

The Economic Value of Chimney Rock National Monument Update 2016

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**for
The Chimney Rock Interpretive Association**

Final Report - January 16, 2017

EXECUTIVE SUMMARY

Chimney Rock, one of America's newest National Monuments, was a sacred place, a celestial observatory and a seasonal calendar for the Ancestral Puebloans over 1,000 years ago. Chimney Rock National Monument (CRNM) encompasses 4,726 acres, preserving hundreds of prehistoric sites that dot the landscape around the twin spires known as Chimney Rock and Companion Rock. It is the most isolated and remote communities connected to Chaco Canyon and it is also the highest in elevation. Of the hundreds of sites in the area, four structures have been excavated and stabilized for public viewing. It is these sites that are the focus of the interpretive tours for over 11,000 visitors a year. Chimney Rock was proclaimed a national monument on September 21, 2012. The designation was made under the Antiquities Act with bi-partisan support from Colorado officials, Native Americans, local businesses and other stakeholders. With the Monument status came no state or federal funding.

In August of 2013 the Region 9 Economic Development District (Region 9) developed a research proposal to examine economic impacts observed during the first year of National Monument status at Chimney Rock. The underlying questions that this research addressed were: will national monument status increase the numbers of tourists to the region; what will the economic impacts be?

From 2012 to 2013 there was a 5% increase in the number of visitors to the newly designated Monument. A visitor survey was developed to help quantify economic impacts. In November 2013 this survey was sent to 192 email addresses that CRIA had collected during the season. Seventy-one responses were received (a 37% response rate); the responses represented more than 169 individuals based on reported party size. Altogether, visitor spending specifically attributed to Chimney Rock, and the operations of the Chimney Rock Interpretive Association (CRIA) were estimated to add about **\$1.43 million** and **16 jobs** to the local economy in 2013.

These findings led the Chimney Rock Interpretive Association (CRIA) to implement a research, marketing and advertising strategy that would make the Monument a destination, resulting in longer overnight stays and enhanced economic impacts to local communities. Ongoing data collection and analysis would focus on tracking visitor attendance and visitor spending patterns. The results of the analysis would include which marketing efforts were successful in reaching the public.

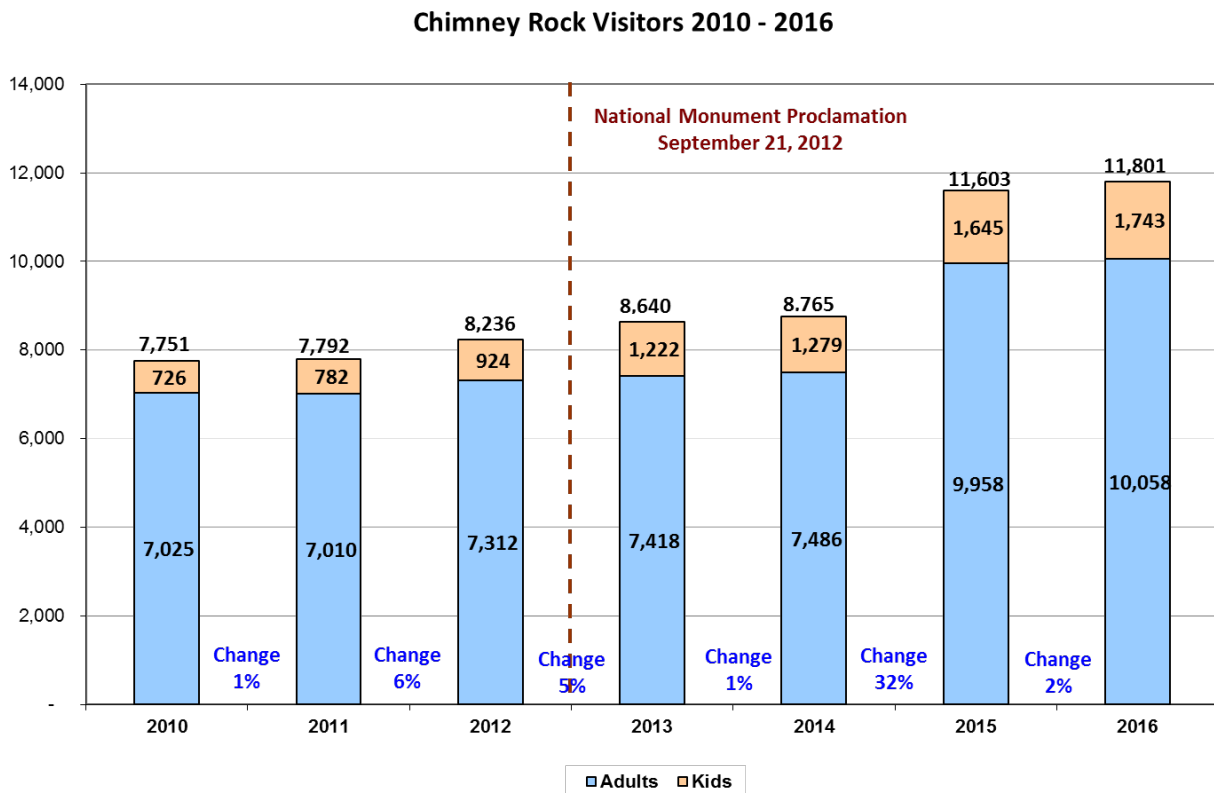
From 2014 to 2015 there was a 32% increase in the number of visitors to the site. This dramatic increase was probably due to a number of factors, including lower gasoline prices nationwide, and increased visibility of the site as a result of more intensive advertising. Of the 11,603 visitors to the site in 2015, 714 parties representing 1,720+ people (15% of visitors) filled out on-site surveys provided by CRIA. Visitor spending specifically attributed to Chimney Rock was estimated to add about **\$1.55 million** and **21 jobs** to the local economy (Archuleta and La Plata Counties) in 2015.

From 2015 to 2016 there was a 2% increase in the number of visitors to the site. Of the 11,801 visitors to the site in 2016, 857 parties representing 2,114+ people (>18% of visitors) filled out on-site surveys provided by CRIA. Visitor spending specifically attributed to Chimney Rock was estimated to add about **\$1.7 million** and **22 jobs** to the local economy (Archuleta and La Plata Counties) in 2016.

CURRENT RESEARCH

Chimney Rock is open from May 15th to September 30th annually, and offers daily guided and self-guided walking tours, seven days a week. Most of the information presented here is drawn directly from reports by the CRIA via Danyelle Leentjes – Director, and primary research gleaned from 857 responses to a short visitor survey conducted during 2016.

Information Services received monthly attendance information from the CRIA for 2009 to 2016. CRIA gathers information in two ways: one is from the sign-in registers daily report, and the other is the safety liability waiver that every visitor must sign. Figures shown here are from the liability waiver. There was a modest 2% increase from 2015 to 2016.



For the time being, modest growth may be preferable as the U.S. Forest Service develops an interpretive plan to guide future growth. Under discussion are infrastructure improvements to the entryway and parking area, additional natural trails with interpretive panels and interactive displays.

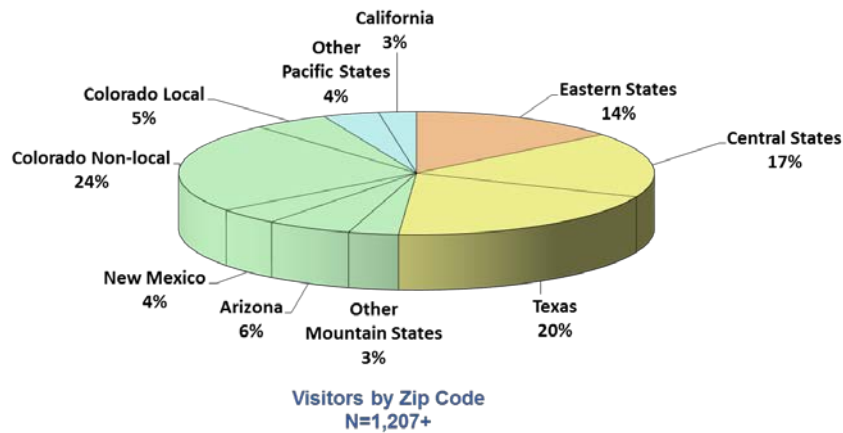
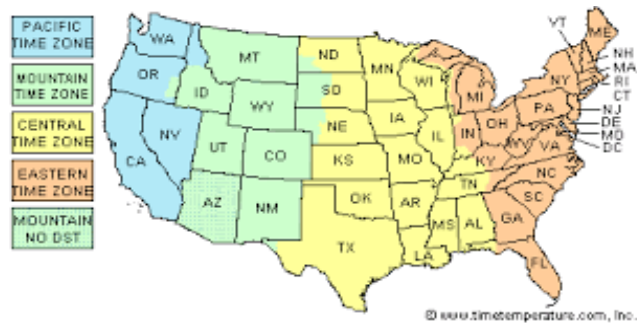
Visitor Survey 2016

Of the 11,801 visitors to the site in 2016, 857 parties representing 2,114+ people (18% of visitors) filled out on-site surveys provided by CRIA. This 16 question survey requested information about how they found out about Chimney Rock, and their spending on accommodations, dining, shopping, and recreation while in the area.

Questions 1- 4 asked respondents to provide contact information if they wanted to participate in a drawing for a \$100 prize for filling out the survey. There were 494 surveys (one per party) returned with contact information. These responses represent 1,207+ people, of which 95% (1,145+) were non-local.

One respondent was randomly selected and contacted by Information Services. The respondent kindly shared details of her trip, as follows. Marika and her husband are ranchers in Wyoming. They have family in southern Colorado and were here this summer visiting. Exploring archaeological sites has been a family interest spanning several generations. In the past they had visited Mesa Verde and Chaco Canyon, but had not had the opportunity to see Chimney Rock. They promised themselves to return, and after 13 years they did. While in the area they also enjoyed the Creede Repertory Theater, the Pagosa Hot Springs, and a drive to Durango. They would like to return for more adventures such as riding the train, and exploring more cultural sites in the larger area.

Also gleaned from the contact information was the number of visitors by state, using zip codes. Most (24%) of the visiting parties that offered this information were from Colorado. Five percent of visitors were from the local area (Archuleta and La Plata Counties). Some visitors were from outside of the U.S., but they were not included in this chart.



Survey Results 2016

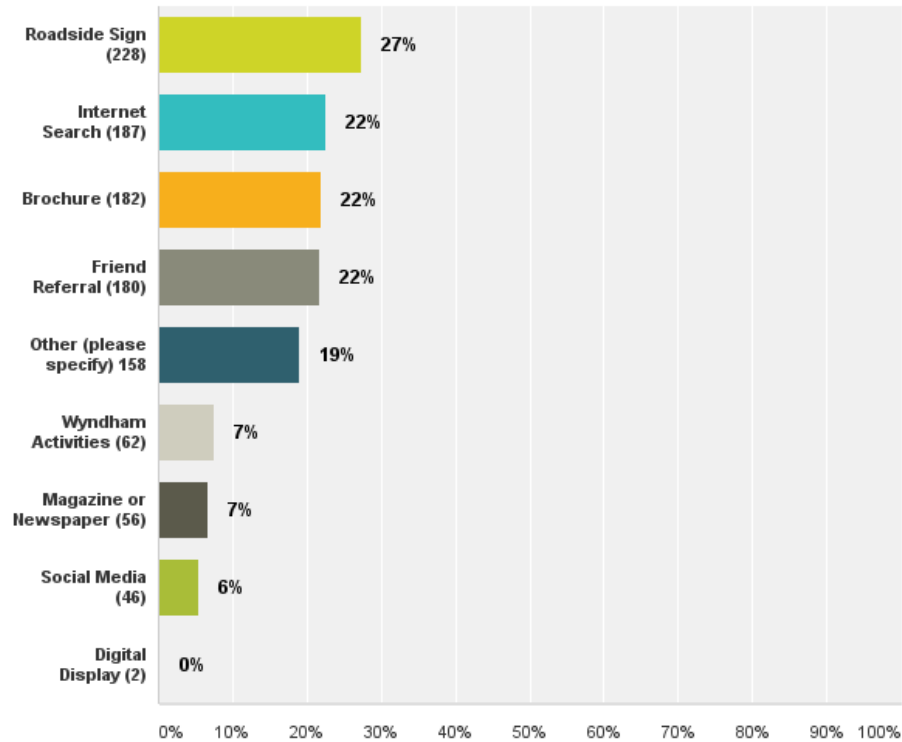
The findings of the visitor survey include:

- Most (24%) of the visiting parties that offered contact information were from Colorado. Five percent of visitors were from the local area (Archuleta and La Plata Counties). Some visitors were from outside of the U.S.
- The roadside signs (27%) erected by CDOT appear to have drawn the attention of most respondents from outside of the local area. Internet searches (22%), Brochures (22%) referrals (20%) from friends, families and local residents also led visitors to the Monument.
- Most (56%) of the visitors were in parties of two.
- 29% of respondents came to the area specifically to visit Chimney Rock. This is up from 27% in 2015.
- Most (51%) of the respondents did not know that Chimney Rock had recently been designated a National Monument. This is down from 53% in 2015.
- Most (88%) respondents stayed overnight within 60 miles of Chimney Rock. This is down from 90% in 2015.
- Most respondents (57%) stayed three or more nights in the area. This is down from 58% in 2015.
- 15% of respondents stayed an extra day in the area to visit the site. This is down from 16% in 2015.
- The majority of respondents (35%) stayed in accommodations such as a Hotel, Motel or Bed & Breakfast. Timeshares were also a popular choice (27%). Some of the visitors spent a night or two camping then moved on to other lodging.
- Average expenditures per person per day in 2016 (\$145) were up 11% from 2015 (\$131).

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Q5 How did you hear about Chimney Rock National Monument? Please check all that apply.

Answered: 832 Skipped: 25



Roadside Sign (228): Two CDOT mileage signs - one leaving Bayfield heading east "Chimney Rock National Monument 23 Miles"; and the other leaving Pagosa Springs heading west "Chimney Rock National Monument 11 miles" both located on HWY 160. Signs went up April 2015.

Internet Search (187): Search engines were not requested or specified.

Brochure (182): Three brochures were distributed by *Certified Folder*, a company that has advertising racks all across the United States located in high traffic areas for visitors. One brochure was produced by CRIA. Another is a SW Colorado brochure with a map and ad produced by Certified. There is also a Colorado activity brochure (map inside as well) with a Chimney Rock ad produced by *Certified*.

CRIA pays *Certified Folder* to distribute brochures in the following locations:

Alamosa - 70 locations

Durango - 89 locations

Pagosa Springs - 34 locations

Cortez/Mancos - 37 locations

Certified Folder also produces and distributes its own visitor brochures. *Fearn's SW Colorado Guide* (100,000 copies) is a half panel featuring lodging and activities. *Fearn's Colorado Activity Guide* is a full page panel ad shared with Crow Canyon Archaeological Center (125,000 copies) featuring activities to do throughout the state (paid advertising)

Friend Referral (180): Referrals by friends, family and other locals were also noted in **Other**.

Other (158): Top 10 specified from text recognition tool.

1-Map

2-Books

3-Pagosa Springs: visitor guide, chamber

4-Saw the Rock, saw the sign

5-Drive by

6-Guide; Fodors, Lonely Planet

7-Local

8-Durango: Durango Magazine, Map of area, public lands office

9-Family referral

10-Live in area

Wyndham Activities (62): Wyndham is a timeshare resort that offers the most lodging units in Pagosa Springs. They have an activities center for their guests to learn about different activities in the area. The activities director at Wyndham had their team recommend the Monument and distribute brochures to guests.

Magazine or Newspaper (56): Paid advertising in *Durango Magazine* and the *Pagosa Springs Official Visitors Summer Guide*. There are also magazines that do editorials on CRNM from time to time, including: *The Durango Herald* (September) and *Colorado Country Life* (August).

Newspapers: CRIA sends out press releases 3-4 times per month to regional newspapers promoting their monthly events. These include: *The Durango Herald*, *The Pagosa Sun*, *The Farmington Times*, *The Bayfield Pine River Times*, and *The Cortez Journal*. In addition, announcements such as awards are also posted in statewide publications *The Colorado Gazette* and *The Denver Post*.

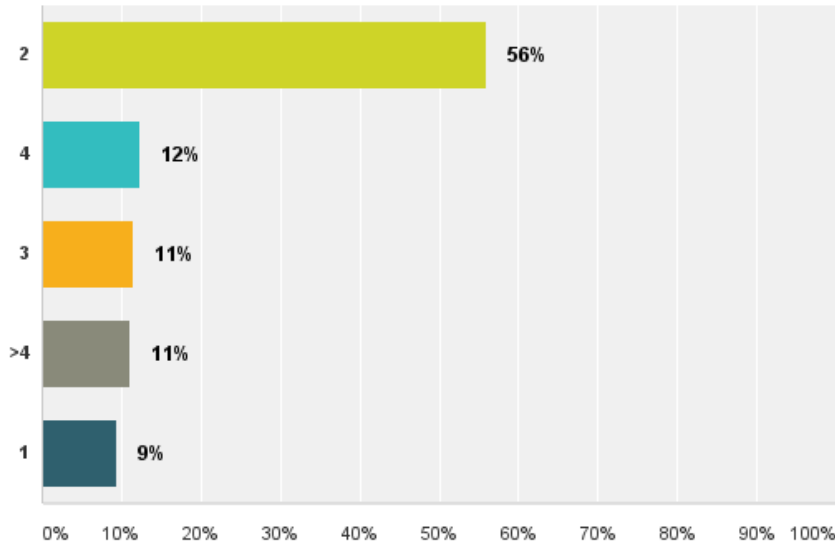
Social Media (46): Facebook paid advertising to get more likes/followers.

Digital Display (2): These short digital films are displayed in the Durango, CO. Welcome Center, the Durango/La Plata County Airport, the Cortez, CO. Welcome Center, and the Alamosa, CO. Welcome Center.

There were a total of 11,801 visitors to the monument in 2016, including 1,743 kids and 10,058 adults. These 850 responses represent 2,114+ individuals, providing an overall response rate of > 18% of visitors. Most (56%) of the visitors were in parties of two.

Q6 How many people are in your party?

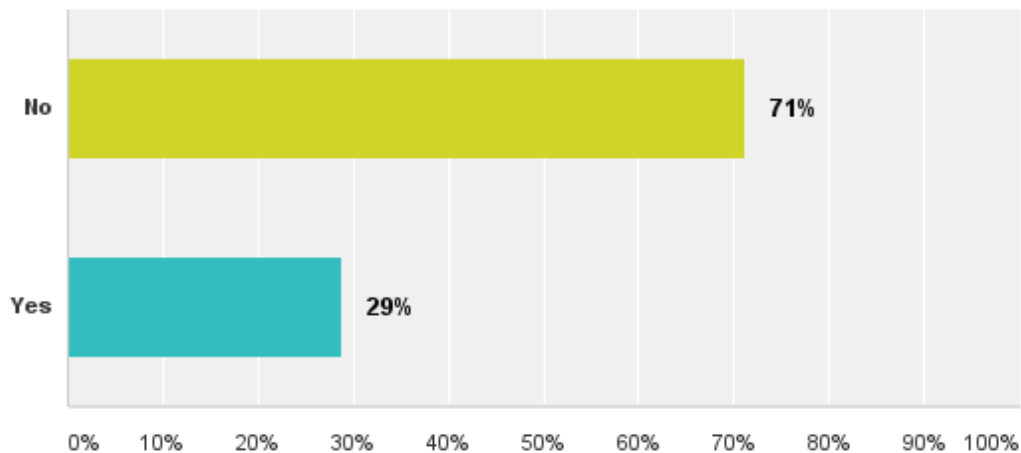
Answered: 850 Skipped: 7



29% of respondents came to the area specifically to visit Chimney Rock. This is up from 27% in 2015.

Q7 Did you come to the area specifically to visit Chimney Rock?

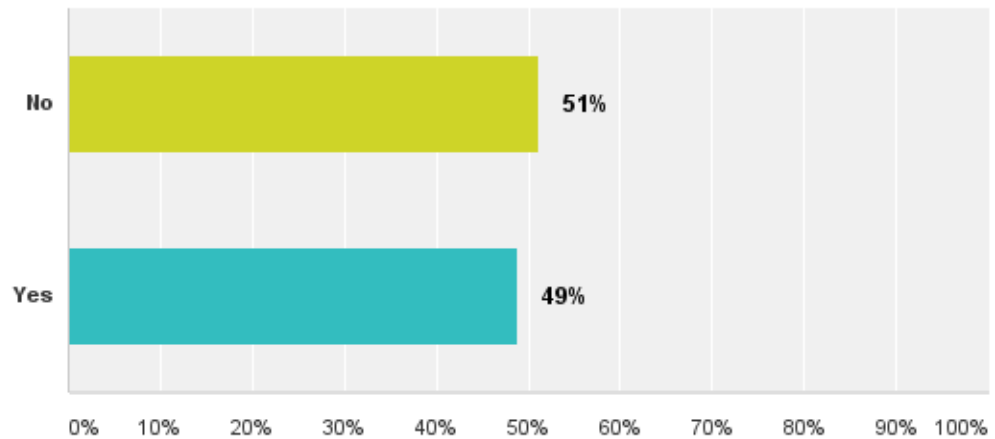
Answered: 851 Skipped: 6



Most (51%) of the respondents did not know that Chimney Rock had recently been designated a National Monument. This is down from 53% in 2015.

Q8 Did you know that it was recently granted National Monument status?

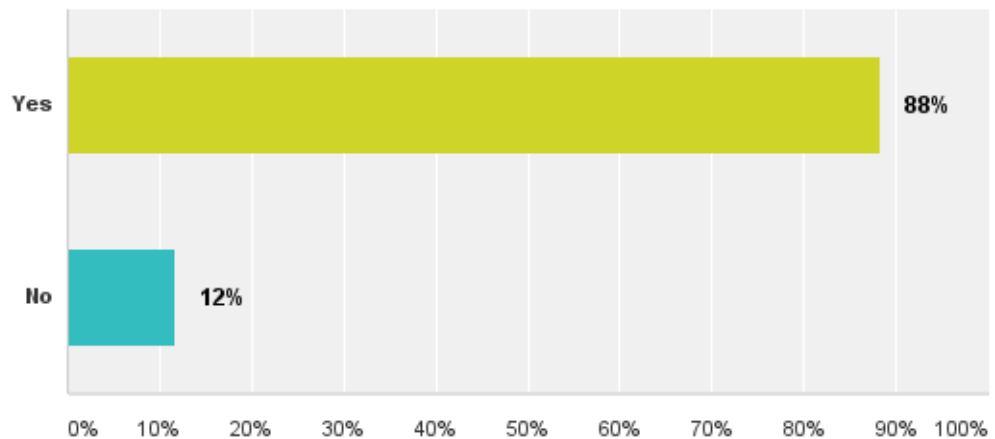
Answered: 855 Skipped: 2



Most (88%) respondents stayed overnight within 60 miles of Chimney Rock. This is down from 90% in 2015.

Q9 Are you staying overnight in the area (within 60 miles of Chimney Rock) ?

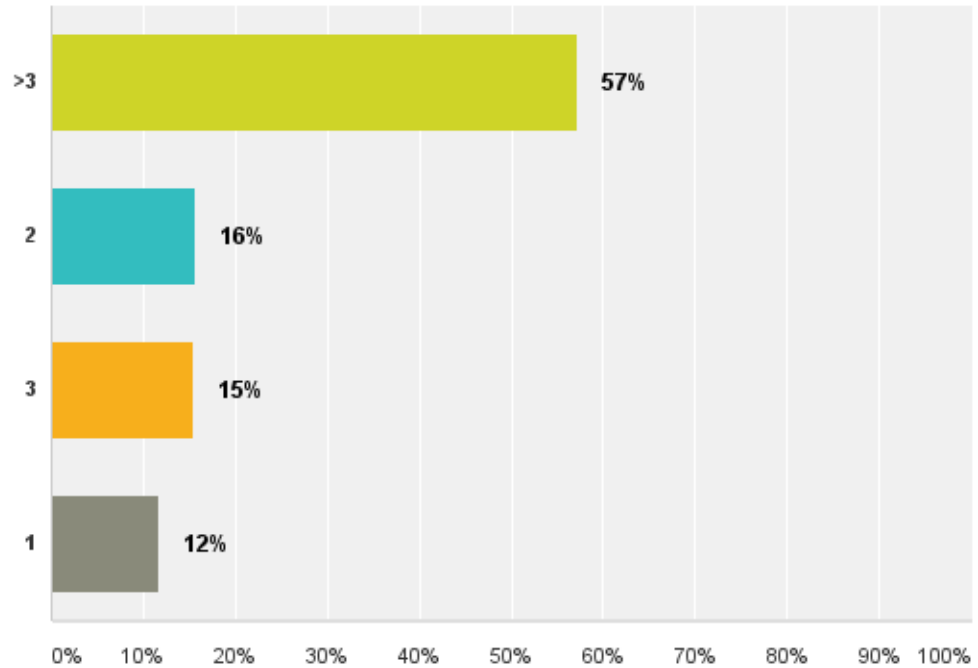
Answered: 852 Skipped: 5



Most respondents (57%) stayed three or more nights in the area. This is down from 58% in 2015.

Q10 How many nights will you spend in the area?

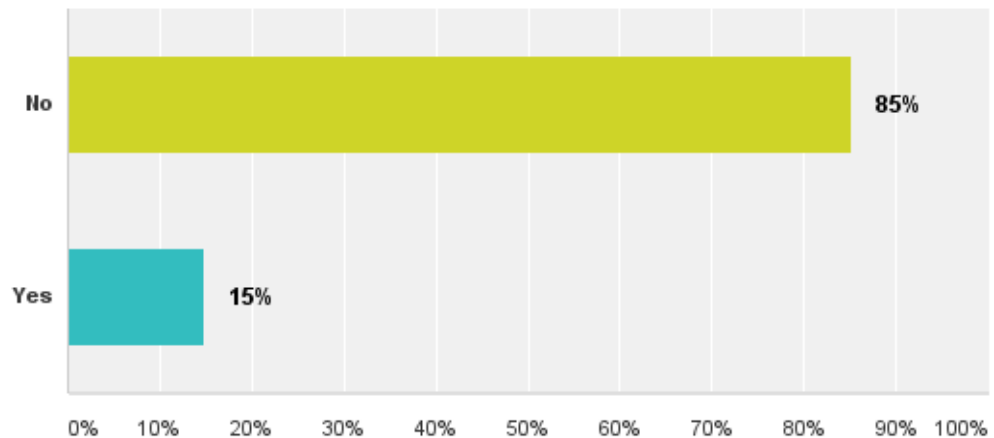
Answered: 768 Skipped: 89



15% of respondents stayed an extra day in the area to visit the site. This is down from 16% in 2015.

Q11 Are you staying an extra day in the area specifically to visit Chimney Rock?

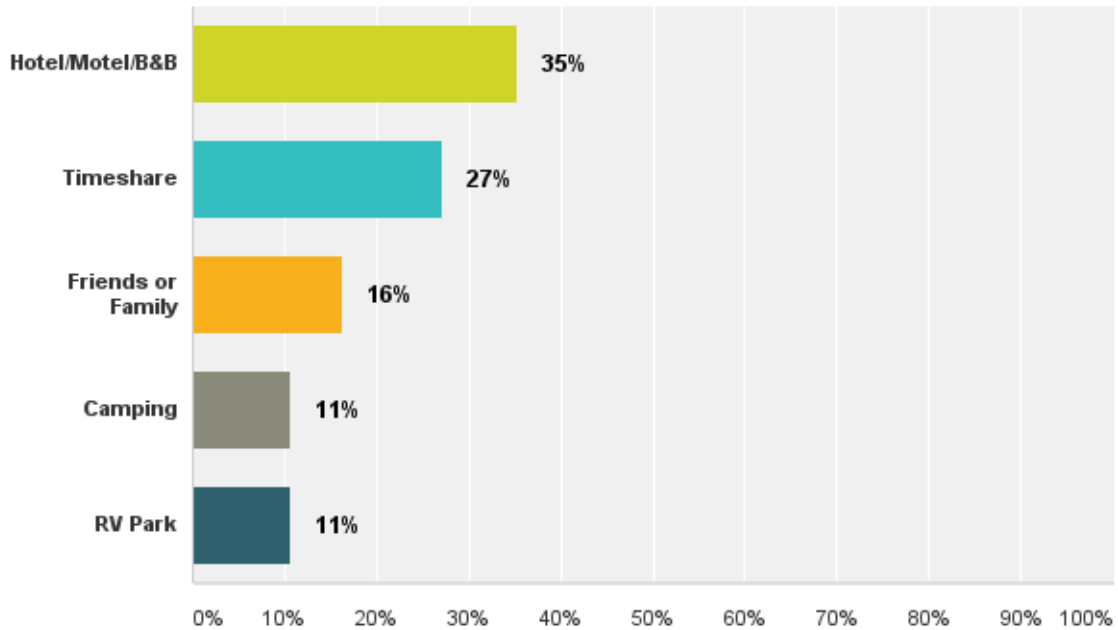
Answered: 836 Skipped: 21



The majority of respondents (35%) stayed in accommodations such as a Hotel, Motel or Bed & Breakfast. Timeshares were also a popular choice (27%). Some of the visitors spent a night or two camping then moved on to other lodging.

Q12 What sort of accommodations are you staying in?

Answered: 780 Skipped: 77



Spending Profiles by Accommodation Type

Expenditures for accommodations, dining, shopping and recreation averaged \$145 per person per day in 2016. This is an 11% increase over average expenditures in 2015. Average expenditures per person per day in 2015 (\$131) were down 25% from 2013 (\$174). The spending decline from 2013 to 2015 and 2016 may be a result of the survey method. The survey from 2013 contacted visitors several months after they had returned home, and had time to tabulate all expenses from their trip. The surveys from 2015 and 2016 were drawn from visitors still on their journeys.

2013 Average Expenditures		2015 Average Expenditures		2016 Average Expenditures	
Average Spending - Per Person Per Day		Average Spending - Per Person Per Day		Average Spending - Per Person Per Day	
Accommodations	\$ 55	Accommodations	\$ 36	Accommodations	\$ 38
Dining	\$ 45	Dining	\$ 33	Dining	\$ 34
Shopping	\$ 36	Shopping	\$ 27	Shopping	\$ 34
Recreation	\$ 38	Recreation	\$ 35	Recreation	\$ 39
Total	\$ 174	Total	\$ 131	Total	\$ 145

2015		2016	
Lodgers Per Capita Expenditures		Lodgers Per Capita Expenditures	
Accommodations	\$ 67	Accommodations	\$ 65
Dining	\$ 41	Dining	\$ 46
Shopping	\$ 32	Shopping	\$ 36
Recreation	\$ 42	Recreation	\$ 47
Total	\$ 182	Total	\$ 194
Lodging in Hotel /Motel/B&B		Lodging in Hotel /Motel/B&B	
Timeshare Per Capita Expenditures		Timeshare Per Capita Expenditures	
Accommodations	\$ 44	Accommodations	\$ 48
Dining	\$ 40	Dining	\$ 35
Shopping	\$ 30	Shopping	\$ 29
Recreation	\$ 44	Recreation	\$ 40
Total	\$ 158	Total	\$ 152
RV Per Capita Expenditures		RV Per Capita Expenditures	
Accommodations	\$ 19	Accommodations	\$ 19
Dining	\$ 29	Dining	\$ 27
Shopping	\$ 27	Shopping	\$ 44
Recreation	\$ 28	Recreation	\$ 36
Total	\$ 103	Total	\$ 126
Camping Per Capita Expenditures		Camping Per Capita Expenditures	
Accommodations	\$ 12	Accommodations	\$ 20
Dining	\$ 21	Dining	\$ 22
Shopping	\$ 16	Shopping	\$ 31
Recreation	\$ 21	Recreation	\$ 33
Total	\$ 70	Total	\$ 106
Friends/Family Per Capita Expenditures		Friends/Family Per Capita Expenditures	
Dining	\$ 33	Dining	\$ 41
Shopping	\$ 32	Shopping	\$ 32
Recreation	\$ 39	Recreation	\$ 38
Total	\$ 104	Total	\$ 111
No accommodation costs		No accommodation costs	

Visitor Spending Impacts

Based on the data collected from the CRIA and the Visitor Survey we estimate that about 80-95% of the adult visitors to the site are non- local. Although spending patterns have been broken down by accommodation type, i.e. hotels, timeshares, RV's and campers, this analysis uses an average of those (\$145) to estimate direct spending. To provide comparability to the 2013 and 2015 research we will estimate spending based on 80% of adult visitors in 2016 (10,058 x .80). Thus it is estimated that 8,046 people spending an average of \$145 per person per day, resulted in an estimated \$1,023,900 in **Direct Impacts** by non-local visitors to Chimney Rock in 2016. **Secondary Impacts** (\$680,700) occur as these dollars re-circulate when local businesses spend earnings to make purchases of goods and services in the local economy, creating a ripple effect. Total visitor spending impacts¹, based on IMPLAN modeling, are estimated to be about **\$1.7 million for 2016**.

***2016 Visitor Spending Estimates**

	Direct Impact	Secondary Impact	Total Impact	Calculated Multiplier
Accomodations	\$ 305,700	\$ 189,100	\$ 494,800	1.62
Dining	\$ 273,600	\$ 180,700	\$ 454,300	1.66
Shopping	\$ 130,800	\$ 108,300	\$ 239,100	1.83
Recreation	\$ 313,800	\$ 202,600	\$ 516,400	1.65
Total Visitor Spending	\$ 1,023,900	\$ 680,700	\$ 1,704,600	1.66

*Dollar amounts have been rounded to the nearest \$000

Visitor spending at Chimney Rock supports about 22 jobs in the area, i.e. waitresses at the local restaurant, retail clerks, doctors or dentists and so on.

2016 Employment Impacts

	Direct Impact	Secondary Impact	Total Impact	Calculated Multiplier
Accomodations	3	2	5	1.67
Dining	6	1	7	1.15
Shopping	3	1	4	1.33
Recreation	5	1	6	1.16
Total Employment Impacts	17	5	22	1.28

¹ The \$ impacts shown are based on IMPLAN Output calculations, where secondary impacts are the sum of indirect and induced effects.