demand for recreational activities that may occur on weekends or for vacations. The following exhibit illustrates the market drawing rings for each of the three demographic areas.

Exhibit 12. - Recreation Market Drawing Area



Source: ESRI and CHMGS

Recreation Market Analysis

The market drawing area identifies that the Proposed Recreation Subject Area provides for a recreational market opportunity for residents of Colorado, as well as Kansas and Nebraska due to its location on the eastern edge of the State of Colorado. This means that the supply and demand profile for recreation will need to include venues and profiles of users in the adjacent states.

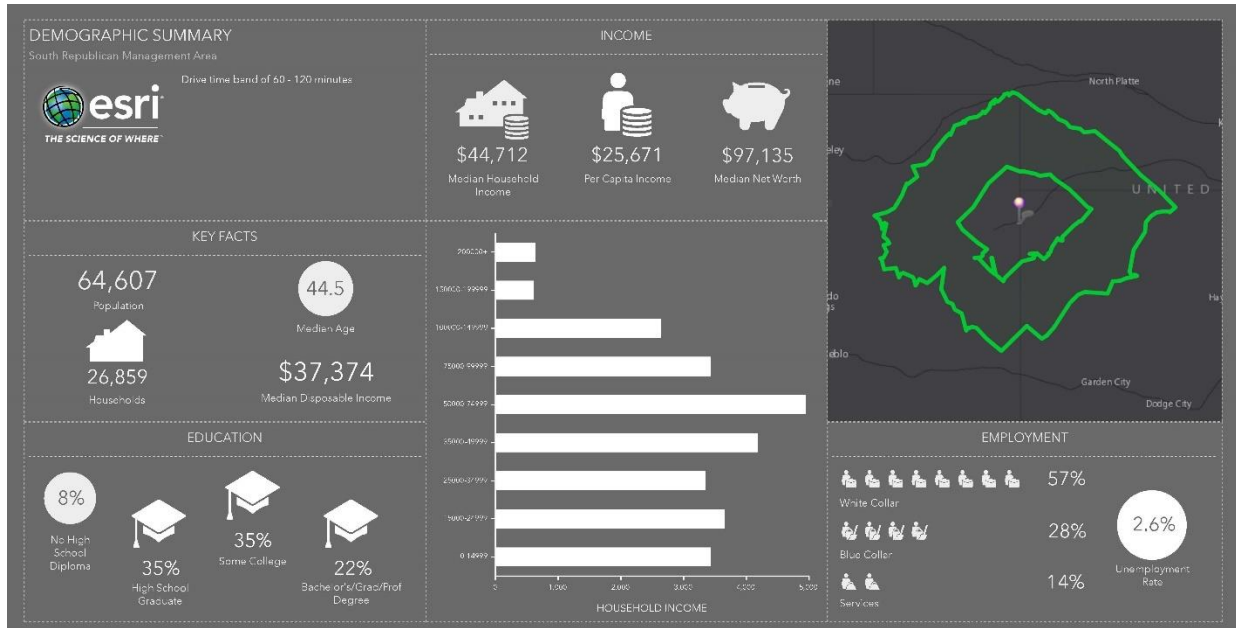
The following exhibits provide details on the economic and demographic profile of the drive time areas. The key issue of note is that the size of the 60- and 120-minute drive time markets is relatively small, and the 180-minute drive time market is exponentially larger. However, this larger market is primarily a drawing area for weekend and vacation demand. The median household income of the 60- and 120-minute drive time markets (e.g. \$46,327 and \$44,712) is below the national median household income of \$60,336 reported as of the end of 2017 by the U.S. Census Bureau, 2005 to 2017 American Community Survey. The median household income within the 120-minute drive time market exceeds the national median household income threshold. A median household income refers to, “the income level earned by a given household where half of the homes in the area earn more and half earn less. It's used instead of the average or mean household income because it can give a more accurate picture of an area's actual economic status”. Median Household Income also provides insight to the ability of a household to spend on recreational activities as disposable income.

Exhibit 13. - Recreation Market Area: 0- 60 Minute Drive Economic and Demographic Profile



Source: ESRI and CHMGS

Exhibit 14. - Recreation Market Area: 60 – 120 Minute Drive Economic and Demographic Profile



Source: ESRI and CHMGs

Exhibit 15. - Recreation Market Area: 120-180 Minute Drive Economic and Demographic Profile



Source: ESRI and CHMGs

ECONOMIC AND DEMOGRAPHIC PROFILE OF MARKET CONCLUSION

The market drawing area for the Proposed Recreation Subject Area includes residents within a one, two- and three-hour drive time including populations of the state of Colorado, Kansas and Nebraska. The immediate market population represents approximately 21,000 people which is small and triples to 65,000 for two hours and over 1.9 million for 3 hours. A general challenge for any recreation market destination is having a large enough population to sustain it year-round including both weekdays and weekends. Absent the large local population, there needs to be unique recreational amenities to draw from a regional market.

H. RECREATION TRENDS

NATIONAL RECREATION TRENDS

National recreation trends provide insight as to overall interest in recreational activities. Interest in activities varies greatly by state and local area but understanding size and scope of participation and growth or contraction in participation is important to understand. The information in the following exhibit profiles nationwide recreation trends over the last decade. The color coding refers to expansion or contraction in demand and degree of said growth/contraction.

Exhibit 16. - National Recreation Participation Trends

General Outdoor Activities	Participation Levels (in 000's)			Compound Annual Growth Rate % (CAGR)	
	2007	2012	2017	2007-2017	2012-2017
Archery	5,950	7,173	7,769	2.70%	1.61%
Adventure Racing	698	2,170	2,529	13.74%	3.11%
Bicycling (BMX)	1,887	2,175	3,413	6.11%	9.43%
Bicycling (Mountain Bike)	6,892	7,714	8,609	2.25%	2.22%
Birdwatching (> 1/4 mile of vehicle/home)	13,476	13,535	12,296	-0.91%	-1.90%
Camping (<1/4 mile of vehicle/Home)	31,375	29,982	26,262	-1.76%	-2.61%
Camping (Car, Backyard, or RV)	41,691	40,518	41,768	0.02%	0.61%
Camping (Recreational Vehicle)	16,168	15,108	16,159	-0.01%	1.35%
Fishing (Freshwater/Other)	43,859	39,135	38,346	-1.33%	-0.41%
Hiking (Day)	29,965	34,519	44,900	4.13%	5.40%
Hunting (All)	14,138	14,705	15,626	1.01%	1.22%
Running (Running/Jogging or Trail Running)	41,957	53,214	55,922	2.91%	1.00%
Shooting (Sports/Clays)	4,115	4,544	5,078	2.13%	2.25%
Shooting (Trap/Skeet)	3,376	3,591	4,300	2.45%	3.67%
Target Shooting (Handgun)	11,736	15,418	16,330	3.36%	1.16%
Target Shooting (Rifle)	12,436	13,853	14,126	1.28%	0.39%
Trail Running	4,216	6,003	9,149	8.06%	8.79%
Wildlife Viewing (> 1/4 mile of vehicle/home)	22,974	22,482	20,351	-1.21%	-1.97%
Water Sports					
Canoeing	9,997	9,839	9,220	-0.81%	-1.29%
Kayaking (Recreational)	5,070	8,144	10,533	7.59%	5.28%
Snow Sports					
Snowshoeing	2,400	4,111	3,711	4.45%	-2.03%
Skiing (Cross Country)	3,530	4,318	5,059	3.66%	3.22%

Note Participation Figures are in 000's for the US Population 6 years and Older

Trend Coding	Highest	Midpoint	Lowest
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Source: Outdoor Industry Foundation and CHMGS

The recreational activities with the highest level of participation are running, hiking, camping and fishing. All these activities are possible at the Proposed Recreation Subject Area. The recreational activities with the highest growth rates are BMX bicycling and Trail Running; however, their levels or

participation are significantly below those of the previously mentioned activities. The recreational activities that have experienced growth in the last five and ten years include: camping, fishing, wildlife viewing and canoeing. To better understand how these trends, play out in the local market area, CHMGS has evaluated the recreation trends for each of the surrounding states.

SURROUNDING STATES RECREATION TRENDS

Colorado State Comprehensive Outdoor Recreation Plan

The Colorado State Comprehensive Outdoor Recreation Plan (SCORP) 2019, was recently completed. This document includes information on recreation participation and priorities. Using survey results as well as Census data, the following exhibits outlines recreational activities for residents of Colorado. The survey was organized by Tourism Regions with the Proposed Recreation Subject Area located within Region 4 or Northeast. Across all regions walking was the participated in by the most residents. In the northeast region Hunting and Wildlife Viewing were ranked second and third.

Exhibit 17. - Colorado SCORP: Survey Regions and Most Popular Activities by Region (SCORP, 2019)

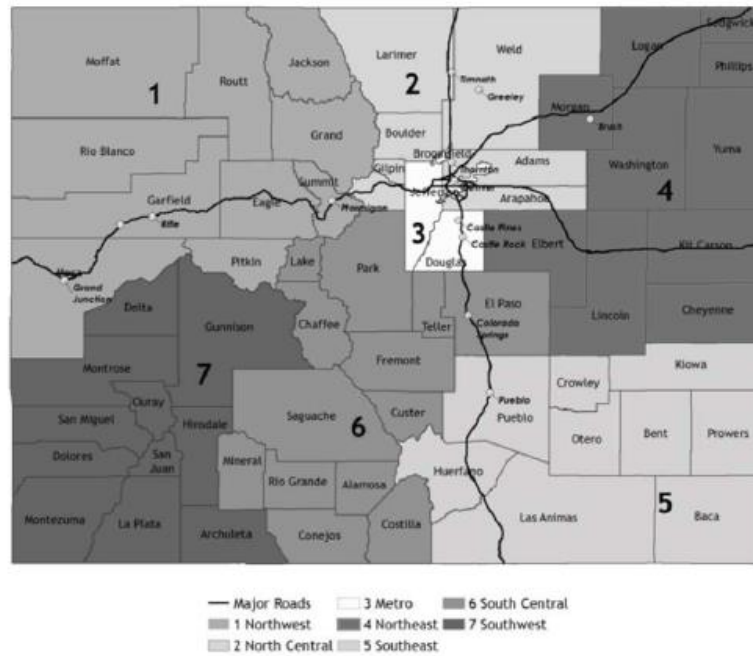


Table 3. Top three most "popular" activities by tourism district.

Rank	Northwest	North Central	Metro	Northeast	Southeast	South Central	Southwest
1	Walking	Walking	Walking	Walking	Walking	Walking	Walking
2	Hiking/ backpacking	Hiking/ backpacking	Hiking/ backpacking	Hunting	RV camping/ cabins	Hiking/ backpacking	Hiking/ backpacking
3	Skiing (alpine/tele)/ snowboarding	Playground activities	Jogging/ running (outdoors)	Wildlife viewing (excluding bird watching)	Fishing	Fishing	Fishing

**Results should be interpreted with caution due to small sample sizes.*

Source: Colorado State Comprehensive Outdoor Recreation Plan 2019

The Colorado SCORP also generated data for the Statewide average of participation rates for all activities surveyed. These are presented in the exhibit below.

Exhibit 18. - Colorado SCORP: Recreation Participation Rates by Activity (SCORP, 2019)

Activity	Statewide Average
Walking	74.97
Jogging/Running (outdoors)	50.03
Road biking	35.04
Bird Watching	32.14
Team or individual sports (outdoors) (e.g., basketball, golf, tennis, etc.)	31.61
Playground activities	30.22
Horseback riding	28.31
Wildlife viewing (excluding bird watching)	25.46
Hiking/Backpacking	24.55
Mountain biking	23.81
Fishing	17.26
Skiing (alpine/tele)/snowboarding	14
Rock climbing	13.54
Picnicking	12.94
Swimming (outdoors)	12.28
Off-highway vehicle (OHV) or 4-wheeling/motorcycling	12.11
RV camping/cabins	11.27
Hunting	10.2
Tent camping	9.3
Target or skeet shooting	7.92
Power boating	6.78
Sledding/tubing	6.2
Ice fishing	6.16
Whitewater rafting	5.75
Water/Jet skiing	5.74
Stand up paddleboarding	5.73
Sailing	4.65

Source: Colorado State Comprehensive Outdoor Recreation Plan 2019

Recreation participation rates by region and activity are provided in the following exhibit. Region 4, the Northeast region is highlighted for ease of review.

Exhibit 19. - Colorado SCORP: Number of Respondent’s who Participated in a Recreation Activity by Region (SCORP, 2019)

5. For each of the following outdoor activities, please enter the approximate number of days in the past year that you participated in each region. Even if you are not sure of the number of days, please enter your best guess. *If you DID NOT participate in an activity or you did not participate in an activity in a particular region, please leave that activity blank.*

To note: Results represent the “number of respondents” who participated in a particular activity within each of the seven tourism districts. These are the only non-weighted data in this report.

	region 1	region 2	region 3	region 4	region 5	Region 6	region 7
Trail/road Activities							
Walking	482	596	512	84	132	399	227
Jogging/Running (outdoors)	119	214	208	11	21	103	44
Hiking/Backpacking	415	402	346	26	53	321	148
Horseback riding	40	29	36	11	11	35	19
Road biking	90	188	133	24	20	53	21
Mountain biking	104	126	94	5	14	83	62
Off Highway Vehicle (OHV) or 4-wheeling/ motorcycling	178	104	34	14	30	111	106
Water-based Activities							
Swimming (outdoors)	94	172	98	17	40	78	58
Power boating	73	59	46	10	22	34	32
Water/Jet skiing	11	5	28	4	10	2	8
Sailing	22	4	30	1	1	2	2
Canoeing/ Kayaking	60	108	59	1	13	35	26
Whitewater rafting	69	53	23	0	3	26	46
Stand up paddleboarding	71	67	50	0	7	8	37

	region 1	region 2	region 3	region 4	region 5	region 6	region 7
Winter Activities							
Skiing (alpine/tele)/ snowboarding	356	103	33	1	3	80	81
Sledding/tubing	141	109	66	5	10	62	30
Snowmobiling	59	27	19	0	4	12	17
Snowshoeing/ cross country skiing	129	103	32	1	4	33	48
Wildlife-related Activities							
Hunting	134	54	29	37	45	73	51
Fishing	202	200	101	14	56	226	135
Bird watching	73	120	117	17	28	61	44
Wildlife viewing (excluding bird watching)	180	146	145	27	29	163	69
Ice fishing	41	48	11	3	6	47	38
Other Outdoor Activities							
RV camping/ cabins	205	103	80	25	59	199	135
Tent camping	248	165	100	23	47	165	127
Picnicking	188	229	189	17	38	113	56
Team or individual sports (outdoors) (e.g., basketball, golf, tennis, etc.)	49	218	205	10	25	55	25
Target or skeet shooting	57	88	38	26	34	50	38
Rock climbing	40	57	26	10	1	34	14
Playground activities	71	244	181	16	21	75	29

Source: Colorado State Comprehensive Outdoor Recreation Plan 2019

Within the Region 4, Northeast region, walking had the highest number of recreation participation days, followed by hunting, wildlife viewing, hiking, target and skeet shooting and RV and Tent camping and road biking. The recreation market drawing area also includes portions of Region 5, Southeast. For this region, walking also has the highest number of participation days, followed by camping, fishing and hiking.

Data was also available from the 2017 Economic Contributions of Outdoor Recreation in Colorado report. Within this data, the analysis identifies participation based upon the destination vs. resident of the activity. The Proposed Recreation Subject Area resides within the Northeast region for analysis purposes.

Overall inbound destination recreation participation number are lowest in the Northeast, due in part to the low supply of recreational venues in this area and surrounding populations to visit the area. The distribution of how recreation participation occurs in the Northeast relates to the geographic settings available (e.g. lack of water resources, and mountains for snow). As a result, the Northeast has higher participation rates in other areas which include the “other outdoor activities”. This includes camping, picnicking and shooting sports. It is important to note that trail-based activities, including both motorized and non-motorized are equally as participated in the Northeast as compared to other regions and the state overall.

Exhibit 20. - Colorado SCORP: Survey Participants (000's) for Activity Groups by Region (SCORP, 2018)

Activity	Northwest	North Central	Metro	Northeast	Southeast	South Central	Southwest	State
Trail/Road	1,603	1,706	1,469	273	356	1,250	710	3,628
Water-based	506	676	378	54	141	325	273	1,758
Winter	983	481	226	16	43	275	231	1,747
Wildlife-related	860	759	504	161	244	773	443	2,201
Other Outdoor	1,117	1,238	1,003	206	309	950	598	3,070
Any Outdoor Activity	2,049	1,942	1,628	452	569	1,579	972	3,796
Total	7,118	6,802	5,208	1,162	1,662	5,152	3,227	16,200
Activity	% of Overall Participation							
Trail/Road	23%	25%	28%	23%	21%	24%	22%	22%
Water-based	7%	10%	7%	5%	8%	6%	8%	11%
Winter	14%	7%	4%	1%	3%	5%	7%	11%
Wildlife-related	12%	11%	10%	14%	15%	15%	14%	14%
Other Outdoor	16%	18%	19%	18%	19%	18%	19%	19%
Any Outdoor Activity	29%	29%	31%	39%	34%	31%	30%	23%
Activity	Region Participation Rate Related to Overall Colorado Participation Rate							
Trail/Road	1.01	1.12	1.26	1.05	0.96	1.08	0.98	1.00
Water-based	0.66	0.92	0.67	0.43	0.78	0.58	0.78	1.00
Winter	1.28	0.66	0.40	0.13	0.24	0.49	0.66	1.00
Wildlife-related	0.89	0.82	0.71	1.02	1.08	1.10	1.01	1.00
Other Outdoor	0.83	0.96	1.02	0.94	0.98	0.97	0.98	1.00
Any Outdoor Activity	1.23	1.22	1.33	1.66	1.46	1.31	1.29	1.00

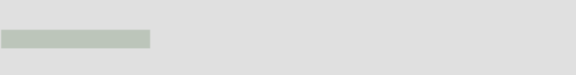

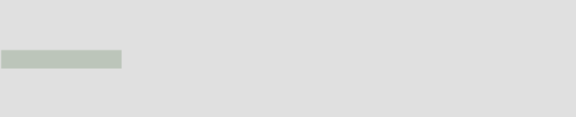





Source: Colorado State Comprehensive Outdoor Recreation Plan 2019, 2017 Economic Contributions of Outdoor Recreation in Colorado. CPW, Southwick Associates

Kansas State Comprehensive Outdoor Recreation Plan

Each state undertakes their SCORP using different methodology and at different time intervals; therefore, there is no way to directly compare participation rates or needs. However, CHMGS has reviewed the Kansas SCORP to identify relevant information that may inform recreation trends for the Northwest region of Kansas.

The Kansas SCORP queried residents about their, “Prime Outdoor Recreation Pursuit” by grouping into broad categories. The following exhibit outlines the findings of this question. Trail use of all types ranked highest from residents’ and continues to be one of the top three amenities desired by both residents and public agencies. Second to trails was consumptive wildlife including hunting and fishing.

Exhibit 21. - Kansas SCORP: Resident Survey of Prime Outdoor Recreation Pursuits (SCORP, 2015)

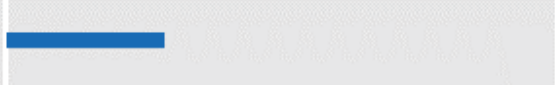

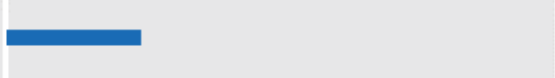

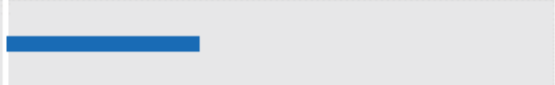

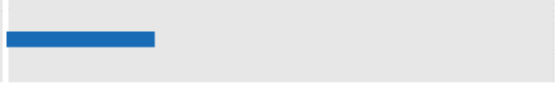

Trail Use (of all types) including bike lanes and scenic byways		10 (25.64%)
Boating and lake based recreation		5 (12.82%)
Consumptive Wildlife based outdoor recreation (e.g. hunting, fishing, gathering)		8 (20.51%)
Touring of Scenic, Cultural, Historic, Geologic Sites and Events		3 (7.69%)
Outdoor Sports and Physical (non-trail) Activity (including spectating)		6 (15.38%)
Camping (of all types)		2 (5.13%)
Local park day and social user (e.g. picnic areas, splash parks, pools, etc)		2 (5.13%)
Environmental education and nature study and youth camps with outdoor curriculums		2 (5.13%)
Outdoor Recreation service or volunteering		0 (0%)
None of the above. I have no clear favorite outdoor pursuit		0 (0%)

Source: Kansas State Comprehensive Outdoor Recreation Plan, 2015

Recreation Market Analysis

The survey also queried suppliers of outdoor recreation regarding types of destinations that would attract out of state tourists. And hunting and fishing ranked highest at 46 percent with specialized trail experiences ranking at 26 percent.

Exhibit 22. - Kansas SCORP: Supplier Survey of Recreation Destination that Would Attract Tourists

Heritage/Regional trails (e.g. Flint Hills Nature from Herington to Osawatomie) connecting several communities		10 (25.64%)
A multi-venue RESORT on a Kansas Lake		18 (46.15%)
High quality youth sports venues in cities (if they have adequate infrastructure to handle visitors)		9 (23.08%)
Quality hunting and fishing opportunities on public and private land		18 (46.15%)
Heritage landscape protection and associated visitor services (tours, lodging, etc.)		13 (33.33%)
Enhanced water trails with adequate access and amenities		15 (38.46%)
An adequate number and variety of specialized trail experiences (e.g. equine, mountain bike, motorized)		10 (25.64%)
Other:		1 (2.56%)

Source: Kansas State Comprehensive Outdoor Recreation Plan, 2015

Nebraska State Comprehensive Outdoor Recreation Plan

Nebraska’s SCORP was completed in 2015 and covers the period 2016 to 2020. Their SCORP included recreation participation and interest surveys with the resident population. The following are relevant exhibits from the Nebraska SCORP.

Exhibit 23. - Nebraska SCORP: Resident Recreation Participation, 2015

ACTIVITY	PARTICIPATION RATE %	ACTIVITY (CON'T.)	PARTICIPATION RATE %
Outdoor Exercise, Play or Hobbies	88	Playing at a Splash Park	24
Sightseeing or Driving for Pleasure	77	Visiting a Nature Interpretive Center	23
Picnicking, Having a Cookout	73	Riding an ATV	22
Walking	72	Baseball	17
Nature, Wildlife or Other Outdoor Recreation	69	Jet Skiing	16
Driving for Pleasure	69	Basketball	15
Swimming or Boating	66	Equestrian Activities	15
Sightseeing	65	Soccer	14
Fishing	59	Football	14
Fishing From Shore	50	Water Skiing	13
Gardening	49	Canoeing	13
Going to a Playground With Children	49	Golf	12
Swimming at an Outdoor Pool	45	Ice Skating	11
Outdoor Field, Court or Team Sports	45	Softball	11
Hiking	44	Climbing, Indoors and Outdoors	10
Bicycle Riding	43	Non-power Boating	10
Hunting, Shooting or Trapping	41	Kayaking	10
Swimming or Wading at a Beach	41	Archery, Not Hunting	10
Visiting a Historical Site	39	Volleyball	9
Observing or Photographing Wildlife/Nature	37	Ice Fishing	7
Hunting with Firearms or Archery	35	Geocaching	6
Tent Camping	34	Trapping	6
Snow or Ice Activities	33	Skateboarding	4
Fishing From a Boat	31	Tennis	4
Motor Boating	30	Snow Skiing	2
Running or Jogging	29	Sailboating	2
Shooting Firearms, Not Hunting	26	Snowmobiling	2
Sledding or Playing in Snow	25	Kiteboarding	Less Than 1

Source: Nebraska State Comprehensive Outdoor Recreation Plan, 2016-2020

Hiking, shooting or trapping each had recreation participation rates of 40 to 50 percent. Wildlife viewing, hunting with firearms and tent camping had recreation participation rates between 30 and 40 percent and shooting firearms and riding an ATV had recreation participation rates of 20 and 26 percent. The survey also asked about mean day of recreation by activity which is provided in the following exhibit.

Exhibit 24. - Nebraska SCORP: Resident Mean Days of Participation, 2015

ACTIVITY	MEAN DAYS PARTICIPATED
Walking	69.81
Gardening	31.91
Running or Jogging	19.84
Bicycle Riding	12.72
Going to a Playground with Children	12.35
Driving for Pleasure or Leisure	12.00
Observing/Photographing Nature	11.24
ATV Riding	10.10
Swimming at an Outdoor Pool	9.18
Picnicking, BBQing, Cookout	8.33
Sightseeing Specifically	8.04
Fishing From Shore	6.71
Baseball	6.29
Swimming or Wading at a Beach	5.91
Hunting	5.84
Hiking	5.02
Soccer	4.87
Basketball Outdoors	4.60
Shooting Firearms or Guns	4.56
Fishing from a Boat	4.29

Note: Mean participation is of everyone responding with non-participants noted as zero.

Source: Nebraska State Comprehensive Outdoor Recreation Plan, 2016-2020

The mean participation rates in Nebraska appear to be closely related to those outlined in Colorado in the area of OHV/ATV Riding, at approximately 10 days. The other activities mean participation rate varied from Colorado. However, since the market includes Nebraska, CHMGs took into consideration these variances in our analysis. The Nebraska SCORP also queried the priority of activities as well as desire for expansion. Trails and campsites were high priority activities in both areas.

Exhibit 25. - Nebraska SCORP: Recreational Facilities Most Important to Your Household, and What Activities you like to See Expanded, 2015

Most Important		Desire for Expansion	
FACILITIES	PERCENTAGE	FACILITY/ACTIVITY	PERCENTAGE
Trails	21.6	Trails	15
Fishing Access	15.3	Infrastructure (Roads, Signs, Restrooms, Showers)	10
Campsites	15.2	Fishing Opportunities	9
Outdoor Swimming and Beach Areas	14.8	Playground Facilities	8
Playgrounds	14.7	Picnic Shelters/Tables	6
Picnic Areas	11.2	Swimming Areas and Opportunities	6
Parks in General	8.8	Tent Campsites	5
Fields and Courts	7.4	Cabins	5
Hunting Areas	7.3	Hunting Opportunities	4
Boat Access	7.1	Shooting Sports Activities	4
Wildlife Observation Areas	6.2	Wildlife Observation Areas	4
Don't Know	12.6	Naturalist Programs	4
		RV Campsites	3
		Other	7
		Nothing	28
		Don't Know	17

Source: Nebraska State Comprehensive Outdoor Recreation Plan, 2016-2020

RECREATION TRENDS CONCLUSIONS

Both national and regional recreation trends provide insight as to future market opportunities for recreational activities at the Proposed Recreation Subject Area. In reviewing trends, the most important indicators are those that are based upon local and regional participation while evaluating emerging trends that are occurring nationally. Due to the location of the Proposed Recreation Subject Area's proximity to two other states and recognizing that the CPW lease is with Reclamation a federal asset, it is critical that these neighboring states recreation activities and needs be reviewed as well.

The data indicates that within the direct market area (e.g. 0 to 120-minute drive) the Colorado recreation activities with the highest levels of participation were walking, followed by hunting, wildlife viewing, hiking, target and skeet shooting, RV and tent camping and road biking. It is important to note however, that recreation participation is in part a function of available supply and in this area, there is an absence of water-based activities and trail systems for both motorized and non-motorized activities. The Kansas and Nebraska recreation participation data were not provided on a county level basis. However, data from their statewide SCORP's indicated favorable participation rates for trail, picnicking, wildlife viewing, fishing, hunting, shooting and ATV'ing. Additionally, when queried about additional facilities desired, Kansas residents indicated preference for multi-recreational resorts and hunting and Nebraska residents indicates trails, fishing and campsites. All these recreational uses are possible at the Proposed Recreation Subject Area.

I. MOTORIZED RECREATION TRENDS

Motorized recreation data was not identified in the National Recreation Trend data, and while some participation rates are available at the state level, understanding the demand for this type of activity can be understood by reviewing both manufacturing trends as well a licensing and registration trends. Therefore, CHMGS has undertaken separate research for this type of recreation. Motorized recreation for purposes of this report would include insight to both Off Highway (OHV)/All Terrain (ATV) Vehicles as well as Motorcycles. For motorcycle trends, the focus is on Off Road Motorcycles.

NATIONAL OHV/ATV MANUFACTURING TRENDS

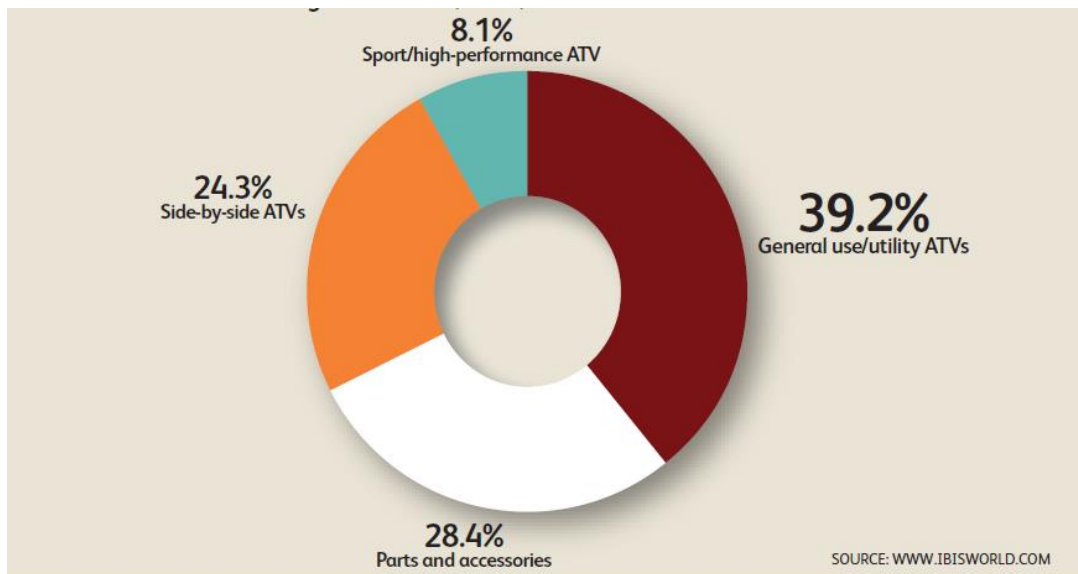
IBISWorld provides an overview of ATV Manufacturing. From 2013 to 2018 ATV Manufacturing grew at a compound annual growth rate of 3.3 percent. It is estimated to slow down and contract over the next five years to a rate of (.2) percent from 2018 to 2023.

All-terrain vehicles (ATVs) are defined as, "four wheeled vehicles that are equipped with wide tires that have a deep tread suitable for various conditions and terrains."⁹ Industry operators manufacture

⁹ Devin Savaskan, "IBIS World Industry Report OD5714, ATV Manufacturing in the US," IBIS, December 2018, 2

ATVs for recreational as well as utility purposes, in addition to associated vehicle parts. Within the ATV Manufacturing sector, the following is a distribution of manufacturing included in this sector.

Exhibit 26. - ATV Manufacturing Product and Services Segmentation



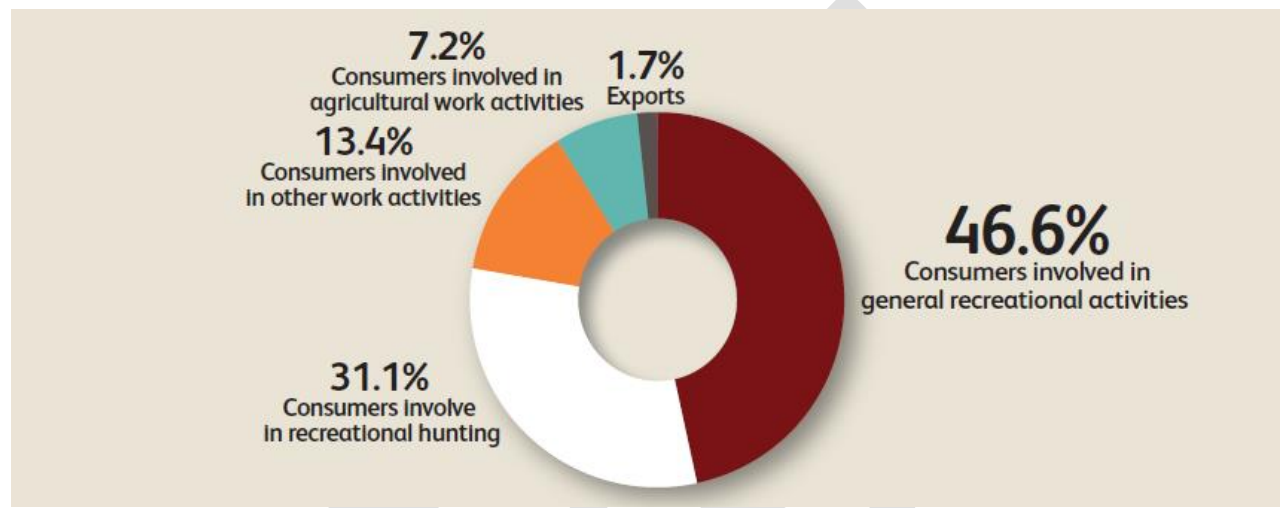
Source: IBISWorld, 2018

Over the last five years, the Side by Side segment has experienced the highest rate of growth. The General Use/Utility ATV's are typically used for agricultural industries to travel across land areas as well as by hunters. Electric ATV are evolving under this segment. The General Use/Utility ATV is typically used for recreational activities that do not required professional grade racing ATV's. Over the last five years, the pace of growth in these vehicles has slowed down as Side by Sides has increased. Sport and High-Performance ATV's are small segment of the manufacturing market and are used outside sanctioned races.¹⁰

¹⁰ Devin Savaskan, "IBISWorld Industry Report OD5714, ATV Manufacturing in the US," IBIS, December 2018, 13

IbisWorld also identifies the market segmentation demand for ATV products and as the following exhibit identifies, the largest segment of demand for these products is recreational activities as well as hunting. All-terrain vehicles (ATVs) are considered good alternatives to four-wheel drive vehicles, which are typically too large to fit in dense bush land. For this reason, ATVs are the vehicle of choice for hunters. ATVs are also used for transportation over sand dunes and as a tourist attraction (i.e. ATV riding or Off-Roading) in some areas. A strong percentage of recreational ATV riders use these vehicles for hunting purposes. Demand from this market is increasing as the economy improves.¹¹

Exhibit 27. - ATV Manufacturing Market Segmentation



Source: IBISWorld, 2018

¹¹ Devin Savaskan, "IBISWorld Industry Report OD5714, ATV Manufacturing in the US," IBIS, December 2018, 15

COLORADO OHV REGISTRATION TRENDS

Within the state of Colorado, if a resident or nonresident is interested in operating an OHV on public land or trails, they must register their vehicles with Colorado Parks and Wildlife and acquire a permit for their vehicle. OHV's are defined by CPW to include motorcycles, dirt bikes, three-wheelers, ATV and dune buggies. The registration data identifies that OHV Registrations trends within the state continue to be favorable.

Exhibit 28. - Colorado Parks and Wildlife OHV Registration Trends 2009 to 2018

FISCAL YEAR	OHV Registration & Permit Quantity
2009	148,528
2010	146,247
2011	142,631
2012	145,874
2013	144,640
2014	153,370
2015	164,564
2016	173,935
2017	180,519
2018	201,032
CAGR 2009 to 2018	3.42%

Source: Colorado Parks and Wildlife

CPW provided OHV registrations by counties and CHMGS reviewed this data to identify the percentage of OHV registrations that exist within the Colorado counties that are in the market drawing areas (e.g. 0-60 minutes, 60-120, and 120-180). For the first two market drawing areas, there are approximately 2,000 OHV Registrations, or approximately 1.0 percent of the total number of registered vehicles. If the larger market drawing area is included, (120-120 minutes) the OHV Registrations increases to approximately 24 percent representing approximately 34,000 registrations.

KANSAS AND NEBRASKA OHV REGISTRATION TRENDS

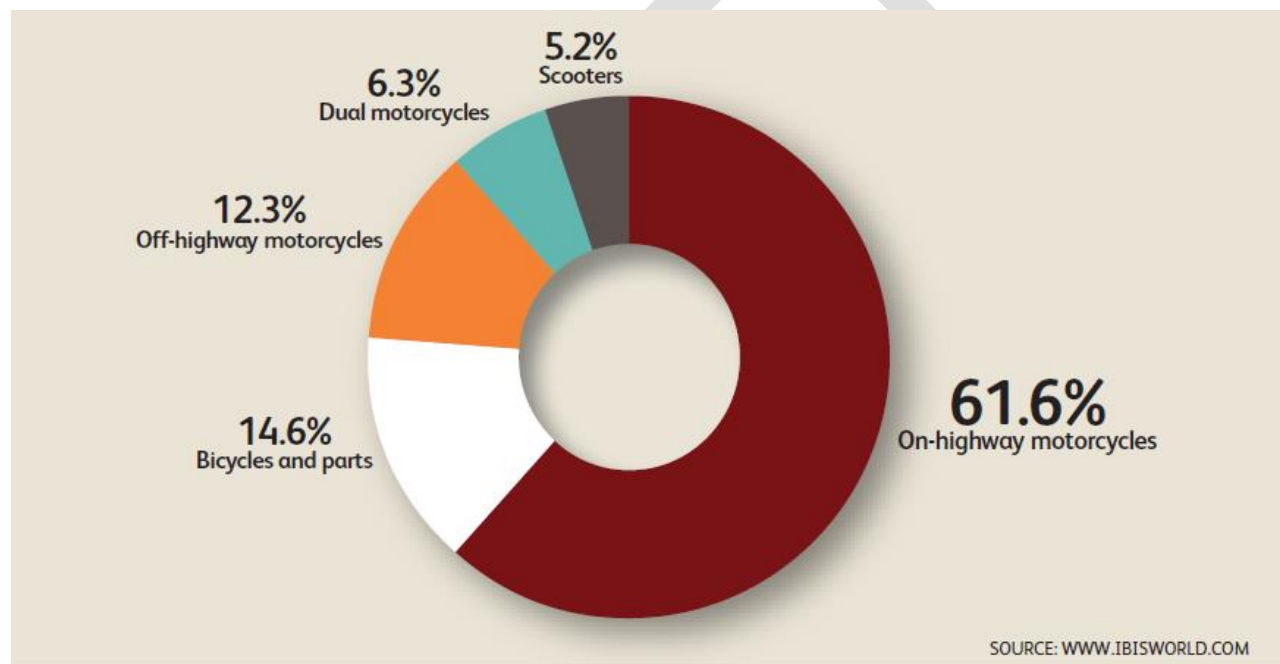
Neither Kansas nor Nebraska require a separate OHV permit for riding on public land. Therefore, the size and trends associated with this market is not available for consideration in the analysis.

NATIONAL MOTORCYCLE MANUFACTURING TRENDS

IBIS World provides an overview of Motorcycle, Bike & Parts Manufacturing. From 2013 to 2018 Motorcycle, Bike and Parts Manufacturing grew at a compound annual growth rate of .8 percent. It is estimated to slow down and contract over the next five years to a rate of (.2) percent from 2018 to 2023.

On-highway bikes are motorcycles exclusively made to be driven on roads. Off-highway bikes are manufactured for racing, recreational or long-distance touring on gravel, mud or sand. Dual motorcycles can be used for on-highway and some recreational off-highway applications. Scooters are bikes with a step-through frame and can be ridden without straddling any part. They also have smaller wheels and are generally slower than other motorcycles.¹² Within this sector, the product distribution is as presented in the following exhibit.

Exhibit 29. - Motorcycle, Bike and Parts Manufacturing Product and Services Segmentation



Source: IBIS World, 2018

Consumers aged 45 and over is the largest customer market for the Motorcycle, Bike and Parts Manufacturing industry. In 2018, IBISWorld estimates the segment to account for 56.4% of industry sales. This segment is boosted by high levels of disposable income by baby boomers, who are people born in, or between, 1946 and 1964. Additionally, consumers aged 55 and over, which includes baby boomers, account for 17.3% of total industry revenue, which makes baby boomers one of the largest customer segments for the industry. Moving forward, this trend is expected to reverse itself. As baby boomers continue to rise in age, riding motorcycles becomes increasingly physically taxing and dangerous. Therefore, changes in lifestyle by baby boomers should reduce their demand for motorcycles over the five years to 2023. The consumers aged 25 to 44 is the second-largest market for industry operators, generating an estimated 33.4% of industry revenue in 2018. Consumers in

¹² Devin Savaskan, "IBIS World Industry Report 33699a Motorcycle, Bike & Parts Manufacturing in the U.S.," IBIS, December 2018, 13

this segment ride industry products for fun and exercise. Over the five years to 2018, this segment has grown due to increased efforts by motorcycle companies to diversify their customer base by reaching out to younger consumers. The ability to grow this segment will have a significant impact on future motorcycle manufacturing growth.¹³

MOTORIZED RECREATION TRENDS CONCLUSION

The market for motorized recreation supports recreational hunting activities as well as provides for unique trail based recreational uses. This market includes both OHV/ATV vehicles as well as off road motorcycles. The uses can be trail based as well as support unique tracks for special events. While the growth rate for OHV/ATV is stable or slightly declining, the registration of OHV permits within the state of Colorado has consistently grown over the last ten years indicating that this usage of OHV on public land for recreation continues to be an important component of outdoor recreation within the State of Colorado.

J. COLORADO HUNTING TRENDS

National hunting participation trends are outlined within the National Recreation Participation Trends and Colorado Hunting trends will be covered in this section. The 2017 Economic Contributions of Outdoor Recreation in Colorado report includes insight to the estimated hunting participation by county in Hunter Days. The following exhibit outlines hunting by region by county and by species category.

The chart identifies that the Northeast Region is an important contributor to Small Game hunting with Yuma County providing seven percent or almost 25 percent of the regions hunting days. Additionally, the region contributes over 20 percent of the Waterfowl hunting days.

Exhibit 30. - Hunting Participation by County in Hunter Days, 2018

County	Big Game	%	Small Game	%	Waterfowl	%
Total	1,608,609	100%	437,418	100%	157,241	100%
Northwest Region	760,237	47%	113,186	26%	16,701	11%
North Central Region	110,277	7%	69,838	16%	76,184	48%
Metro Region	28,392	2%	4,500	1%	957	1%
Northeast Region	43,840	3%	123,235	28%	32,841	21%
Cheyenne	3,247	0%	700	0%	-	
Elbert	8,768	1%	2,310	1%	136	0%
Kit Carson	4,096	0%	10,260	2%	194	0%
Lincoln	7,863	0%	4,161	1%	113	0%
Logan	5,641	0%	21,592	5%	8,781	6%
Morgan	3,960	0%	18,715	4%	18,630	12%
Phillips	480	0%	9,429	2%	105	0%
Sedgwick	1,907	0%	16,079	4%	3,039	2%
Washington	2,936	0%	11,059	3%	375	0%
Yuma	4,942	0%	28,930	7%	1,468	1%
Southeast Region	85,996	5%	39,273	9%	15,827	10%
South Central Region	237,110	15%	47,008	11%	8,028	5%
Southwest Region	342,757	21%	40,378	9%	6,703	4%

Source: Colorado State Comprehensive Outdoor Recreation Plan 2019, 2017 Economic Contributions of Outdoor Recreation in Colorado. CPW, Southwick Associates

¹³ Devin Savaskan, "IBIS World Industry Report 33699a Motorcycle, Bike & Parts Manufacturing in the U.S.," IBIS, December 2018, 16

COLORADO HUNTING TRENDS CONCLUSIONS

The hunting data for the Northeast region and specifically, highlights the importance of the SWA’s within Yuma and Kit Carson County for overall hunting benefit to the state. Therefore, maintaining hunting as a recreational demand component of the Proposed Recreation Subject Area is important. However, as future recreational needs are evaluated, it is important to note that while hunting is the second most frequently participated recreation activity in the Northeast region (e.g. Exhibit 17), within the Northeast, Wildlife- Related Recreation represents only 14 percent of the regions in bound recreation compared to 23 percent for Trail/Road and 39 for other Outdoor Activities (e.g. Exhibit 18).

K.TOURISM TRENDS

Recreation is typically considered a tourism asset within a region. Specifically, recreation destinations can provide the availability of day use and overnight demand for surrounding counties. Colorado Tourism provides Welcome Centers at major crossroads within the state. For the Proposed Recreation Subject Area, the visitor centers in Burlington (i.e. intersection of I-70 and SR 385) to the south of Bonny State Park and Julesburg (i.e. intersection of I-76 and SR 385) north of Bonny State Park are considered locations that historically directed visitors to Bonny State Park. Provided in the following table are the visitor counts at these locations for the last sixteen years at each location.

Exhibit 31. - Visitor Counts at Julesburg and Burlington Welcome Center, 2002 to 2018

Year	Julesburg	Burlington
2002	229,531	220,863
2003	235,904	202,340
2004	206,024	203,095
2005	236,024	195,489
2006	232,300	193,681
2007	218,441	184,360
2008	212,771	119,954
2009	214,190	168,158
2010	220,500	175,928
2011	226,558	161,739
2012	274,826	224,444
2013	263,577	166,439
2014	266,580	210,082
2015	266,195	235,572
2016	277,108	215,993
2017	324,091	177,941
2018	363,057	161,474
CAGR 02 to 18	2.9%	-1.9%
CAGR 08 to 18	5.5%	3.0%
CAGR 13 to 18	6.6%	-0.6%

Source: Colorado Tourism Department

Recreation Market Analysis

The data indicates that visitation counts have consistently grown at the Julesburg Welcome Center and have fluctuated at the Burlington Welcome Center. Access to the Proposed Recreation Subject Area is more direct from the Burlington Welcome Center. The travel time is almost twice as long from Julesburg than Burlington. Additionally, this data identifies that between these two locations there is an opportunity to “influence and educate” over 500,000 travelers about the Proposed Recreation Subject Area and its offerings.

During the Fall of 2016 to the Fall of 2017, the Colorado Office of Tourism undertook a survey of Colorado Welcome Center guests. The survey focused on developing an understanding of who welcome center guests were, what type of trip the guests were taking, why they stopped at the welcome center, how Colorado Welcome Centers compared to other similar experiences, and what impacts the welcome center experience had on guests’ decisions while on their trip.¹⁴ Key findings from this research include:

- The most significant activity that Welcome Center guests participated in was some form of outdoor or nature-based experience like hiking or camping, at a level higher than shopping;
- When asked about what activities they experienced while on their Colorado trip, about 2/3rds noted outdoor activities like hiking or camping; and,
- Smaller destinations around the state were very often noted as areas guests experienced. Therefore, Welcome Centers can thus be a key resource in helping direct visitors to lesser known destinations around the state, helping to support the Steward Pillar of the Colorado Tourism Roadmap.

Recently, the Colorado Office of Tourism adopted a new Regional Branding Initiative. This effort was an output of the Colorado Tourism Roadmap. This project resulted in new regional brand identities founded upon Colorado’s local visitor travel patterns, geography, topography, tourism groupings and seasonality of each regions offerings. The Proposed Recreation Subject Area would be located within the “Pioneering Plains” Market. As the exhibit notes, this area’s supporting attributes includes two natural resource elements but currently no recreation elements.

¹⁴ Nichols Tourism Group, “Colorado Tourism Office Welcome Center Guest Survey”, 2018, 2.

Exhibit 32. - Regional Tourism Branding for Northeast Tourism Market of Colorado

Regional Profile: Pioneering Plains

Key Defining Attributes:



Supporting Attributes:

- Agriculture
- Authentic
- Birds
- Blue Collar
- Centennial Farmland
- Grassland
- Highways
- Humble
- understated
- Hunting
- Livestock (cows, horses)
- Myths & Legends
- Native American
- Pawnee National Park
- Pioneering History
- Pioneers
- Plains
- Pony Express
- Ranching
- Rural Culture
- Set in their ways
- Small Town
- Traditional
- Vast
- Western
- Wind Energy

Source: Colorado Tourism Department

COLORADO TOURISM TREND CONCLUSIONS

Northeast, Colorado is a region that visitors drive through on their way to the Front Range or Western Slope. However, both the Julesburg and Burlington Welcome Center’s experience some of the highest visitations due to their location as the western entrance to the state. The proximity of the Proposed Recreation Subject Area to these visitor centers positions them well for future promotion if development occurs at the site. The favorable opportunity for the South Fork Republican Restoration Coalition, is that this regions’ Tourism Profile is at the beginning of its “Destination Profile”. This means that if a new recreational entity is created at the Proposed Recreation Subject Area, it can be integrated into the “DNA Drivers” for the area. Then the site can be leveraged to expand overall tourism to the recreation site as well as other important tourism assets within Yuma and Kit Carson County.

L. RECREATION SUPPLY INVENTORY

Developing the local and regional supply inventory for the Proposed Recreation Subject Area requires a determination of what uses are possible based upon the characteristics of the landscape and available facilities as well as evaluation of current local, regional and national recreation trends and stakeholder priorities. The following section will profile how proposed recreational uses were determined for inclusion in the supply inventory.

DEVELOPMENT OF LISTING RECREATION USES

Stakeholder Engagement

CHMGS attended and facilitated a community meeting in Burlington on January 28, 2019. This meeting was attended by over 40 individuals from the surrounding communities. The meeting provided insight to CHMGS process for Recreation Market Analysis as well as an open forum for citizens to provide insight as to future recreation uses. Minutes of the meeting are maintained by the South Fork Republican Restoration Coalition. The exhibit below provides a listing of the different recreation uses discussed and background on the rationale as to their importance to the community.

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Exhibit 33. - Stakeholder Meeting Discussions and Findings

Recreation Activity	Unique Amenity	Community Value
Trail/Road		
Running	Setting lends itself for loops and works seasonally due to less snow	Local High School Cross Country, Community Running Groups
Hiking	Could be useful year-round, if routed carefully	Families Hiking, Hunter Access
Horseback riding	Important to tie horse camping into trails	Local Equestrian Groups
BMX Track	Should focus this on youth as gateway to mountain biking	Focused area for youth
Motocross Track	Should design something that meets need for practice but could be used for special events in Motocross Series	Attraction for youth, families and special event/races
OHV Training/ Trails	Focus should be on Safety/Training Center with features and small loops	Attraction for youth, families and special training area
Water-based		
Canoeing/Kayaking	Focus on Hale Ponds at first and then if stream flow comes back, ensure that access is provided	Local communities and regional flat-water canoe/kayak clubs
Winter		
Low Demand		Not likely enough consistent snow
Wildlife Related		
Hunting	Contemplate hunting areas that are not in conflict with other recreation development area opportunities	Access needs to be maintained
Birding	Seasonal and ties to events and birding tours	Priority for species on Birding Trails, Greater Prairie Chicken Special Events+
Fishing	Hale Ponds is currently great asset	Hale Ponds Important Resource
Any Outdoor Activity		
RV Camping/Cabins	Would need to reestablish areas unique to markets. Would need to make camping unique destination features without water.	Family outings, regional outings, supporting amenity to other events. Desire for Destination camping.
Tent Camping	If do RV/Cabins, would want to support with water/electric hook ups as well as tent	Useful for hunters
Picnicking	If camping, then adding picnicking areas	Place for families on weekends outside of city/town parks.
Shooting Sports	Ties into Hunting focus, would need to be different from existing local ranges	Long Distance shooting range would augment local clubs
Playgrounds	Would support only if camping and picnicking	Family outings and supporting picnicking
Special Event Venue	Adaptive reuse of Visitor Center and Camp store for special event rental venue and potentially overnight bunk house.	Unique food and beverage venue in beautiful setting, opportunity for catering kitchen and bunkhouse.
Recreational Aviation	Reestablishment of Existing Air Strip	Opportunity for regional and nation recreation pilots

Source: CHMGS and Community Stakeholder Meeting

LOCAL AND REGIONAL SUPPLY INVENTORY

CHMGS visited the South Republic Wildlife Area and former Bonny State Park site to ascertain the general suitability of the proposed recreational uses identified from the stakeholder meeting. CHMGS determined that all uses appeared to be reasonable to assess from a competitive market perspective. CHMGS undertook a supply inventory analysis within the recreation drawing area to identify the number and types of competitive or comparable assets.

The supply analysis was undertaken for all potential uses. Web research and phone calls were undertaken to identify the geographic span of properties both in and outside of the competitive drive time. Addresses of each site were identified as well as, where available, amenities, prices, and other relevant characteristics. The competitive matrix profile provides an understanding of the number of facilities, insight as to how they are managed, where they are positioned in the market from a price point and in some cases how they are performing. These elements not only support the market analysis but can be used later in financial analysis.

The geographic mapping of the facilities provides insight as to the location of the supply in relation to the competitive market drawing area. It answers the question, “what is the extent of supply available to satisfy the recreation demand within the market drawing area?”.

The exhibits on the following page provides the competitive matrices for all recreation uses considered and is followed by a geographic mapping of the facilities.

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Exhibit 34. - Recreation Supply Inventory: Water, Non-Motorized, Shooting Sports

Competitive Supply Inventory									
Water Based									
Fishing	Stalker Lake	Flagler Reservoir	Hale Ponds	North Sterling State Park	John Martin State Park				
Price									
Kayak/Canoeing	North Sterling State Park	John Martin State Park							
Price	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass							
Trail Based									
Non Motorized									
Mountain Bike Parks	Frisko Bike Park	Golden Bike Park, CO	Barnum Mountain Bike Park, CO	Ruby Hills Bike Park	Valmont Bike Park	Fruita Bike Park, CO	Lunch Loop Bike Park, CO	Lyons Bike Park	Kansas Rocks Recreation Park, KS
Amenities	Pump Track, Slope Style, Dirt Jump	Flow Track, Jumps, Pump Track		7.5 Acre Slopestyle course, dirt jumps, pump track, varying levels	42 Acre, all skill levels and elemnts, Dirt Jumps,	Drop Zone, Pumptack, Dirt Jumps, Skill Trails		Dirt Jumps, Rock Features, Pump Track	
Price	Free								Annual Pass \$90.00 \$5 per Hiker/Biker
Entity		City of Golden, COMBA, IMBA Golden Bike Park Group	City of Denver and Winter Park Resort	City of Denver	Boulder Parks and Recreation Department		Colorado Plateau Mountain Bike Trail Association		
Hiking	North Sterling State Park	John Martin State Park	Barr Lake State Park	Jackson Lake State Park					
Amenities	6.4	4.5	21.9	3.4					
Price	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass					
Equestrian	North Sterling State Park	John Martin State Park	Barr Lake State Park	Cherry Creek State Park					
Amenities	3	3	16.5	25.6					
Price	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass					
Wildlife									
State Wildlife Areas	Flagler Reservoir SWA	Sandy Bluffs SWA	Arikee SWA	Sandsage SWA	Willow Creek SWA	Simmons SWA	South Republican SWA (Bonny)	South Republican SWA (Kleweno)	Stalker Lake SWA
Birding	North Sterling State Park	John Martin State Park							
Shooting Sports									
Shooting	North Sterling State Park	Cherry Creek State Park	Mike Higbee SWA	Oxbow SWA	Burlington Gun Club	Kit Carson County Sportsmen Club	Holyoke Gun Club	Logan County Shooting Sports Complex	Haxtun Gun Club
Amenities					Two Trap Ranges and One Skeet Range	Outdoor Pistol (50/100) & Outdoor Rifle (50/100/150), Trap		Archery, Trap, Rifle Long, Pistol, Rifle	Handgun, Rifle - 200 yd
Price					\$30.00 Memberships, Practice Rounds \$4.00 and \$5.00 non members			Memberships: Family \$140.00 , Adult \$100.00 Daily Fees \$10.00	
Entity						Logan County, CPW, SLB, CoCorrections			
Archery	Barr Lake State Park	North Sterling State Park	Stalker Lake State Wildlife Area	Lon Hagler Archery Range					
Price	\$8-\$10.00 Day Pass	\$8-\$10.00 Day Pass							

Source: CHMGS and Respective Entity Websites

Exhibit 35. - Recreation Supply Inventory: OHV Trails and OHV Parks

Competitive Supply Inventory									
Trail Based									
Motorized									
OHV Trails	Jackson Lake State Park	John Martin State Park							
Address	26363 County Road 3, Orchard, CO 80649	30703 County Road 24, Hasty, CO 81044							
Amenities	1.2 miles	Multi - Use Trails							
Price	\$8-10 Per Vehicle Pluse OHV Permit	\$8-10 Per Vehicle Pluse OHV Permit							
OHV Parks	Peach Valley OHV Area, Comp CO	Leadville Motocross Park,CO	Big Bend OHV Park,CO	The River ATV Park, KS	Syracuse Sand Dunes, KS	Otter Creek ATV Area, KS	Perry Lake ATV and Motorcycle Trail	Pomona ATV and Motorcycle Area, KS	Kansas Rocks Recreation Park, KS
Amenities	50 ", Parking, Vault Toilets, Shade Gazebos, Training Course (3 loops)	Motorcycles/ATV	Motorcycles/ATV	OHV/ATV, 4x4 , RV Sites, 9 Cainbs, Convenience Store	Motorcycles/ATV and camping	Day Use, ATV and Adjacent to USACE Campgrounds	Motorcycles, ATV and UTV	Motorcycles, ATV and UTV, Kansas ATV Association Manages	Motorcycles, ATV/OHV/4x4
Price	OHV Permit Only	Annual Memberships: \$150.00 Individual and \$200.00 Family; \$20.00 Day Membership, \$15.00 children below \$15.00	OHV Permit plus \$7.00 parking	Use Campground Pricing to provide Access to Site. Annual Pass, \$250.00 per person. Campground Admission Fees for one day \$15.00 Kid/\$20.00 Adult. Multi Day Rates,	\$5.00 per day for rider		None		Annual Pass \$90.00 \$20 per Vehicle and \$5.00 per Passengers
Usage	45,984 visits		6,000 Visitors		5,000 visitors				
Entity		Mt. Elbo Motocross Association							KANROCKS Recreation Association
Features	15 square miles		53 Acres	2000	1300 acres	240 Acres - USACE Site	140 acres	11 acres	380 acres
	https://www.youtube.com/watch?v=B1QuHV3yWnU								

Source: CHMGS and Respective Entity Websites

Exhibit 36. - Recreation Supply Inventory: Motocross and BMX

Competitive Supply Inventory																			
Trail Based																			
Motorized																			
Motocross Parks	Sweeney Cycle Park, CO	Thunder Valley Park, CO	Two Rivers Racing, CO	Aztec Family Raceway, CO	IMI Motorsports Complex, CO	Ram Off Road Park, CO	Jewell Motocross Track, CO	Dry Lake MX Park, CO	Inman Motocross, KS	Bar 2 Bar Motocross, KS	Dragon Creek Motocross Park, KS	Fancy Creek Motocross Park, KS	Green Acres MX, KS	Platter Hill MX Park	Abott Sports Complex, NE	Fox Run Motocross, NE	Fiddler Creek MX, NE		
Amenities	Motorcycles/ATV	Motorcycles	Motorcycles	Motorcycles Only, Track, Available Sites for Camping	Motorcycles/ATV- Three Tracks	Motorcycles/ATV/UTV, Camping in designated Areas	Three Different Level Tracks	Motorcycles	Motorcycles/ATV	Motorcycles and Separate Times for ATV	Motorcycles/ATV, Motocross School	Motorcycles/ATV	Motorcycles/ATV	Motorcycles/ ATV on certain days	Motorcycles/ Limited Days for ATV. Membership includes daily fee rides and access to Abbott Fitness Center		Member only track, Motorcycles/ATV's		
Price	\$15.00 per rider, \$10.00 non prepped track	\$20.00 per rider	\$25.00 per rider	Annual Membership \$40 and Per Ride Rate (\$5 Pee Wee/\$20 Big Track 60 acres	Annual Year Pass \$500.00 Per day \$20.00/\$40.00 Depending on Track	\$10.00 per OHV Rider, 4x4 and Buggies \$20.00 per Day	Membership: Family \$40.00, Individual \$25.00 and \$15.00 per rider, 50cc- \$10.00 Kids	Family Pass \$350, Individual \$200, Day Pass \$20.00	\$100 Annual membership	Private Motocross Track For Events	\$15.00 per rider	Membership Rate and \$10.00 per rider	Membership Rate plus \$20.00 per rider, smaller rides \$15.00	\$20.00 per rider	Annual Membership Family \$600.00/Individual \$400.00 Day pass \$20.00/ \$15.00 Non preferred days		Annual Membership Family: \$300.00 and Individual is \$300.00		
Features																			
BMX Tracks	Grand Valley, BMX, CO	Mile High BMX, Co	Cortex BMX, Co	Eagle County BMX, CO	Cross Creek BMX, CO	Durango BMX, CO	Pikes Peak BMX, CO	County Line BMX, Co	Dacono BMX, CO	Twin Silo BMX, CO	Montrose West BMX, Co	Crown Mountain BMX, CO	Steamboat Springs BMX, CO	Heartland BMX Track, KS	Emery Park BMX, KS	Park City BMX, KS	Tri-City BMX Track, NE	Star City BMX Track, NE	Omaha BMX, NE
Prices	Strider Bike/ Annual \$30.00 Full BMX Price \$60 First Family Member, \$55.00 Second Family Member, \$70.00 Pro	BMX Membership \$60.00 Race Fees \$5-7.00	BMX Membership \$60.00 Race Fees \$5-7.00			Practice Pass \$16 to \$20, Race Pass \$55-\$60		BMX Membership \$60.00 Race Fees \$10.00 to \$30.00		Practice Pass \$16 to \$20, Race Pass \$55-\$60								Strider Bike/ Annual \$30.00 Full BMX Price \$60 First Family Member, \$55.00 Second Family Member, \$70.00 Pro Race Fees	
Entity					Cross Creek Metropolitan District			South Suburban Parks and Recreation			Montrose West Recreation, Inc.	Crown Mountain Park and Recreation District - Colorado Special District- Quasi Governmental Agency			Emery Park BMX and Wichita Parks and Recreation	Park City BMX,			

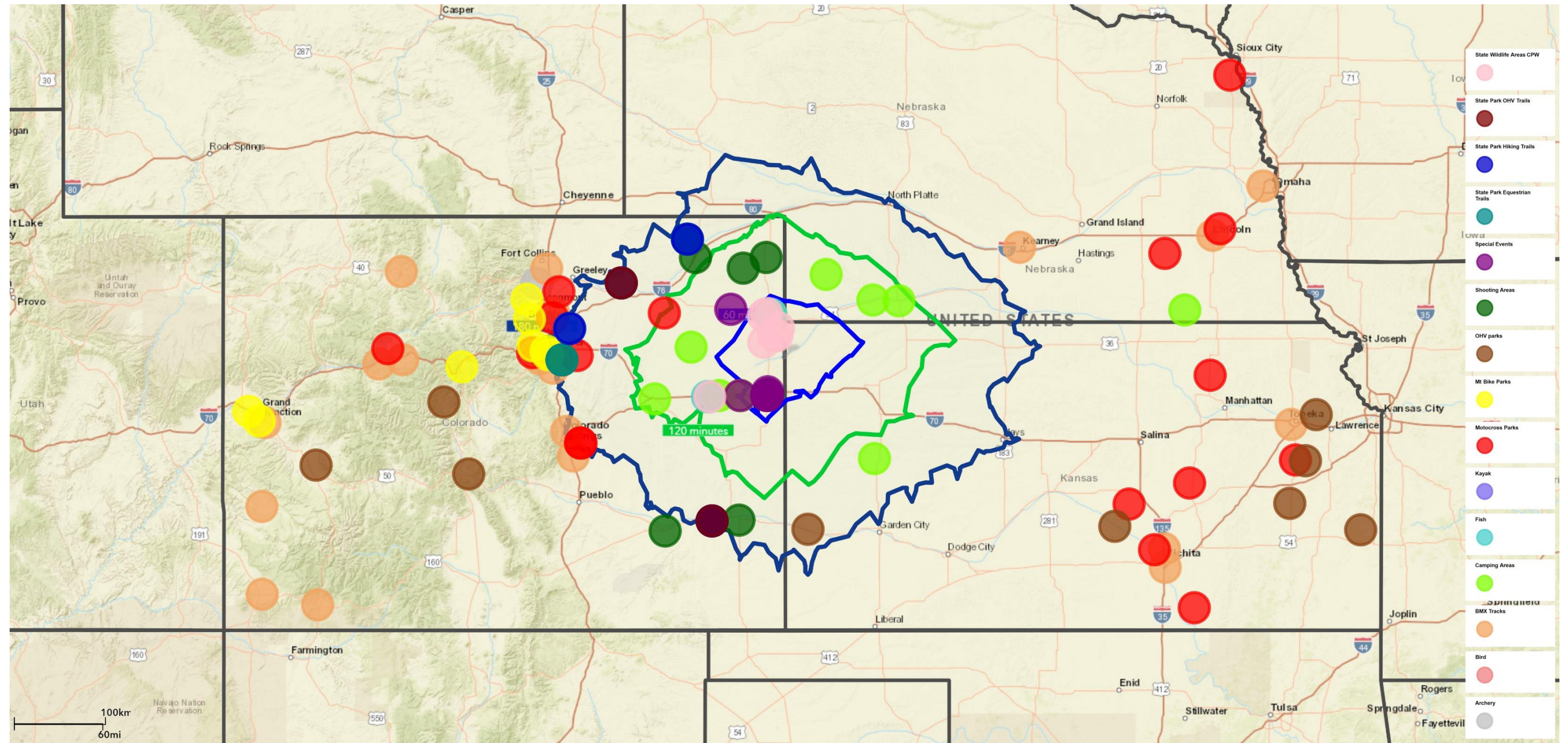
Source: CHMGS and Respective Entity Websites

Exhibit 37. - Recreation Supply Inventory: Camping and Special Events Venues

Competitive Supply Inventory														
Camping														
Tent, RV and Other	Campland RV Park, CO	Marshall Ash Village RV Park, CO	Shady Grove Campground, CO	Limon KOA, CO	Wray Hitchin Post RV Park, CO	Prarie Motel & Campground, CO	John Martin State Park	Jackson Lake State Park	North Sterling State Park	Lake Scott SP - KS	Rock Creek SRA- NE	Enders Reservoir SRA - NB	Red Willow Reservoir - SRA	Swanson Reservoir SRA- NE
Amenities	30/50 W/S/E	30/50 W/S/E	30/50 W/E	30/50/70 Pool, Pavilion, Cabins Snack Bar	30/50/Tent		30/50/Tent	30/50/Tent	30/50 Tent	30/50/ Tent and Full Hook Up	Primitive Camping	20/30/50 /Tent	30/50/Tent	30/50/Tent
Prices	\$25.00/day	\$30 Tent \$45.00 RV	\$21 Tent /\$29 to \$39 RV	\$50 to \$50.00 RV \$55.00 to \$60.00 Cabins	\$15.00 Tent /\$30 to \$32.00 RV		Ten \$14-18/ Basic \$22-\$28/Elec \$28-36/WSE \$32-\$41	Ten \$14-18/ Basic \$22-\$28/Elec \$28-36/WSE \$32-\$42	Ten \$14-18/ Basic \$22-\$28/Elec \$28-36/WSE \$32-\$43	\$23.00 RV Site W/E	\$10 Tent/\$15.00 Basic/\$25 Electric/\$35 W/S/E	\$10 Tent/\$15.00 Basic/\$25 Electric/\$35 W/S/E	\$10 Tent/\$15.00 Basic/\$25 Electric/\$35 W/S/E	\$10 Tent/\$15.00 Basic/\$25 Electric/\$35 W/S/E
Campground Occupancy Estimates							3% Basic 16% Electric	Basic 14% Electric 37%	Basic 15%/ Electric 19%	Electric 16%		21% Occupancy for Combo of Basic and Electric	17% Occupancy for Combo of Basic and Electric	14% Occupancy for Combo of Basic and Electric
Visitation							134,432	191,879	143,011	158,533		66,300	64,600	74,900
Special Events														
Indoor	Old Town Museum	Burlington Civic Center	Red Willow Catering	The Dish Room	Claremont Inn & Winery	Spices on the Green								
Prices		Conference Hall \$400 for 4 +Hours Alcohol Deposit												
Usage Estimates	60-75 Rentals	200 Rentals												

Source: CHMGS and Respective Entity Websites

Exhibit 38. - Recreation Supply Inventory: Mapping of Supply



Source: CHMGS, ESRI and Respective Entity Websites

RECREATIONAL SUPPLY INVENTORY GEOGRAPHIC DISTRIBUTION

The map on the prior page identifies several gaps of recreational facilities within the market drawing area. The three recreational land uses that are primarily located outside of the market drawing area are: Motocross, BMX Trak's and OHV Parks. There is only one Motocross and OHV Park within the competitive market area. The map illustrates a large supply of these venues' due east and west of the Proposed Recreation subject area, but a nominal number within one, two and three hours of the Proposed Recreation Subject Area.

There are multiple State Wildlife areas as well as shooting venues within the immediate market area and there are several campgrounds. However, most of the campgrounds are located along the interstate within Colorado, or adjacent to the tributaries of the Republican River in Nebraska.

RECREATIONAL SUPPLY INVENTORY CONCLUSION

The stakeholder engagement process assisted CHMGS in identifying the types of recreational activities that would potentially be desired for the Proposed Recreational Subject Area. From this, CHMGS undertook comprehensive supply analysis to ascertain the geographic location as well as characteristics of the competitive market supply for recreation facilities.

The analysis identified the distribution of sites within and outside the competitive market. This provides insight as to areas of possible recreation market opportunities. The analysis results indicate that there is an absence of motorized trail options as well as specialized venues for OHV, Motorcycle and Biking in the market area.

M. RECREATION DEMAND ANALYSIS

ANALYSIS PROCESS

Developing site specific recreation market demand involves identifying the competitive market for each recreational land use, identifying the "accommodated" demand in the market and its performance characteristics, and then determining how an "addition" to supply would capture existing demand as well as induced demand.

However, since this is general market analysis, where the goal is to identify high level demand forecasts, this level of analysis is not possible. However, if this project proceeds to the financial analysis stage, a more rigorous demand analysis would be completed. Therefore, for the general market analysis, CHMGS will be focusing on:

1. Evaluating demand forecasts based upon recreation participation rates and frequency of participation.
2. Assessing the suitability of the supply to accommodate the demand and therefore estimate of potential capture rate in market.
3. Evaluating the uniqueness of this site to capture demand based upon qualitative interviews with recreation market representatives.
4. Providing demand proxy's based upon comparable examples of demand accommodation.

MARKET AREA DEMAND ANALYSIS

Qualitative Interviews

CHMGS undertook interviews with 44 individuals and/or associations that could provide insight as to the potential for recreation demand at the Proposed Recreation Subject Area. The following exhibit profiles the entities and key findings from their discussions that were used to inform the analysis.

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Exhibit 39. - Recreation Demand Qualitative Analysis

Experiences/Activities	Organization	Key Demand Information
Trail/Road		
Horseback riding	Back Country Horsemen Colorado	Interested in trail and camping experiences, specifically equestrian camping facilities. Not a chapter in that area, and is a distance from other population.
Mountain biking	International Mountain Bike Association	Opportunity would be best focused on technical skills and basic riding, terrain would have to be manufactured.
	Bosch E- Bikes	Would be open to looking at trails, but typically venues for events would require more resort settings.
Off-highway vehicle (OHV)/ATV/Motocycling	Colorado Off Highway Vehicle Coalition	Interested in site for various reasons. Primary one is the State is lacking in locations for safety training and entry level venues to teach skills. Thinks all motorized types would be attracted based upon a well designed setting. (e.g. OHV/ATV/Motocross). Also potential venue for Motocross Events. Would want to see camping and support facilities. Entity could apply for OHV Planning and Development funding. Could be focus on families as destination with something for all.
	Great Outdoors Consultants	Could see a safety and skills development destination being viable, general lack of these on Front Range. Comparable is what BLM did at the El Mirage OHV Area in CA.
	California State Parks	Comparable is a Prairie City State Vehicle Area Environmental Training Area.
	USFS	Discussed the tie in between safety training needs and linkages to trails as well as support facilities of camping. State lacking in safety education training locations. Would need to link into County Road system for larger opportunity. Sees need for system since Western Kansas and Nebraska do not really have many locations for Riding. Seeing increase in Side by Sides, so tracks need to be larger.
	Bureau of Land Management - OHV Lead	Discussion with Colorado BLM OHV Lead about in state needs. General Observation is that skills park adjacent to camping and trail system is needed.
	Peach Valley OHV	ATV Training Area, Advanced Skill Course and Beginner Loop, highly desired by families for training young folks. Provide certified trainers as well. Motorcycle Clubs will be useful and helpful. Think about creating place for families to picnic and camp.
	North Sand Hills OHV	Seems like an interesting area and there really is a dearth of facility in that part of the state. Syracuse Sand Dunes in Kansas attracts many people and a new location could take some of that demand off that location. Could be a cool way to integrate both technical training, trails and interpretive loops. Would have to be uniquely done to attract folks.
	Gunnison OHV Park	Skills Track, Terrain Park, Trail miles, linked to trail systems. Families love one stop location for all levels.
	Rio Blanco Economic Development	Rio Blanco and Meeker is OHV Destination and lesson learned is linkages between trail and ride to camping. Also leveraging OVH Clubs to help with Grant writing and advocacy. Need to have trails as well as technical training.
	Past Park Staff - Designed OHV Trails	Historically had OHV Trail and camping at North Cove. Area due west of North Cove was used for trail systems as well. Total Mileage was approximately 9 miles which included County Roads.
	Town of Syracuse, Kansas	Managing Syracuse Sand Dunes, 1,500 acre Sand Dune Park. Attracting locals and regional, make sure you have camping. Also make sure you have access to EMS teams since typically more accidents than other recreational activities
BMX & Motocross	MX Trak Builders LLC	Northeast and Southeast portions of site are likely suitable for the development of both a BMX Track as well as Motocross Track. You can link them into a trail system and build OHV features on the North Cove. Have worked on public land before in Florida and with DoD. Key is understanding development parameters and working to design something unique.
	Colorado Off Road Championship Series	Believe the location could be a suitable one for a part of series. Can develop a course for one time use or work with a course developed. Model is to share in gate fees and handle all set up and break down. The fact that roads and parking exist is a large benefit to this site.
	Local Motocross Club Enthusiast	Has chatted with local motocross clubs and they realize a public location for training and racing doesn't exist in this part of state. Could benefit local as well as regional folks (e.g. Kansas and Nebraska).
	Lake County, Colorado OHV Park	Has a Motocross Track Club that incorporated under the 501c3 that was set up by the County. The Partnership for Lake County Recreation works as an umbrella 501(c) 3 for emerging groups until they can get their non profit status.

Source: CHMGS, and Respective Interviewees

Exhibit 40. - Recreation Demand Qualitative Analysis (Cont.)

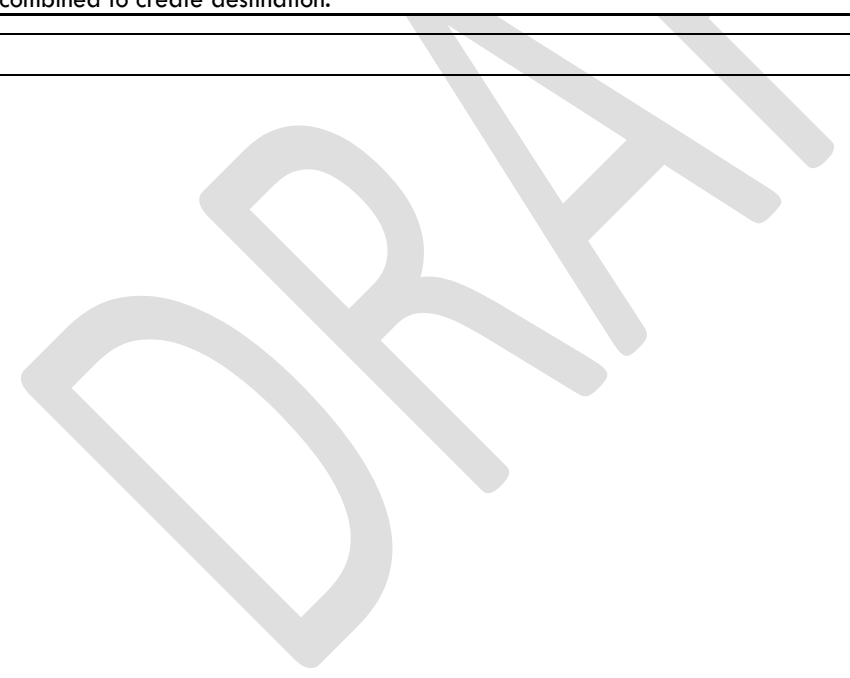
Experiences/Activities	Organization	Key Demand Information
Water Based		
Canoeing	Rocky Mountain Canoe Club	Is always looking for outings. It would be a flat water experience and comparable would likely be the Poudre River. Needs to better understand stream flow to comment.
Winter		
Snowmobile	Colorado Snowmobile Associations	Not sure there would be enough snow or market for grooming which is essential for snowmobiling. The idea of a Bunkhouse for clubs is something that happens that may apply to OHV/ATV Clubs
Wildlife		
Hunting/Fishing	Colorado Back Country Hunters & Anglers	Ensure on going access for fishing is key and is opinion that Hale Ponds are great resource.
	National Wild Turkey Federation (Wray and Lindon Chapters)	Ensure that species and hunting is maintained.
	Colorado Mule Deer Foundation	Ensure that species and hunting is maintained.
Birding	Bird Conservancy of Rockies	Important to recognize value of the Prairie Chicken and other birds in the Birding trail. Birding Groups and Tours include this region so sustaining habitat would be important.
	Tour Colorado	Bird Touring is big and there are several entities that currently run tours through this region. Would need to package a series of events and places and then present to tour companies. Create the experience with the tours. Likely smaller tour groups.
Other Outdoor Activities		
RV camping/cabins/tent	Jellystone Campgrounds	Key for Jellystone with any franchise is that the area does not compete with another franchisee (which this one doesn't) and also that it would need to be created as a destination. This site would need extra focus on that due to non water. Product offering does include water feature and typical prototype is 100 RV sites and 5 cabins plus amenities.
	Colorado Campground Association	Right now most campgrounds in this area are off of Interstate and are stop over locations, vs. Destinations. Would need to create activity to draw people or create destination camping. Could leverage trail market as well as western theme to tie into new tourism regions.
Picnicking	Multiple Parties	Indicated that if opened up campground and built trail systems, adequate and appropriate picnic areas would also make sense. Family Pavilions may also be possible.
Special Events (Catering, F&B)	Worden Vineyard	There is an interest in outdoor spaces for weddings, need off site caterers, would need to think about lodging.
	Red Willow Catering	Market for weddings is good, price point for market impacts the price point for rentals. Off site catering would need proper facilities, and on site lodging for small parties (e.g. bunk house) makes sense.
	Camp Cook Concessions	Opportunities for special events and corporate outings. Burlington Civic Center is good proxy on rental rates.
	Spices on the Green	Venue out there would need to have a proper catering kitchen and access to food trucks was available.
	Claremont Inn & Winery	Focus on smaller wedding functions below 50 people, having lodging on site is a good thing.
	Burlington Community Center	High volume of weddings and other social events, mostly "do it yourself" market and our facility does include tables and chairs. Must take this into consideration in pricing facility.
	Old Town Museum	Old Town Museum highly desired location in town and rental rates must be competitive. There are number of local caterers that could support the facility. Museum provides special dinners and events that could be leveraged to visitors looking for other activities that are close by (e.g. Shoot out, Cowboy Dinners, Can- Can shows, Carousel).
Airfield	Recreation Advocate	Strong local interest in reopening recreation airfield near North Cove.
	Recreation Aviation Foundation	Interested due to its location on plains vs. Front Range. Non altitude flying sites are highly desired. The members would have minimal impact on site and the Foundation has operating standards for members on creation and maintenance. Would likely have funds to help in setting up and partial site maintenance.

Source: CHMGS and Respective Interviewees

Exhibit 41. - Recreation Demand Qualitative Analysis (Cont.)

Experiences/Activities	Organization	Key Demand Information
Government Agencies		
General Recreation Destination	Colorado Office of Outdoor Recreation	Northeast Colorado has many hunting opportunities, but not a lot of public access to recreation. Specialized motorized venue, hunting and shooting sports likely to be popular. Also would draw from Kansas and Nebraska.
Agritourism	Colorado Agritourism Association	Communities are always looking for ways to enhance amenities. No direct programs for recreation offerings.
Visitor Information Centers	Burlington & Julesburg Welcome Center	Highly visited centers along eastern corridors. Small side trips are sought after by visitors. Currently nothing to send them to. Could see focusing out of the Burlington Center as a out and back or out and go through Julesburg.
Government	City of Wray	Thinks larger public recreation asset would benefit community. No existing Non profit structure to place entity under, would be open to discussion.
	Kit Carson	Thinks ideas for motorized is interesting and thinks other support amenities (Camping, picnicking) would be important. Currently OHV's are allowed on County Roads; however most of site is in Yuma so less impact on roads in Kit Carson. Would be open to consideration of non profit entity and have one currently since set up to fund the hospital.
	Yuma	Thinks ideas for motorized is interesting and while OHV is not prohibited on County Roads , this would need to be codified. Also, realize that site is in middle private land and so as always adjacent land owners needs are important. Also would want to know drive time for Emergency Management Services (EMS) due to distance from main county seat. Would be supportive of a non profit umbrella created to put sub non profit entities.
Economic Development	East Central Council of Governments & Prairie Development Council	Thinks that idea for motorized destination could draw from Nebraska and Kansas and serve local need. Also special event needs are there as well and local catering is available. An array of funding and loan programs are available if private entity was interested in developing or non profit wanted to establish for profit entity.
State Rural Tourism - Marketing	Colorado Office of Tourism - Rural Destination Development	Regional Concept for Pioneering Plains provides a foundation to build upon. Hunting is clearly recreation priority but others could be created. Critical that folks think holistically about all assets that can be combined to create destination.

Source: CHMGS and Respective Interviewees



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The prior exhibit identifies that there is interest in multiple types of activities to be considered at this Proposed Recreation Subject Area. Multiple parties recognized the importance of the site as a State Wildlife Area and its value to both local and regional visitors. Additionally, the wildlife community was interested in ensuring that habitat for important and unique species (e.g. Prairie Chicken) be maintained.

Stakeholders identified that absent the existence of water, trail-based recreation and its supporting amenities is a viable option based upon the setting and available land. Interviews with non-motorized trail communities, (e.g. equestrian, hiking) noted that the setting, is not unique as compared to those settings available on the Front Range and Western Slope. They indicated that it could be a trip that they may take, but it would not be a frequent visit location. The mountain bike community identified that the existing setting was not unique, but a Mt. Bike Park setting could be a draw within the market area if done properly. Motorized communities (e.g. OHV, Motocross) were intrigued with the extent of open space that would provide for the development of a unique venue that could attract visitors from western Kansas and Nebraska as well as serve the needs of the more distant (two to three hour) market area. The fact that the site already has facilities that could be rehabilitated including extensive road systems and parking were favorable factors in considering it suitable for recreational activities.

Quantitative Analysis

Recreation demand estimates were developed through a multiphase process as outlined below.

1. Quantitative demand analysis for the Proposed Recreation Subject Area Data was developed using data from ESRI and its consolidation of research completed by GfK MRI in a nationally representative survey of U.S. households. This data leverages national propensities to utilize various products and services, applied to a local demographic composition. The output of the GfK MRI analysis is the number of individuals who participated in recreational activity by market drawing area (e.g. 0-60, 60 to 120 and 120 to 180) at least once in the last twelve months. For OHV recreational use, ownership vs. participation data was the source available. Therefore, CHMGS applied data from the IBIS report regarding the percentage of OHV that are used for recreational purposes, to the data.
 - **Resulting Data:** Base level of interested population available for estimating recreation participation for recreational activity by activity.
2. CHMGS then used a combination of data from the SCORP's from Colorado and Nebraska since no data was available from Kansas. CHMGS applied a weighted average of 66/35 for Colorado/Nebraska. CHMGS has assumed that the data on frequency represented the entire population surveyed such that the frequency can be reasonably assigned to the entire data set. CHMGS notes that the population within the market drawing area may not represent an average population. However, absent any specific insight to each area and its usage, CHMGS has used it as a reasonable proxy.
 - **Resulting Data:** Potential recreational participation in market area by recreational activity.

3. To the baseline of potential recreation participation, CHMGS then reviewed the Colorado SCORP data regarding where residents undertook their recreational activity (e.g. city, county, state, federal, private). From this, CHMGS identified that approximately 80 percent of Colorado residents leveraged either a county, state, or federal public land for the recreational activity. Therefore, CHMGS applied this rate to the overall demand to assess the potential for this type of demand to be captured at the Proposed Recreation Subject Area.
 - **Resulting Data:** Potential recreational participation in market area that would likely occur at a county, state or federal recreation venue.
4. CHMGS then reviewed each recreational demand activity and identified the propensity of that demand to occur on the weekday vs. weekend. CHMGS reviewed the SCORP data from each state to identify if there were any survey questions regarding the use of recreational facilities during weekday vs. weekend. There were no specific questions on each respective survey for this issue. However, the recreation participation rates for various activities tend to provide insight as to those activities that would occur during weekday vs. weekend or a combination of both. Specifically, those activities that have a higher participation are more likely to have that participation distributed between the weekday and weekend. Also, from qualitative interviews and quantitative demand information, CHMGS was able to ascertain demand information that was used in the analysis (e.g. campground occupancy data information by weekend vs. weekend).
 - **Resulting Data:** Potential recreational participation in market area that would likely occur during the weekday vs. weekend.
5. CHMGS then undertook an analysis of the attractiveness of the Proposed Subject Recreation Areas amenities and positioned it within the competitive offerings within each market. This is representing the percentage chance that this site would be chosen by the people in the drawing area for a recreation opportunity. These attractiveness percentages decreased as the market area got larger and the supply offerings were more extensive.
 - **Resulting Data:** Likelihood that participation would occur at Proposed Recreation Subject Area site considering its competitive position in the market.
6. CHMGS then undertook evaluated the likely propensity of the specific market to use the Proposed Recreation Subject Area during the weekday vs. weekend. The primary SCORP data reviewed for this analysis was that located in the 2017 Economic Contributions of Outdoor Recreation in Colorado study. Data from that study as provided in Exhibit 18 identified how much participation occurred by region. This data supports that most individuals recreate closer to their homes except for unique types of recreation activities or overnight activities. CHMGS then converted the recreation demand to an average demand that could occur on a weekday vs. weekend during the relevant seasons. CHMGS developed seasonal demand usage periods based upon weather, recreational use patterns and hunting seasons CHMGS analysis divided the usage by seasonality.
 - **Resulting Data:** Potential captured recreation demand at the Proposed Recreation Subject Area by Weekday and Weekend for each market area.

7. CHMGS then aggregated potential captured recreation demand at the Proposed Recreation Subject Area by market segment and then summed the total recreation demand. Item number seven, in bold at the end of the table is the estimate of total recreation participation demand days by activity. The color coding identifies the highest recreation demand category by Green and lowest by red.

- **Resulting Data:** Highest to lowest estimated recreation participation days demand by activity for the Proposed Recreation Subject Area.

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Exhibit 42. - Recreation Demand Quantitative Analysis

Process Step	2018 Population	2023 Population	Birding	Camping	Canoeing/Kayaking	Fresh Water Fishing	Hiking	Horseback Riding	Mt.Biking	Hunting/Shotgun	Hunting/Rifle	Target Shooting	Motorcycling	Owens OHV/ATV
0 to 60 Minutes Drive to Site : Participated/Went or Did														
1 Activity within the Last 12 Months	20,889	20,709	826	2,297	877	3,094	1,426	327	557	941	1,218	798	641	1,256
1 Use for Recreation (OHV only) 78% Recreational Use														78%
% of 2023 Population			4%	11%	4%	15%	7%	2%	3%	5%	6%	4%	3%	6%
Frequency of Participation, CO			32.14	10.29	5.73	17.26	24.55	28.31	23.81	10.20	10.20	7.92	12.11	12.11
Frequency of Participation, NE			11.24	N/A	N/A	6.71	5.02	N/A	12.72	4.56	4.56	4.56	10.10	10.10
2 Weighted Average Participation			23.12	10.29	5.73	12.53	17.06	28.31	17.88	7.51	7.51	6.00	9.71	9.71
Estimated Possible Participation			19,100	23,625	5,025	38,775	24,322	9,257	9,957	7,064	9,144	4,790	6,224	12,195
3 Estimated Participation on Public Land (80%)			15,280	18,900	4,020	31,020	19,458	7,406	7,966	5,651	7,315	3,832	4,979	9,756
4 Estimated Weekday Participation Distribution			40%	15%	15%	40%	40%	40%	40%	40%	40%	40%	40%	40%
4 Estimated Weekend Participation Distribution			60%	85%	85%	60%	60%	60%	60%	60%	60%	60%	60%	60%
Weekday Demand			6,112	2,835	603	12,408	7,783	2,962	3,186	2,261	2,926	1,533	1,992	3,902
Weekend Demand			9,168	16,065	3,417	18,612	11,675	4,444	4,780	3,391	4,389	2,299	2,987	5,854
Attractiveness of Site Attributes Within the Competitive Supply														
5 Set			100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
6 Propensity to Use Site (50%) Weekday/Day			15	9	3	31	39	15	16	6	7	3	10	20
6 Propensity to Use Site (75%) Weekend/Day			86	201	64	174	219	83	90	32	41	17	56	110
60- 120 Minutes Drive to Site : Participated/Went or Did														
1 Activity within the Last 12 Months	64,607	64,477	2,672	7,318	2,751	9,794	4,686	1,105	1,713	2,955	4,026	2,597	1,937	4,310
% of 2023 Population			4%	11%	4%	15%	7%	2%	3%	5%	6%	4%	3%	7%
2 Weighted Average Participation			23.12	10.29	5.73	12.53	17.06	28.31	17.88	7.51	7.51	6.00	9.71	9.71
Estimated Possible Participation			61,785	75,266	15,763	122,741	79,926	31,283	30,623	22,184	30,224	15,588	18,807	32,642
3 Estimated Participation on Public Land (80%)			49,428	60,213	12,611	98,193	63,941	25,026	24,499	17,747	24,179	12,471	15,046	26,113
4 Estimated Weekday Participation Distribution			40%	15%	15%	40%	40%	40%	40%	40%	40%	40%	40%	40%
4 Estimated Weekend Participation Distribution			60%	85%	85%	60%	60%	60%	60%	60%	60%	60%	60%	60%
Weekday Demand			19,771	9,032	1,892	39,277	25,576	10,010	9,799	7,099	9,672	4,988	6,018	10,445
Weekend Demand			29,657	51,181	10,719	58,916	38,365	15,016	14,699	10,648	14,508	7,482	9,028	15,668
Attractiveness of Site Attributes Within the Competitive Supply														
5 Set			75%	50%	20%	25%	20%	20%	50%	100%	100%	50%	75%	75%
6 Propensity to Use Site (0%) Weekday/Day														
6 Propensity to Use Site (25%) Weekend/Day			70	107	13	46	48	19	46	33	45	9	42	73
120 to 180 Minutes Drive to Site: Participated/Went or Did														
1 Activity within the Last 12 Months	1,954,934	2,127,020	61,828	191,821	98,502	163,626	199,762	32,589	67,918	44,265	53,511	66,305	44,322	36,276
% of 2023 Population			3%	9%	5%	8%	9%	2%	3%	2%	3%	3%	2%	2%
2 Weighted Average Participation			23.12	10.29	5.73	12.53	17.06	28.31	17.88	7.51	7.51	6.00	9.71	9.71
Estimated Possible Participation			1,429,661	1,972,879	564,416	2,050,610	3,407,221	922,595	1,214,170	332,306	401,718	397,989	430,349	274,736
3 Estimated Participation on Public Land (80%)			1,143,729	1,578,303	451,533	1,640,488	2,725,776	738,076	971,336	265,845	321,374	318,391	344,279	219,789
4 Estimated Weekday Participation Distribution			40%	15%	15%	40%	40%	40%	40%	40%	40%	40%	40%	40%
4 Estimated Weekend Participation Distribution			60%	85%	85%	60%	60%	60%	60%	60%	60%	60%	60%	60%
Weekday Demand			457,492	236,745	67,730	656,195	1,090,311	295,230	388,534	106,338	128,550	127,357	137,712	87,915
Weekend Demand			686,237	1,341,558	383,803	984,293	1,635,466	442,845	582,802	159,507	192,825	191,035	206,567	131,873
Attractiveness of Site Attributes Within the Competitive Supply														
5 Set			25%	25%	5%	5%	5%	5%	25%	25%	25%	50%	50%	50%
6 Propensity to Use Site (0%) Weekday/Day														
6 Propensity to Use Site (5%) Weekend/Day			107	279	24	31	102	28	182	25	30	46	129	82
Summation of Recreation Participation Demand by Activity and Area														
			Birding	Camping	Canoeing/Kayaking	Fresh Water Fishing	Hiking	Horseback Riding	Mt.Biking	Hunting/Shotgun	Hunting/Rifle	Target Shooting	Motorcycling	Owens OHV/ATV
0 to 60 Minutes Drive to Site: Summation of Immediate Area	20,889	20,709	826	2,297	877	3,094	1,426	327	557	941	1,218	798	641	1,256
6 Weekday Participation			15	9	3	31	39	15	16	6	7	3	10	20
6 Weekend Participation			86	201	64	174	219	83	90	32	41	17	56	110
6 Total Participation			12,927	23,351	7,450	26,243	32,923	12,531	13,478	4,781	6,189	2,494	8,425	16,508
0-120 Minutes Drive from Site: Summation of Two Areas	85,496	85,186	3,498	9,615	3,628	12,888	6,112	1,432	2,270	3,896	5,244	3,395	2,578	5,566
6 Weekday Participation			15	9	3	31	39	15	16	6	7	3	10	20
6 Weekend Participation			155	307	77	221	267	102	136	65	86	26	98	183
Total Participation			20,156	34,440	8,844	31,030	37,910	14,483	18,256	8,242	10,903	3,429	12,826	24,146
0-180 Minutes Drive from Site: Summation of All Three Areas	2,040,430	2,212,206	65,326	201,436	102,130	176,514	205,874	34,021	70,188	48,161	58,755	69,700	46,900	41,842
6 Weekday Participation			15	9	3	31	39	15	16	6	7	3	10	20
6 Weekend Participation			263	587	101	251	369	130	318	90	117	71	227	266
7 Total Estimated Recreation Participation Days			24,071	36,633	4,360	26,306	18,655	6,672	14,300	8,329	10,792	8,202	10,093	12,576

Source: CHMGS, ESRI, and Respective State SCORP's

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RECREATION DEMAND ANALYSIS CONCLUSIONS

The resulting quantitative recreation demand analysis ranks the following activities as those that would have highest recreation demand at the Proposed Recreation Subject Area.

1. Camping
2. Fishing
3. Birding
4. OHV/ATV/Motorcycling
5. Hiking
6. Hunting (Rifle/Shotgun Combined)
7. Mt. Biking
8. Target Shooting
9. Horseback Riding
10. Canoe/Kayaking

Note, CHMGS has not included recreation aviation field in its ranking, since BOR has already approved this future recreation use in its RMP FONSI. It is important to note that demand for each of these activities assumes that there are facilities, amenities and venues available to accommodate them. Presently, there is only primitive camping, and hunting available at the site.

CHMGS notes that camping is the top ranked activity. However, CHMGS's review of public campground occupancy at the surrounding state park and reservoirs indicates that demand is highly seasonal and is based upon a unique recreational amenity (e.g. water). Therefore, CHMGS notes that camping should only be developed to support other recreation uses, since camping alone at the Proposed Recreation Subject Area, will not itself provide a destination draw.

For those recreational land uses that are not currently available, the analysis assumes that the future demand would be primarily induced demand. Induced demand is additional demand created by the existence of a new demand generator or the addition to the competitive supply of new recreational facilities. Induced demand occurs with specialized facilities designed to cater to a specialized segment and attract demand that previously did not exist in the area.

N. CONCEPTS FOR PROPOSED RECREATIONAL SUBJECT AREA

SPECIALIZED MOTORIZED/NON-MOTORIZED SAFETY AND TRAINING VENUE

CHMGS's recreation market analysis has identified that leveraging a portion of the Proposed Recreation Subject Area for use as a specialized motorized/non-motorized venue including support facilities would be a suitable proposed recreational use profile for this site. The map outlined in following exhibit highlights in Blue, areas that should be considered for future planning of a specialized motorized venue.

CHMGS notes that some of these areas have existing recreational amenities that would ideally support the future proposed recreational land uses. Additionally, these areas would only be used outside the existing hunting seasons and could support hunters during the hunting seasons. CHMGS has assumed that these areas would primarily be used during the summer months and other periods outside hunting seasons.

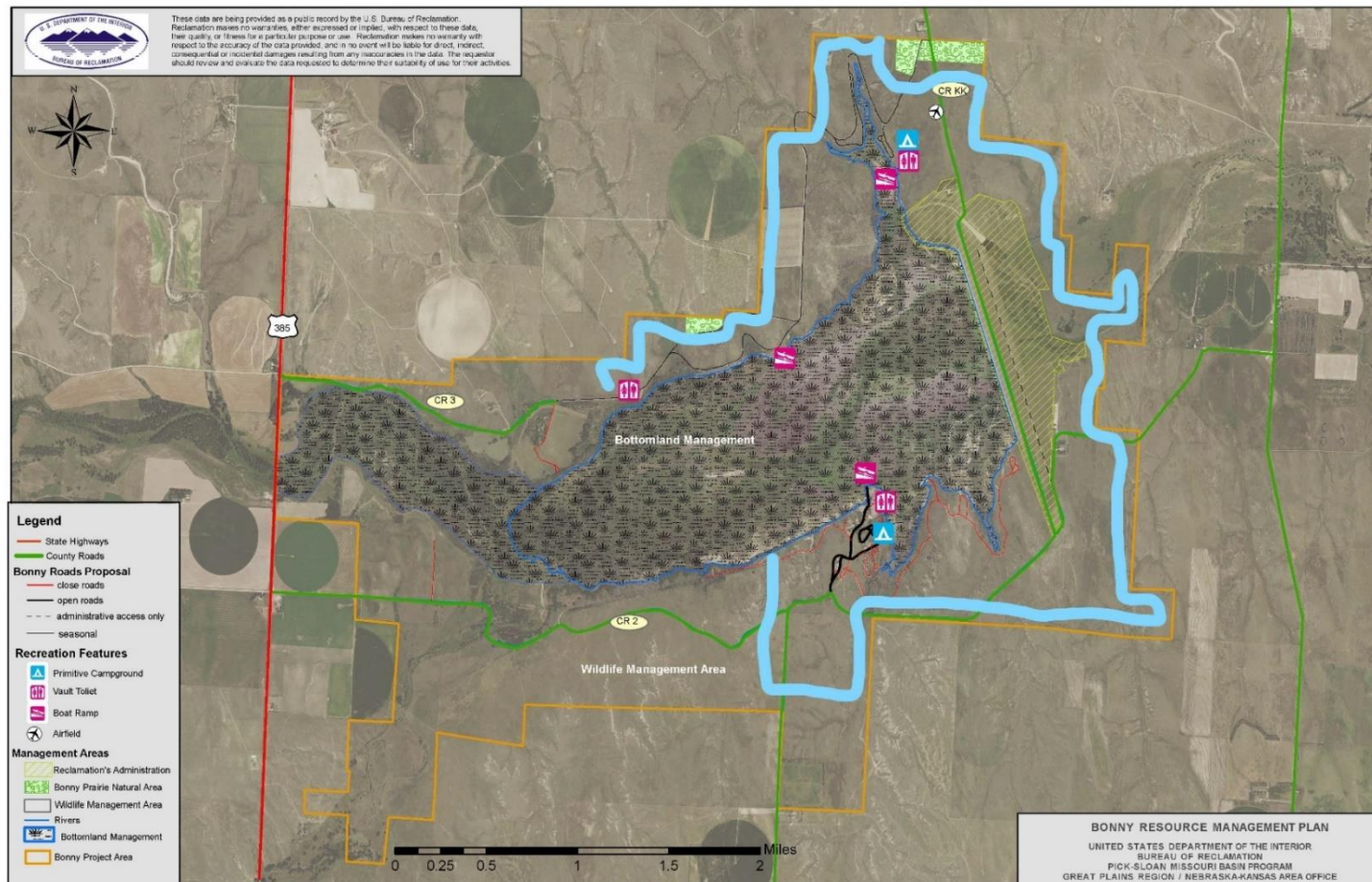
Recreation Market Analysis

CHMGS undertook discussions with two motorized/non-motorized planning entities as well as the Colorado Off Highway Vehicle Coalition and a Motocross Special event planner. In conversation with these entities, CHMGS highlighted the areas in blue, discussed hunting season limitations, identified county road availability and shared available soil information. Some general feedback from interviews:

- *“This site has a lot of potential for a Motocross track, Mini Moto track, BMX track and Enduro loops. We would recommend focusing track construction in the southeastern portion of the site near the existing campsites. The site would also be ideal for a longer Moto/ATV/UTV/Enduro trail that loops the southeastern portion of the site making the area a motorsports recreational area for the entire family.”*
- *“The State of Colorado is generally lacking in locations where people can go and get trained on how to ride OHV/ATV’s safely. While there are multiple places to go to OHV/ATVing and there are mini areas for practicing, there are no official areas. The existing support amenities and available land make it an attractive idea.”*
- *“The OHV grant program has a responsibility to serve the interests of residents throughout the state. The area in north east Colorado, is intriguing since it also provides an opportunity for visitors from Kansas and Nebraska. This could expand the opportunity for registrations from these states.”*

CHMGS notes that this proposed concept is built upon the eastern edge of the site and contemplates leveraging both the north east and south east quadrants for recreational activities. This site can ideally leverage both former developed sites for different motorized and non-motorized uses. For example, an OHV Safety Training Center can be designed for the North Cove area along with OHV trails, and the Southeastern section could be developed as a Motocross/BMX/Mt. Bike pump track area. Roads linking the sites along with support campgrounds and picnic areas provide for a variety of recreational experiences.

Exhibit 43. - Proposed Recreation Subject Area – Planning Area for Consideration



NOTE: The blue line EXCLUDES any areas in the Bottomland and development and use would be restricted from that area.

Source: CHMGS

SPECIAL EVENT/BUNKHOUSE

CHMGS undertook multiple discussions with special event venues and caterers within the local market to understand the market opportunity for rental of the former Visitor Center as a special event rental and/or Bunkhouse to support overnight accommodation for groups. CHMGS recognizes that vandalism has occurred within the building, but the overall structure appears to be sound which would position it for a rehab opportunity. The town of Burlington has several public facilities (e.g. Burlington Community Center and Old Town Museum) and private venues (e.g. The Dish Room and Spices on the Green). The Town of Wray has the privately-owned Red Willow Catering Venue. Both communities have catering companies that do off site catering.

CHMGS did not receive detailed plans of the Visitor Center. However, available data indicates that there are 2,700 square feet available on the main level as well as the lower level. If the restrooms stay in their present location, approximately 2,000 square feet (e.g. approximately 75 percent of the building) may be available for special events on the upper level. Assuming 20 square feet per person for special events, results in a space that could accommodate approximately 75 to 100 people. This would position it on the smaller side of venues in the market. If special event space was not desired, usage of the building as a Bunkhouse for groups to reserve, may also be a possibility. Additional planning and research are needed to understand how this facility could be adaptability reused for these two market opportunities.

O. STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT) ANALYSIS

CHMGS has developed a SWOT analysis to ascertain factors that would need to be evaluated for the for the Proposed Recreation Subject Area. As a review, SWOT sections can be defined as:

1. **Strengths:** Attributes within an organization that are necessary for the success of the project.
2. **Weakness:** Factors that could prevent successful results.
3. **Opportunities:** External elements that may be helpful in achieving the goals of the project.
4. **Threats:** External Factors that could negatively impact the success of the project.

Exhibit 44. - Strengths, Weakness, Opportunities, Threats (SWOT) Proposed Recreation Subject Area Development

Strength (Internal)	Weakness (Internal)
Existing Infrastructure in Place	Cost to Refurbish Infrastructure
Available Land Area under Public Ownership/Lease	Available Area potentially impact Hunting
Season of Availability outside Hunting Season is Summer	Land Use Planning May Identify Non Conforming Use
Favorable Market Demand	Ability of Local Counties to Form Quasi Public Agency
CPW Sublease Tools Provide for Varying Mgmt Models	Availability of Interested Parties to Support Development
Opportunities (External)	Threats (External)
OHV Grant Funding Available for Planning and Operations	Lack of Commitment to Future Planning and Analysis
Local and Regional OHV/Motorcross Clubs	Inadequate Planning and Operational Resources for Development
Absence of Specialized OHV/Motorcross/BMX track in Region	Local Landholders Desire Alternative Uses
	National Economic Trends Impact Disposable Income Profile
	Cost of Fuel for Motorized Activities Increases

Source: CHMGS

P. COMPARABLE IDEAS FOR CONSIDERATION

To better understand the conceptual ideas outlined above, CHMGS has provided some information on comparable sites that were discussed as part of the market research for this project.

CALIFORNIA STATE PARKS

California has multiple State Vehicle Recreation Areas (SVRA). The Prairie City SVRA is in Rancho Cordova, California, 20 miles east of downtown Sacramento. The Prairie City SRVA includes the Environmental Training Center/Area. The training area includes a dirt riding arena and a three-acre trail system designed to mimic natural riding conditions. The training area is used by certified professional trainers to introduce new riders to proper riding techniques. The ATV Safety Institute offers hands on half day All-Terrain Vehicle Rider courses at this location. The Dirt Bike School created by the Motorcycle Safety Foundation also provides hand on rider train in at this location. There is also a classroom facility at this facility that is available for rental. In addition to the Environmental Training Center, other facilities located at the site include:

- Motorcycle/ATV Area
- Hangtown MX Track
- Practice Track
- Kids Track
- Quarter Midget Track
- Go Cart Track
- Mini MX Track
- 4x4 Area
- Concession Store/Rentals

Exhibit 45. - Prairie City SRVA Map of Safety Training Area



Source: CHMGS

Additionally, the Hollister Hills SVRA located in central California, has an area set aside for skill practice and field training. The site includes a formal training area and smaller skill features that the park has developed over time.

BUREAU OF LAND MANAGEMENT

The Bureau of Land Management is responsible for oversight of many OHV areas in Colorado. Discussions with individuals within the BLM Colorado Office identified two examples of facilities that include elements of a safety and skills training area. These sites include Peach Valley OHV area and the Motocross Terrain Park within the Hartman Rocks Recreation Area. The Peach Valley OHV area BLM staff created a skills training area within the site. The areas include a beginner loop, ATV skill area, and advanced skill area surrounded by a picnic and viewing area. This area is fenced off separate from the extensive trail system. It is supported by two clubs in the local area and the town of Montrose. Photos of the Peach Valley OHV Area elements are provided in the exhibit below.

Exhibit 46. - Peach Valley OHV Training Area Images



Source: CHMGS

HONDA OHV & ENVIRONMENTAL LEARNING

Honda Corporation operates an OHV & Environmental Learning Center in Colton, CA that provides the public with OHV and Motorcycle Rider Training in a setting that focuses on land stewardship. The facility is adjacent to their Learning Center Campus that does flat land training with the Motorcycle Safety Foundation. The OHV course incorporates 1/3 mile of terrain that includes five different ecosystems, similar to the closet National Forest.

OPERATING STRUCTURE EXAMPLES

CPW manages the sublease with Reclamation and in that role will be responsible for overseeing any future entity that proposes to develop and operate at the Proposed Recreation Subject Area. CPW has four agreement types that can be used: Concession Agreement, Special Use Activity Agreement, Special Use Agreement and Memorandum of Understandings (MOU). The type of entity and nature/frequency of the activity would guide the determination of what type of agreement would be used. As such, there are likely four types of entities that could be envisioned:

- Private Company
- Quasi-Public Entity
- Public Entity
- Non-Profit

Partnership for Lake County Recreation

During CHMGS's research a potential model for consideration in future planning efforts was identified. The Leadville Motocross Park is managed by the Mt. Elbert Motocross Friends Group that operates under a Recreation Non-Profit called the Partnership for Lake County Recreation. This umbrella nonprofit was established by the Lake County Recreation Department. This "umbrella" nonprofit was developed to serve as an incubator for small nonprofits as they need support for their friends' group.

The mission of PLCR, *"is to support the development of diverse recreational opportunities in Lake County and surrounding areas. We believe these opportunities will result in a healthier, more unified community and an enriched quality of life for residents and visitors alike."*

This entity undertakes the following functions on behalf of the smaller friends' groups.

- PLCR will serve as the flow-through agent for all tax-deductible donations or grants associated with said organization.
- PLCR will provide at least two board members who are available to sign checks within a week.
- PLCR will maintain an accounting of revenues and expenditures with receipts and/or other valid documentation.
- PLCR will assure funds are expended within the intent of the organization's mission.
- PLCR **does not** provide accounting, auditing, grant writing, or grant reporting services.
- PLCR shall carry and maintain Directors' and Officers' insurance only. All liability and special event insurance will be the responsibility of the organization requesting operation under PLCR.
- PLCR shall request that funds be returned if they are used for purposes other than those that were approved in the request for funds. PLCR also reserves the right to take legal action in the case of any illegal or unethical use of grant funds.

Discussions with both Yuma and Kit Carson County identified that while neither has a County Level recreation department, they both have experience in establishing a nonprofit entity for purposes of achieving community development goals. CHMGS notes that what is attractive about this model is that should activities at the Proposed Recreation Subject Area, desire to be developed by various nonprofits (e.g. OHV community, Recreation Aviation, Motocross, etc.) this model would provide an umbrella for small entities to work under and yet have a central entity overseeing them.

Q. MARKET ANALYSIS CONCLUSIONS AND NEXT STEPS

MARKET ANALYSIS CONCLUSIONS

The recreation market analysis process results in an identification of possible recreation uses for the Proposed Recreation Subject Area. The recreation market analysis has concluded with addressing the answers to following questions introduced at the beginning of this report.

5. What is the market opportunity for the specific recreation land use?

- a. The market supply and demand analysis has identified the Proposed Recreation Subject Area as having favorable market demand for a specialized motorized/non-motorized area with support amenities including camping and either a bunkhouse and/or special event venue.

6. How does this recreation land use potentially fit within the subject site?

- a. Preliminary discussions with CPW and BOR as well as individuals who undertake planning for comparable facilities, identified that leveraging the eastern portion of the site above the reservoir to include both North Cove and Wagon Wheel, would be a suitable area for consideration. The seasonality of use would be outside of hunting season with a focus on the summer months of June, July and August.

7. How do the existing facilities support the proposed recreation land uses?

- a. The FONSI identified continued use as a SWA, support for primitive camping and potential use of the northeast corner for reestablishment of a Recreational Airfield. The proposed recreational activities support the existing land use in that their season and potential area of operation would not overlap with the hunting seasons. How the recreational land uses can be planned to provide for the least impact on species would be determined during the Planning Feasibility process.

8. What additional facilities are required to support the proposed recreation land use?

- a. The proposed recreational uses would require the re-establishment of several facilities that are currently shuttered, and which have experienced vandalism. (e.g. Visitor Center, Camping Sites, Camping Shower Facility). Additionally, parking areas as well as adjacent open space would be required for use in the development of a special venue for OHV Safety Training, and a potential Motocross, BMX, or Mt. Bike Course. Additionally, County Roads would need to be incorporated into a future design and would need formal approval for OHV riding.

NEXT STEPS

CHMGS introduced the four phases of Recreation Planning Feasibility in Exhibit 1. The process involves:

5. Market Feasibility
6. Planning Feasibility
7. Financial Feasibility
8. Investment Feasibility

This report fulfills the objectives market feasibility and the Scope of Services requirements for the Recreation Market Analysis. The next critical phase in the process would be identifying if the recreational activities identified are physically possible and legally allowable to occur on the parcel. Additionally, understanding the costs for adapting existing facilities for other uses as well as rehabilitation existing facilities (e.g. campgrounds) for future use needs to be understood.

CHMGS has undertaken preliminary discussions with several landscape architects, engineers and planners to ascertain the potential costs for the next phase of planning. Additionally, CHMGS undertook discussion with COHVCO to understand their grant program and its timing. The following is an overview of a possible Recreation Planning Feasibility steps.

Phase 1: Pre-Work and Site Visit

- **OHV Safety Training Area / Motocross/BMX/ Pump Bike Courses:** Gather existing available data and perform a site visit to get a better understanding of the topography and soil types on the site that are available for construction. Undertake necessary review of existing soil data and take minimal test pit samples
- **Visitor Center/Campground Reestablishment:** Gather existing available data on the facilities and perform a site visit. Do review of facilities and identify impact of vandalism on systems and infrastructure.

Phase 2: Preliminary Site Planning

- **OHV Safety Training Area / Motocross/BMX/ Pump Bike Courses:** High level course maps and renderings of each type of track and support amenities.
- **Visitor Center and Campgrounds:** Adaptive Reuse of Floor Plans and layout # of campsites that would be rehabilitated and decommissioned.

Phase 3: Preliminary Cost Estimate for use in Financial and Investment Analysis.

- **OHV Safety Training/Motocross/BMX/Pump Bike Facilities:** Prepare a preliminary cost estimate for each track that is designed in Phase 2 based on estimated earth work quantities, permanent erosion and sediment control measures and any other site amenities desired by the client.
- **Visitor Center and Campground:** Develop preliminary cost estimate for rehabbing visitor center as either a Bunkhouse or special event venue with catering kitchen and reestablishing campgrounds.

Total estimated cost range for the Planning Feasibility would be between \$40,000 and \$50,000. Discussions with COHVCO indicated that this type of project would be considered a suitable project for submission under their "[Programmatic OHV Project Grants](#)". This type of work would qualify for as: "OHV trail system planning, engineering or design." Interviews indicated that the typical competitive grant range was up to \$100,000 dollars.

Recognizing the grant cycle period, (2020-2021 cycle is open beginning in October of 2019 and will close at the beginning of December of 2019 and awards are made in May of 2020), it may make sense to submit a grant that also includes the other two phases of analysis (e.g. financial and investment analysis). This would therefore provide the South Fork Republican Restoration Coalition a full understanding of the recreation project feasibility by the middle of June of 2020. The scope of work for these two phases would include:

Phase 1: Financial Analysis

1. Update market data on the competitive set to identify demand levels and pricing attributes
2. Identify the positioning of the recreational facilities considering the proposed site designs for courses and facilities.
3. Undertake discussions with County and Coalition to understand possible operational management models
4. Undertake demand analysis to include growth in demand, induced demand for each of the selected operational management models.
5. Identify the proposed recreational site activities performance for a ten-year period.
6. Develop a ten-year financial proforma for the proposed overnight accommodations and supporting facilities. Include a discussion of the basis for the development of revenue and expense projections. Proforma will be developed to the Earnings Before Interest, Taxes and Depreciation (EBITDA).

Phase 2: Investment Analysis

1. Development of deal structure terms based upon analysis findings and cost estimates for sites developed in the Planning Analysis.
2. Undertake analysis based upon various management models to identify the most suitable model for operation. At a minimum the consultant would evaluate the fees to CPW under a concession contract, and what a MOU relationship structure would look like. The terms for the deal structures would be based upon the investments required.

COHVCO indicates that much of the work that is being completed under this recreation market analysis would be beneficial to use in the submittal of a grant for the 2020-2021 cycle under the Programmatic OHV Project Grant.

S. APPENDIX

Experiences/Activities	Organization	Point of Contact	Email	Phone	
Trail/Road					
Horseback riding	Back Country Horsemen Colorado	Tif Rodriguez - Chairmen	lrodri0202@cs.com	970-882-3477	
Mountain biking	International Mountain Bike Association	David Wiens- Executive Director	david.wiens@imba.com	970-275-0485	
	Bosch E- Bikes	Steve Sheffield -	steven.sheffield@us.bosch.com	949-469-8623	
Off-highway Vehicle (OHV)/ATV/Motorcycling	Colorado Off Highway Vehicle Coalition	Scott Jones	scott.jones46@yahoo.com	720-684-6912	
	Great Outdoors Consultants	Drew Stoll	drew@greatoutdoorsconsultants.com		
	California State Parks	Jared Zucker	jared.zucker@parks.ca.gov	916-653-4574	
	USFS	Rick Ellsworth	rellsworth@fs.fed.us		
	Bureau of Land Management - OHV Lead	Jack Placchi	iplacchi@blm.gov	303-239-3832	
	Peach Valley OHV	Julie Johnson - Peach Valley OHV		970-240-5310	
	North Sand Hills OHV	John Markowski-North Sand Hills OHV	jmonkous@blm.gov	970-724-3040	
	Gunnison OHV Park	Kristy Murphy- Gunnison OHV Park	kmurphy@blm.gov	970-642-4955	
	Rio Blanco Economic Development	Katelin Cook	katelin.cook@rbc.us		
		Past Park Staff - Designed OHV Trails	Bob Shade	bobshade2@gmail.com	
	Town of Syracuse, Kansas	Bryan Boyd		620-384-4080	
BMX & Motocross	MX Trak Builders LLC	John Steiner	john@mxtrackbuilders.com		
	Colorado Off Road Championship Series	Brad Smith	brad.smith@cosmicaes.com		
	Local Motocross Club Enthusiast	Mike Forostoski	stowski@gmail.com		
	Lake County, Colorado OHV Park	Amber McGee	amagee@co.lake.co.us	714-486-7486	
Water Based					
Canoeing	Rocky Mountain Canoe Club	Kathryn Mutz	kathryn.mutz@colorado.edu		
Winter					
Snowmobile	Colorado Snowmobile Associations	Scott Jones	scott.jones46@yahoo.com	720-684-6912	
Wildlife					
Hunting/Fishing	Colorado Back Country Hunters & Anglers	Ian DuClos	ian.a.duclos@gmail.com		
	National Wild Turkey Federation (Wray and Lindon Chapters)	Crystal Adams	cdadams@nwtf.net	(308) 737-7227	
	Colorado Mule Deer Foundation	Marty Holmes	marty@muledeer.org	719-221-0732	
Birding	Bird Conservancy of Rockies	Lauren Connell	lauren.connell@birdconservancy.org	970-482-1707 Ext 50	
	Tour Colorado	Carrie Whitley	info@tourcolorado.org	970-946-4614	
Other Outdoor Activities					
RV camping/cabins/tent	Jellystone Campgrounds	Jim Westover	JWestover@leisure-systems.com	(513) 831-2100 ext. 7820	
	Colorado Campground Association	Mary Arlington, Executive Director	mary@maryarlington.com	970-573-0320	
Picnicking	Multiple Parties				
Special Events (Catering, F&B)	Worden Vineyard	Vanness Worden		719-342-1227	
	Red Willow Catering	Delana Gorman	redwillowcatering@gmail.com	970-630-1568	
	Camp Cook Concessions	Deb Hogerhuis	debhogerhuis@gmail.com	719-346-7067	
	Spices on the Green	James Thomas	it4spice@gmail.com	719-342-2613	
	Claremont Inn & Winery	Harry -Owner		719-348-5125	
	Burlington Community Center	Tyson Weishaar	tyson.weishaar@burlingtoncolo.com	(719) 346-8918	
	Old Town Museum	Nikki Wahl , Director	Nikki.wahl@burlingtoncolo.com		
	Airfield	Recreation Advocate	Neil Hutton	neil_hutton55@hotmail.com	719-342-5689
		Recreation Aviation Foundation	Patrick Romano	promano@theraf.org	512-289-1989
	Government Agencies				
General Recreation Destination	Colorado Office of Outdoor Recreation	Luis Benitez	luis.benitez@state.co.us		
Agritourism	Colorado Agritourism Association		director@caatour.org	303-305-3728	
Visitor Information Centers	Burlington & Julesburg Welcome Center	Taren Mulch	taren.mulch@state.co.us		
Government	City of Wray	James DuPue, City Mayor		970.630.4531	
	Kit Carson	Paula Weeks, County Administrator			
	Yuma	Andreas Calhoon, County Administrator		970-332-5796	
Economic Development	East Central Council of Governments & Prairie Development Council	Candace Payne, Executive Director	cpayne@prariedevelopment.com		
State Rural Tourism - Marketing	Colorado Office of Tourism - Rural Destination Development	Elizabeth O Rear	elizabeth.o'rear@state.co.us	303-892-3840	
Colorado Division of Parks and Wildlife	State and Regional Office	Frank McGee	frank.mcgee@state.co.us	719-349-5655	
Republican River Water Conservation District		Rodney Lenz, Deb Daniels, Suzanne Cure	deb.daniel@rrwcd.com , suzanna.cure@rrwcd.com		
Three Rivers Alliance		Dana Shaw	shaw1@plainstel.com		