

2014 Path Forward



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Acknowledgements

Colorado Parks & Wildlife Commissioners

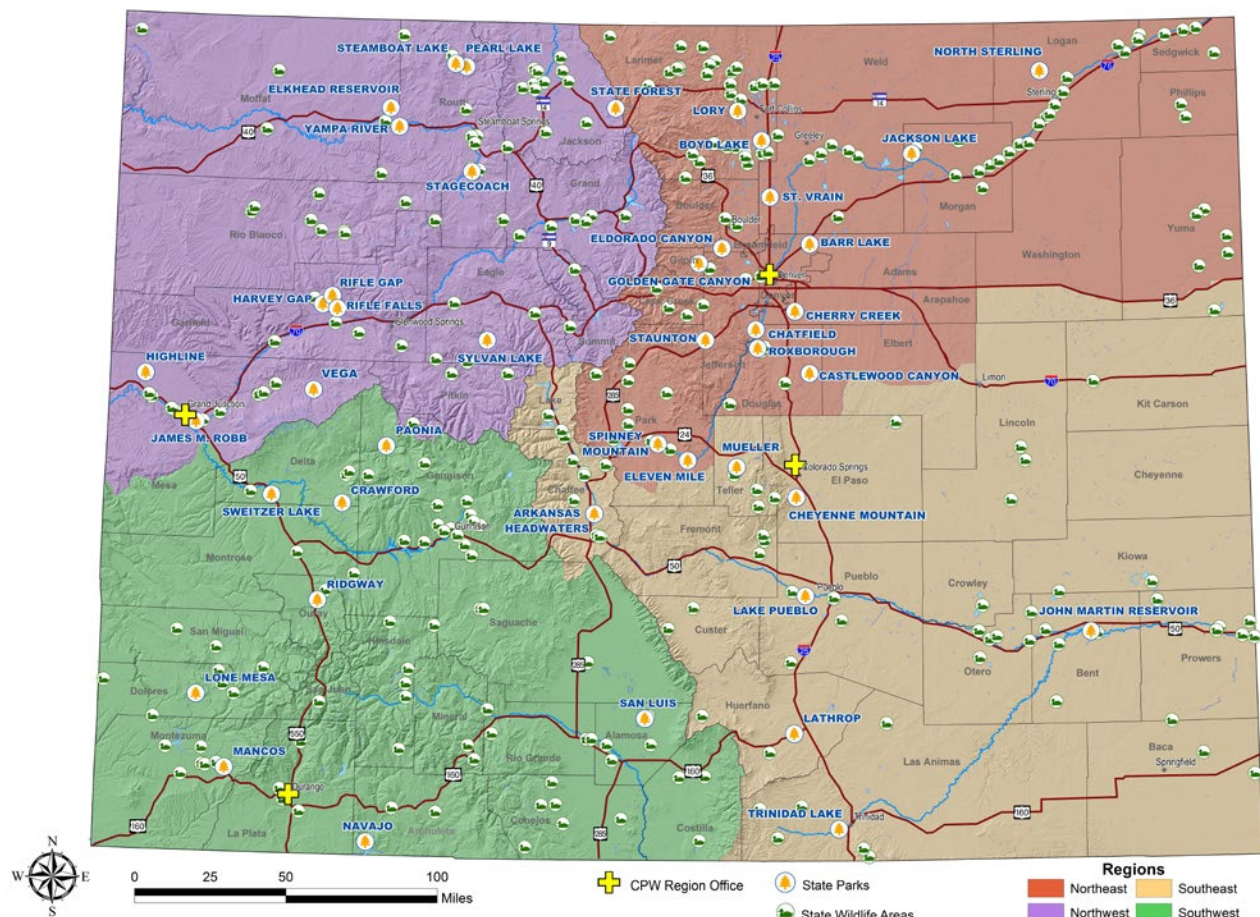
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The Policy and Planning Section of CPW facilitated the development of this plan.

Regional Map of Offices, State Parks, and State Wildlife Areas



Executive Summary

In July 2012, Colorado State Parks and the Colorado Division of Wildlife officially merged to form Colorado Parks and Wildlife (CPW). The 2014 CPW Strategic Plan and Merger Report, referred to as the “*Path Forward*”, is a statutorily required document that reports on the status of the merger and charts a five-year course for the newly combined agency. While many of the more immediate challenges associated with the merger have been dealt with, significant challenges remain. The *Path Forward* is designed to help address some of these issues head on, positioning the agency for future success.

Included in the *Path Forward* are CPW’s overarching mission, vision, and strategic priorities, objectives and desired outcomes that together comprise the strategic plan. These priorities are derived from recently developed strategic plans of the former agencies, as well as CPW Commission-defined priority areas and input from the public and stakeholders. Specific goals that link to these priorities include:

- Recruitment, Retention and Connecting People to the Outdoors. Providing Quality Outdoor Opportunities and Settings
- Habitat Preservation and Enhancement. Support and Facilitate Habitat Protection and Natural Resource Stewardship
- Financial Sustainability. Stabilize and Strengthen Colorado Parks and Wildlife’s Financial Condition

Additionally, the *Path Forward* includes a merger status update (Merger Report) which highlights ongoing or new issues resulting from the merger, as well as several achieved or planned efficiencies and cost savings. This and other information pertaining to implementation of the *Path Forward* will be provided annually to the House Committee on Agriculture, Livestock, and Natural Resources and the Senate Committee on Agriculture, Natural Resources, and Energy.



Introduction and Background

On June 26, 2011, Governor Hickenlooper signed into law Senate Bill 11-208 which merged the Division of Parks and Outdoor Recreation (State Parks) and the Division of Wildlife (DOW) to become Colorado Parks and Wildlife (CPW). The purpose of this merger was threefold— to find efficiencies that benefit both programmatic areas, to ensure greater long-term financial viability, and to improve opportunities for outdoor recreation in Colorado.¹ The legislation recognized that combining divisions would further the shared and mutually-beneficial goals and objectives that were identified in the strategic plans that had recently been developed for both former divisions.

In 2012, House Bill 12-1317 directed CPW to discuss and formulate a strategic plan with a focus on issues, efficiencies and cost savings related to the merger (C.R.S. § 33-9-101 (11) (a)). To address these legislative requirements, the Parks and Wildlife Commission and CPW staff produced a strategic plan and merger report termed the *Path Forward*. This document builds upon the 2010 State Parks and DOW strategic plans, while incorporating shared CPW strategies resulting from the merger. Additionally, the *Path Forward* reports on required merger-related information, seeks alignment with goals of partners such as the Department of Natural Resources and Great Outdoors Colorado, and incorporates meaningful statewide input gathered from the general public and CPW stakeholders. Overall, the *Path Forward* serves as a general report on the merger of Parks and Wildlife while also establishing a shared vision for the future of CPW.

Even before the merger, the two former divisions shared similar values and objectives. From 1963-1972, the divisions were part of a combined department of Game, Fish and Parks. While they were designated as two separate divisions within the Department of Natural Resources in 1972, elements of Colorado State Parks and DOW have worked closely together over the years. Today, there are more commonalities between the two former divisions than there are differences. The existing 2010 strategic plans for both agencies highlighted the importance of conservation and management of natural resources and the importance of outdoor recreation. As a merged agency, CPW has an opportunity to provide a multitude of essential functions for the state of Colorado and its visitors in an even more effective manner.



¹ Colorado Parks and Wildlife. 2011. "Merger Implementation Plan". Page 3.

The importance of CPW's mission is clearly supported by the economic and recreational outcomes that result from CPW services. Hunting and fishing bring an estimated annual economic impact of \$1.8 billion (including secondary impacts) and support an estimated 21,000 jobs in Colorado.² Wildlife watching brings an estimated annual economic impact of \$1.2 billion (including secondary impacts) and supports an estimated 12,800 jobs in Colorado.³ Outdoor recreation at state parks adds about \$1.7 billion per year to Colorado's economy, including secondary impacts.⁴ CPW provides outdoor recreation, hunting and fishing opportunities annually for more than 2.3 million state park visitors, 284,000 licensed hunters and 733,000 licensed anglers. Almost 1.5 million Colorado residents over the age of 15 participate in some form of wildlife-watching.⁵ About 45% of Coloradans report that they visited state parks regularly⁶ and recent studies indicate that roughly 18% of Coloradans are anglers and almost 5% of Coloradans hunt.⁷ Additionally, over 80% of all Coloradans participate in trail- or road-based recreation opportunities (e.g. walking, hiking, jogging, bicycling, off-highway vehicle use, etc.) and over 50% participate in water-based recreation such as fishing, boating, water skiing, whitewater rafting, etc.⁸ Overall, activities supported by CPW result in over 24 million recreation days per year in Colorado.

Colorado Parks and Wildlife clearly benefits the state and its citizens. However, population growth, forest health issues, non-native species, and numerous other social and natural factors are constantly presenting new challenges to the successful operations of park and wildlife programs. CPW is also faced with financial challenges such as shortfalls in income from the sale of hunting and fishing licenses and the loss of general fund for parks. The *Path Forward* will report on strides that CPW has taken to address these challenges, as well as to provide a general vision for the future activities of Colorado Parks and Wildlife.



Merging State Parks and DOW “represents an historic proposal with wide-reaching ramifications. Colorado’s outdoor resources form the very fabric of our state’s self-image. The role that Colorado Parks and Wildlife will play in the quality of life and environment is critical to the citizens we serve.”

- CPW Merger Implementation Plan

² BBC Research and Consulting. 2008. The Economic Impacts of Hunting, Fishing and Wildlife Watching in Colorado.

³ Ibid.

⁴ Corona Research. 2009. Colorado State Parks Marketing Assessment. Visitor Expenditure Analysis, 2008-2009.

⁵ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

⁶ Corona Research. 2008. Colorado State Parks Marketing Assessment Public Survey.

⁷ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

⁸ 2013 SCORP Public Survey

Key Steps in the Planning Process

Development of the *Path Forward* was a collaborative effort and is reflective of the guidance and input provided by the Colorado Parks and Wildlife Commission (Commission), the Department of Natural Resources, CPW stakeholders and the general public.

Special effort was made to develop the *Path Forward* building upon a foundation of recently-developed documents while also adhering to a conservative budget and tight timeline. Review and synthesis of key components of strategic plans from the two prior divisions, review and synthesis of other relevant statewide and agency planning efforts, and direct input from stakeholders and the general public all played an important role in the development of this strategic plan and merger report.

Guiding Resources

CPW referred to a number of plans, reports and other documents to help inform development of the *Path Forward*. This was to ensure that the *Path Forward* was based on the best available information, as well as to ensure that CPW's direction aligned with statewide and department-wide direction and the strategies of key partners. A sampling of some of the internal documents that were reviewed early in the strategic planning process included: State Parks and Division of Wildlife strategic plans (2010); CPW Merger Implementation Plan (2012); and Commission Strategic Priorities (2012).

Soon after State Parks and the DOW officially merged in July 1, 2011, the Colorado Parks and Wildlife Leadership Team developed 20 overarching Guiding Principles to provide a framework and “organizational philosophy” for establishing CPW's newly-combined programs and regions, and to help chart the course for further organizational restructuring. Special emphasis was placed on the importance of concepts like partnerships, improving funding, fostering collaboration, and pushing decisions to staff located closest to the land, community, and customer wherever possible. These guiding principles are reflected in many of the objectives and strategies that are included in the *Path Forward* Strategic Plan.



Other planning efforts with a statewide focus that proved particularly relevant included: the 2013 Department of Natural Resources Strategic Operational Plan; the Office of Economic Development and International Trade's 2011 Colorado Blueprint; the 2008 Statewide Comprehensive Outdoor Recreation Plan (SCORP); and Colorado's Comprehensive Wildlife Conservation Strategy (2006).

The 2010 Great Outdoors Colorado Strategic Plan and state and federal policies and directives related to Pittman-Robertson, Dingell-Johnson, Land and Water Conservation Fund, Recreation Trails, etc. were also evaluated to ensure that the *Path Forward* outlined strategic priorities that were consistent with other partner efforts and state and federal legislative direction.

Colorado Parks & Wildlife Commission

One of the Commission's central functions is supporting CPW's mission and its responsibilities to its customers and constituents. The Commission also provides overarching vision, leadership and oversight to the agency via policy direction. The *Path Forward* is a key tool in this effort.

The Commission's 11 voting members were provided opportunities to participate in the formulation of the *Path Forward* at key junctures. The Commission was particularly involved in providing suggestions and guidance related to the planning process, shaping the architecture of the plan, as well as reviewing and approving the draft and final strategic plan.

In early 2012, the newly-merged Commission identified three core priorities that served as important themes looking ahead to the future. These include financial sustainability, recruitment and retention, and habitat preservation/enhancement. These priorities have remained as standing Commission agenda items and as a combined set of priorities, they have components that are relevant to state parks, wildlife and outdoor recreation. These Commission priorities are woven within the *Path Forward's* overarching priorities.

Special emphasis was placed on the importance of concepts like partnerships, improving funding, fostering collaboration, and pushing decisions to staff located closest to the land, community, and customer wherever possible.



Public Input

Public input was an important part of the planning process. The general public and CPW stakeholders were informed about the process and consulted to gather feedback that was used to guide the development of the *Path Forward*. Key outdoor recreation and wildlife stakeholder groups were sent a letter introducing the process in May 2013. The general public were informed of the *Path Forward* planning process via social media (e.g., CPW Facebook page), which resulted in over 9,000 views, and through the CPW website. Almost 80,000 direct e-mails were sent to CPW constituents announcing the process and soliciting input.

CPW also provided opportunities for direct public and stakeholder comment through multiple Commission meetings and other established stakeholder venues, such as the Colorado Sportsmen's Roundtable in April 2013, the State Trails Committee in September 2013 and the Agricultural Roundtable in October 2013. CPW also made an effort to reach out and to hear from the general public around Colorado through four open house meetings across the state, as well as a statewide "telephone town hall" meeting to solicit ideas and suggestions. The telephone town hall meeting resulted in an active discussion with over 550 participants.

Input shared by the public provided a basis for developing strategic plan objectives and desired outcomes, as well as assuring that the *Path Forward* was inclusive of all parts of CPW's statutory mission.

External Considerations

Population Growth and Demographic Shifts

Between 2000 and 2010, Colorado's population increased by 16.9% and total population grew to just over 5.1 million (US Census Bureau, 2012). State forecasters project that Colorado's population will exceed 7.1 million by 2040, with greatest growth rates projected in or near the Front Range and in mountain counties. This projected population growth will present challenges to CPW such as stress to wildlife habitats, trails and demand for resources, but may also present opportunities. While traditional customer communities remain very important, new opportunity markets may allow CPW to reach more Colorado citizens. Important changes in Colorado's population that may affect CPW are:

- Continued rapid growth in Colorado's population, especially along the Front Range and other population centers in Colorado, with generally slow or even stagnant growth in other areas. CPW's opportunities and challenges in serving an "urbanized" population will increase in the future.
- A rapidly increasing portion of the population over 65, involving different expectations from CPW.
- The growth rate of the Hispanic population in Colorado is significantly greater than other portions of the population, which in turn requires different outreach strategies and opportunities to generate new customers.
- In-migration from other states, primarily by young adults and families, who move to Colorado due to an expanding job market, yet who are not familiar with CPW.

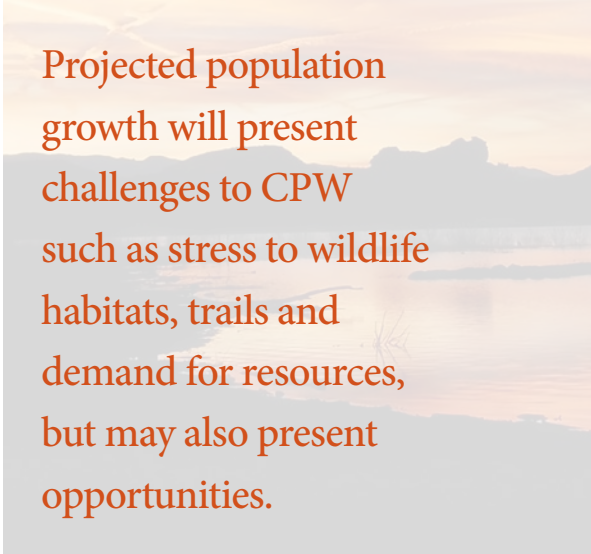
These opportunity markets will increase in Colorado over the next 20 years. Appendix A presents a more in-depth look at the customer and market trends that will affect CPW's future opportunities to retain current customers and to engage a broader base of users. The primary challenges facing CPW are to assure that current strategies effectively engage its existing, but changing, customer base and to generate new strategies that engage new users.

Environmental Challenges

Colorado continues to face significant environmental issues. Drought, insect outbreaks, invasive species, habitat changes and wildfire have intensified over the past decade or more, resulting in greater challenges and costs to CPW. Drought directly affects water supply and fluctuations, which in turn affect boating, fishing, park use and aquatic species conservation. Wildlife habitats are affected by invasive species, insect infestations or wildfires, thereby impacting hunting, fishing, wildlife viewing or species conservation efforts. Wildfires or insect outbreaks can dramatically change recreation opportunities at parks or on trails around Colorado. Additionally, with increasing urban populations, wildlife and human interactions are expected to increase.

Public Expectations

Understanding public expectations, now and in the future, can provide CPW with the knowledge to anticipate how to effectively satisfy customer needs. Recent public survey data provide an indicator of the expectations that the public has for CPW. Clean, safe, well-managed state parks are important not only to park visitors, but also to the general public. Park users also place a high priority on maintaining quality facilities with some level of balance for new development. Trails continue to be a priority for Coloradans, with increased interest in regional connecting trail networks. Big game hunters want both quality hunts and the ability to hunt each year, and, in general, hunters enjoy hunting as an experience even if not successful. Anglers are generally satisfied with their fishing experiences in Colorado and they value diverse and convenient fishing opportunities. Wildlife viewers value diverse natural communities and access to public lands.



Projected population growth will present challenges to CPW such as stress to wildlife habitats, trails and demand for resources, but may also present opportunities.

Relevant Agency Considerations

Financial Challenges

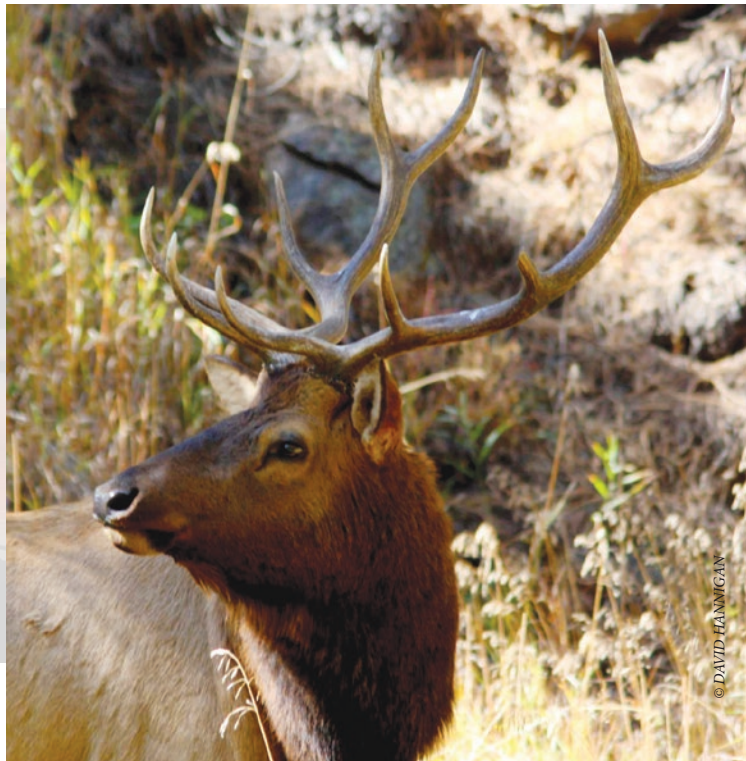
CPW is faced with several recent financial challenges. General Fund support for State Parks from the Colorado Legislature was completely eliminated in 2011; in the early 1990's General Fund support of State Parks exceeded 30 percent of the agency operating budget. For Wildlife programs, CPW must ensure the long-term viability of the main Wildlife Cash Fund, which is supported by the sale of hunting and fishing licenses. The health of this fund is related to a long-term decline in the number of people hunting across the United States. Hunting revenues comprise a majority of wildlife revenues. Potential reductions in hunting license sales have the potential to significantly affect all of CPW's wildlife programs.



CPW operational costs for wildlife already exceed revenue, and financial projections estimate that this deficit will continue without substantial adjustments, including significant budget cuts. Park operational costs are projected to exceed projected revenues within three years. To address this, CPW leadership, working with DNR and the Commission, are developing financial plans that will restore agency financial sustainability. Failure to rectify this financial structural imbalance will jeopardize CPW's ability to meet long-term operational and capital investment needs, for parks, wildlife and outdoor recreation program operations.

CPW User Trends

CPW's existing customer base is changing. Parks visitation generally is increasing slightly faster than Colorado's population growth over the last 10 years, with indications that this trend is likely to continue. The number of hunters and anglers in Colorado has not kept pace with population growth, with the number of hunters declining most dramatically. The number of anglers as a portion of the Colorado population continues to shrink, but there



has been a positive trend in fishing participation over the past 10 years. Given that hunting and fishing licenses represent about 40 percent of total CPW revenues, these trends are of great importance. In addition, CPW's current hunting and angling populations are aging. This trend, also seen in the general population of Colorado, has the potential to change the license purchase patterns and demands of current hunters, anglers and park users. It is also noteworthy that the number of people participating in wildlife watching, both near and away from home, has steadily increased since 2001.⁹ Demographic patterns in the statewide population discussed above and in Appendix A suggest several "opportunity" cohorts that could be primary targets of CPW's hunting, angling and outdoor recreation recruitment efforts. By engaging a broadening group of individuals who see benefit from resources we manage, CPW can ensure its ability to continue to protect and manage resources in the future.

⁹ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

Path Forward Strategic Plan

CPW Mission Statement

“To perpetuate the wildlife resources of the state, provide a quality state parks system, and provide enjoyable and sustainable outdoor recreation opportunities that educate and inspire current and future generations to serve as active stewards of Colorado’s natural resources.”

(C.R.S. § 33-9-101 (12) (b)).

CPW Vision Statement

“Colorado sustains a natural abundance of fish and wildlife, and high quality lands and waters. These resources give residents and visitors opportunities to recreate in the outdoors. Agency employees and their partners work together to protect the public trust and provide outstanding customer service through recreational programs, amenities, and services.”

Inspire current and future generations to serve as
active stewards of Colorado’s natural resources



Strategic Priorities

The following strategic priorities are intended to position CPW for future success in accomplishing its diverse mission. With the merger, the mission of the newly created agency includes multiple components that are generally complementary but may, at times, be a source of tension. In implementing the following strategic priorities, CPW aims to be inclusive of all components of its mission while recognizing the importance of seeking balance between its diverse statutory requirements. Going forward as a merged agency, CPW will seek to implement its mission while minimizing tensions and pursuing agreement between these components wherever possible.

- 1 | Recruitment, Retention and Connecting People to the Outdoors:
Provide Quality Outdoor Opportunities and Settings**
- 2 | Habitat Preservation and Enhancement: Support and Facilitate Habitat
Protection and Natural Resource Stewardship**
- 3 | Financial Sustainability: Stabilize and Strengthen Colorado Parks and
Wildlife's Financial Condition**



1 Recruitment, Retention and Connecting People to the Outdoors: Provide Quality Outdoor Opportunities and Settings

CPW is naturally positioned to be a leader in providing opportunities and settings for children, families and friends to recreate and connect with the outdoors, promote healthy lifestyles, and learn more about the natural world. CPW also believes that broader participation in outdoor recreation is needed to



attract a new generation of park and wildlife advocates, and to sustain many of the wildlife, park and outdoor recreation management and programmatic activities that CPW oversees.

CPW currently relies heavily on revenue from user fees such as the sale of hunting and fishing licenses, as well as park passes, camping fees and OHV, snowmobile and boat registrations. CPW recognizes that more must be done to recruit and retain hunters and anglers, as well as to attract additional park visitors and to provide adequate opportunities for trail users and water sport enthusiasts. Additionally, providing opportunities for citizens and visitors to volunteer with CPW will further connect people to the outdoors and CPW's comprehensive mission. Efforts to recruit, retain and connect more people to the outdoors must also be balanced with other strategic priorities to successfully implement CPW's diverse mission.

- **Objective 1:** Promote public awareness of and participation in Colorado's outdoor and wildlife recreation opportunities.
- **Objective 2:** Provide a variety of hunting, fishing, and trapping opportunities on public and private lands, and provide watchable wildlife opportunities on public lands.
- **Objective 3:** Maintain or increase current levels of hunter, angler and park user satisfaction and participation.
- **Objective 4:** Operate, maintain and enhance park resources and services to meet visitor needs and enrich the Colorado State Parks experience.
- **Objective 5:** Promote participation by youth and families in hunting, fishing, camping, parks visitation and all outdoor recreation activities by providing accessible and meaningful recreational and educational opportunities.
- **Objective 6:** Continue to direct leadership, support, and resources to promote and establish a statewide interconnected trails network.
- **Objective 7:** Effectively engage volunteers by promoting and increasing meaningful opportunities that enhance CPW operations and encourage active stewardship.
- **Objective 8:** Seek adequate resources to meet current and future demand for outdoor recreational opportunities.

Desired Outcomes

- Increased participation in hunting, fishing, and park visitation.
- Colorado's residents and visitors have a greater awareness and appreciation for hunting, fishing, camping and other outdoor recreation opportunities offered by Colorado Parks and Wildlife.
- Loyalty and satisfaction of our current customers is maintained and increased.
- A new generation of wildlife advocates, park users and outdoor enthusiasts are engaged in outdoor recreation.
- The agency plays a lead role in growing and nurturing broader support among the public for wildlife, state parks, sustainable trails and outdoor recreation.
- Colorado's residents and visitors have increased involvement as active stewards of Colorado's natural resources through meaningful volunteer opportunities.



Broader participation in outdoor recreation is needed to attract a new generation of park and wildlife advocates.

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2 | Habitat Preservation and Enhancement: Support and Facilitate Habitat Protection and Natural Resource Stewardship

CPW manages wildlife and state lands for the benefit of the public. To be good stewards for the public trust, CPW recognizes the critical role of habitat preservation, habitat enhancement and resource stewardship. Colorado's abundant outdoor recreation opportunities, including hunting, fishing, trail use, water sports, wildlife viewing and camping, are directly linked to the quality and diversity of our natural resources. Residents of Colorado understand this important point. Of Colorado voters responding to the 2012 *Conservation in the West*¹⁰ poll administered by Colorado College, 86% said that even with state budget problems, the state should still find money to protect and maintain Colorado's land, water and wildlife; 82% said the same about state parks.

Whether it be hunting a bull elk in the Weminuche wilderness, catching a smallmouth bass at Lake Pueblo State Park, or hiking among the pines of Staunton State Park, opportunities like these rely on preserving, protecting, and proactively managing our natural resources. In light of diminishing financial resources amidst increasing public demands, this is easier said than done. It requires that CPW utilize the best available science, employ models for efficient and effective resource planning, and conduct sound on-the-ground management.

Colorado Parks and Wildlife must also continue to demonstrate leadership in habitat protection and natural resource stewardship not only within our parks and state wildlife areas, but also in concert with our private landowner and public land management partners. These efforts will better protect and enhance Colorado's natural values while also providing a wide range of sustainable recreational opportunities.

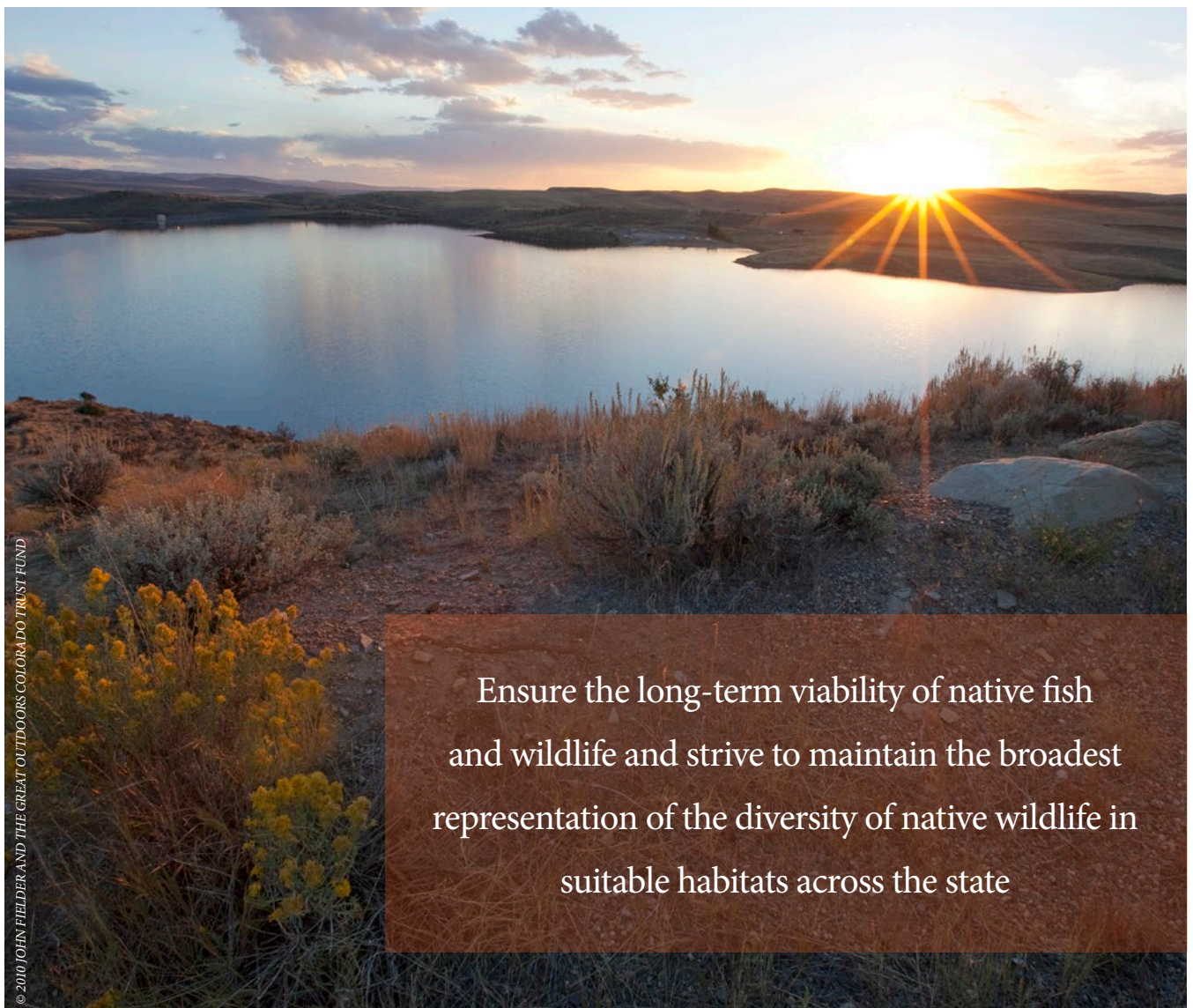


- **Objective 1:** Protect, restore, and enhance habitat for fish and wildlife.
- **Objective 2:** Cooperate with other agencies and conservation organizations to collect, share, and disseminate natural resource information and to coordinate resource management.
- **Objective 3:** Promote the stewardship of properties managed by CPW through proactive management and sound planning to minimize impacts and keep resources intact for future generations.
- **Objective 4:** Ensure the long-term viability of native fish and wildlife and strive to maintain the broadest representation of the diversity of native wildlife in suitable habitats across the state. Proactively prevent and control non-native species and fish and wildlife diseases.
- **Objective 5:** Maintain healthy and viable game and sport fish populations sufficient to meet the demand for hunting, fishing and trapping, while minimizing landowner conflicts.
- **Objective 6:** Provide meaningful interpretive and environmental education opportunities that expand public awareness, appreciation and stewardship of Colorado's natural values.

¹⁰Colorado College. 2012. State of the Rockies. 2012 Conservation in the West Survey. The 2012 Survey of the Attitudes of Voters in Six Western States.

Desired Outcomes

- Quality fish and wildlife habitat is conserved, maintained, and restored.
- Colorado citizens are satisfied with the diversity and health of the state's native fish and wildlife, and with the number and variety of fish and game available for harvest.
- CPW is regarded as a leader in natural resource stewardship and a comprehensive source for fish and wildlife information.
- State parks and other CPW properties are managed sustainably for the long-term benefit of Colorado citizens and visitors.
- Colorado's fish and wildlife are conserved adequately to minimize the need for federal listings under the Endangered Species Act.



3 | Financial Sustainability: Stabilize and Strengthen Colorado Parks and Wildlife's Financial Condition

The recent economic recession, projected budget shortfalls, and instability of federal and other funding sources have required that CPW place a heightened emphasis on long-term financial sustainability. In order to position itself for success and effectively carry out its mission in the future, CPW must continue to implement creative approaches to strengthen its financial condition. This means identifying additional operational efficiencies, using cost-saving measures, employing innovative technologies, seeking alternative sources of revenue and, if necessary, reconfiguring or divesting assets. In addition, CPW should continue to devote financial and staffing resources to the areas of greatest need and public benefit, and avoid investing in infrastructure or initiatives that do not align with the agency's mission or lead to undue financial burdens.

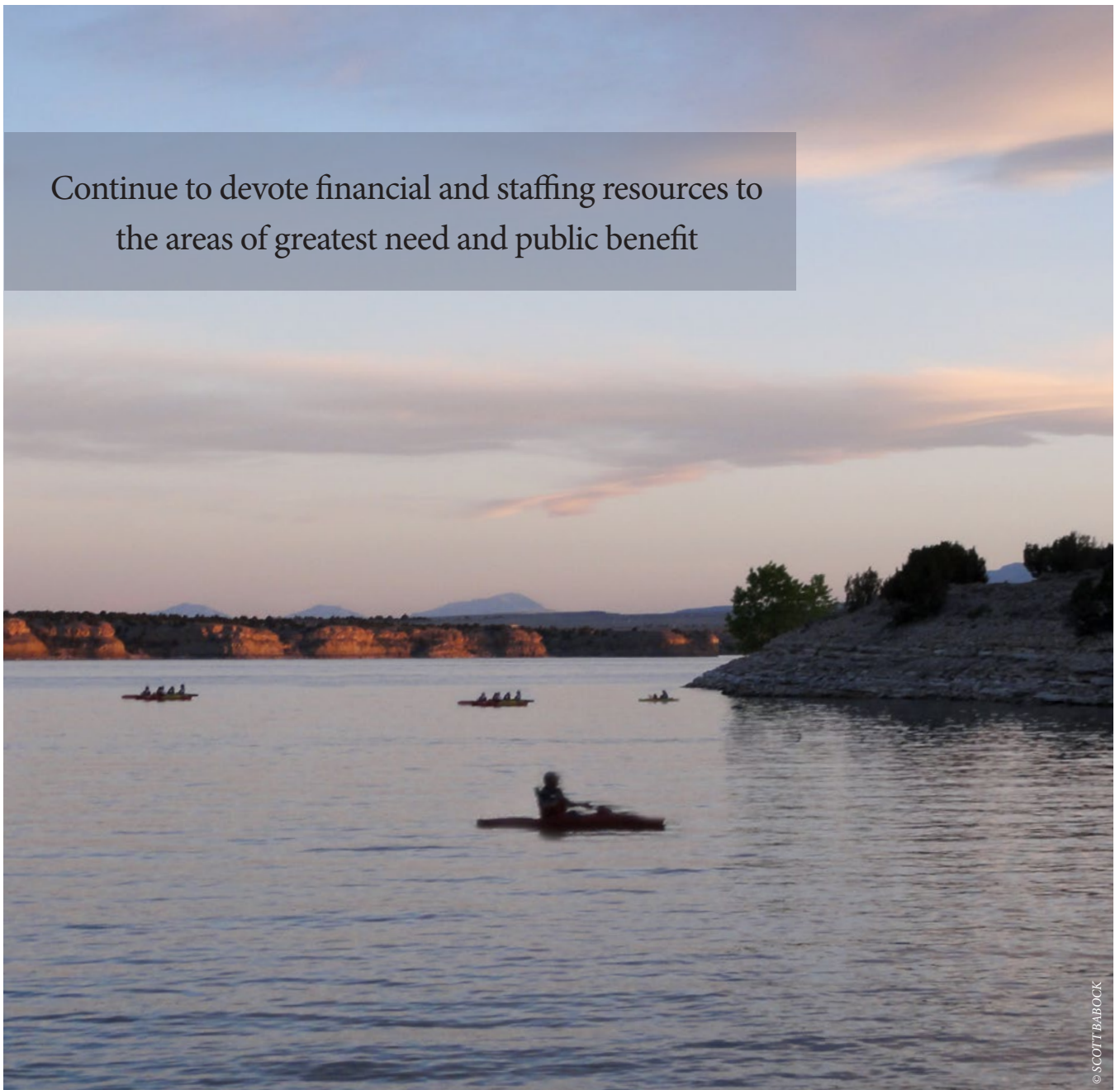


- **Objective 1:** Increase funding as needed to meet legal mandates and public expectations.
- **Objective 2:** Identify efficiencies and eliminate unnecessary costs.
- **Objective 3:** Develop strategies to enhance existing and secure new and more sustainable funding sources.
- **Objective 4:** Effectively market and expand awareness of and support for Colorado Parks and Wildlife.
- **Objective 5:** Maintain accountability and transparency in all financial decisions.

Desired Outcomes

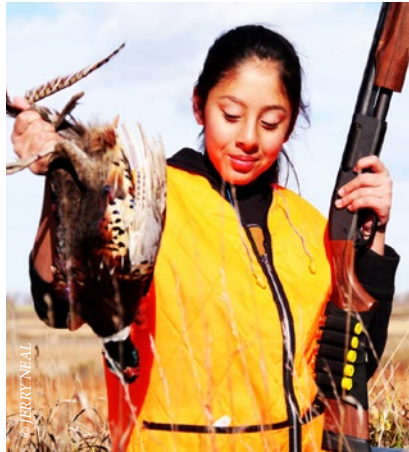
- CPW can more effectively serve the public and manage fish, wildlife, parks and trails by meeting current and long-term financial needs.
- CPW is recognized as an effective and efficient state agency with a high level of customer satisfaction.
- Increased awareness about the agency's long-term funding needs among the public that enjoys or benefits from wildlife, parks or trails leads to greater support for these values.

Continue to devote financial and staffing resources to the areas of greatest need and public benefit



Merger Report

A primary goal of the merger of State Parks and the Division of Wildlife was to create more efficient and effective services through economies of scale and use of shared resources while creating a more comprehensive outdoor recreation mission for the agency. Since the merger legislation of 2011 and 2012, a great deal of work has been undertaken to plan and implement the merger.



A review of activities that preceded the merger provides valuable historical context. Prior to the merger, the former Division of Wildlife implemented a series of budget reductions to address declining revenues, including one-time reductions in capital expenditures of \$15.7 million and \$11.5 million made in FY 09-10 and FY 10-11, respectively.

Also, State Parks took aggressive steps to address reductions in revenue several years prior to the merger. As recently as FY 08-09, State Parks received \$6.7 million in General Funds, but by FY 11-12, this had dropped to zero. To adapt, State Parks took the following steps: eliminated 5% of its permanent positions and 10% of its seasonal employees; increased fees for daily passes, camping reservations and boat registration; significantly reduced administrative costs; cut services at Bonny Lake State Park during the winter months; and redirected certain funds to cover operating shortfalls.

From July 2011 through February 2012, with the creation of Colorado Parks and Wildlife, the agency developed a Merger Implementation Plan which was approved by the Parks and Wildlife Commission on February 9, 2012 and delivered to the Colorado legislature in April of 2012. Since then, CPW has proceeded to implement the merger plan, and will continue to work to create an efficient and comprehensive outdoor recreation agency.

This section provides information concerning the merger that is required in C.R.S. § 33-9-101(11)(a) and (b), including realized and planned efficiencies and cost savings, and other effects of the merger.

Division Summary Facts

Managing Lands with Partners

Both the former State Parks and DOW had a history of leveraging funding and resources through partnerships, leases and other approaches to maximize outdoor recreation opportunities and habitat protection. As a merged agency, CPW has further magnified its recreational and conservation impact by using both perpetual and long-term leases and access easements and other agreements with landowners to provide recreational opportunities and crucial wildlife habitat. This is a very effective and efficient use of limited funds aimed at maximizing recreational opportunities for hunters, anglers, campers and other types of recreation. (See table at right)

CPW Land and Water Acres Ownership and Management as of 7/1/2013	
State Parks Properties	Acres
42 State Parks	220,437
23 Recreational/Water-based Parks	
16 Resource-based Parks	
3 River Corridor Parks	
Ownership and Management Partnerships	
Colorado State Land Board	36.2%
Colorado Parks and Wildlife (Fee Title)	23.5%
U.S. Army Corps of Engineers	11.5%
U.S. Bureau of Reclamation	11.3%
Local Governments	8.0%
Irrigation Companies	6.4%
U.S. Forest Service/Bureau of Land Management	2.6%
Other	0.5%
Conservation Easements in State Parks (Acres)	4,551
Wildlife Properties, 3rd Party Conservation Easements and Public Access Areas	Acres
345 State Wildlife Areas	672,044
76 State Habitat Areas	155,455
19 State Fish Hatcheries	
State Land Board Public Access	484,471
State Land Board Total Surface Control (CPW)	12,361
Ownership and Management Partnerships	
Colorado Parks and Wildlife (Fee Title)	37%
Leasehold Interests (excluding SLB leases)	18%
Conservation Easement	18%
3rd Party Conservation Easement	18%
Public Access/ROW Easement	9%
Conservation Easements in Wildlife Areas	Acres
(Held by 3rd parties; Funded by CPW)	189,432
Walk-in Hunting Access Programs	Acres
Small Game Walk-In Access (WIA) acres	250,000
Big Game Walk-In Access (BGAP) acres	147,013
Ranching for Wildlife	1,200,000

Getting People Outdoors

Collectively, a merged Colorado Parks and Wildlife agency is better equipped to provide comprehensive outdoor recreation opportunities to residents and visitors. Each year people go fishing, hunting, camping, boating, hiking, biking, wildlife viewing, bird watching or other activities, accumulating millions of activities days of outdoor recreation. Much of this occurs on lands and waters managed by CPW, or thanks to services provided by CPW.

Visitation and Participation, FY 12-13			
State Park Visitation			11,501,520
Percent of Colorado residents who visited State Parks			46% ¹
Most popular activities when visiting a state park			Hiking, Fishing, Camping, Boating
Total Hunting and Fishing License Sales			1,506,686
	Hunting Licenses	Fishing Licenses	Combination
Resident	361,387	634,126	74,338
Non-Resident	106,032	330,803	-
<small>¹ Source: 2008 State Parks Market Assessment Study (Corona Research)</small>			

Hunters, anglers, park visitors and wildlife watchers collectively contribute billions of dollars to the Colorado economy, which can be especially important to rural economies. The total economic impact from CPW customers is second only to the ski industry within the tourism sector of Colorado’s economy.

Residents and visitors also demand meaningful opportunities to engage in CPW’s mission and outdoor recreation through volunteerism. In calendar year 2012, over 6,500 individuals volunteered 337,235 hours of service to CPW. This represents a value of \$7,466,383 that volunteers chose to donate in 2012, greatly expanding CPW’s reach and mission in local communities throughout the state.

Realized Savings and Efficiencies of Merged Division Resources

In order to achieve more efficient and effective services through economies of scale and use of shared resources, CPW has taken several steps since the merger. Below is a list of realized savings and efficiencies that have already resulted from the merger:

- CPW eliminated 22 permanent positions, resulting in annual savings of \$1.7 million beginning in FY 13-14.
- As a result of HB12-1317, the Parks and Wildlife Commission was reorganized in 2012 to reduce its membership by three commissioners, from fourteen to eleven. This yields further annual savings in per diem, lodging, mileage, printing and associated costs. Merging the Parks Board and the Wildlife Commission also reduced the number of annual meetings from an average of 18 separate Board and Commission meetings to at most 12 meetings each year. Additionally, legislation has provided more discretion for the CPW Commission to work in a more efficient and cost-effective manner than was previously allowed.
- Prior to the merger, the uniforms in use by over 200 commissioned law enforcement officers in the two agencies were not identical. New uniform standards have been adopted, including clothing, patches, hats, and badges. In some cases this required replacement of existing uniform items. The selection of the new



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Realized Savings and Efficiencies of Merged Division Resources (continued)

uniform standards, and the implementation of the new standards, was approached with the intent of minimizing costs. For example, shirts were re-patched instead of being replaced and the new standards were based on existing uniforms to minimize the degree of replacement required. Other minor start-up costs include updating signs at major administrative offices, and updating websites and selected publications.

While one-time transition costs for uniform components, badges and patches amounted to about \$225,000, CPW has minimized to the extent possible transitional expenses resulting from the merger.



- Both the State Parks and the Division of Wildlife, and their respective boards, had distinct rule-making procedures. The merger required that these rule-making processes be reconciled and integrated. During 2012, CPW combined the regulatory processes of the two previous agencies into one process managed by a single Regulations Manager. A consistent and reliable review schedule that allows for regular and timely regulatory changes has been established. In January 2013, the Parks and Wildlife Commission streamlined and combined the two divisions' former rule-making policies. The new process features a reduction from a three-step to a two-step process for most regulatory changes. This includes consent agenda approval for non-controversial and administrative issues and an extension of the former wildlife citizen petition process to parks issues. The new Commission process meets or exceeds all Administrative Procedure Act requirements, while streamlining the regulatory process and creating a more efficient system.
- CPW streamlined the Impact Assistance Grant program in 2013. CPW pays impact assistance grants to counties to offset the taxes that would have been paid if the land remained in private sector ownership. Before the merger of Parks and Wildlife, the counties had to apply to Parks separately from Wildlife. The process has now been merged, with a single, new, individualized web grant application page for each county that has most fields pre-populated to make the application process for parks and wildlife grants as efficient for the counties as possible.
- To effectively address invasive aquatic nuisance species (ANS), CPW has built on the framework of the strong ANS strategies of the former divisions and quickly and efficiently created a single ANS program. Training, administration and other functions are now combined into a cohesive program.

Planned Savings and Efficiencies of Merged Division Resources



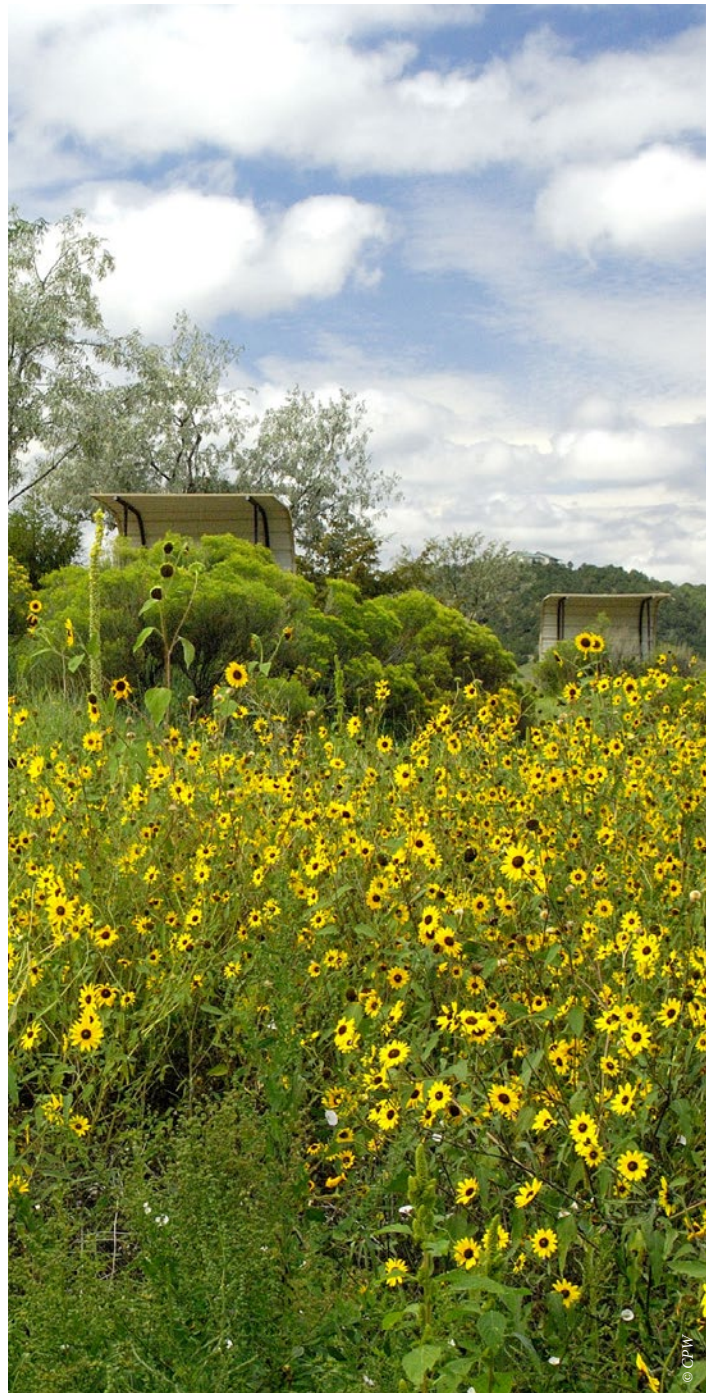
CPW is actively pursuing plans and opportunities for additional cost savings and efficiencies as a result of the merger. These efforts are underway and will continue to be a focus in the coming years.

- Currently, CPW is reviewing all policies and directives of the former Parks and Wildlife divisions for integration into a single set of policies and directives that reflect the requirements of the new agency. Some directives, such as the Uniform, Media Relations, Colorado Open Records Act and Land Use Commenting have already been completed. Division staff is currently analyzing all others for overlap, duplication, relevance and the potential for modification to better serve the needs of the new agency.
- CPW is analyzing opportunities to consolidate facilities to eliminate duplication while best serving customers.

- An 'Integrated Parks and Wildlife System' for managing the sale of licenses, permits, and registrations will improve customer service (e.g., one-stop shopping) while reducing costs. Prior to the merger, State Parks was planning to invest a considerable sum to implement its own Point of Sale System; such a system was already in place at the DOW. That system is being replaced and will handle the sale of both parks and wildlife products. Due to the increased volume of transactions, the cost per transaction for wildlife products will also be reduced from what it would otherwise be. This system will also provide better customer information for CPW, which will provide more opportunities for public outreach.

- Given the complexities of the financial systems of the two former divisions, the merger of the two financial accounting and budget sections is focused on a variety of efficiencies: devising a system for allocating funds from different sources; tracking the use and expenditure of funds from different sources; maintaining a strong internal control environment; complying with statutory direction and requirements to maintain the distinct integrity of funding sources; performing and providing oversight activities; and fulfilling reporting responsibilities. Considerable progress has already been made, with final steps in the implementation taking place in fiscal years 13-14 and 14-15.

- A targeted assessment is planned of CPW properties (Parks and State Wildlife Areas). This will include assessments of properties that could make better parks vs. wildlife areas, sites that could house offices, etc.



- Prior to the merger, each agency maintained a number of like-kind databases (such as law enforcement violation databases, budget databases, etc.). Over time these will be integrated, which should result in reduced maintenance costs.

- Prior to the merger, each agency had its own GIS system. Over time these will be integrated, resulting in improved species management, natural resource/habitat management and natural areas work.

- Cost sharing of fleet and heavy equipment offers opportunities for cost savings, particularly in areas where parks and state wildlife areas are nearby and each utilize heavy equipment. Efforts to share vehicles and equipment are already underway and will ramp up in coming years.

- A new, merged web site and social media outreach are being developed using current best practices to create a more effective communications platform for outreach and better information service for customers.

Planned Savings and Efficiencies of Merged Division Resources (continued)

- The former Divisions' two successful volunteer programs are being integrated into a coordinated, effective approach. As administration, recruitment and management of volunteers is effectively merged, CPW will be better positioned to expand an already extensive volunteer program (CPW has over 6,500 individuals, contributing nearly \$7.5 million worth of hours equivalent to an additional 163 full time employees).
- Beginning in 2011 pursuant to the program modifications adopted by the State Parks Board, CPW staff has integrated the review process for trail grant applications. Previous to 2011, wildlife staff reviewed and commented on trail grant applications by submitting comments directly to the State Trails Committee and the State Parks Board. Wildlife managers now assist with the preliminary review of applications so that CPW



provides one recommendation to the State Trails Committee's OHV Grant Review and Ranking Subcommittee for the OHV grant applications they elect to comment on. Each grant application (both motorized and motorized) must be reviewed and signed off by CPW's Regional Managers and their staff prior to convening the five grant review and ranking subcommittees.

- The former DOW focused on habitat protection and management through a number of programmatic efforts. The former State Parks developed a conscientious stewardship approach toward natural resources. The new agency has expanded its focus to address broad natural resource management issues, building on the best practices of both former agencies. This includes a more comprehensive approach to the conservation of Colorado's biodiversity.
- The merger is already showing signs that CPW can more effectively understand how changing demographics and other factors affect the delivery of services to its customers across Colorado (and beyond). Rather than two distinct agencies attracting a customer market that overlapped much of the time, CPW can now take an integrated approach that leverages the strengths and expertise of both former agencies.

Ongoing or Emerging Issues

A merged CPW agency is better positioned to deal with a variety of issues and challenges. Through unified leadership, creative thinking and leveraging of resources, CPW and the Commission will approach the biggest issues facing our agency with a stronger and more comprehensive approach.

Financial Challenges

CPW is faced with major financial challenges including declining revenue from license sales, the loss of state parks general or severance tax funds and budget shortfalls in the main Wildlife Cash fund. For this reason, Financial Sustainability is a major priority for the merged agency (see p. 16-17). To help address this challenge, CPW is in the process of developing financial plans for both parks and wildlife.

A significant result of the merger is that a unified financial strategy for CPW is emerging. With improved transparency of financial reporting and detailed analyses and projections of agency revenue streams, the agency can better understand and address its financial needs, against the context of changing social, economic and environmental patterns. These and other steps are aiming CPW toward financial stability and sustainability.

Participation in Outdoor Recreation

Overall, participation in outdoor recreation is exceptional in Colorado, with about 94 percent of Coloradans participating in different types of outdoor recreation. However, there are several concerning trends, such as declining interest from youth and declining or stagnant hunter and angler participation rates. The merged CPW is now well positioned to address some of these challenges head-on.

Early on, CPW staff recognized the overlap between activities such as fishing and state park visitation. What had been a long-standing cooperative partnership to stock fish in state park reservoirs is evolving into a stronger strategic vision. Even before the merger officially started in July 2011, CPW's marketing and graphics staff developed brochures for fishing and hunting in State Parks and began distributing those to the public. About 25 percent of people visit state parks to fish,¹¹ and about 35 percent of anglers in Colorado fish on state parks.¹² These synergies position CPW to take the appropriate steps that will build both park visitation and fishing license sales. As an effort to begin capitalizing on such synergies, CPW has developed the 2013 Increasing Angling, Hunting and Park Visitation Long-Term Strategy that outlines strategies to drive positive, effective improvements for three key CPW revenue streams, while providing strong focus on the delivery of quality customer service and satisfaction.

CPW also hopes to reach youth that are increasingly staying indoors or focused on electronic media. As mentioned in one of the main CPW strategic priorities, CPW aims to provide accessible and meaningful recreational and educational opportunities to families and youth (see p. 12-13). Recognizing that youth and families are the future CPW customer base, CPW will continue to work closely with Great Outdoors Colorado (GOCO) and other partners to effectively reach a high-priority segment of Colorado's population. GOCO lists "youth, families and the outdoors" as one of its top strategic priorities in the 2010 Great Outdoors Colorado Strategic Plan. Because of its newly aligned priorities, CPW is committed to investing GOCO funds to reach youth and families. Going forward, CPW is positioned to develop strategies that are congruent with GOCO's that include visiting parks, trail recreation, watchable wildlife, fishing and other recreation.



Environmental Challenges

The challenges presented by environmental changes are not specific to the merger, but these issues continue to be a main focus of the merged agency. Drought, wildfires, insect outbreaks and invasive species present on-going challenges for a resource management agency. Coupled with a growing population and conversion of habitats through development, CPW's role in wildlife management and natural resource stewardship takes on great importance.

To address these environmental challenges, CPW is taking a proactive approach to wildlife management, habitat conservation and natural resource stewardship. As a major water rights owner with expertise on wildlife and recreation, CPW will be a contributor to the Colorado Water Plan. This will allow for these wildlife and recreational concerns to be incorporated into statewide water planning. Additionally, CPW has merged what used to be separate aquatic nuisance species programs to more efficiently monitor and prevent the spread of these damaging invaders. To address declining mule deer herds, CPW is developing a mule deer strategy that incorporates extensive input from stakeholders and wildlife managers. To better implement landscape-scale conservation planning, CPW is also proactively developing 'crucial habitat' mapping that can inform development plans and conservation efforts statewide. Finally, DNR has recently been appointed as a member of the Colorado Department of Agriculture's Noxious Weed Advisory Council, which will allow CPW to be more actively involved in managing a primary threat to state lands, wildlife habitat and recreation. All of these activities of the merged CPW will work toward habitat preservation and resource stewardship, which is one of the primary strategic priorities of the merged agency (see p. 14-15).

¹¹Corona Research. 2009a. Colorado State Parks 2008/2009 Marketing Assessment Executive Summary of Findings and Recommendations.

¹²Colorado Parks and Wildlife. 2012. "2012 Colorado Angler Survey Report" 64 pages.

Appendix A - CPW Customer and Market Trends

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Policy and Planning Unit

Research, Policy and Planning Branch

Colorado Parks and Wildlife

November 1, 2013

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Executive Summary

When the Colorado legislature merged the Division of Wildlife and State Parks to create Colorado Parks and Wildlife (CPW), it did so with the direction to “provide enjoyable and sustainable outdoor recreation opportunities that educate and inspire current and future generations...” Whereas, nearly 90% of Colorado’s citizens benefit from CPW programs (Corona Research, 2008), only about half of Coloradans directly contribute to funding CPW’s operations by purchasing hunting or fishing licenses or paying access fees at state parks. In order to ensure that CPW can continue to engage future generations and fund operations, we must understand how Colorado’s population and customer and market base is likely to change. This report looks at changes in existing and potential customer groups and suggests some ways we may experience changing demand for our services.

Demographic changes in Colorado’s population provide opportunities to engage new users. Important changes in Colorado’s population that may affect CPW customers are: a rapidly increasing portion of the population over 65, growth in the Hispanic portion of the population, continued population growth along the Front Range and in urban areas of the state, and in-migration from other states, primarily by young adults and families. These opportunity markets will make up a larger proportion of Colorado’s population over the next 20 years.

In addition to the overall state population changing, our existing customer base is changing. While visitation to state parks has increased over the last 10 years, participation in hunting and fishing has continued to decline. In addition, our current hunting and angling populations are aging. This trend, also seen in the rest of the population of Colorado, has the potential to change the license purchase pattern and demands of our current hunters, anglers and park users. In addition, an analysis of big game quota and application trends over time indicates that there is significant unmet demand for deer and elk licenses in the state. These patterns point out several “opportunity” cohorts that could be primary targets of our hunting, angling and outdoor recreation recruitment efforts and opportunities to manage big game hunting to meet biological objectives and maximize participation. Retention efforts and policies that encourage participation should continue to focus on current purchasers to maintain stable funding until we can develop new audiences into regular purchasers.

The trends detailed in this report are already underway; as such, the primary challenge facing CPW is to ensure that current decisions and policies effectively engage our existing, but changing, customer base and engage new users. These activities will need to occur on a short timeline and with concrete, achievable goals in mind. The information in this document may provide context for the development of agency goals and guide efforts to address our changing customer markets.

Justification for this Report

The Guiding Principles for the Leadership Team of Colorado Parks and Wildlife state that “science is the foundation of conservation and management of Colorado’s wildlife and parks” and that “management decisions will be informed by science and also include consideration of impacts to local communities as well as social and economic concerns.” As such, the Policy and Planning Unit at CPW has been tasked with monitoring and reporting on demographic and social trends in our customer and stakeholder populations to assist the agency in its efforts to engage and serve these audiences. This report summarizes existing data compiled by CPW, the Colorado State Demographer’s Office and other state agencies to guide future decisions which will allow CPW continued financial and conservation success.

1.0 What are the opportunity markets for CPW?

Why focus on opportunity markets?

Population, economic and demographic trends strongly influence participation in outdoor recreation, including hunting, angling, camping, and many other recreational activities. In addition, geographic patterns of demand, type of activities preferred, ages and ethnicity of those participating all influence the type and distribution of services and opportunities CPW provides. CPW provides direct services to many Coloradans (Corona Research, 2009a; SCORP, 2008); however, CPW will need to adjust our services to retain current users and best engage new users, ensuring that the state's residents continue to benefit from and value the contribution public lands and wildlife play to the Colorado way-of-life. Identifying marketable opportunities ensures that CPW can achieve our mission while expanding our relevancy to Coloradans in the future. Bringing new users into contact with CPW also ensures more sustainable funding and the ability to weather future economic changes.

Population Distribution and Growth

Current Population

Between 2000 and 2010, Colorado's population increased by 17% and total population grew to just over 5.1 million (US Census Bureau, 2012). Population growth, measured by percent growth and number of residents, was highest along the Front Range (which includes the I-25 corridor from Fort Collins to Pueblo) and in portions of Western Colorado (Colorado State Demography Office, 2012; Figure 1). In that decade, the Front Range population increased 27% and the Northwest population grew by 20%. Douglas County experienced the highest growth rate in the state and one of the highest in the nation (109,699 people, or 62%) during this time. Weld County was the second fastest growing county in Colorado (40% population increase). Other high growth areas during that decade included Garfield, Eagle, Mesa, Montrose, San Juan and Archuleta counties in Western Colorado.

While many areas of Colorado are experiencing growth, population decreased in 17 of Colorado's 64 counties between 2000 and 2010 (Colorado State Demography Office, 2012). These 17 counties are primarily located in the Southeast and South Central area of Colorado.

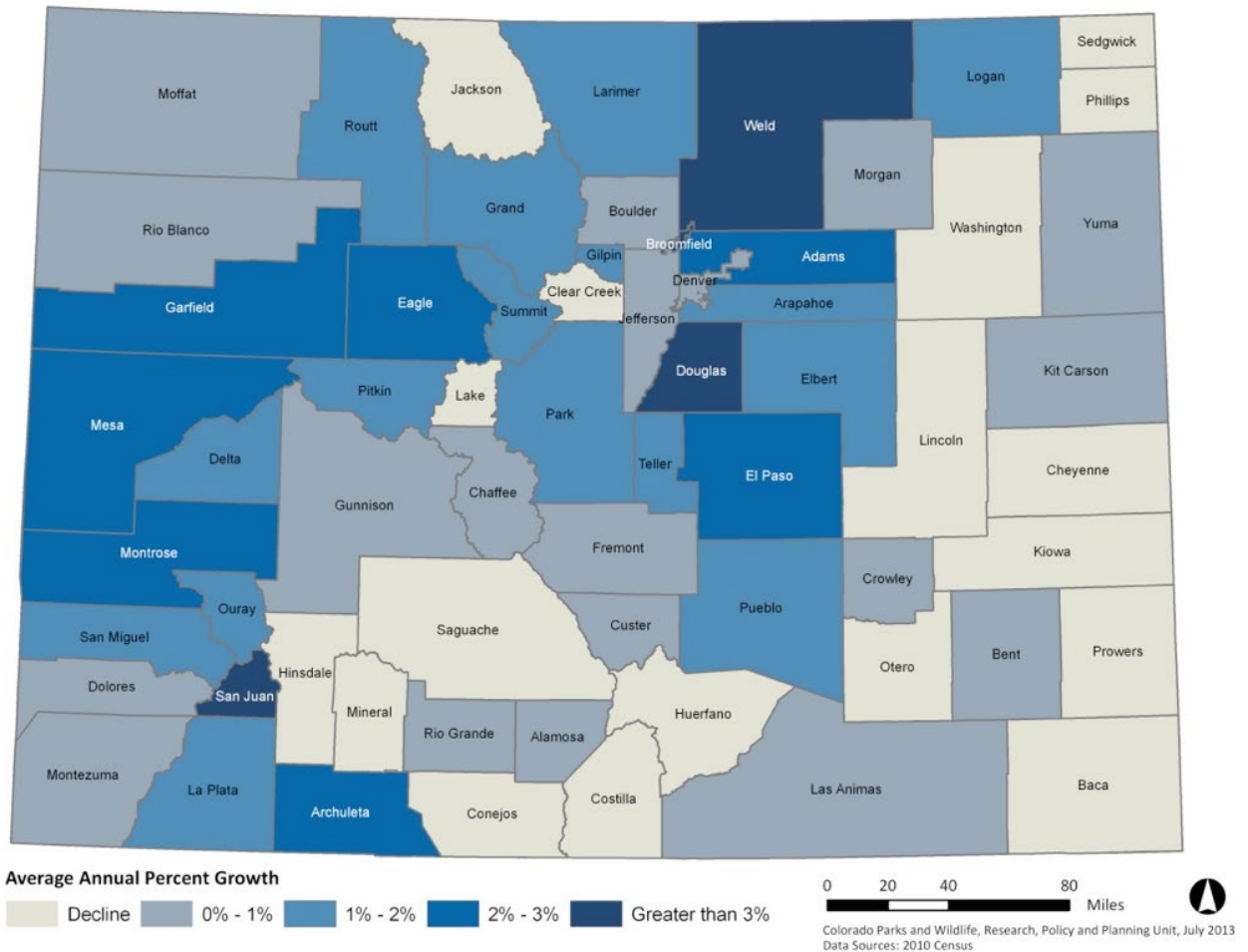


Figure 1. Percent change in population by county: 2000-2010

As of 2010, the Front Range contains over 80% of Colorado’s population, and includes all 10 cities with the largest population (U.S. Census Bureau, 2012; Table 1). The highest population densities in 2010 were the Front Range metropolitan areas and along the I-70 corridor to Grand Junction (Figure 2, U.S. Census Bureau, 2010).

Table 1. Top ten Colorado cities by population: 2011
Source: U.S. Census Bureau

City	Population
Denver	619,968
Colorado Springs	426,388
Aurora	332,354
Fort Collins	146,762
Lakewood	144,406
Thornton	121,435
Westminster	107,967
Pueblo	107,577
Arvada	107,541
Centennial	102,603

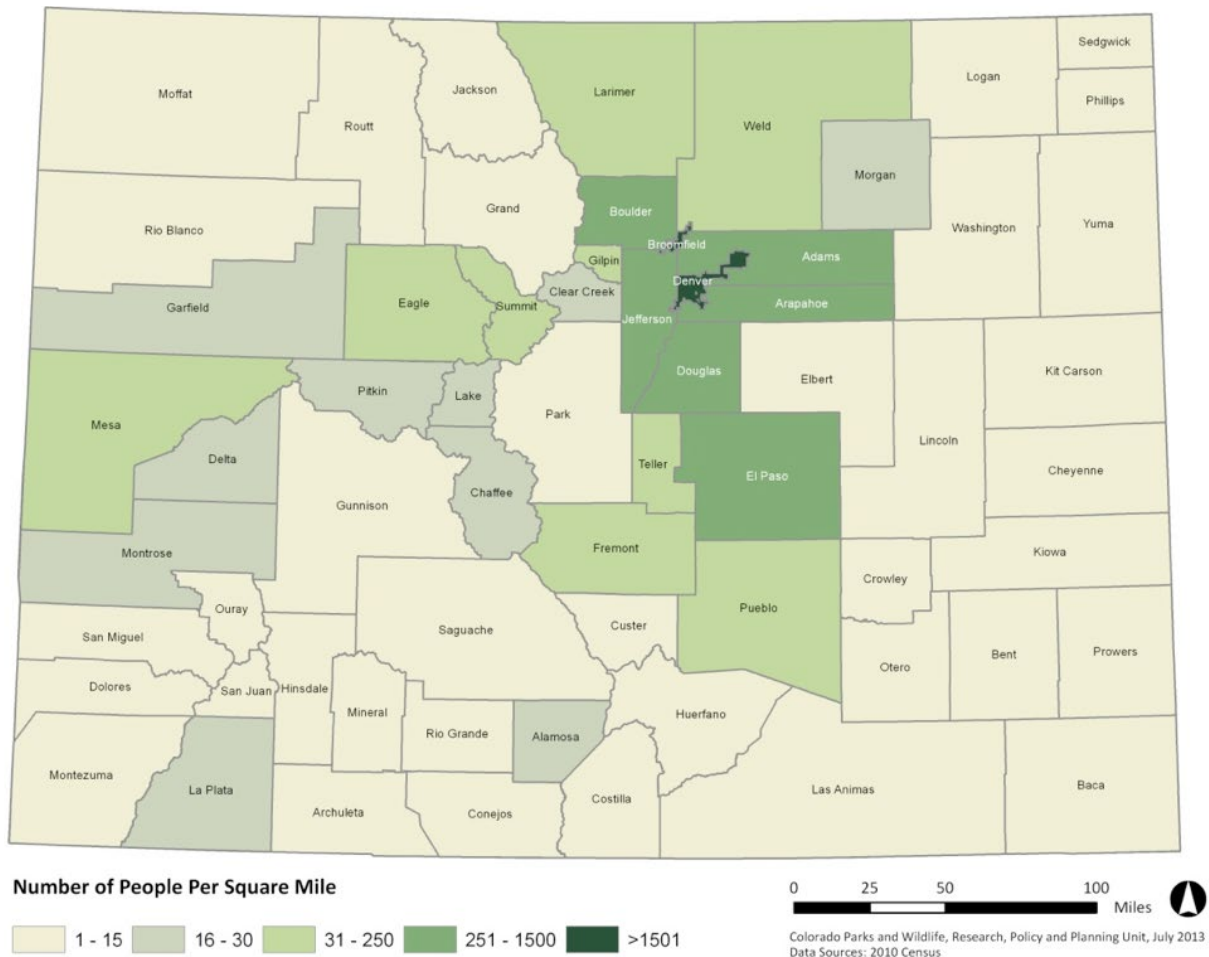


Figure 2. Colorado population density by county: 2010

Population projections

State forecasters project that Colorado’s population will exceed 7.1 million by 2040, with greatest growth projected in the metropolitan Front Range counties, western slope counties such as Eagle, Garfield, and Mesa counties, and other mountain counties such as Boulder, Jefferson, Summit, and Lake counties (Figure 3; Garner, 2012). Extension of the urbanized landscape is likely to occur in Front Range communities, however high growth is also expected to occur near other existing population centers in Colorado, e.g. such as Glenwood Springs, Pueblo, and Grand Junction (Figure 3).

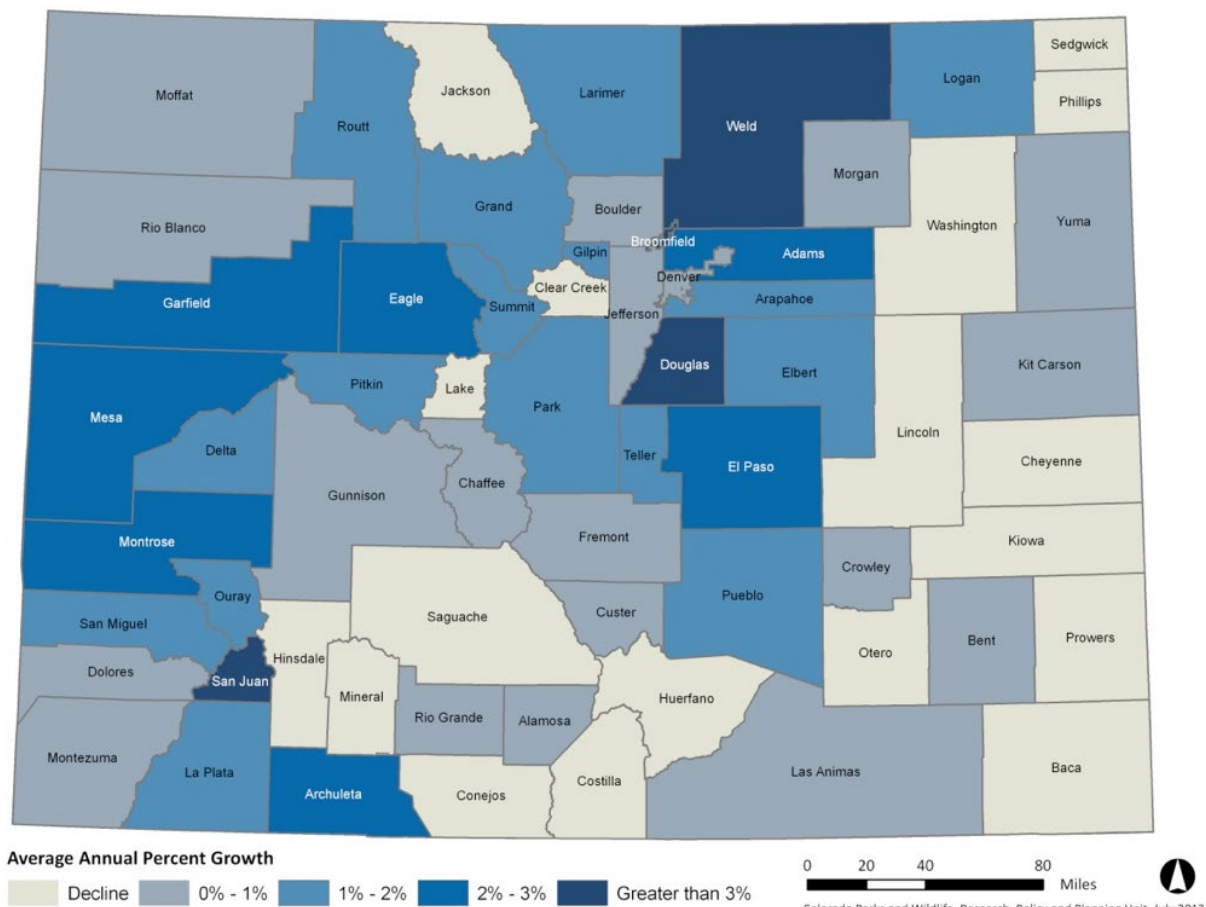


Figure 3. Forecasted population growth by county: 2010-2040

This growth presents unique challenges and opportunities for CPW. The human-dominated landscape in these areas will increase in area and affect wildlife habitat and areas available to outdoor recreation. Population increases may increase visitation to parks close to urban areas, which may also place added stress on natural resources, trails, roads and other related infrastructure in these parks. Urban areas may have lower rates of participation in hunting and angling, but may provide opportunities to improve participation in engagement activities by drawing from a larger population center. Efforts to engage new and lapsed users of wildlife and land resources in urban areas will play a significant role in maintaining the relevancy of the agency in the next 20 years.

Aging of the Population

Whereas Colorado will experience significant increases in the size of all age cohorts, the state will experience substantial growth in the number and proportion of the population over age 65 (Garner, 2011). By 2030, Colorado's population of citizens age 65 and older is predicted to be 150% larger than it was in 2010, increasing from 540,000 to 1,350,000. This represents a shift of Colorado residents ages 65 and older comprising 10% of Colorado's population in 2010 to 18% in 2030.

Whereas many members of the “baby boomer” generation, those born between 1945 and 1967, are choosing to work past age 65, it is anticipated that approximately one million workers will age out of the workforce over the next 20 years (Garner, 2011). This segment displays a strong interest in an active lifestyle and travel during retirement (Longwoods International, 2012), which may lead to an increase in interest in trails, hunting, fishing, bird/wildlife watching, and other activities among residents and non-resident visitors. This provides opportunities for CPW to cross-market these activities, thereby increasing participation by tying them to activities these older adults are already interested in (Corona Research, 2009a).

A proportion of older individuals are likely to be part-year or seasonal residents of Colorado who are attracted to the state because of the recreational amenities available. Understanding these residents and how they may be distinct from year-round residents will be particularly important to predicting demand in high-amenity communities dependent on tourist-based economies.

Providing opportunities for older sportspeople and visitors will allow CPW to take advantage of an increasing demographic in the next 5 to 10 years, but a focus on older Americans will not result in revenue increases that will be sustained in the long-term. As users age, their participation in outdoor recreation will likely wane (Gordon et al., 1976). With a population predicted to be dominated by younger individuals in the future, a focus on catering to older users, exclusively, may not provide the long-term opportunities required for sustained funding. Efforts to bring older users into the purchasing fold will need to be tied to efforts to recruit and retain younger users.

Diversification of the Population

A major demographic trend across the U.S. and in Colorado is the growth of the Hispanic population. At the national level, the number of Hispanics increased 43% from 35.3 million in 2000 to 50.5 million in 2010 (Ennis et al., 2011). Hispanics are the state’s largest minority group. The population of Hispanics in Colorado has increased 41% from 735,000 to more than 1 million between 2000 and 2010 (Garner, 2011). Areas with a high proportion of Hispanics are found across the state, but particularly along the northern Front Range, southern counties and Western I-70 corridor (Pew Research Center, 2012; Figure 4).

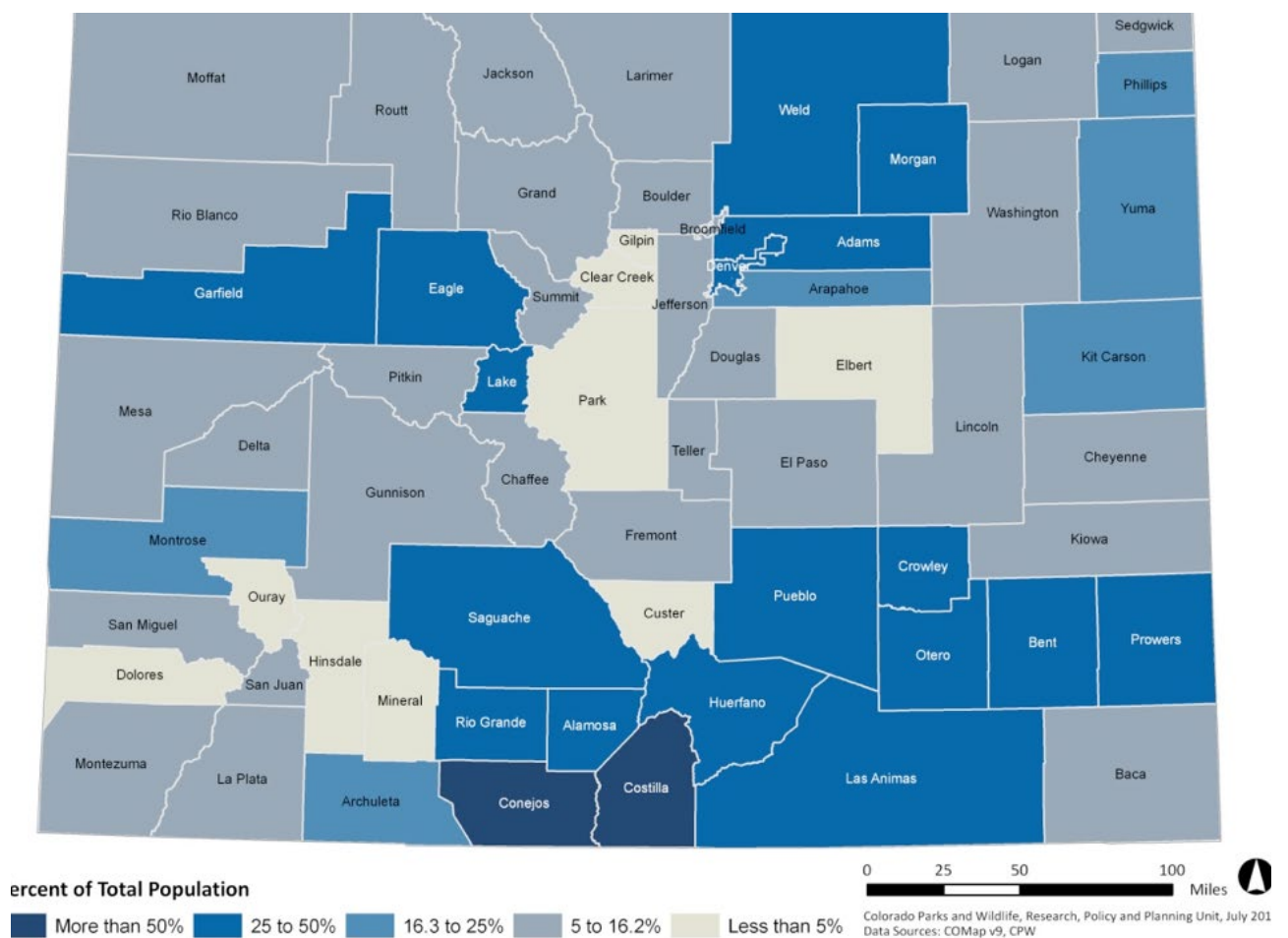
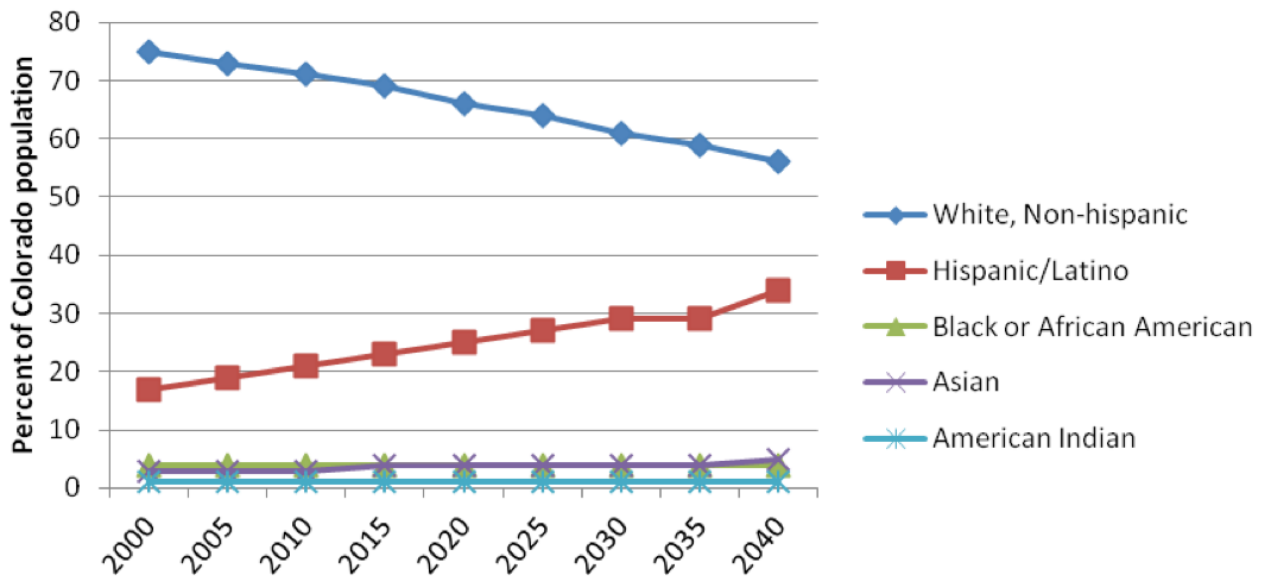


Figure 4. Hispanic population as a percentage of total population by county: 2010

The Hispanic population under age 18 grew by 44% to approximately 375,000 between 2000 and 2010 (Garner, 2011). In comparison, the Hispanic population 18 and older grew at a rate of 39% from 476,879 to 664,462 (Garner, 2011; ProximityOne, 2012). For the period of 2000 to 2010, Hispanics were the only ethnic group where the under 18 population grew faster than the 18 and older population (Garner, 2011). With a higher proportion in younger age groups, the proportion of Hispanics in Colorado, especially families and those with school-aged children, will continue to increase. Statewide population projections indicate that Hispanics will comprise almost 34% of the population by 2040, while white, non-Hispanics will comprise 56% of the population (Figure 5).



Source: Colorado State Demography Office

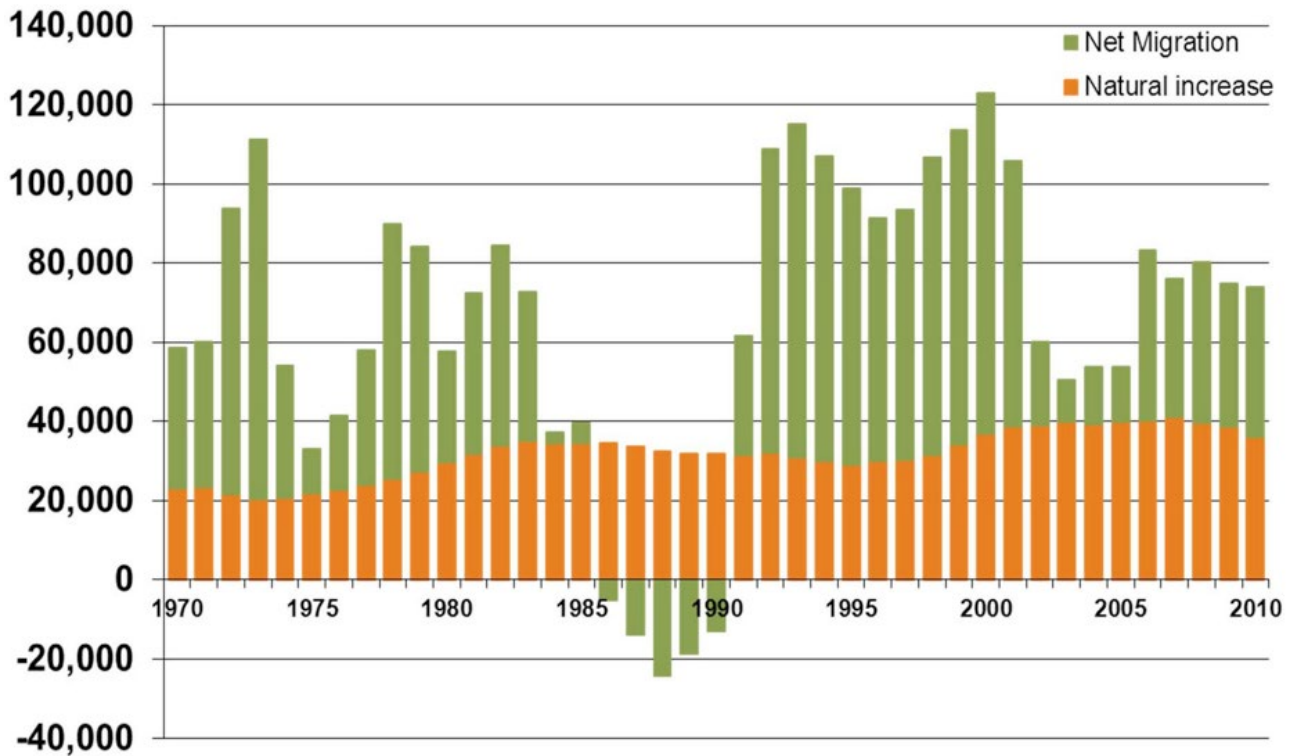
Figure 5. Projected change in racial background of the Colorado population: 2000-2040

California-based studies on the unique patterns and expectations of Hispanic outdoor recreation participants indicate a number of key differences between these individuals and traditional CPW constituents. Hispanics frequently reported having one day off from work per week, resulting in day-use visits to outdoor recreation sites (Chavez, 2012). Hispanics also reported placing strong emphasis on spending time with their families, both nuclear and extended, and consider leisure time an important contribution to family bonding (ProximityOne, 2012). Hispanics approach picnicking differently from other users, by cooking many meals from scratch over a 6 to 10-hour period at the picnic area. The length of picnicking results in relatively low turnover at picnic sites (ProximityOne, 2012). Studies also indicate the average group size of Hispanics at outdoor recreation sites is 8 to 15 people, with some groups numbering more than 100 people (Chavez and Olson, 2009). This demographic shift requires that our staff has an adequate understanding of the preferences of the state’s Hispanic population, as many of CPW’s facilities were not initially constructed with these factors in mind.

Young Adults, Families and In-migration

Colorado should experience more economic growth given the state’s geographic location, available resources, and business friendly history (Hickenlooper, 2013). Despite the expectation that many “baby boomers” will continue to work past 65, opportunities for replacement labor will expand over the next decade and beyond (Garner, 2011). Forecasts are that the number of available jobs will exceed the available labor pool among Colorado residents, even with natural increases in the state’s population (Garner, 2011). Based on recent trends, we expect that the percent of population growth attributed to net migration will be larger than the natural increase in the population from current residents for the foreseeable future (State Demography Office, 2011; Figure 6).

Components of Population Change



Source: State Demography Office. 2011.

Figure 6. Colorado net migration compared to natural population increase

Although this is not a new trend for Colorado, the contribution of in-migration to population growth is likely to continue during the next several decades. Much of the expected migration will be young adults seeking jobs or better quality of life (Garner, 2011). These people may move here as young families, or may start families after moving to Colorado.

Forecasted growth from economic development, planned resorts, increased numbers of second homes, and business expansion will draw new residents into areas that have already experienced high rates of growth, such as the Front Range and Grand Junction areas (Figure 3). This growth is likely to be highest along the outskirts of centers of economic growth, such as along the I-70 mountain corridor.

Summary

The population of Colorado is changing. Growth will continue along the Front Range over the next 10 years, but will also increase along the Western Slope. Forecasts for Colorado to experience a sizeable growth in the proportion of the population over 65 and significant change in the number of Hispanics will alter the makeup of the state's population. Economic development and job opportunities, partially resulting from baby boomers aging out of the work force and generating more demand for services, will likely attract new, younger residents to Colorado. These three important trends are not isolated from each other, and may result in the opportunity to recruit many new hunters, anglers and users. Recognizing these changes gives CPW the opportunity to maximize participation among these groups and prepare for changing expectations of new participants, particularly if we place priority on collecting information from these opportunity groups. Information on participation, motivations, barriers and expectations will allow us to anticipate changes in demand from increasing involvement of these groups.

As an agency charged with managing the natural resources of the state for the benefit of all residents, recognizing these trends also gives us the opportunity to refine and expand our current definition of user. By engaging individuals who see benefit from resources we manage, but have not regularly contributed to the financial sustainability of the agency, we will ensure our ability to continue to protect and manage resources in the future. This effort will require focused and sustained effort, guided by clear objectives and meaningful engagement of a wide range of stakeholders, but could have major impacts on the future fiscal state of our agency.

2.0 Are our actual participation numbers growing, shrinking or stable?

Why focus on participation trends among current customers?

The bulk of funding and support for the activities of CPW currently come from the sale of hunting and fishing licenses and state park passes and camping fees. Paying attention to trends in participation in CPW-related activities will help CPW and the Parks and Wildlife Commission make long-term plans for financial sustainability and evaluate the effect of any actions taken to address trends (i.e. marketing, new regulations, etc.). Understanding where our funding structure is headed will help us plan efficient use of resources, while maintaining Colorado's resources for all to enjoy.

State Park Visitation

Overall, the trend for state park visitation has been increasing with minor, short-lived fluctuations (Figure 7). During Fiscal Year 11-12, more than 12 million visitors entered state parks for the third year in a row. Over the past ten years, visitation to state parks in Colorado has increased faster than the rate of growth of Colorado's population (U.S. Census Bureau, 2012). Indications are that these trends will continue, assuming that the state park system continues to find adequate funding to maintain facilities and provide quality experiences to park visitors (NASPD, 2011).

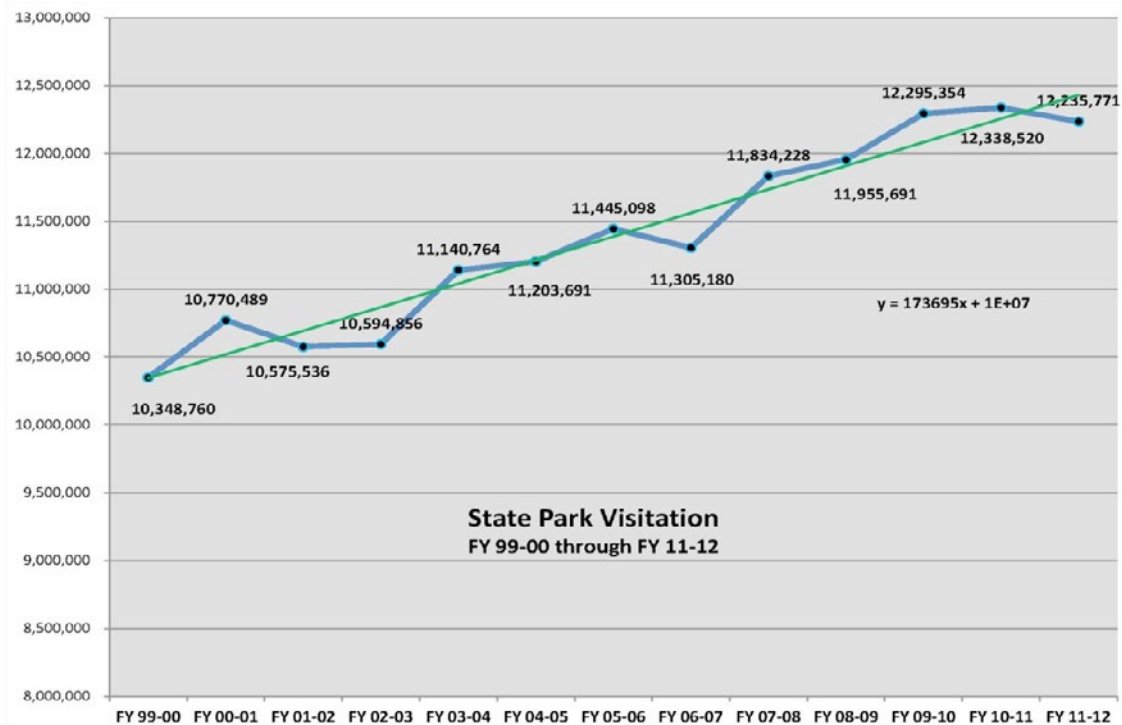


Figure 7. State park visitation FY 99-00 through FY 11-12

Hiking, fishing, camping, boating and biking (all types) are the top recreational activities at state parks as reported by park visitors in 2008-2009 (Corona Research, 2009b). More than 26% of park visitors reported that hiking was one of their top activities when visiting a park. About 25% reported that fishing was their top reason for going to a state park, while camping was only slightly behind. Hunting accounts for about 1% of park visitation; however, these reports may underestimate hunters, as hunters may camp at a park and hunt on other lands outside State Park boundaries.

Based on the above percentages, we estimate that individuals fished at state parks on nearly 3,000,000 visitor days in 2012 (Corona Research, 2009b). The parks with the highest number of angler-visitors are Lake Pueblo, Chatfield, Eleven Mile, Steamboat and State Forest (Corona Research, 2009b). Park visitors who do not currently fish may represent a significant opportunity group for CPW, as cross over in interests and motivations already exist among park visitors and anglers. Providing "learn to fish" opportunities at state parks may capitalize on that cross over and recruit new anglers to purchase licenses.

Fishing License Holders

The overall trend in angling participation since 1986 shows a decline in the number of individual fishing license holders (Figure 8); however, the number of fishing license holders in Colorado shows signs of improving since reaching a low in 2000. The overall trend in license holders during that time is upward, from approximately 630,000 in 2000 to nearly 740,000 in 2010 (Figure 9). The mean number of fishing license holders recorded since 2000 is 693,000, annually.

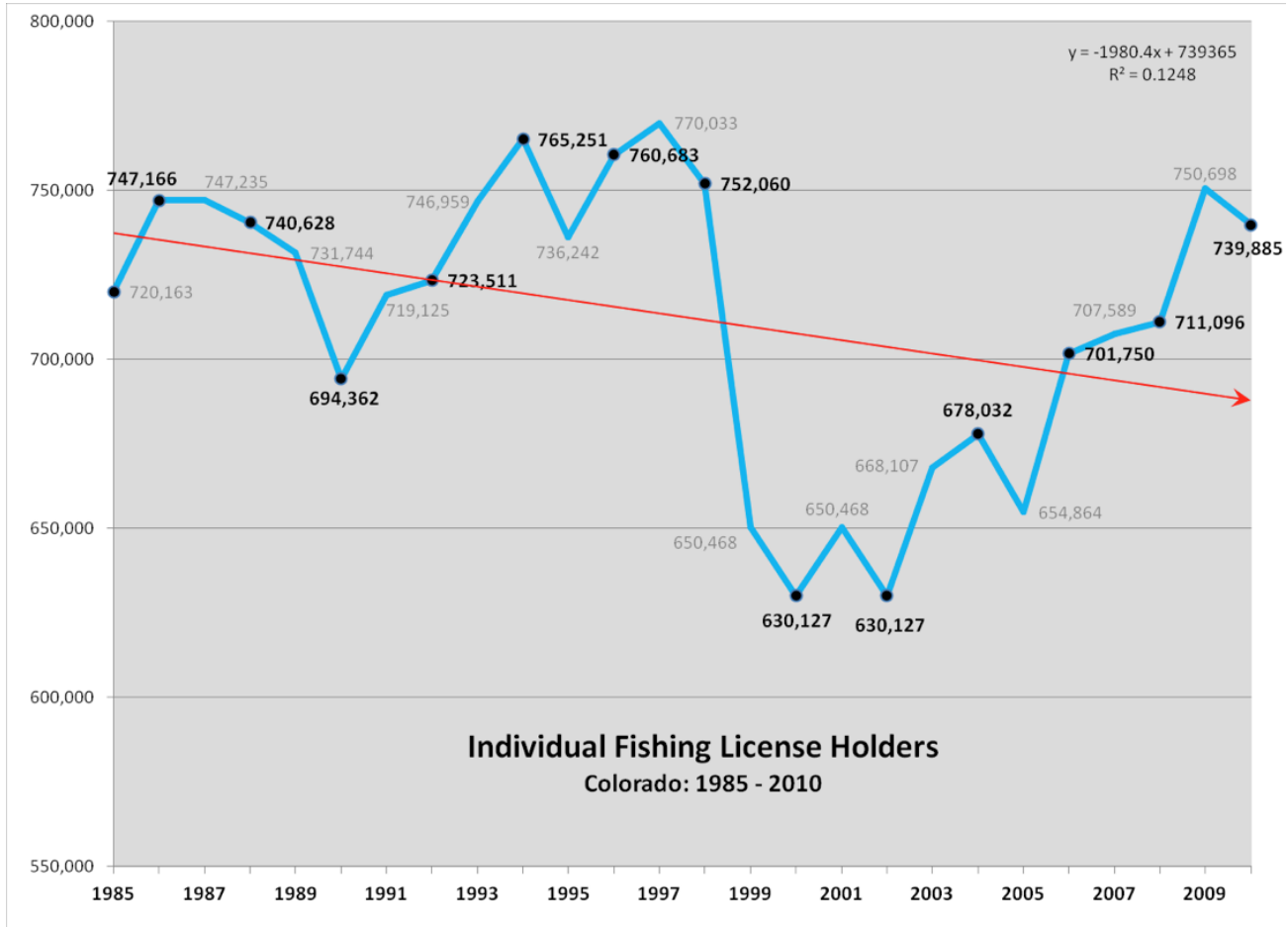


Figure 8. Colorado fishing license holders: 1985-2010.

This figure depicts the number of unique individuals who purchased a fishing license in Colorado in each calendar year, as reported to the U.S. Fish and Wildlife Service for the purpose of Federal Aid allocation. From 2006 to 2010, the number of senior angling license is added to the Federal Aid total to represent the entire population of anglers in Colorado. From 1986 to 2006, the Federal Aid numbers included senior license holders.

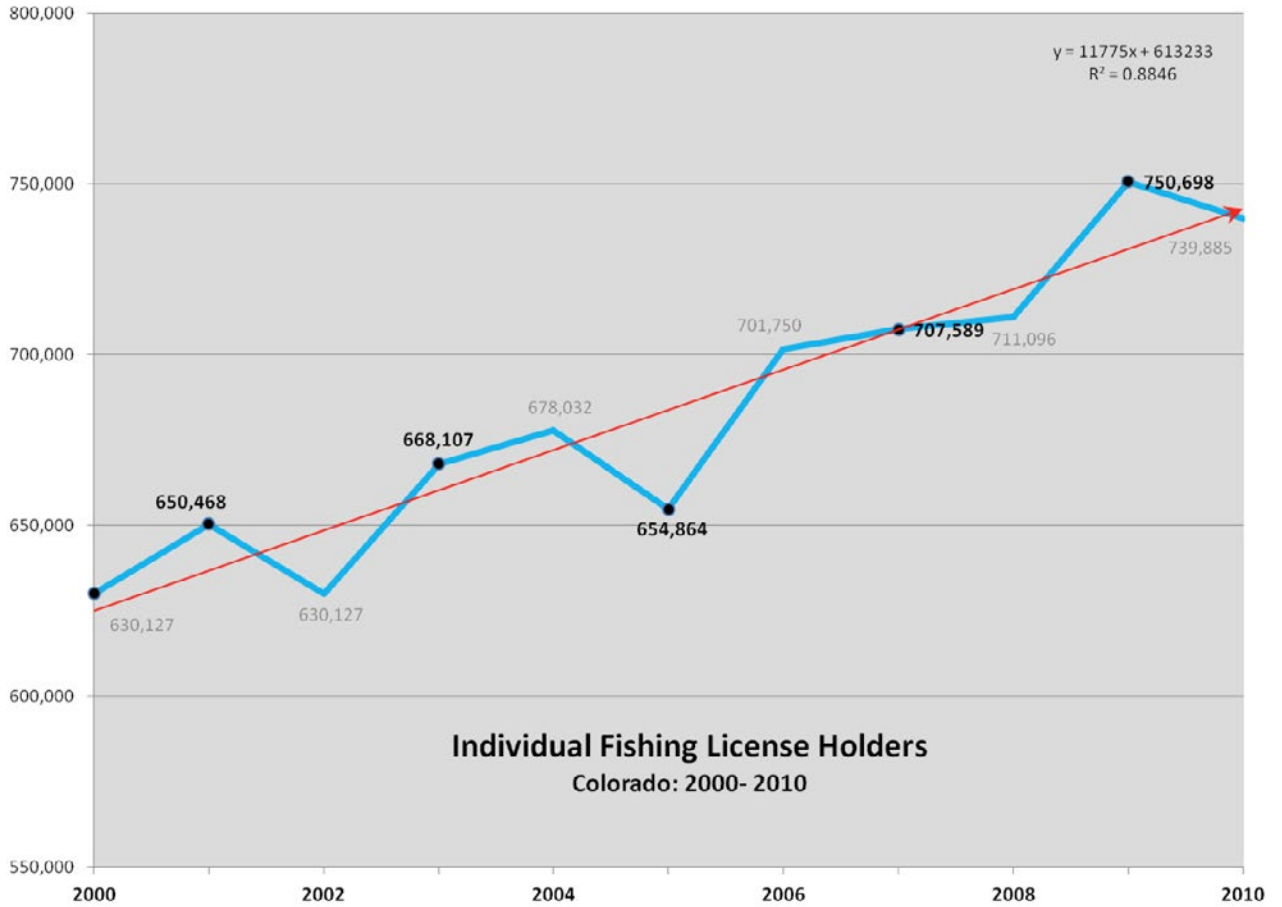


Figure 9. Colorado fishing license holders: 2000-2010.

This figure depicts the number of unique individuals who purchased a fishing license in Colorado in each calendar year, as reported to the U.S. Fish and Wildlife Service for the purpose of Federal Aid allocation. From 2006 to 2010, the number of senior angling license is added to the Federal Aid total to represent the entire population of anglers in Colorado. From 2000 to 2006, the Federal Aid numbers included senior license holders.

Hunting License Holders

The number of hunting license holders in Colorado follows a different pattern than for fishing. License holder numbers for hunting continue to display a general decline since a high in 1998 (Figure 10). This is largely consistent with the national trends for hunting license holders, despite Colorado offering many of the best big game opportunities in the U.S.

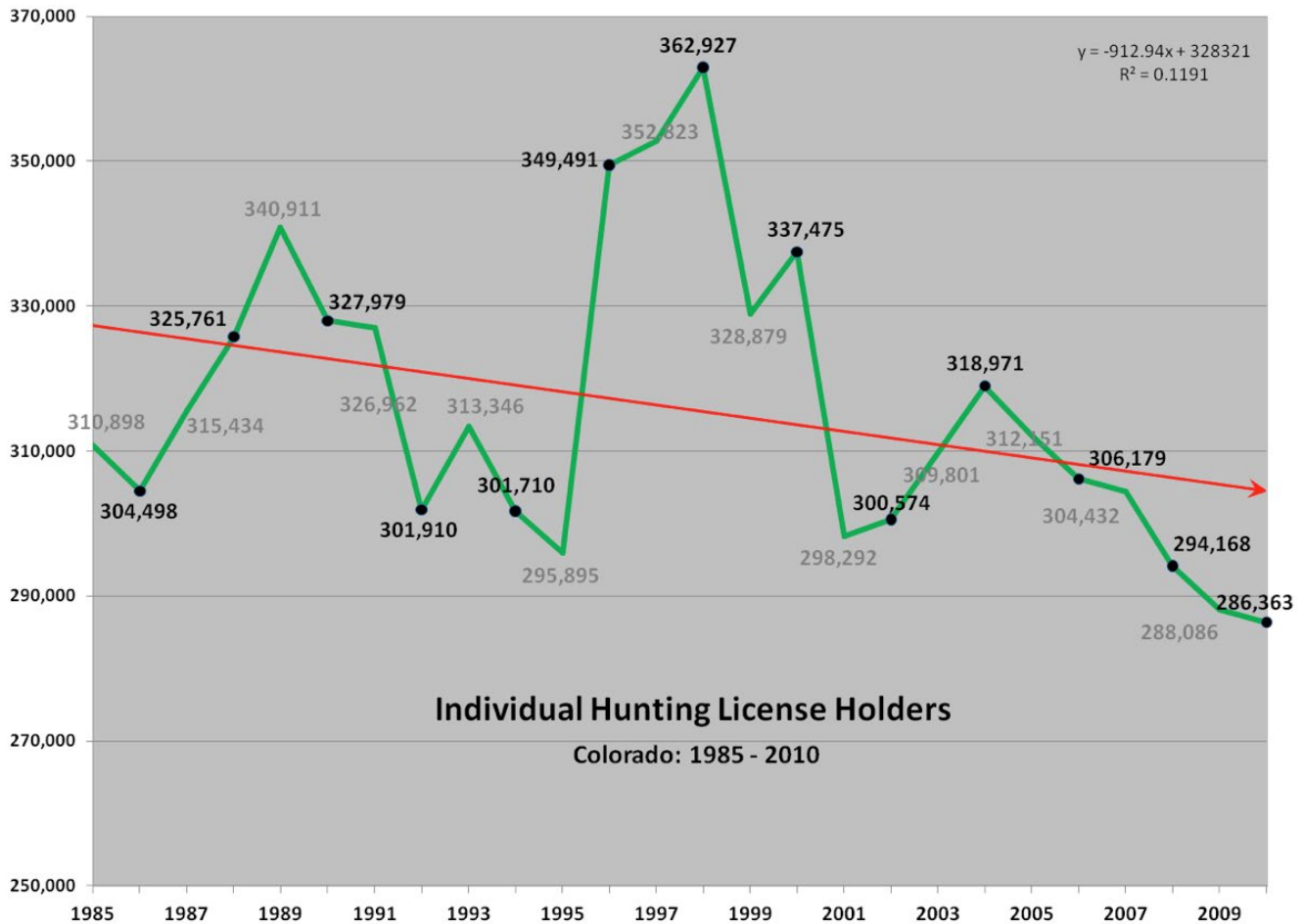


Figure 10. Colorado hunting license holders: 1985-2010.

This figure depicts the number of unique individuals who purchased a hunting license in Colorado in each calendar year, as reported to the U.S. Fish and Wildlife Service for the purpose of Federal Aid allocation.

Whereas overall hunting participation paints a rather dismal picture of the future of hunting in Colorado, looking at groups of hunters individually points out where opportunity markets may lie within our existing hunter pool. Big game hunters are the largest group of hunters in Colorado, and much of the revenue generated from license sales results from the sale of big game licenses. Over the period from 2000-2012, the number of big game licenses sold in Colorado has decreased from 395,000 to a current low of 330,000 (Lloyd, 2013; Figure 11), closely tracking the pattern in license quotas set by the Parks and Wildlife Commission. Over that same time period, the number of applications to hunt big game has increased from a low of 423,000 to the current high of 474,000. This increase was especially dramatic during the period from 2003-2005.

Overall Big Game Applications, Quota & License Sales by Year

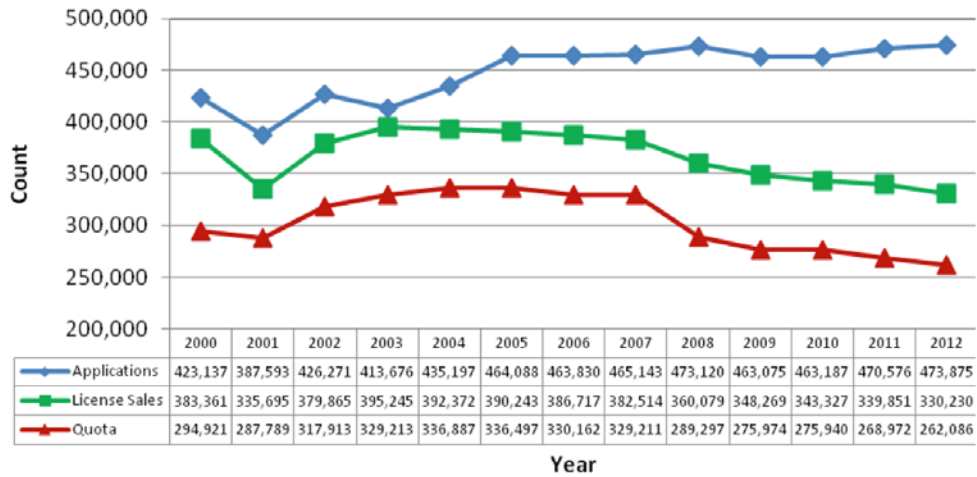


Figure 11. Number of big game applications, licenses and quota level by year (2000-2012)

If big game hunters are further divided into elk, deer and pronghorn hunter groups, the effect of management strategies, especially quota levels, becomes even more apparent. Since 2000, the number of applicants for elk hunting licenses in Colorado has been relatively stable (Lloyd, 2013; Figure 12), indicating stable demand for elk hunting opportunity in the state. In contrast, license sales and quotas increased from 2001-2003, and then began a concurrent decline through 2012. The number of elk licenses sold is considerably higher than quotas in Colorado because of the availability of over-the-counter licenses in many areas of the state.

As seen in the trends for all 3 big game species considered here, quota levels drive the number of licenses sold. Quota levels are set in an effort to meet biological objectives for managing big game populations. The mismatch between the number of applicants and quota levels indicate unmet demand for elk hunting opportunities in Colorado. Whereas over-the-counter license sales may address the unmet demand in some circumstances, individuals seeking trophy hunts or hunts in specific areas of the state where demand outstrips supply, may not be satisfied with the experience over-the-counter licenses provide. As biological objectives for managing elk populations are reviewed in individual units, the balance between maintaining sustainable populations and providing more hunting opportunity may be re-visited.

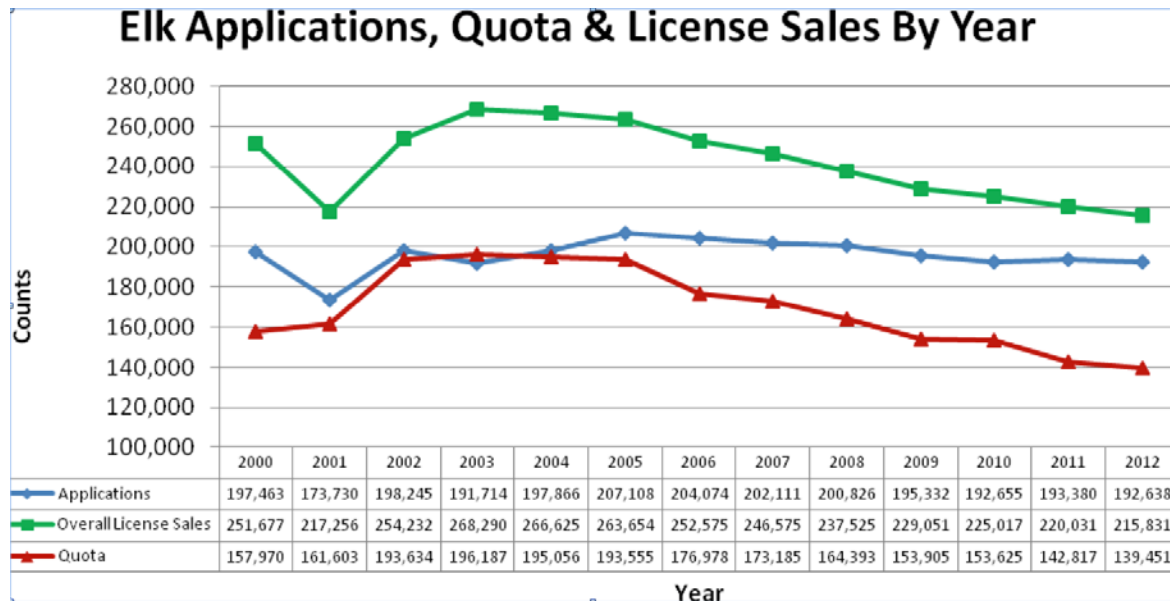


Figure 12. Number of elk applications, licenses and quota size by year: 2000-2012

In contrast to elk hunter demand, deer hunter behavior indicates significant unmet demand for licenses and hunting opportunity, but the biological realities of the populations allow fewer options to address this demand. The total number of applicants for deer licenses in Colorado has increased from a low of 136,000 in 2001 to a current high of 173,000 in 2012 (Lloyd, 2013; Figure 13). During that same time period, quotas and license sales have tracked very closely, at a level considerably below the number of applicants. Especially in the years since 2007, when deer license were all converted to a limited system and over-the-counter tags were eliminated, the number of licenses sold and quotas have been virtually identical and declining, while demand, as evidenced by the number of applicants, continued to increase.

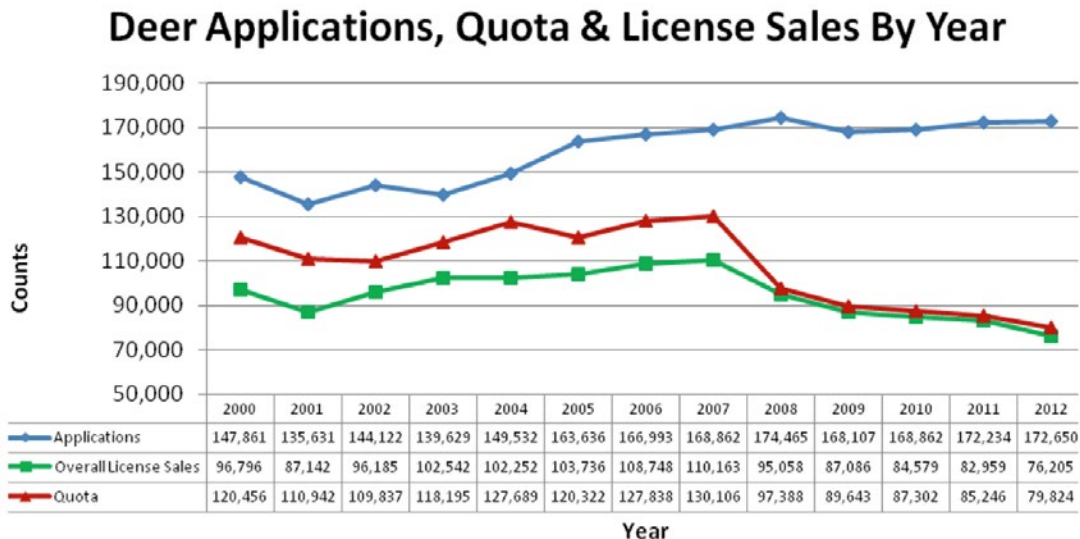


Figure 13. Number of deer applications, licenses and quota size by year: 2000-2012

Demand for pronghorn licenses also appears to exceed supply in Colorado. The number of applicants for pronghorn licenses has stayed relatively constant between 2000 and 2012, but is more than double the number of licenses issued and quota levels over that time period (Lloyd, 2013; Figure 14). The number of licenses and the quota levels track very closely for this species. The large gap between the number of applicants (demand) and quota levels (supply) indicate an unmet demand for pronghorn hunting in the state.

Pronghorn Applications, Quota & License Sales By Year

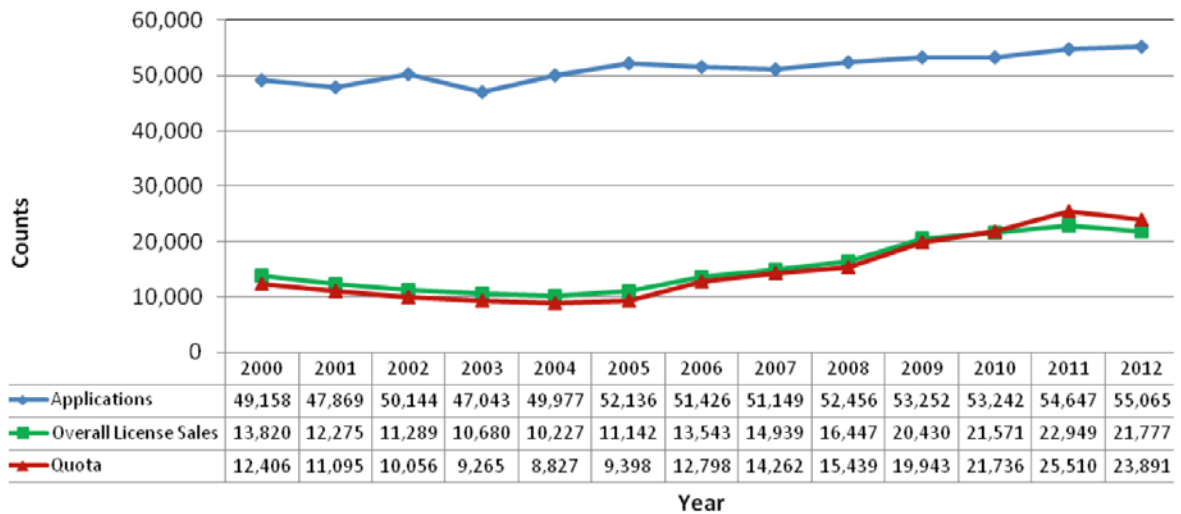


Figure 14. Number of pronghorn applicants, licenses and quota size by year: 2000-2012

County and Regional License Sales and Park Visitors

License sales and parks visitation varies from county to county, but a majority of hunters, anglers and parks users reside in and along the urban Front Range corridor (Table 2). Several rural counties in the state (Rio Blanco, Dolores, Jackson, Mineral and Hinsdale) had the highest proportion of residents who purchased hunting and fishing licenses, but more urban counties (Jefferson, El Paso, Adams and Larimer) contained a larger total number of hunters and anglers.

The same pattern was true for parks visitation, where Las Animas, Bent and Ouray counties had the highest proportion of residents who had visited a state park, but Arapahoe, El Paso and Denver counties had the highest total number of resident visitors. Park visitation patterns at the county level relate to geographic proximity to state parks, where counties with the lowest reported visitation were those the farthest distance from state parks. This pattern was also measured in past research about State Parks visitation (Corona Research, 2009b).

Table 2. Resident hunting and fishing license sales and park visitors by county and CPW Region: 2011

CPW Regions	Population 2011	Number of Hunting Licenses Sold ¹	Hunting License Sales as % of the Population ²	Number of Fishing Lics. Sold ³	Fishing License Sales as % of Population ²	Unique Park Visitors ⁴	Park Visitors - Percent of Population
CPW NE Region	3,525,146	209,887		449,490		1,597,565	
	70.1%						
Adams	451,576	26,039	5.8%	63,165	14.0%	218,946	48.5%
Arapahoe	584,703	21,031	3.6%	62,570	10.7%	284,511	48.7%
Boulder	300,383	14,256	4.7%	36,872	12.3%	141,206	47.0%
Broomfield	57,305	3,976	6.9%	5,748	10.0%	21,776	38.0%
Clear Creek	8,965	723	8.1%	1,219	13.6%	1,992	22.2%
Denver	620,917	12,366	2.0%	50,388	8.1%	273,663	44.1%
Douglas	292,305	18,602	6.4%	34,246	11.7%	117,495	40.2%
Elbert	11,578	2,935	25.4%	2,971	25.7%	9,841	50.0%
Gilpin	5,450	709	13.0%	828	15.2%	1,363	25.0%
Jefferson	540,023	33,017	6.1%	75,400	14.0%	244,810	45.3%
Larimer	305,309	29,943	9.8%	51,169	16.8%	134,459	44.0%
Logan	22,193	3,639	16.4%	4,485	20.2%	12,329	55.6%
Morgan	28,338	4,043	14.3%	5,735	20.2%	11,020	38.9%
Park	16,079	3,023	18.8%	3,751	23.3%	7,796	48.5%
Phillips	4,387	886	20.2%	721	16.4%	658	15.0%
Sedgwick	2,358	568	24.1%	535	22.7%	786	33.3%
Washington	4,759	1,004	21.1%	862	18.1%	635	13.3%
Weld	258,448	31,349	12.1%	47,303	18.3%	112,448	43.5%
Yuma	10,070	1,778	17.7%	1,522	15.1%	1,831	18.2%
CPW NW Region	360,125	71,403		92,058		171,523	
	7.2%						
Eagle	51,776	7,129	13.8%	8,614	16.6%	25,313	48.9%
Garfield	56,237	10,811	19.2%	12,381	22.0%	28,565	50.8%
Grand	14,500	4,282	29.5%	4,664	32.2%	3,816	26.3%
Jackson	1,366	640	46.9%	530	38.8%	607	44.4%
Mesa	147,753	27,826	18.8%	41,211	27.9%	75,270	50.9%
Moffat	13,434	4,963	36.9%	4,721	35.1%	5,971	44.4%
Pitkin	17,094	3,509	20.5%	4,643	27.2%	4,884	28.6%
Rio Blanco	6,785	3,625	53.4%	2,419	35.7%	1,508	22.2%
Routt	23,216	5,620	24.2%	7,165	30.9%	11,608	50.0%
Summit	27,964	2,998	10.7%	5,710	20.4%	13,982	50.0%
CPW SE Region	995,180	83,022		161,209		426,703	
	19.8%						
Baca	3,786	962	25.4%	1,014	26.8%	1,325	35.0%
Bent	6,311	790	12.5%	990	15.7%	4,207	66.7%
Chaffee	17,966	4,313	24.0%	5,305	29.5%	8,384	46.7%
Cheyenne	1,872	514	27.5%	390	20.8%	1,248	66.7%
Crowley	5,801	448	7.7%	659	11.4%	1,934	33.3%
Custer	4,206	1,267	30.1%	1,147	27.3%	1,402	33.3%
Elbert	11,578	518	4.5%	524	4.5%	1,737	50.0%
El Paso	637,302	34,478	5.4%	85,764	13.5%	276,259	43.3%
Fremont	47,375	6,858	14.5%	11,032	23.3%	18,716	39.5%
Huerfano	6,474	776	12.0%	1,499	23.2%	3,237	50.0%
Kiowa	1,433	505	35.2%	287	20.0%	502	35.0%
Kit Carson	8,150	1,572	19.3%	969	11.9%	3,622	44.4%
Lake	7,396	1,488	20.1%	2,217	30.0%	2,465	33.3%
Las Animas	14,991	2,809	18.7%	3,853	25.7%	9,994	66.7%
Lincoln	5,399	985	18.2%	1,006	18.6%	2,700	50.0%
Otero	18,866	2,763	14.6%	3,771	20.0%	5,590	29.6%
Prowers	12,503	2,025	16.2%	2,500	20.0%	6,946	55.6%
Pueblo	160,393	16,529	10.3%	33,883	21.1%	64,561	40.3%
Teller	23,378	3,422	14.6%	4,399	18.8%	11,875	50.8%
CPW SW Region	238,075	54,285		62,278		78,932	
	4.7%						
Alamosa	15,642	2,286	14.6%	3,556	22.7%	5,688	36.4%
Archuleta	12,038	3,329	27.7%	3,245	27.0%	4,815	40.0%
Conejos	8,251	998	12.1%	1,759	21.3%	1,179	14.3%
Costilla	3,661	1,111	30.3%	1,113	30.4%	439	12.0%
Delta	30,412	8,018	26.4%	9,821	32.3%	10,671	35.1%
Dolores	2,042	962	47.1%	683	33.4%	255	12.5%
Gunnison	15,402	4,365	28.3%	4,522	29.4%	6,161	40.0%
Hinsdale	821	203	24.7%	296	36.1%	205	25.0%
La Plata	51,944	8,658	16.7%	10,183	19.6%	12,986	25.0%
Mineral	709	279	39.4%	340	48.0%	142	20.0%
Montezuma	25,413	6,390	25.1%	6,787	26.7%	5,647	22.2%
Montrose	41,025	11,001	26.8%	12,466	30.4%	21,174	51.6%
Ouray	4,355	733	16.8%	842	19.3%	2,903	66.7%
Rio Grande	11,915	3,037	25.5%	3,608	30.3%	2,166	18.2%
Saguache	6,258	1,279	20.4%	1,348	21.5%	1,565	25.0%
San Juan	691	106	15.3%	147	21.3%	124	18.0%
San Miguel	7,496	1,530	20.4%	1,562	20.8%	2,811	37.5%
Statewide Totals	5,118,526	418,597		765,035		2,274,724	

- 1 Number of resident hunting licenses sold (big game, small game and combo) with home address zip codes in the county (2011 license year).
- 2 Number of total licenses sold divided by the population of the county. Because individuals may purchase more than one license, this is an over-estimate of the proportion of county residents who participate.
- 3 Number of resident fishing licenses sold (fishing and combo) with home address zip codes in the county (2011 license year).
- 4 Number of unique visitors to state parks who resided in county, as reported in 2008 Market Assessment Study (Corona Research, 2008). Updated to reflect 2011 population (U.S. Census Bureau, 2011).

The Colorado Tourism Office (CTO) has developed a 7 region breakdown of Colorado counties based on regions where tourism and tourism spending are concentrated and visitation characteristics are similar (Figure 15). These regions provide a logical basis from which to align hunting, angling, and state park visitation trends with trends in other types of tourism and spending. These regions are used to summarize participation in Colorado’s Statewide Comprehensive Outdoor Recreation Plan, an assessment used to plan investments by multiple agencies and groups in outdoor recreation opportunities around the state.

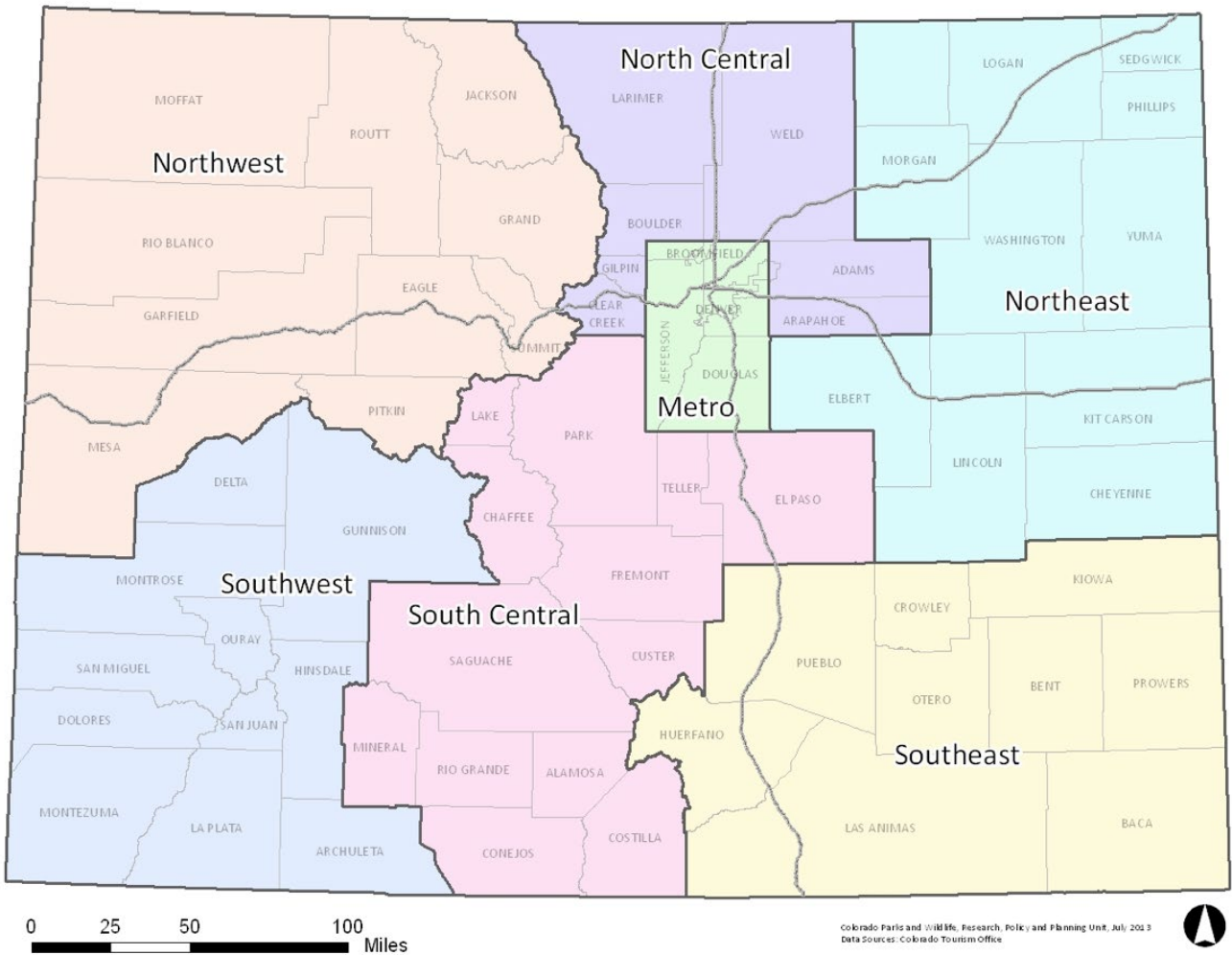


Figure 15. Map of Colorado Tourism Office (CTO) regions.

A breakdown of CPW customer distribution by the CTO regions (Table 3) shows that rural counties often have a higher proportion of hunting or fishing license purchases, while urban counties with high populations report higher numbers of licenses sold. The greatest number of hunting and fishing licenses are sold to people in the CTO Metro region. The CTO regions with the highest proportion of the population purchasing a hunting or fishing license are the Southwest and Northwest regions.

The patterns for State Parks visitation tend to reflect the location of large, high amenity parks in Colorado. Numerically, the CTO Metro region had the highest number of park visitors, constituting over half of all unique park visitors (~1.2 million; Table 3). Still, the proportion of the population that visited a state park is between 42% and 48% in all but the Southwest CTO region. This may be a result of the limited number of state parks in that region of Colorado, and the wealth of other outdoor recreation opportunities available.

	2011 Population	Population - Percentage of Colorado Population	Number of Hunting Licenses Sold ¹	Percent of Statewide Hunting Lic.	Hunting License Sales as % of the Population ²	Number of Fishing Lic. Sold ³	Percent of Statewide Fishing Lic.	Fishing License Sales as % of Population ²	Unique Park Visitors ⁴	Park Visitors - Percent of Population
CTO Northeast Region	142,962	2.8%	22,357	5.3%	15.6%	25,270	3.3%	17.7%	60,452	42.3%
CTO Front Range Region	712,975	13.9%	66,474	15.9%	9.3%	114,937	15.0%	16.1%	316,800	44.4%
CTO Northwest Region	360,125	7.0%	71,403	17.1%	19.8%	92,058	12.0%	25.6%	171,523	47.6%
CTO Southwest Region	191,639	3.7%	45,295	10.8%	23.6%	50,554	6.6%	26.4%	67,754	35.4%
CTO South Central Region	800,138	15.6%	63,839	15.3%	8.0%	125,339	16.4%	15.7%	338,076	42.3%
CTO Southeast Region	230,558	4.5%	27,607	6.6%	12.0%	48,456	6.3%	21.0%	98,295	42.6%
CTO Metro Region	2,680,129	52.4%	121,621	29.1%	4.5%	308,063	40.3%	11.5%	1,221,824	45.6%
Statewide Totals	5,118,526	100.0%	418,597	100.0%		764,677	100.0%		2,274,724	

Table 3. Resident hunting and fishing license sales and park visitors by Colorado Tourism Office (CTO) regions: 2011

1 Number of resident hunting licenses sold (big game, small game and combo) with home address zip codes in the county (2011 license year).

2 Number of total licenses sold divided by the population of the county. Because individuals may purchase more than one license, this is an over-estimate of the proportion of county residents who participate.

3 Number of resident fishing licenses sold (fishing and combo) with home address zip codes in the county (2011 license year).

4 Number of unique visitors to state parks who resided in county, as reported in 2008 Market Assessment Study (Corona Research, 2008). Updated to reflect 2011 population (U.S. Census Bureau, 2011).

Summary

Overall, visitation to state parks has been on an upward trend over the last 15 years, while participation in hunting and angling have been on downward trends. Visitation to state parks was likely affected by drought and wildfire conditions in 2012, which caused a slight decline in visitation. The number of individuals purchasing fishing and hunting licenses has decreased in Colorado since the late 1990s. However, since 2003, the number of fishing license holders has been increasing, although they have not returned to historic high levels. Hunting participation has not seen the same increase, though participation for some species may be limited by the availability of big game licenses more than desire to hunt in Colorado. Participants from the Front Range area of the state make up the largest proportion of license buyers and park visitors, but the more rural areas of Western Colorado have a larger proportion of residents that hunt, fish and visit state parks.

3.0 What are the demographics of our current customers?

Why focus on demographics of our current customers?

Most fish and wildlife management agencies across the U.S. rely on strategies that assume funding for habitat and species management can be supported by license sales and federal funds associated with hunting and fishing. As license sales decline over time, the response generally has been to raise the cost of licenses. At the same time hunting license sales declined, public interest in non-consumptive wildlife recreation has increased (Cordell, 2012), leaving the agencies charged with management and conservation of wildlife species with increased responsibilities but waning funding.

Unless additional revenue sources from non-consumptive users are accessible to fund the agency, CPW needs to maintain the size and structure of our current customer base. Understanding the characteristics of our current customer base will allow us to work to adjust strategies and operations to ensure continued and expanded participation and funding in the near-term, while we attempt to broaden our base of customers into the future. This will involve outreach and marketing to target market segments identified elsewhere in this report. It will also involve packaging services and products so that those serve the interests and expectations of existing customers.

The following section looks at age and participation trends in our existing hunter and angler customer pool. Because age data for state parks users is not available, no comparable analysis is possible for state parks users. We do assume, however, that similar trends are likely based on information collected as part of the State Parks Marketing analysis in 2009 (Corona Research, 2009a). At that time, the age group with the highest park usage was 45 to 54 years old, similar to the mean age of hunting and angling license purchasers. Whereas visiting State Parks is an activity people of a wide range of ages participate in, we expect that similar patterns to those seen among hunting and fishing license purchasers may be occurring.

Aging of Hunting and Angling License Purchasers

Taking a long-term view of the aging of our hunter and angler populations is complicated by the difficulty in portraying trends in age of participants over time. The graphics presented below attempt to show trends in the ages of these customers in a way that is easily understandable. The data analysis presented in this section was completed by Loren Chase, Organization of Wildlife Planners, as part of a multi-state analysis of demographic changes in hunter and angler populations. Interpretation was conducted by CPW staff.

The following figures show the aging of license purchasers over a period from 1994 to 2011. The columns in each figure represent the year in which licenses were sold. Each row shows the proportion of license buyers in that year who are the indicated age. Proportions are indicated by the color of the cells, where cooler colors (e.g. blue) indicate higher proportions, and warmer colors (e.g. red) indicate lower proportions. Intermediate colors (e.g. orange, yellow and green) indicate intermediate values. Values in each column add to 100%. It is important to note, however, that the proportion of the total that each cell makes up is small (from a maximum of 4% in blue cells to 0% in red cells). “Streaks” of color, moving from left to right, indicate an age class of license purchasers aging over the time period.

Figures 16 (resident) and 17 (non-resident) show the aging of big game license purchasers (ages 18-85) over the period from 1994 to 2011. For comparison, the same methods were applied to the population of the entire state of Colorado, using data provided by the Colorado State Demography Office (Figure 18).

The largest age class among resident big game hunters was between 30 and 40 years of age in 1994 and are now between 47 and 57 years of age (Figure 16). As this cohort has aged, they have begun to drop out of the big game hunter pool, and fewer are purchasing licenses each year. This trend is likely to continue and intensify as the age class nears age 75, the age of near-universal attrition of our resident big game hunters.

Baby boomers made up a large proportion of big game purchaser, but participation in this age cohort has decreased in the last 5 years.

The proportion of the Colorado population between 30 and 40 years old is predicted to increase, yet this group exhibits low rates of participation in big game hunting.

Participation in big game hunting drops to nearly zero after age 73.

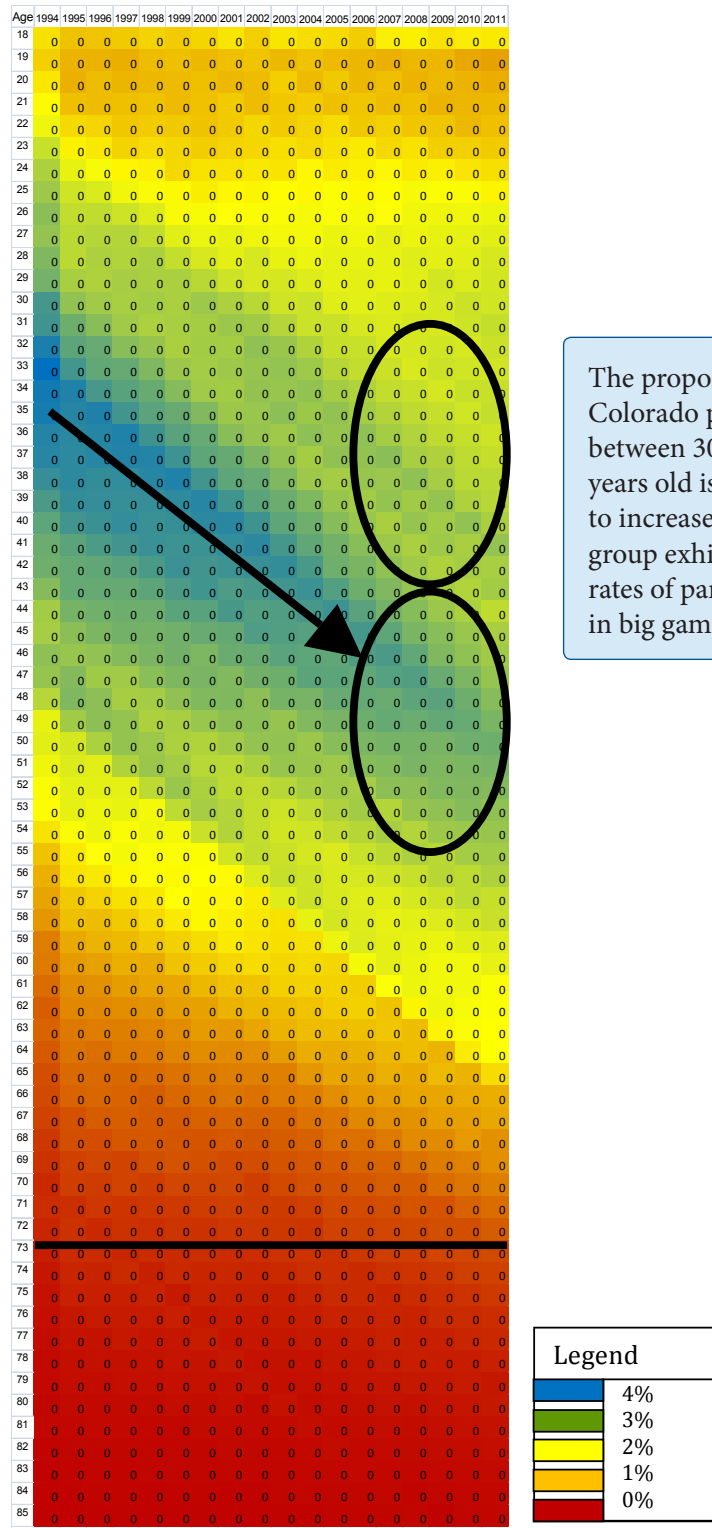


Figure 16. Ages of resident big game license purchasers: 1994-2011

The largest cohort of non-resident big game hunters were 33 to 47 years of age in 1994 and are now 50 to 64 years of age (Figure 17). Hunters who began hunting in Colorado at an older age (>50 years old) are likely to age out of participation more quickly than those who began visiting Colorado to hunt at a younger age. As a result, efforts that target 30-something non-resident hunters may have more long-term success at bringing hunters to Colorado, than efforts to attract 50-something non-residents. Whereas the cost of non-resident big game licenses in Colorado is similar to other Western states, cost of a license may contribute to low participation among young non-resident hunters (ages 18-27).

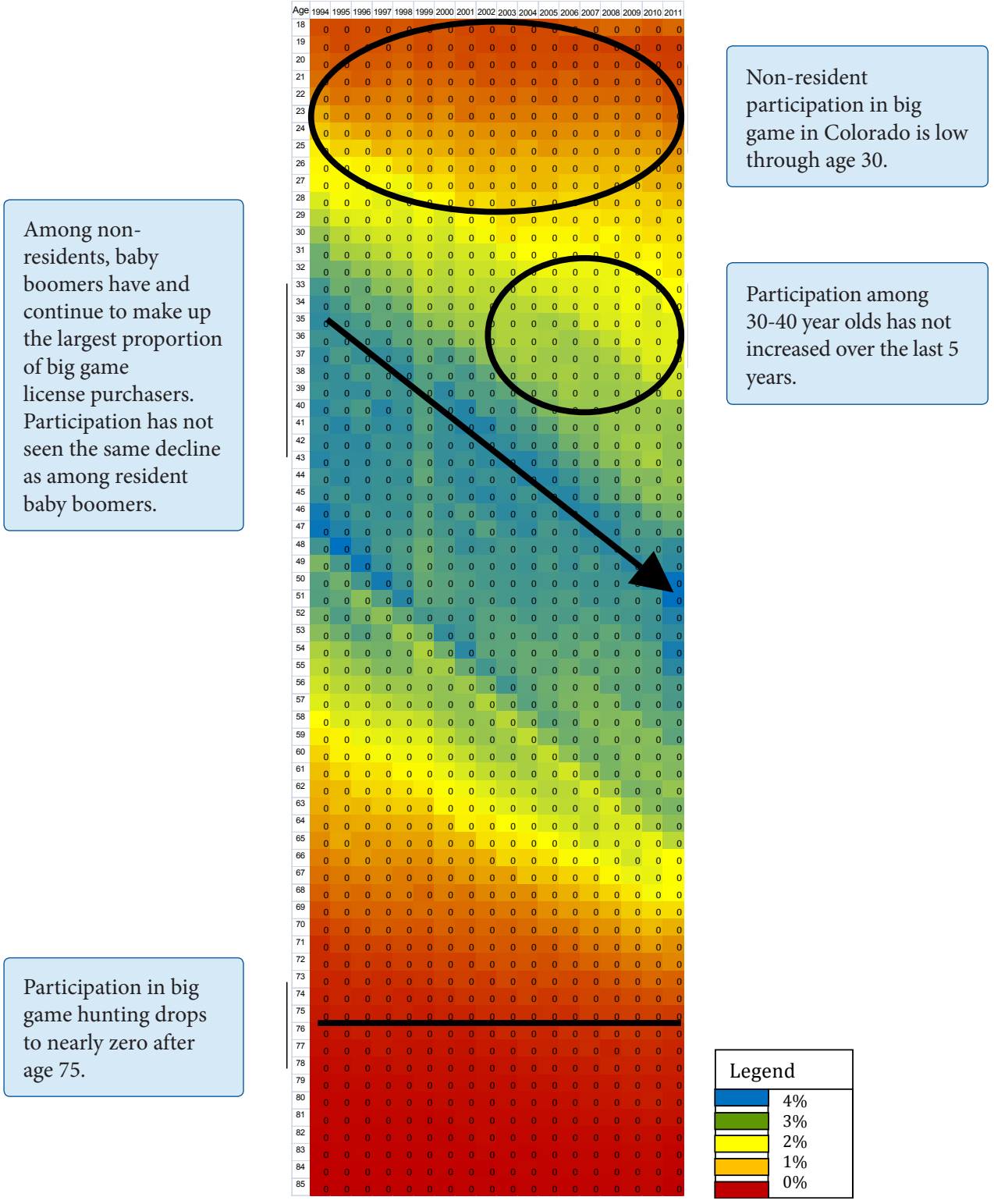


Figure 17. Ages of non-resident big game license purchasers: 1994-2011

Young adults make up a small proportion of resident big game license purchasers, despite the fact that there is a pulse in this age class evident in the statewide population data (Figure 18). The pulse in the statewide population in this age class indicates a significant opportunity for recruiting big game and other hunters in the state. Strategic effort and evaluation of recruitment and retention efforts targeted at individuals in their late 20s and early 30s may result in recruitment of a new age class of big game hunters.

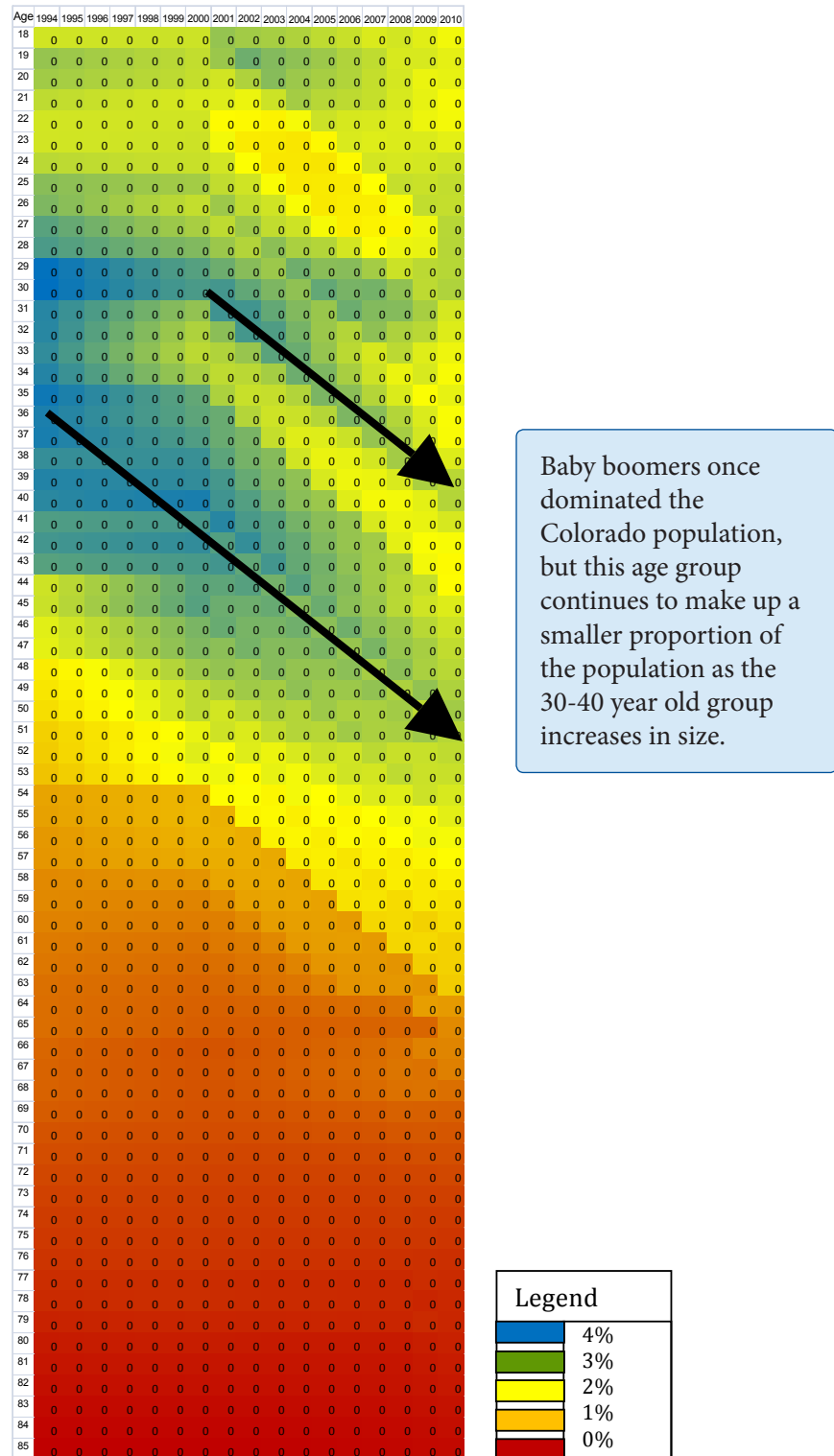
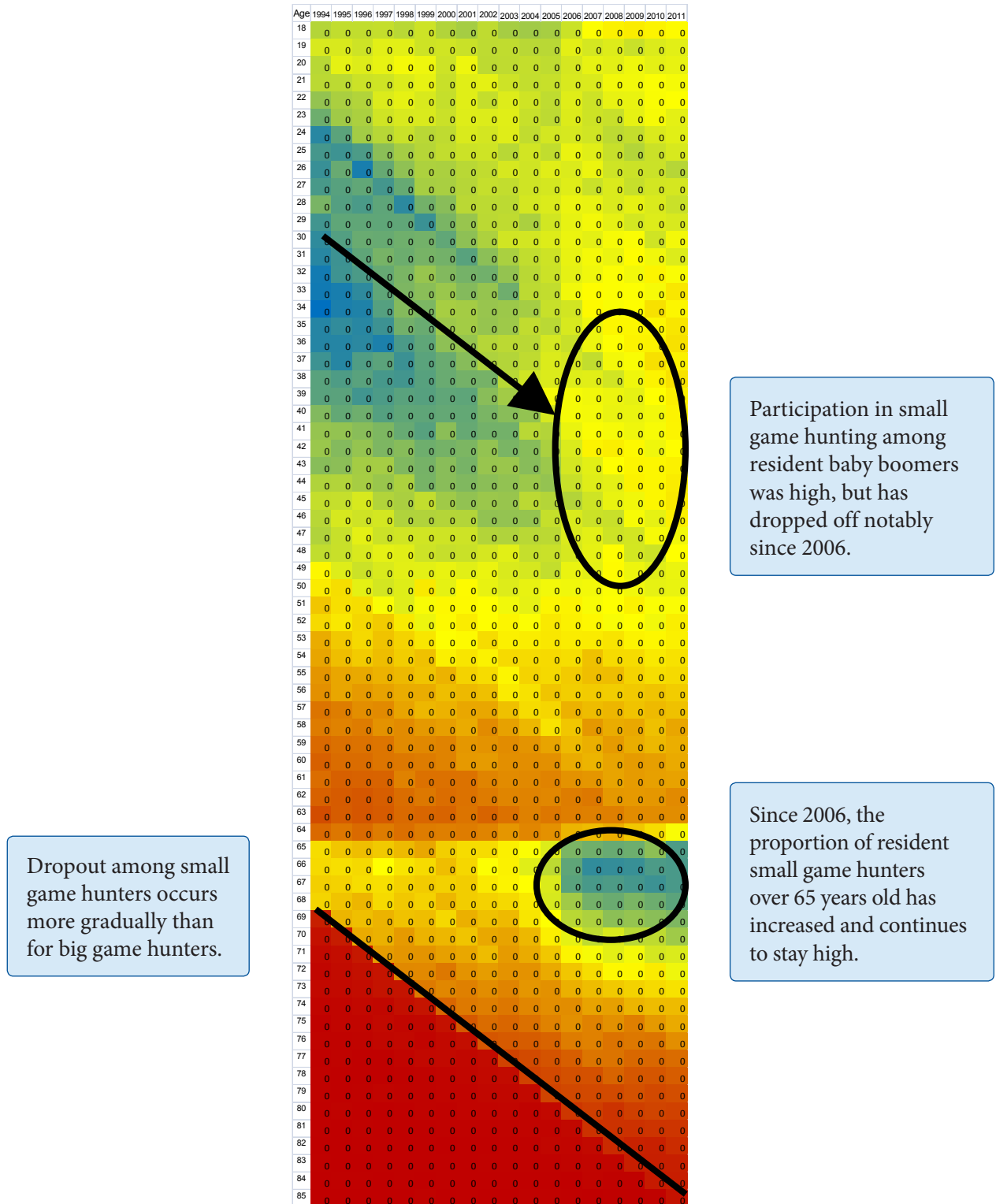


Figure 18. Ages of Colorado residents: 1994-2010

Figures 19 (resident) and 20 (non-resident) show the aging of small game license purchasers (ages 18-85) over the period from 1994 to 2012. Colorado's resident small game hunters are aging out of participation much more quickly than big game hunters. Resident hunters who were between the ages of 24 and 37 in 1994 made up the largest proportion of small game license purchasers at that time, but by 2006 this cohort made up a much smaller proportion of small game hunters. Interestingly, in 2006, the proportion of small game license purchasers who were over age 65 increased and has stayed consistently high since that time.



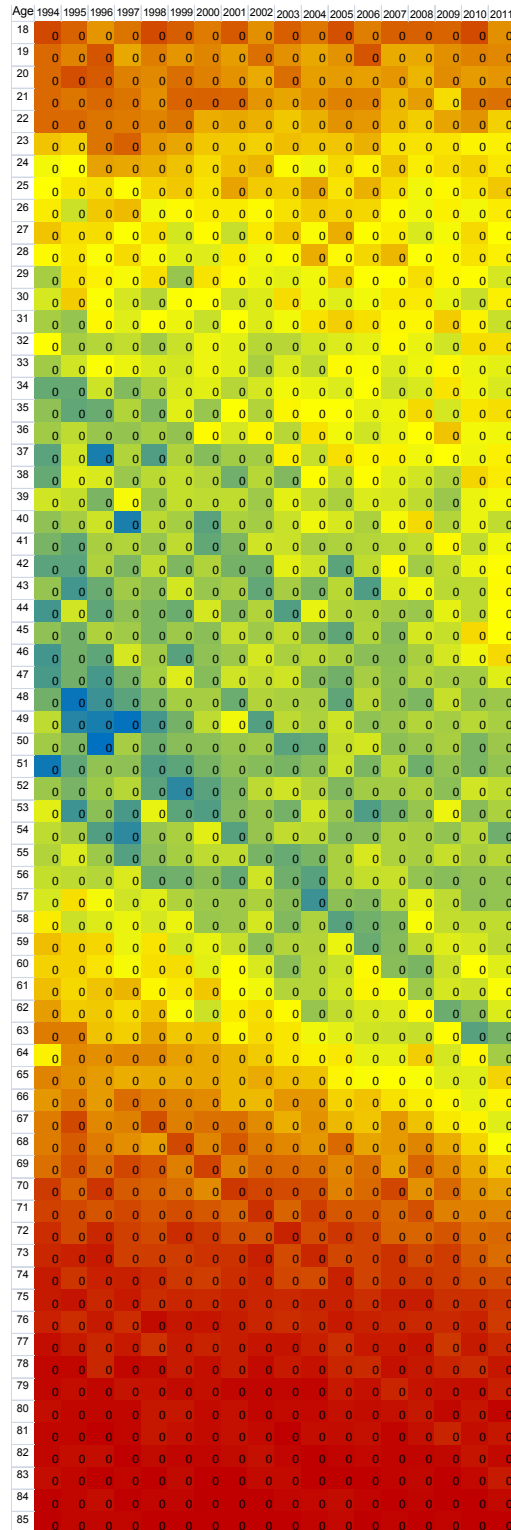
Dropout among small game hunters occurs more gradually than for big game hunters.

Participation in small game hunting among resident baby boomers was high, but has dropped off notably since 2006.

Since 2006, the proportion of resident small game hunters over 65 years old has increased and continues to stay high.

Figure 19. Ages of resident small game license purchasers, 1994-2011

Non-resident small game hunters showed an inconsistent pattern in licenses purchased over time (Figure 20), however the total population of non-resident small game license purchasers is small enough to prevent trends from showing up clearly. It is likely that many of these license purchasers decide to go small game hunting not as the primary purpose of their trip to Colorado, but rather as an add-on or infrequent activity. This pattern of individuals moving in and out of the license-purchasing population may prevent any clear patterns in age of participants from showing up in this analysis.

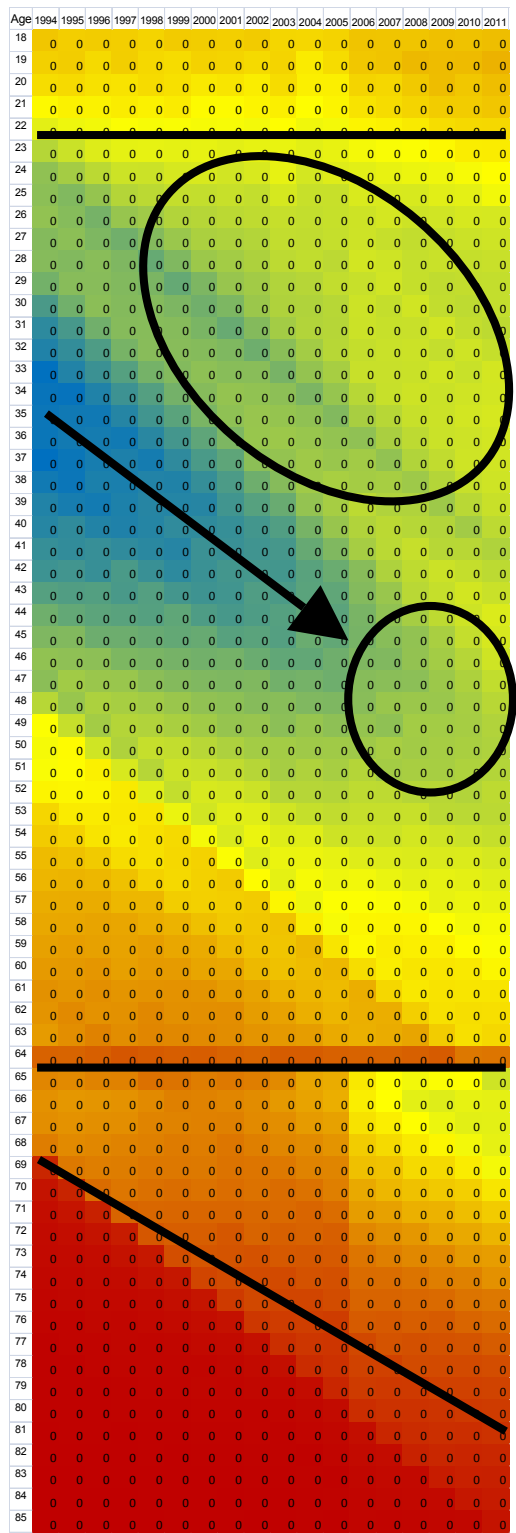


There is no discernable pattern in small game license purchase among non-residents.

Figure 20. Ages of non-resident small game license purchasers, 1994-2011

Residents who were between 31 and 41 in 1994 (now 48 to 58 years old) made up a large proportion of resident fishing license purchasers in the last 15 years (Figure 21). Over time this group continued to participate at relatively high levels, though participation began to drop off once anglers hit their mid-forties. In contrast to big and small game participation, there is high participation in angling among young adults, especially between the ages of 22 and 37. Participation drops off gradually after age 65, until about age 80, after which few participants remain.

Participation in fishing under age 22 is very low.



There is higher participation among Millennials (born between 1982 and 2004) and Generation Xers (born between 1956 and 1982) in fishing than in big and small game hunting.

Baby boomers made up a large proportion of resident anglers until 2006, when that group began to decrease participation.

After age 65, Colorado residents are eligible for a free fishing license. The apparent change in participation at age 65 is an artifact of the way data is collected from regular and senior license purchasers.

Angling participation drops off more gradually than hunting as resident anglers age.

Figure 21. Ages of resident fishing license purchasers: 1994-2011

Non-resident fishing license purchasers are primarily older adults (ages 62 to 65) who are likely increasing the time they spend fishing due to increased leisure time (Figure 22). This pattern is relatively recent, and has increased considerably since 2003. These non-residents appear to stay in the license purchaser pool to an older age than residents do and the older age cohort is growing among non-residents. If these individuals are indeed purchasing more regularly because they have more leisure time available to them, they may be an opportunity market for CPW retention efforts. There is low and decreasing participation among non-residents under age 45. By linking angling with other recreational activities that attract visitors to Colorado, we may be able to increase participation among younger non-resident anglers, and increase the size of this cohort.

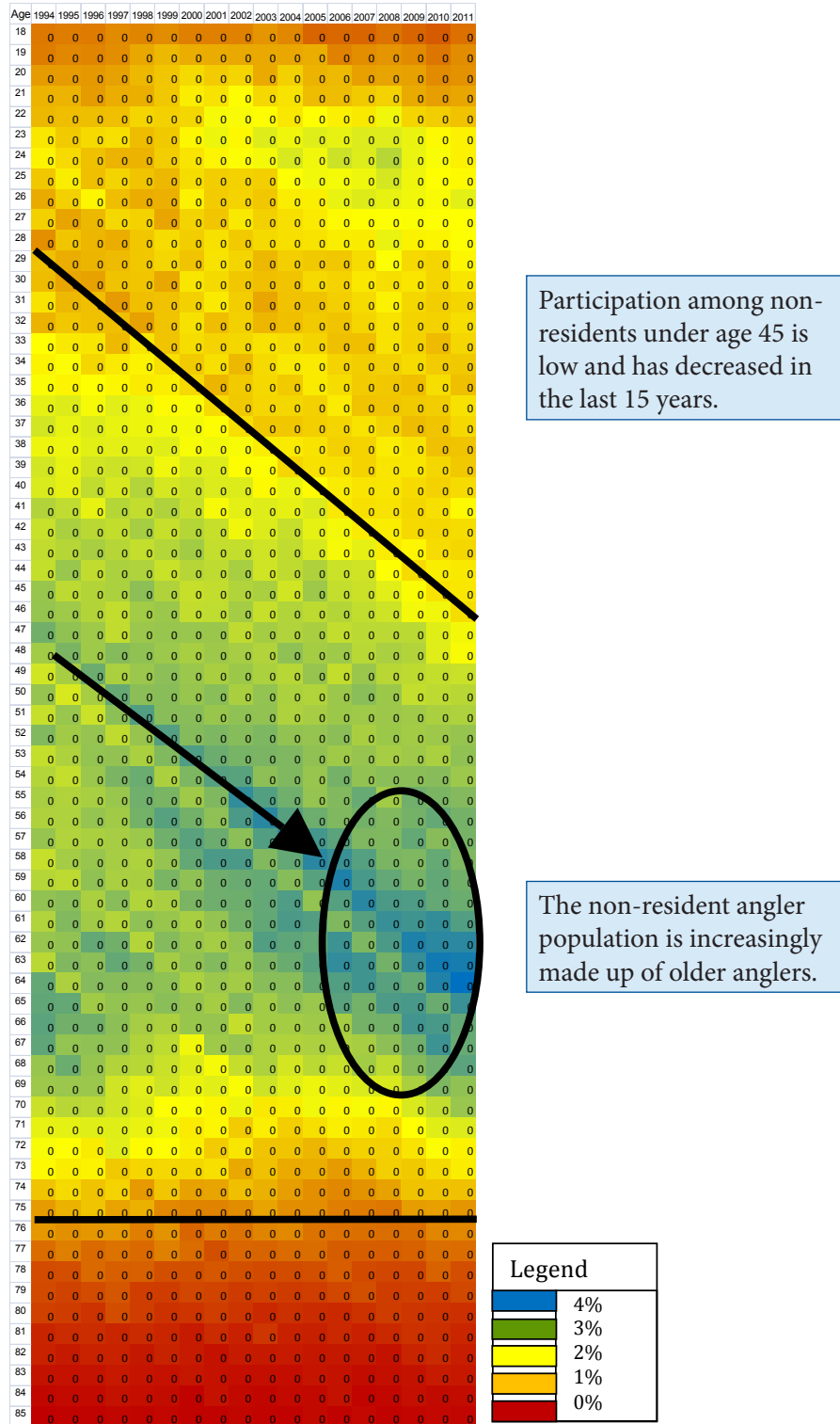


Figure 22. Ages of non-resident fishing license purchasers: 1994-2011

Summary

The overall population of license purchasers in Colorado is aging, but we do see the same trend in the population of Colorado, generally. For both hunting and fishing license purchasers, recruitment was most effective with individuals who were 30-45 years old in 1994 (now 46-61 years old). This cohort has made up the largest portion of our resident fishing, small game, big game and non-resident big game purchasers since 1994, and is a part of the largest cohort in the overall Colorado population. We were able to retain these sportspeople over time, but we have not been able to recruit a new cohort of the same size since that time. However, demographic patterns in the statewide population point out several “opportunity” cohorts that we ought to be targeting with our recruitment efforts (now 24-30 and 38-41 years old). Focusing recruitment efforts on these age classes could help backfill for the loss of older hunters and sportspeople. Retention efforts should continue to focus on those who are now 46-61 years old to maintain stable funding until we can develop these new audiences into regular purchasers.

4.0 What additional information will be available?

The report includes a snapshot of population, demographic, and CPW user and visitor trend data that are relevant to Division-wide initiatives such as recruitment and retention. Additional research tied to the Statewide Comprehensive Outdoor Recreation Plan, financial sustainability and economic impact of outdoor recreation are underway and will result in additional data applicable to many CPW priorities going forward.

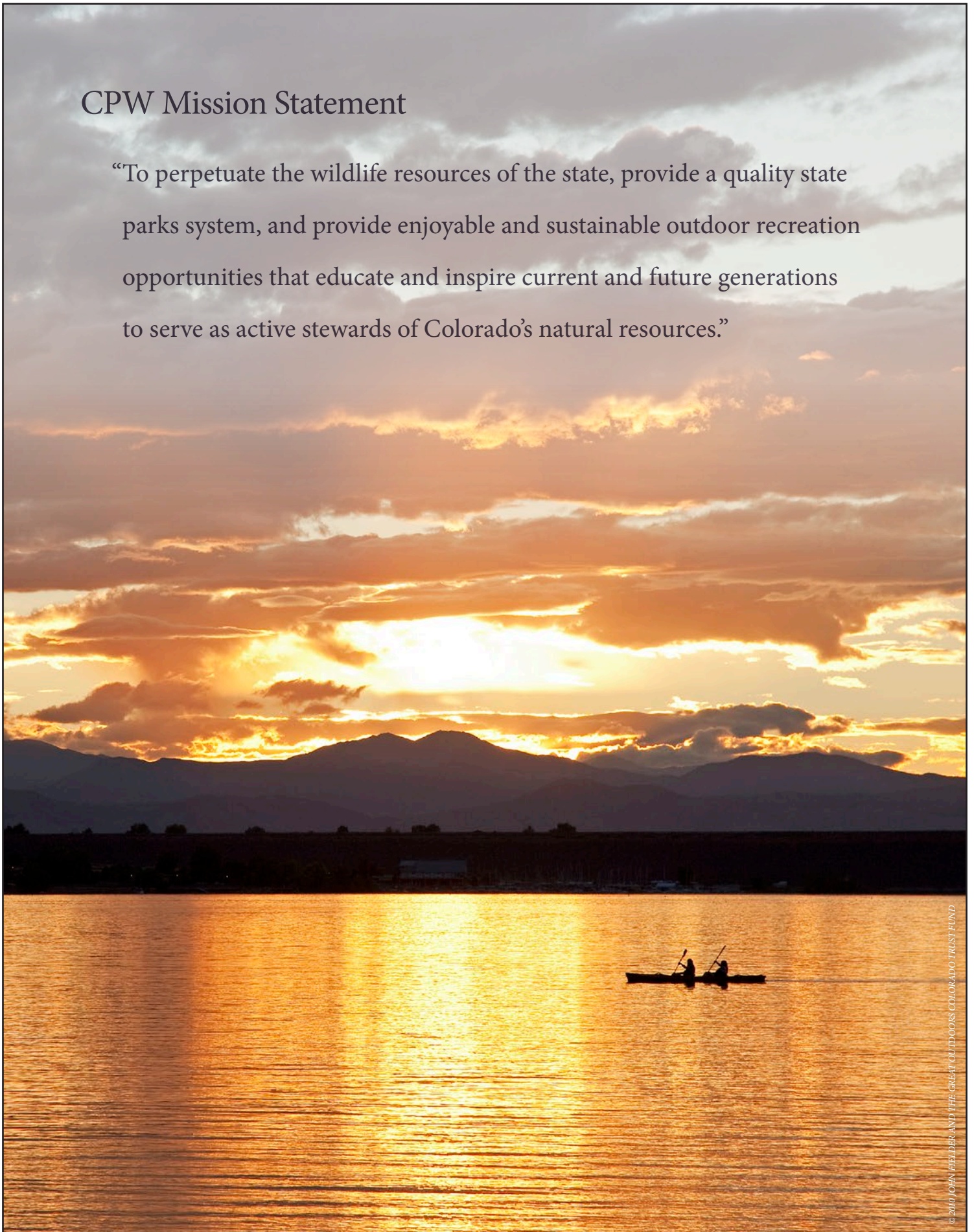
The CPW Planning and Policy section will continue to make this information available to the Commission, CPWLT, and CPW staff to help provide a basic understanding of these key trends and their potential impact on decisions

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CPW Mission Statement

“To perpetuate the wildlife resources of the state, provide a quality state parks system, and provide enjoyable and sustainable outdoor recreation opportunities that educate and inspire current and future generations to serve as active stewards of Colorado’s natural resources.”



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