COLORADO STATE PARKS

2008/2009 MARKETING ASSESSMENT

Executive Summary of Findings and Recommendations

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INTRODUCTION & BACKGROUND

Corona Research is pleased to present this marketing assessment to Colorado State Parks. This executive report provides an overview of key findings and conclusions arising from an extensive marketing assessment, as well as recommendations for marketing priorities and strategies arising from those findings.

BACKGROUND

Colorado State Parks retained Corona Research in 2008 to learn more about perceptions and attitudes about Colorado State Parks from both State Park visitors and non-visitors, with the goal of identifying Colorado State Parks' position in the outdoor recreation marketplace, and to provide information for the future direction of Colorado State Parks by identifying the facilities, services, and programs valued by citizens of Colorado and visitors to Colorado State Parks.

In order to properly account for the significant seasonality of state parks visitation, the research portion of the project required a full 12 months of data collection. Between the various phases of the project, the initial design began in April of 2008, and the final field data were collected in August 2009, with results being prepared in September of 2009.

PROJECT DESIGN AND METHODOLOGY

The project had five different unique elements. These were:

Public Survey. Corona conducted a random survey of 1,925 members of the public in Colorado, without regard to whether they visited Colorado's state parks or not. This element of the project, completed in the summer of 2008, examined market share issues for Colorado State Parks, reasons for attending or not attending state parks, and the extent of general public support for Colorado State Parks. The study was conducted statewide.

Public Focus Groups. Corona conducted ten focus groups with members of the general public in Colorado in the summer of 2008. The groups were conducted in five locations around the state – Denver, Grand Junction, Colorado Springs, Pueblo, and Greeley. In each community, two groups were held, one with people who had visited a Colorado state park in the past two years, and one with people who had not visited in the time frame. This element of the project examined in-depth opinions of parks and gathered people's perceptions of the role of state parks in the spectrum of recreation options.

Park-Specific Visitor Surveys. Working in conjunction with Colorado State Parks staff, Corona gathered over 9,400 surveys roughly evenly distributed across the 42 parks in the state parks system. With a target of 200 surveys per park, this number allowed analysis of findings by park as well as findings on a statewide basis (after weighting results to reflect the visitation differences across parks). Detailed sampling plans were developed to ensure that the data for each park accurately reflected seasonality of visitation, day of week visitation (weekday vs. weekend), time of day, and even the entrances used. This survey examined the visitor experience at Colorado state parks, including the demographics of visitors, key factors in satisfaction with visits, and other issues.

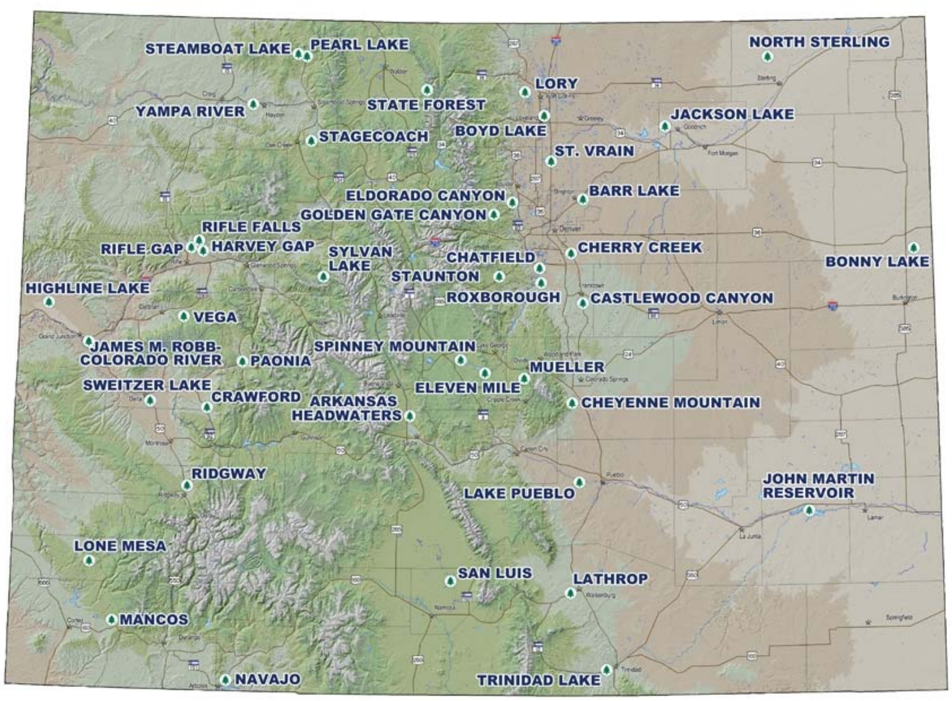
Visitor Spending Analysis. As part of the visitor survey, respondents were asked the distance traveled to reach the park, and their spending within 50 miles of the park that was directly related to the park visit. Using this data, Corona prepared estimates of total direct spending in local areas as a result of park visits. Two sets of figures were developed: the first examined total spending by all visitors that occurred within 50 miles of the park, and the second included only imported spending by visitors who originated 50 miles or more from the park.

Future Directions Surveys. Working in conjunction with Colorado State Parks staff, Corona gathered over 1,000 surveys at five strategically selected state parks that represent of a microcosm of the larger system. Within those parks, these surveys used the same sampling system as the visitor survey above, with sampling by month, day of week (weekday vs. weekend), time of day, and entrance used. The future directions surveys asked specific strategic questions to visitors regarding future priorities for Colorado State Parks, as opposed to the more tactical questions posed in the Visitor Survey. The survey also included some repeated questions from the visitor survey, and these questions were analyzed to assess and ensure that the five parks could be considered representative of the entire system. (This was found to be true.)

MAP OF COLORADO STATE PARKS

For the reader's reference, a map of Colorado's state parks is shown below.

Reference Map of Colorado's State Parks System



ORGANIZATION OF SUPPORTING DOCUMENTS

The study produced six distinct documents: one report for each of the five project elements above, and this report as a sixth document.

The five supporting documents, comprising over 1,300 pages of information, provide detailed data on each element of the project, along with a summary of the key findings of that element. Since each of those elements were conducted independently, and since those documents were prepared at different stages of the process, they contain no cross-correlation with other elements, or a broad sweep of the entire project.

This sixth report provides that compilation. This report brings together select key findings from each element of the project, adds some selected follow-up analyses, and processes all of the information into a set of global findings and recommendations. While different readers may draw different conclusions (and we encourage readers to study all six documents), this summary document provides the research team's perceptions of the key issues and implications of the entire project.

This report therefore contains the crux of the study and its final recommendations. Nonetheless, it should be noted that information was gathered on many topics and issues in the five project elements, and only a fraction of those with the strongest strategic import are discussed here. We recommend that the reader peruse the key findings summaries of each of the five reports, and also note that the full bodies of the reports contain even more information on various issues, as well as a rich depth of detail that cannot be succinctly summarized.

ORGANIZATION OF THIS REPORT

This report addresses several particular top-level categories of findings, each organized as one section. Those sections are:

- General attitudes and awareness of state parks
- The current market profile, containing information about visitor demographics and activities
- "Enhancing Visitor Experiences", which discusses the reasons and motivations for visiting a state park, and research findings about what would enhance the experience
- The Competitive Landscape, which provides an overview of state parks visitation versus other venues
- Market Trends, which discusses two key demographic groups on the rise in Colorado, and their preferences regarding state parks
- Customer Satisfaction, which provides a summary of satisfaction with various park features and services
- State Parks Brand Attributes, which summarizes selected attributes of the brand now, based primarily on focus group research
- Reaching Markets, which discusses information conduits to potential visitors
- "Moving Forward – Recommendations", which discusses the research team's conclusions and broad strategy recommendations.

GENERAL ATTITUDES AND AWARENESS

This section will begin with the basics: general attitudes and awareness of state parks.

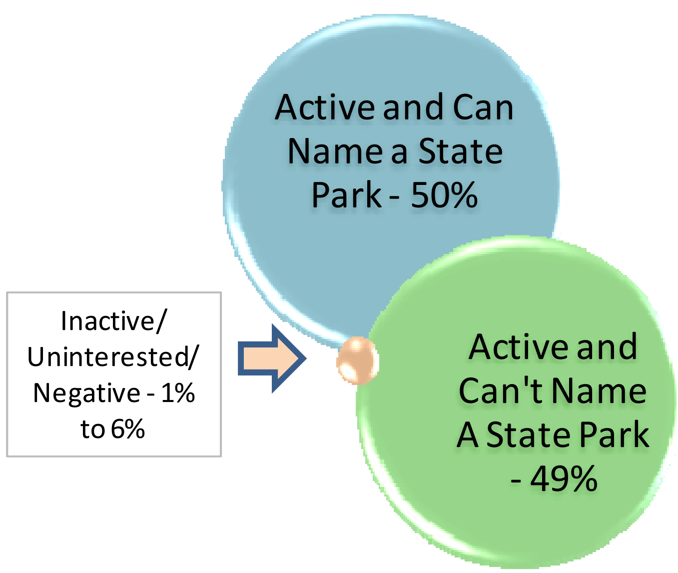
TANGIBLE KNOWLEDGE AND ATTITUDES

In this category, there are three groups of people in the state: those who are active and aware of at least one state park, those who are active and unaware of at least one state park, and those who are inactive (and generally uninterested and/or negatively inclined toward state parks.

Based on the research, roughly 50 percent of the state's population can name at least one state park, and another 49 percent can't name a state park, but still participates in activities that can be done at a state park. Based on various measures, between 1 percent and 6 percent really don't have any interest in anything involved in state parks, don't participate in any activities that are done at state parks, or has a negative perception of state parks. Given the small size and barriers to moving that third market's opinions and behaviors, it's a group that likely doesn't warrant much investment in strategy or resources.

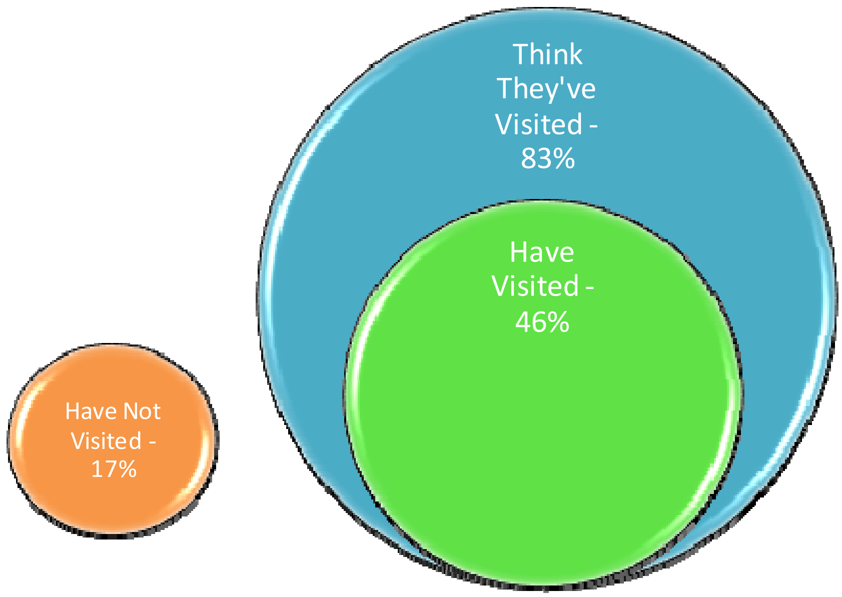
So in essence there are three primary markets in terms of awareness:

Awareness of Colorado State Parks, and Physical Activity Level



Related to the above, 83 percent of the state population, when asked, said that they have visited a state park within the past two years. However, when asked for specifics, 37 percent either cited a location that wasn't a state park (e.g., "Woodland Park", "Dinosaur State Park", "Rocky Mountain State Park", etc.) or couldn't name the park they visited. Thus the estimate of actual visitation was conservatively revised downward from 83 percent to 46 percent.

Visitation to Colorado State Parks During the Past Two Years



This therefore leads to the conclusion that a significant initial issue is general recognition of state parks: what they are and where they are. A significant portion of the population appears to have trouble recognizing state parks.

Focus group research confirmed this. Among roughly 50 focus group participants who had visited a park within the past two years, participants guessed that there were between 20 and 150 state parks in Colorado. A similar number of participants who had not visited a state park in the past two years guessed between 6 and 200. Many participants were surprised to hear there are 42 (soon to be 43) State Parks.

INTANGIBLE ATTITUDES AND PERCEPTIONS

A lack of knowledge about state parks, and even the inability to name a single state park or accurately estimate their numbers, did not negatively impact the public's positive feelings about state parks in general. The general public, both visitors and non-visitors, held state parks in very high regard. For example:

- 97 believed that state parks are a good thing for Colorado (and nearly all of the other 3 percent didn't answer the question).

- 61 percent have a "very favorable" impression of Colorado state parks, and another 28 percent have a "somewhat favorable" impression. Only about 2 percent had a "somewhat unfavorable" or "very unfavorable" impression.

It is clear from these findings that Colorado State Parks has a strong reputation among the general public. More information on the experiences of visitors is presented later.

THE CURRENT MARKET PROFILE

The current market landscape for Colorado State Parks can be thought of a number of different ways: demographically, geographically, psychographically, or other constructs. Based on the 2009 research, the following truths can be discerned.

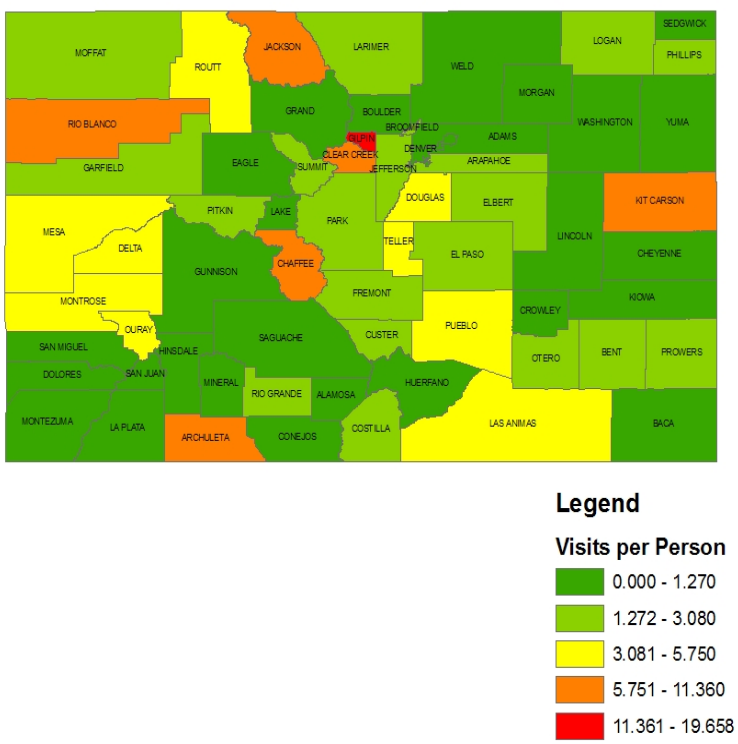
It should be noted that the statistics in this section are reported on a systemwide basis, and the characteristics of individual parks can vary dramatically. Those findings by park are reported in the Visitor Survey report.

1. The current market for Colorado State Parks is approximately 46 percent of the state's population. Additionally, 12 percent of state park visitors come from out of state (1 in 12 day visitors, 1 in 7 campers (non-RV), and 1 in 5 RVers).

2. The potential market for Colorado State Parks is 94 percent of the state's population. Only 6 percent of the population does not participate in activities that are commonly done at state parks.

3. Within the state, some areas produce more visits per capita than others, as shown on the map below. While there are many factors that can affect this, the location of parks appears to be a key driver, as well as the location of other competitors such as Forest Service land.

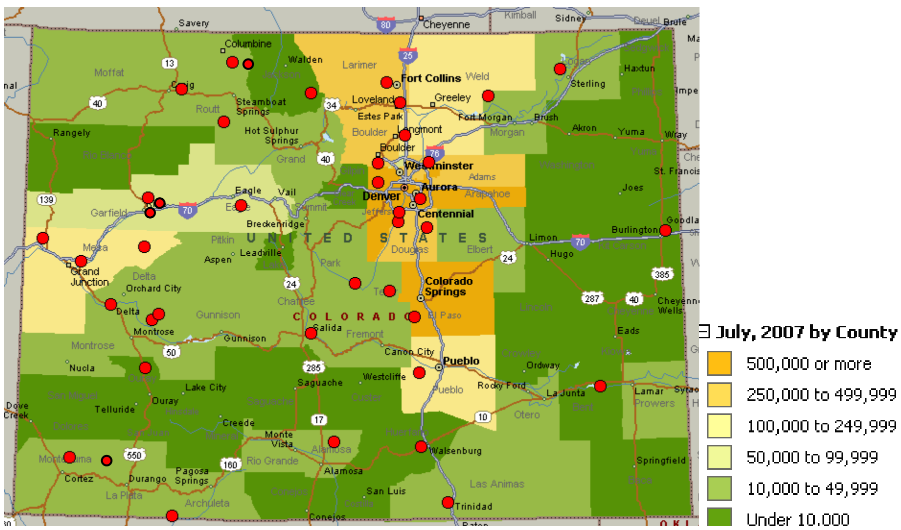
Annual State Parks Visits Per Capita



Data for less populous counties may be based on very small sample sizes.

4. Over 98 percent of the state's population lives within 50 miles of 1 or more state parks, and 93 percent are within 50 miles of at least 2 state parks. A majority of the state's population, roughly 56 percent, lives within 50 miles of 6 or more state parks.

State Parks Locations Compared to Colorado Population Distribution



5. The core market appears to be centered on the 45 to 54 age bracket, though visitation is strong across several age levels. While the public survey indicated that the likelihood of visiting a start park was relatively consistent across age groups from 18 to 64, the visitor survey showed that 45 to 54 year-olds were present in groups to a much greater degree than their population would project. The same is true of 35 to 44 year-olds and 55 to 64 year-olds to a slightly lesser degree. Visitation drops significantly for those from age 65 to 74, and even more for those 75 and older. People under 35 are less likely than other non-senior groups to visit state parks, but those who do report a much higher visitation level. On the whole, it appears that the number of visits per capita decreases steadily with age, but the likelihood of visiting, and of being represented in a typical visitor group is higher among the middle age ranges.

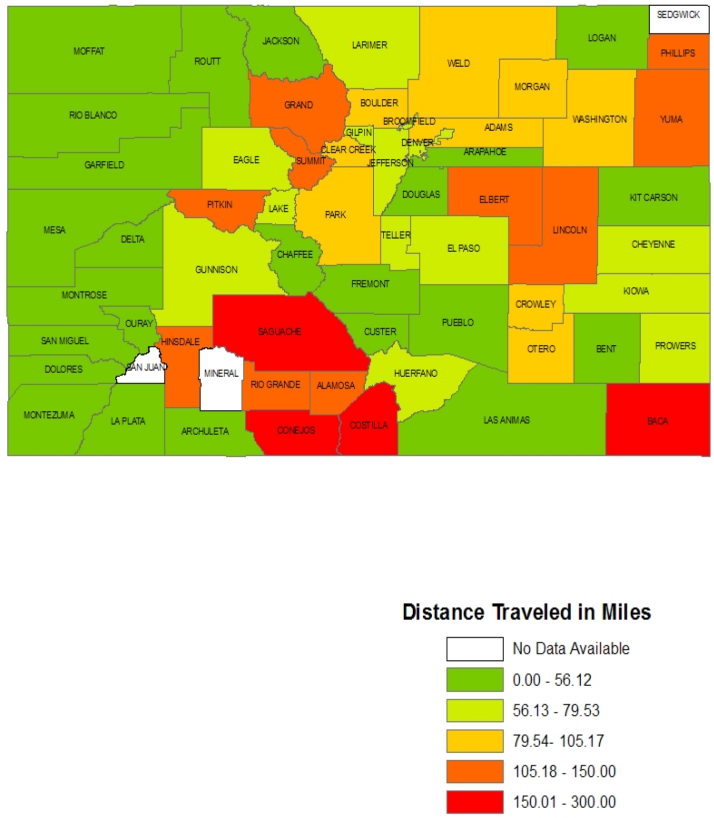
6. State park visitation is high for people of all education levels, but the frequency of visits increases as education levels increase.

7. People tend to visit in groups, and generally mixed gender groups. The average group size was 3.19 people (2.69 per vehicle, but some groups had more than one vehicle). Overall, 17 percent of visiting groups were one person arriving alone and 43 percent consisted of a pair of people. The remainder were larger groups (excluding 3 percent who did not arrive in their own vehicle, arriving either on foot or by bus).

8. 41 percent of visitors were local, driving less than 25 miles to reach the park, and another 16 percent originated 25 to 49 miles from the park. Another 15 percent traveled 50 to 99 miles, 17 percent traveled from 100 to 249 miles, 3 percent from 250 to 499 miles, and 8 percent traveled 500 miles or more. For in-state visitors, there were some regional variations in typical distances traveled to reach parks, as shown in the map below. (Note that travel

distances may be a combination of park location factors and also park preferences by residents.)

Average Distance Traveled to Visit State Parks, by County



Data for less populous counties may be based on very small sample sizes.

9. Different pass types are preferred by different types of visitors. Based on the visitor survey, approximately 48 percent of visits were produced by day pass visitors, while 44 percent were produced by annual pass holders of all types. The remainder were produced by miscellaneous entry methods such as volunteer passes, disabled veteran license plates, and by people who did not know or did not provide information on their type of pass.

   However, different types of pass holders had different repeat visit rates, so the above figures do not equate to pass sales. While the typical visitor using a daily pass visits parks approximately 4.2 times per year (buying a pass each time), the typical visitor using an annual pass visits much more often – 15.3 times for the typical annual pass holder and 10.8 times for the typical Aspen Leaf pass holder (for Colorado residents age 64 or older). The typical Columbine pass holder (available for disabled Colorado residents) returns 7.8 times, and the typical Centennial pass holder (available for low-income Colorado residents) visits 2.0 times per year.

10. 38 percent of visitors spend the night, while 58 percent take only a day trip. Of those who spend the night, 63 percent do so in RV's, 30 percent in tents, 5 percent in cabins, 3 percent in nearby hotels, 2 percent in boats at marinas, 1 percent in yurts, and 1 percent in boats not at marinas. (Note that figures add up to more than 100 percent since people could take advantage of more than one option.)

11. Visitors to Colorado's state parks spend significant money in the local areas near the parks. Based on expenditure data provided in the visitor survey, non-local visitors (those originating more than 50 miles from a park) spend approximately $396 million in the parks' surrounding 50-mile radius during their visit. This equates to $80 per visitor. If spending by all visitors is included (both non-local and local, the figure rises to $571 million, or $48 per visitor.

In conclusion, the market of state parks visitors is large and complex, with many segments. However, as will be discussed later, there are some core experiences that they seek, which can be the foundation of the Colorado State Parks brand.

ENHANCING VISITOR EXPERIENCES

While Colorado State Parks serves many types of visitors, there are some patterns, trends, and markets that are of particular interest.

ACTIVITIES

The word cloud below shows the 150 most commonly used words by visitors when asked the reason for their visit. This technique allows one to easily see the activities or benefits that drive people to visit state parks. As one can see, activities tend to dominate, specifically camping, fishing, and hiking.

Reasons Cited for Visiting a State Park on Most Recent Visit

But what do people really hope to achieve out of their visit? The research team asked visitors to describe a perfect state park experience, and organized their answers into another word cloud, shown below. As one can see, there was a common theme among answers here: "clean" dominates the responses, but they hope for good weather, beautiful scenery (based on descriptive words such as scenery, beautiful, picturesque, and pristine), they would like to see wildlife, and they want specific facilities (hence the words restrooms, bathrooms, facilities. Trails are also prominently mentioned, implying that trail characteristics play a role.

What Makes an Ideal State Park Visit?

The relationship between these two word clouds provides a finding of interest. While people will generally make their decision to visit a state park based on activities, much of their experience is based on unrelated issues once they arrive: the cleanliness of the park, the weather and scenery and wildlife they encounter, and the availability of facilities, particularly bathrooms.

These findings directly match the findings of specific questions asked in the Visitor Survey and the Future Directions survey.

In the Visitor Survey, respondents were asked to consider a number of potential changes to the parks they visited, and whether those changes would make them more or less likely to return. Three types of changes ranked highest, all equal in magnitude and strongly pointing people toward return trips: more natural/primitive experiences, more bathrooms/changing facilities, and more non-motorized trails.

A similar series of questions were asked in the Future Directions Survey, where visitors were asked what changes would please or displease them the most if they were to return to the same park a year later. The top three responses that would please those visitors were the addition of new land to the park, new/expanded hiking and walking trails, and the addition of wildlife observation areas.

In the Future Directions Survey, visitors were also asked whether they typically elect to visit a state park only after deciding to participate in an activity, or whether they typically decide to visit a state park and then figure out what activity to do at the park. A total of 55 percent select an activity first and then decide to do that activity at a state park, while 41 percent said that they decide first to visit a state park and the figure out what activity to do there. This finding confirms the belief that a majority of visitors are thinking of activities first, and then state parks compete with other venues as a place to perform those activities.

PHILOSOPHY – BACKCOUNTRY VERSUS AMENITIES

A key philosophical question for future development is whether state parks should be oriented more toward backcountry experiences or more towards an amenities-based experience. Visitors were asked their opinions on this issue.

Interestingly, opinions were perfectly divided – 41 percent preferred a backcountry philosophy, and 41 percent preferred an amenities-based philosophy. However, there were patterns of particular preferences among different audiences.

Backcountry preference were more common among…

- Younger visitors (54% - 18 to 34; 44% - 35 to 54)
- Local visitors, as opposed to those originating more than 50 miles from the park where they were surveyed (42%)
- Hispanic visitors (48%)

Amenity preferences were more common among…

- RV campers (61%)
- Older visitors (46% - 55 and older)
- Non-local visitors who traveled more than 50 miles to the park where they were surveyed (46%, traveled 50 miles or more)

There were also geographic variations, with different preferences at different parks. The strongest examples of preferences were:

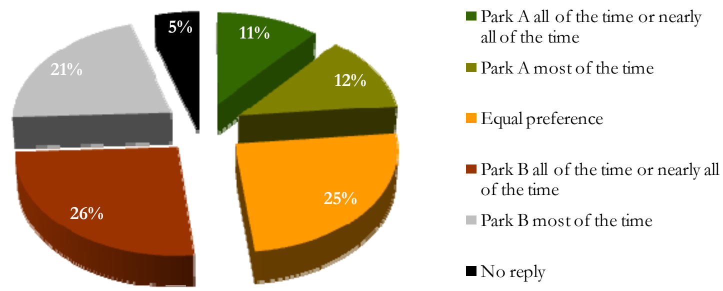
- Most desirous of backcountry philosophy – Lory (72%), Roxborough (69%), Castlewood Canyon (69%)
- Most desirous of amenities-based philosophy – St. Vrain (63%), San Luis (61%), Boyd Lake (60%)

One particularly interesting question was asked during the Future Directions survey. In this question, visitors were given two hypothetical parks from which to choose. The question was worded as shown below:

Imagine two Colorado State Parks that have similar landscapes, and which are about the same distance from your home. Park A is developed, with plumbing, electric hookups, hot showers in the restrooms. There is room for 100 campsite units with parking and picnic tables. You can see your neighbors (about 5 other units) from your site. Park B is a more natural setting with primitive camping available. (There is no plumbing or electric.) Other campsites are far enough away that campsites are spaced further apart for privacy. Which of the following best describes your visiting preferences?

By a two to one margin, respondents chose Park B as the park that they would visit most often, indicating a stronger preference for a more natural setting.

Preferred Park Type (See Previous Page For Description)

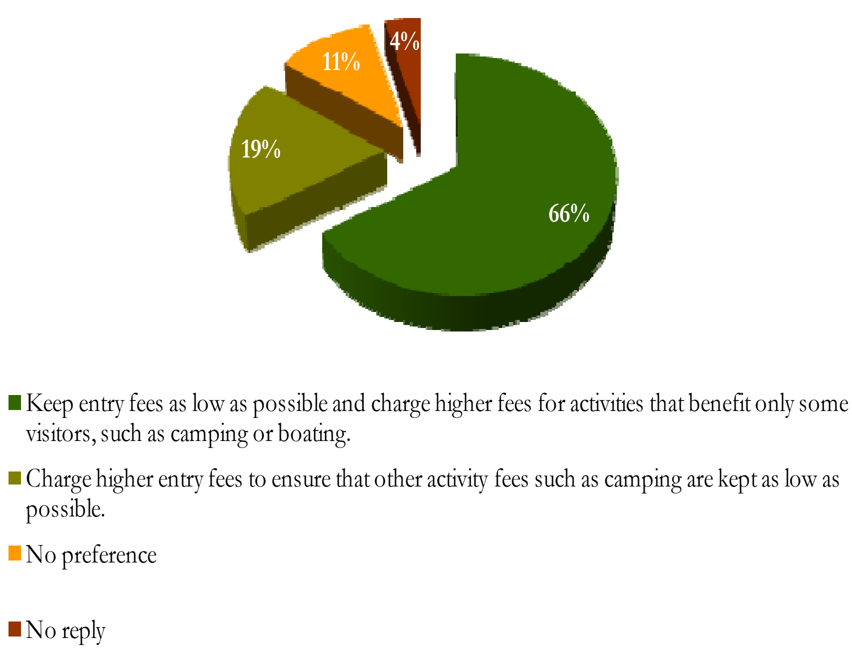


FEE STRUCTURES

Several questions sought to address fee structures. In essence, the questions revolved around tolerance for fees, and the tradeoff between specific activity fees or use fees versus more all-encompassing entrance fees.

The responses came back relatively clearly, in that visitors understood the relationship between amenities and fees, and they felt that a fee-based structure was more appropriate, where visitors paid an entrance for access, but then paid more if they used specific services or amenities. While numerous questions probed this issue (and received consistent responses), opinions can more or less be summed up with the most direct question that was asked, where visitors were given a choice between two specific options. As shown below, they preferred a "low entry fee with other activity fees" option.

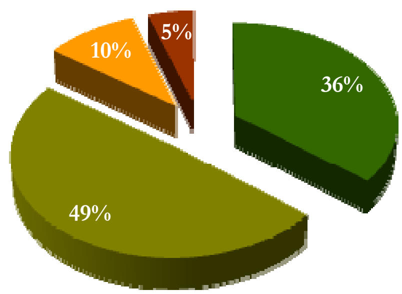
Preferred Fee Structure



It is also interesting to observe that in the Park A/Park B example noted above, respondents were willing to pay more for entry to Park A (the more developed park) than Park B (the more natural park). Again, it is clear that visitors understand the tradeoff between services and costs.

Visitors did not particularly want to give up the ability to access particular amenities, however. When asked whether all facilities should be the same, or whether "premium" facilities should be available for an additional cost, there was a marked preference toward having a variety of facility types available.

Preference for Customization of Features



- Build facilities at the parks at the same standards so that everyone has the same opportunities and pays the same fees
- Have a few premium facilities such as particularly nice camp sites or cabins with electricity and other features that cost extra and are available for thos who are willing to pay premium fees
- No preference
- No reply

ANCILLARY SERVICES

It is worth noting that approximately 34 percent of park visitors leave the park and return during the course of their visit. While the purpose of this departure is not known, it may warrant further research, as the placement of ancillary services in parks may hold the potential for generating additional revenues while also providing convenience to park visitors.

Such a service would likely be unnecessary at all parks, because the practice varies by park. For example, the parks with the highest leave-and-return rates have very high proportions: San Luis (87% leave and return at least once), Pearl Lake (71%), and Lathrop (59%). At other parks, it is an uncommon practice, as seen at Eldorado Canyon (9%), Lory (10%), and Castlewood Canyon (11%). Statistics for every park are shown in the Visitor Survey report.

The addition of such services would likely be somewhat controversial, though. In another question series in the Future Directions Survey, visitors were asked if they would be pleased or displeased with specific changes. When asked about the addition of places to buy convenience items or supplies, 36 percent said they would be pleased by that change, but 19 percent said they would be displeased. (The remainder had no opinion.) Of nine potential changes, only three – this, the addition of cabins with comfort amenities such as bedding and linens, and added campsite features such as child play areas and upgraded showers/bathrooms – had significant opposition, though in all cases approval was greater than opposition.

COMPETITIVE LANDSCAPE

In Colorado, recreationists have many destination options to choose from. In the public survey, respondents were asked about their destinations for outdoor recreation.

The figures below represent self-reported figures, and as noted earlier, respondents tended to significantly overstate their visitation of state parks. To that end, the 83 percent figure for Colorado State Parks was adjusted to 46 percent after detailed investigation. One might presume that other destinations are similarly overstated, but regardless, the figures provide a collective comparison of visitation, which shows the primary competition for outdoor recreation being municipal parks and open space and national lands. Private land is popular for strong repeat visits.

	At Least Once	More Than 5 Times	More Than 20 Times
Municipal Park/ Open Space	92%	70%	38%
Colorado State Park	83%	45%	14%
National Park/Other National Lands	82%	40%	13%
Private Land	68%	40%	20%
Other State Park	55%	14%	3%

When asked about the differences between state parks and other types of outdoor recreation venues, focus group responded that they tend to choose destinations they're familiar with, which is likely a reason for the popularity of municipal parks and open space that may be more familiar from a daily visibility standpoint.

In the focus groups, both visitors and non-visitors also agreed that there are some obvious differences between State Parks and other types of public land/parks. The greatest differences mentioned included the relative amount of on-site development, the proximity/accessibility, and the entry cost. The following quotes from both visitors and non-visitors describe how participants compared State Parks to other types of parks and public land.

- BLM and National Forest are a little more primitive."
- "There's more solitude (on BLM land), and I'd feel more safe." [Note: safety was not considered an issue of concern in the visitor survey. The research didn't address safety in the public survey to determine if some potential visitors had safety concerns at state parks.]
- "It costs more to go to a State Park."
- "(The entry fees at a National Park are more expensive) but the entry fees are good for a week."
- "(Other (local) parks) are just quicker, easier, and less expensive."

- "(Other types of parks) are free, but they don't have the amenities (that State Parks do)."

- "…I like to camp around others, so I can't be in the middle of nowhere (like on BLM land or at a National Forest.)"

- "I think of the word "raw" for those places (land other than State Parks.) I think of less people too."

- "It (a National Park) is more of a destination," another visitor agreed and said, "…There seems to be something a little grander about it…Here's a place where you go and see something that's unbelievable enough to the point where it's become a National Park."

These comments touch on some of the barriers that are cited as reasons for not visiting state parks (for non-visitors) or not visiting more often (current visitors). When asked about the main reason, the most common responses were:

- **24% - Time** (Other venues such as municipal parks and open space may be closer, but then again many residents don't realize the number of state parks or their locations. This is more likely competition for time with other life activities such as work and indoor recreation.)
- **14% - Money** (Other venues such as municipal parks and open space and some national lands may be free or lower cost to enter.)
- **13% - Age/Health** (Particularly an issue for older residents who may view state parks as a setting for more active pursuits than passive enjoyment.)
- **12% - Lack of Knowledge about parks** (As discussed earlier, the public's lack of awareness and knowledge of state parks is an issue that needs to be addressed.)
- **11% - (All Other Reasons)**
- **8% - No Desire** (There may be an advantage in general education of this group to ensure they know the broad range of activities available to them at state parks, and to educate them about key brand differentiators compared to other types of outdoor recreation venues. At least some of this group participates in activities that can be done at state parks.)
- **7% - Location/Distance** (Once again, a knowledge of the number and proximity of state parks could help overcome this barrier.)
- **6% - Prefer Other Venues** (While it may be impossible to lower this to zero, targeting marketing message to potential visitors' interests and educating them on the 42 products offered by Colorado State Parks might help.)
- **6% - Transportation** (Other than potential major marketing and operational initiatives such as transportation shuttles, this may be out of Colorado State Parks' immediate control.)

In the focus group findings, it was also observed that non-visitors to state parks were simply not as comfortable and attuned to the outdoors. This lack of comfort could be another barrier, though it was not generally mentioned as the primary barrier.

The most common activities cited by the general public (asked in the public survey) are, shown in order below, with the percentage of the public that has participated in the activity more than 12 times during the past 12 months. Items in a green font are those that appear prominently in the reasons listed by visitors for visiting state parks, and presumably represent competitive strengths for Colorado State Parks. Items in a gold font represent those activities that appear to a less prominent degree among visitors' reasons for attending. Those items in gold that have high participation levels may represent activities where Colorado State Parks is not competing well for visitors. And finally, those items in black were either rarely mentioned or not mentioned, which implies that Colorado State Parks is not seen as a destination for people participating in those activities, or that the activity is so niched that it doesn't show up among common reasons for visiting.

- 73% - Walking, Jogging, Hiking
- 35% - Sightseeing
- 30% - Photography
- 30% - Swimming
- 27% - Relaxing in (any) park
- 27% - Bicycling
- 25% - Visiting (any) park with friends/family
- 23% - Bird/wildlife watching
- 18% - Fishing
- 18% - Picnicking
- 15% - 4x4/ATV/Dirt Bike/Motorcycling
- 10% - Tent/Car Camping (Not RV)
- 7% - Backpacking
- 7% - Hunting
- 6% - RV Camping
- 6% - Water or Jet Skiiing or Power Boating
- 6% - Cross-country skiing or snowshoeing
- 5% - Horseback riding
- 4% - Sailing, rafting, kayaking, or canoeing
- 4% - Climbing
- 3% - Skateboarding
- 3% - Snowmobiling
- 2% - BMX bike riding

While Colorado State Parks serves many types of visitors, there are some patterns, trends, and markets that are of particular interest.

THE SENIOR POPULATION

First and foremost is the growth of Colorado's population, and the rapid aging of that population. The senior population is expected to rise dramatically over the next 20 years, at a rate nearly three times faster than that of any other age group. At the same time, the population in the middle age ranges will grow at a below-average rate compared to other age groups.

The table below illustrates this pattern. Senior Coloradans will increase from 10.2 percent of the population today to 18.0 percent of the population 20 years from now. Simultaneously, every other age group will grow, but due to the rapid growth of the senior population, all other age groups will become smaller as an overall proportion of the population.

Colorado Population by Age, 2009 to 2029

Population			
Age	2009	2029	Annual Growth
0-5	437,407	602,228	1.6%
6-17	821,416	1,151,128	1.7%
18-24	548,551	697,885	1.2%
25-34	678,848	932,441	1.6%
35-44	746,421	951,207	1.2%
45-54	767,246	816,044	0.3%
55-64	588,276	775,777	1.4%
65+	521,535	1,304,824	4.7%
	5,109,700	7,231,534	1.8%

% of Population			
Age	2009	2029	Change
0-5	8.6%	8.3%	-0.2%
6-17	16.1%	15.9%	-0.2%
18-24	10.7%	9.7%	-1.1%
25-34	13.3%	12.9%	-0.4%
35-44	14.6%	13.2%	-1.5%
45-54	15.0%	11.3%	-3.7%
55-64	11.5%	10.7%	-0.8%
65+	10.2%	18.0%	7.8%
	100.0%	100.0%	

Red indicates below-average growth (population) or a decline as a proportion of the population (% of population). Green represents above-average growth or an increase as a proportion of the population.

This has strong implications for state park marketing (and operations). First, while it should be noted that visitation will likely rise overall because the population in all age groups is rising, visitation drops rapidly for populations age 65 and older. This could mean that state parks are serving a smaller portion of the population in future years even with increased overall visitation. As seen earlier, age and health concerns is one of the biggest barriers to state park visitation among the public. Over the next 20 years, this issue could actually become the largest single barrier.

To serve this population, it may be desirable to anticipate their needs and work to slow the decline in visitation as the population ages. This could be a combination of operational (accessibility) issues, as well as marketing to ensure that the senior population recognizes that seniors can visit and enjoy state parks.

Seniors differ from the general population in specific ways. For example, they are…

- More likely to prefer amenities over a backcountry philosophy, which differs from the general population.

- Much more likely to be RV campers than the general population, which could mean an increase in RV traffic in the long term (independent of other economic and cultural factors).

- Are much more likely to use annual passes for park access (particularly the Aspen Leaf pass for seniors), which could have implications on revenue generation in the long term.

- Tend to maintain or even increase interest in walking, sightseeing, photography, and wildlife watching compared to other age groups. While it's not surprising that their interest in some active pursuits drops (e.g., swimming, biking), it is somewhat surprising that their interest in some passive activities also decreases relative to younger populations, including coming to a park just to relax, coming to be with friends or family, and even fishing.

- Tend to be high users of local parks, which perhaps implies issues with transportation or convenience. However, seniors are also the group that is most like to travel more than 150 miles when visiting a park. One potential explanation for this is that this group simply has more leisure time and can do both; another potential explanation is that there are two distinct markets of seniors – one very active and one inactive.

- Directional signage is an important issue to all age groups, but particularly stands out for seniors as something that would increase their visitation.

- This group tends to have a lower interest in a number of the administrative issues of state parks, including education programs, volunteering, and also general support for long-term initiatives.

Keeping the interest of the current middle-age population as they age will be a key to maintaining Colorado State Parks' market share in the long term. This may be via programs or marketing specifically targeted to seniors, or merely keeping this population in mind and recognizing the growing size of this market when prioritizing programs and initiatives.

THE HISPANIC POPULATION

Another population bloc that is growing disproportionately is the Hispanic population. Over the next 20 years this population is expected to grow by 66 percent, compared to 33 percent growth in the White Non-Hispanic population and 48 percent growth in all other minority populations. While not as dramatic an increase as that of the senior population, this nonetheless indicates a notable increase in this population.

Colorado Hispanic Population, 2010 to 2030

% of Population		
Group	2010	2030
White Non-Hispanic	73	69
Hispanic	19	23
All Other Minorities	8	8

As with seniors, this population does have some preferences that differ from that of the typical visitor. For example, compared to the typical state parks visitor, Hispanics…

- Come to parks in bigger groups than average (3.37 per vehicle compared to 2.69 overall)

- Are much younger on average, with a median age of 27 compared to 36 for the state as a whole
- Tend to be more likely to use daily entrance fees as opposed to annual passes
- Are less likely to have visited multiple state parks
- Are more likely to want backcountry experiences
- Are more likely to support motorized trails

Obviously, language is an issue for some Hispanics as well. While the majority of Hispanics in Colorado are native to the U.S. and are either native English speakers or bilingual, approximately 28 percent of the Hispanic population of Colorado speaks English "less than well", according to the 2008 American Community Survey of the U.S. Bureau of the Census.

Colorado Hispanic Population Language and Origin

Language and Origin	Population			
Total:	878,705			
Native:	601,342	68%		
Speak only English	378,860		43%	
Speak another language	222,482		25%	
Speak English "very w ell"	169,824			19%
Speak English "less than w ell"	52,658			6%
Foreign born:	277,363	32%		
Speak only English	10,109		1%	
Speak another language	267,254		30%	
Speak English "very w ell"	76,863			9%
Speak English "less than w ell"	190,391			22%

CUSTOMER SATISFACTION

A key element of marketing is not just capturing new customers, but retaining existing customers. For this purpose, the research team gathered data about the importance of various elements of a state park when considering visiting, and also visitor satisfaction levels. Figures are reported for every park in the visitor survey report.

As seen in the table below scores were high not only for the system as a whole, but for every park in the system. Even the lowest-scoring park in each category

Visitor Satisfaction by Attribute

Attribute	High	Low	Average
Scenery	3.98	3.55	3.79
Customer Service	3.96	3.53	3.78
Safety	3.92	3.64	3.77
Cleanliness	3.94	3.44	3.68
Recreational Act. (Boating, Fishing, etc.)	3.81	2.80	3.66
Info and Signage	3.85	3.48	3.64
Trails	3.91	3.23	3.64
Camping, Cabins, Yurts	3.87	3.45	3.61
Facilities	3.89	3.09	3.56
Marina	3.77	2.87	3.55
Nature/Interpretive Programs	3.72	3.22	3.52

Scoring was on a 4-point basis with 4.0 being "very satisfied", 3.0 being "somewhat satisfied", 2.0 being "not very satisfied", and 1.0 being "not satisfied at all". For camping and marinas, only parks offering those services were rated (34 parks for camping and 12 for marinas).

When asked what was important to the quality of their experience at a state park, many attributes were deemed important. However, the top-ranked attribute was cleanliness, followed closely by scenery/surroundings. Slightly lower in the third and fourth rankings were safety and facilities.

STATE PARKS BRAND ATTRIBUTES

Given the information in the previous pages, as well as the additional detail in the 1,300+ pages of the five supporting documents, what is the brand of Colorado State Parks?

From the previous pages, it is apparent that Colorado's state parks are well thought of in theory, even if practical knowledge of the parks is limited for roughly half the population. The parks serve a wide variety of visitors of all ages and origins, who are involved in a wide variety of activities. Those visitors by and large have positive experiences at parks.

The focus group exercises around the state also shed light on some other brand attributes.

State parks are primarily summer destinations. Park visitors added that they mostly associate the summer season with State Parks. In their drawings of a typical State Park visitor, close to one-half of all visitors drew something to indicate protection from the sun, including hats, sunglasses or people wearing summertime clothes such as shorts.

State parks are near metropolitan areas. As a caveat, 8 of the 10 focus groups were held in metropolitan areas. However, regardless of prior knowledge or experience at a State Park, the majority of both visitors and non-visitors to state parks guessed that State Parks are near larger populations of people, and thus, near metropolitan areas. As examples, a Greeley park visitor said, "They are close to populations," and a Durango non-visitor surmised that parks are "near Denver."

State parks have water activities. After analyzing both visitors' and non-visitors' focus group drawings of what they considered "a typical Colorado State Park," it was clear that a majority of Colorado residents associate water (including lakes, ponds, streams, rivers and waterfalls) with Colorado State Parks more than anything else, even the mountains. Although mountains were relatively popular, less than one-half of all participants included them in their drawings of a typical Colorado State Park.

State parks are crowded. Both visitors and non-visitors to state parks perceive that state parks are crowded. As one participant said, "It's not a perception; it's a reality (that parks are overcrowded.) When you have to wait to get in, there are not enough parks for the number of Coloradans who want to use State Parks." Many expressed similar sentiments to a Colorado Springs non-visitor, who remarked, "It (a State Park) doesn't strike me as a good place to go for solitude."

State parks serve three main types of visitors. Visitors and non-visitors associated three primary groups of people with a typical State Park visitor: experienced outdoors-people, families, and tourists.

Colorado state parks have amenities. Non-visitors indicated that they expect some amenities at a State Park, including clean bathrooms/toilets, showers for camping, picnic tables, paved parking lots and paved roads.

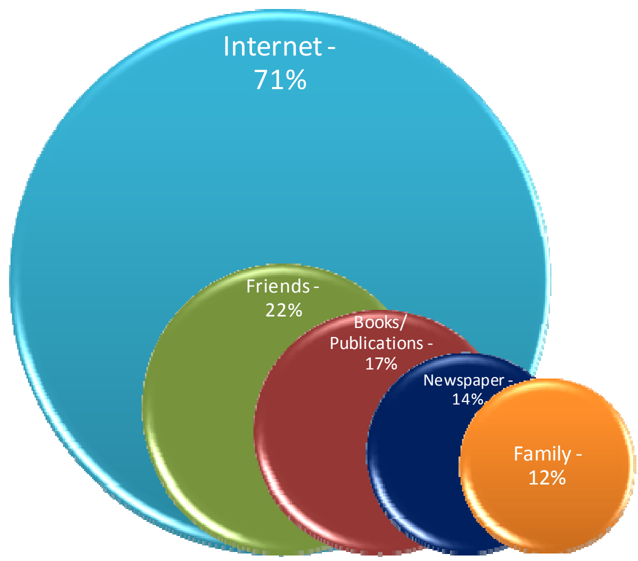
It is not unreasonable for parks to be assigned these attributes, because for most of these attributes, the descriptors are accurate…for the largest parks that draw the most visitors. It appears that the brand attributes of state parks are drawn to a great extent from large metro-area parks such as Lake Pueblo, Chatfield, and Cherry Creek. Those parks have notable water activities, large numbers of visitors, significant amenities, and are located near metropolitan areas. Like the other parks, they tend to be summer destinations more so than the other three seasons.

Given their large numbers of visitors, it is not surprising that parks like these dominate the brand image of the Colorado State Park system, because a) more people have direct experience with these parks, and b) word of mouth spreads faster because there are more people with direct experience. However, this current image tends to diminish the diversity of parks in the Colorado State Parks system.

Given the need to reach the public with marketing messages, what are promising modes to do so?

A clear answer arose in the public survey. When the general public was asked how they find out information about recreational activities they might wish to pursue, one information mode clearly outdistanced all other sources. The Internet was cited as a source by 71 percent of the general public, which was larger than the next four sources combined (word of mouth [friends] – 22 percent, books and other publications – 17 percent, newspapers – 14 percent, and word of mouth [family] – 11 percent. Traditional mass media such as television and radio were each cited by fewer than five percent of respondents. (Note that respondents could select more than one method.)

Five Most Widely Used Information Sources for Recreational Opportunities



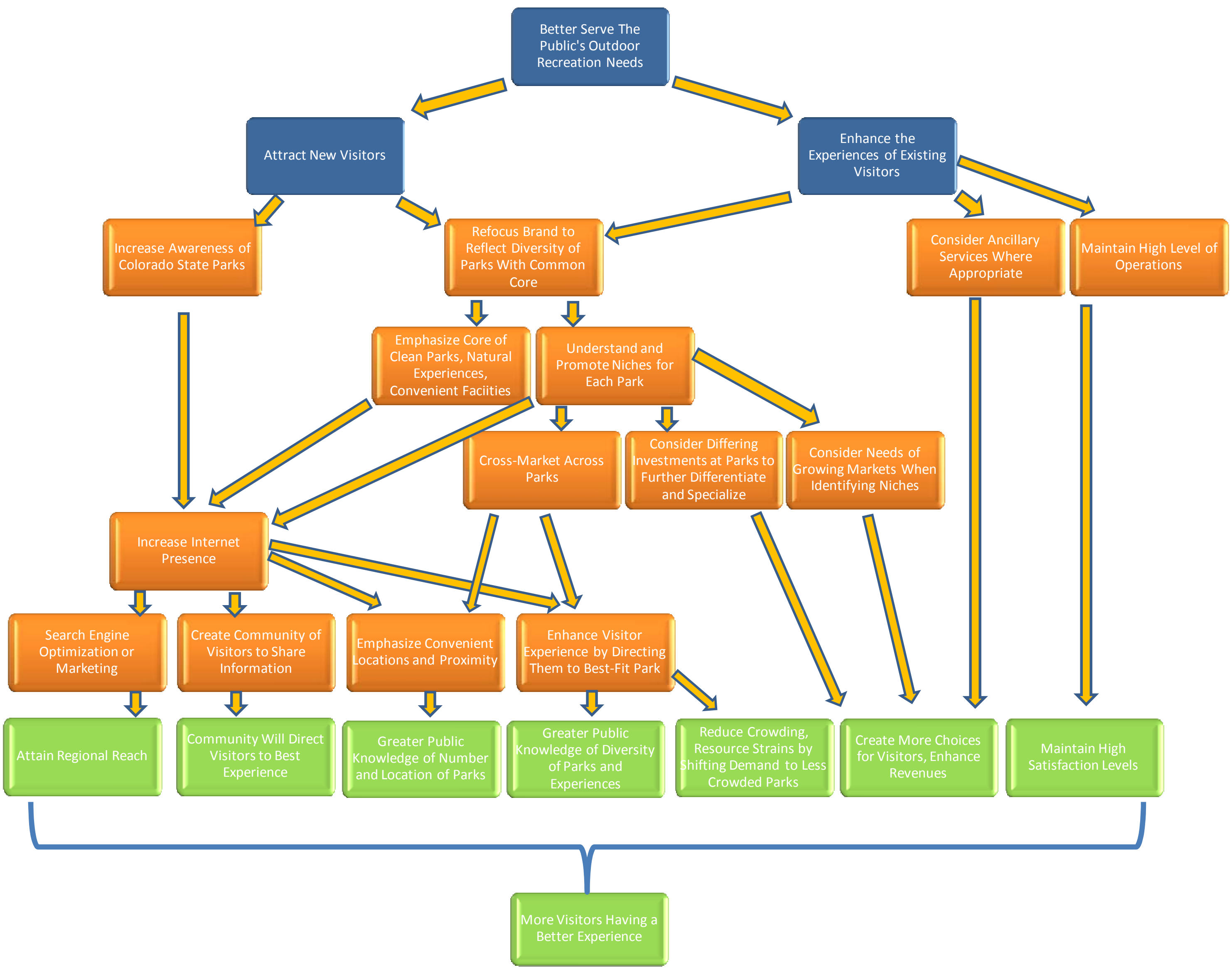
Given the relatively large radius from which visitors arrive at parks, any marketing and education efforts should have a regional reach, which supports the Internet as a primary tool. While mass media and direct marketing can certainly have value, the Internet appears to be a tool of first preference for many potential visitors. It also has the advantage of lasting power and the ability to provide differing levels of information for people at their own discretion and timing.

Additionally, for local audiences, directional signage was a feature that would entice them to visit more frequently. While not cited as a major information source, signage nonetheless serves as advertising above and beyond its purpose of assisting visitors, particularly if the signage is located in high-traffic areas.

Last, based on focus group research many pre-existing park visitors make last minute decisions to visit a state park, whereas non-visitors want more details before they decide to go. This implies that perhaps non-visitors may need a particular emphasis in web site design. For existing visitors, an easy way to reach them with messages is via in-park materials. While these materials would obviously not drive the decision to visit a park on that particular day, they could be used to educate visitors on other park options and help them develop a better awareness and knowledge of state parks that they can use to find the park that best fits their recreation goals.

Linking together the findings from the previous pages, a clear strategy recommendation begins to emerge, as outlined below and discussed in the following pages.

Recommended Course of Action



Blue boxes represent goals, Green boxes represent outcomes, and Orange boxes represent actions. For reasons of clarity and priority, this graphic excludes some tertiary tactical recommendations discussed elsewhere in this report or the other five supporting reports.

The goal of this research has been to identify Colorado State Parks' position in the outdoor recreation marketplace, and to provide information for the future direction of Colorado State Parks by identifying the facilities, services, and programs valued by citizens of Colorado and visitors to Colorado State Parks. Beginning with the goal that Colorado State Parks wishes to better served the public's outdoors recreation needs, one immediately identifies two sub-goals beneath that ultimate goal: attract new visitors to take advantage of the parks, and enhance the experiences of existing park visitors.

Beginning with the first sub-goal of attracting new visitors, the research identified two immediate actions that need to take place: improve the public's awareness and knowledge of state parks, and refocus the brand to better communicate the benefits offered by Colorado's state park system.

Given the fact that the Internet is far and away the greatest source of information for people seeking recreation information, the expansion of Colorado State Parks' internet presence is a straightforward recommendation, and it can attack four challenges.

- First, by employing search engine optimizations and search engine marketing, Colorado State Parks can improve its visibility to those seeking information. In a nice confluence of benefits, a robust Internet presence will also extend beyond the local area and can inform a regional (nee, even a worldwide) audience, which is vital given the long reach of Colorado State Parks. At the current time, the Colorado State Parks website does not rise to the top of many search results for core activities that take place in state parks.

- Second, a robust web presence can better inform the public of the number, location, and diversity of Colorado's state parks, strengthening the next point below. This is already being done to some extent, but can be expanded.

- Third, and importantly, the research team recommends a more robust system in the web site to direct visitors to their "best fit" park, and a more differentiated set of niches for each park. By emphasizing specific niches for each park, the system may be able to draw more out-of-area visitors with specialized interests.

- Fourth, an optional but potentially valuable tool would be to create an online community where state park visitors can share insights and opinions with each other. With this tool, the visitors themselves will act as ambassadors for Colorado State Parks, and will direct each other – and new visitors – to the parks and locations that will most enhance their experiences in the parks.

The second action recommended by the research team is an emphasis on branding Colorado State Parks. Essentially, the research team concludes that Colorado State Parks has 42 different products (soon to be 43 when Staunton State Park opens) that are not well understood by the public at this time. First, the public does not know that there are 42 products available, which must be addressed before any other progress can be made. Second, the public appears to be poorly informed of the unique characteristics of each park, and to some extent appears to view all state parks as being the same, or at least highly similar. The public's perception of state parks is markedly similar to a description of the major metro area parks – located near metro areas, known for water features, summer-focused, and with high volumes of people and well-developed facilities and amenities.

Based on the research in the study, the research team concludes that three disparate objectives can be met by deliberately differentiating parks' individual assets and unique characteristics. First and foremost, it will enhance visitors' experiences if they are directed to a park that fits their ideal image and activity goals, which will improve word-of-mouth marketing for Colorado State Parks. Second, it could possibly allow Colorado State Parks to redirect visitors from some of the more resource-strained parks to those with more capacity. Third, it may be possible to consider the preferences of growing markets such as the senior market and Hispanic market, and specifically target specific parks to those markets' interests and needs.

The research findings indicate that many parks already have particular niches, so it may not be necessary to make large investments to differentiate parks. (In fact, it is unlikely that large investments will be necessary, though when large investments are considered, they should be influenced by the identified niches.) It may simply be a matter of working with individual parks to identify and describe and develop those niches, and to do so in such a way that the entire system provides a complementary network of niches.

Niches could be identified on many levels. They may be activity based, such as wildlife watching or climbing or motorized trail use. They may be amenity-based, such as a few parks having higher-end amenities for target markets that prefer that, or a network of parks that in combination form an RV route across the state. They may be market-based, such as parks that have particular expertise or programs for seniors or beginning campers or families. The key is to identify genuine strengths of each park.

These niches will not override selected core values and activities, however. As seen in the research, there are some activities that are so central to a state park that they cannot really be claimed as a niche. Camping and hiking are two that spring immediately to mind, and perhaps fishing as well, though there may be niches within the broad realm of that activity that could be claimed (e.g., fly fishing, or fishing for particular species).

To tie the parks together, the research team recommends core branding elements across parks that emphasize a clean environment, the opportunity for a natural experience, and the presence of facilities (i.e., bathrooms to a great extent). The research showed that these are three key elements of the experience for state park visitors.

Last but not least are operational considerations. The research team gathered data on satisfaction with various elements of state parks, and learned that the system overall gets high marks from visitors. While there are undoubtedly operational elements beyond the scope of this study that could be improved or optimized, the general public by and large holds a very positive opinion of Colorado State Parks, having positive experiences in the park and with park staff and programs. No particular element stood out as needing attention from a customer service standpoint. One potential issue that came up is the provision of ancillary services at selected parks where visitors were found to make trips out of the park and back during their visit. However, that should be considered only for some parks, and more research would be needed to determine the value of such services.

In summary, then, three main strategies arise from this research:

- Invest in a robust web presence that reaches the inquiring public, educates them, and interacts with them to direct them to the best possible experience. In particular, educate the public about the number, convenience, and diversity of experiences at Colorado's 42 state parks.

- Re-examine and rework the Colorado State Parks brand and brand awareness, which is currently strong in theoretical terms ("the public likes state parks"), but relatively weak in practical terms ("the public doesn't know much about state parks").

- Differentiate parks from each other so that visitors and potential visitors have the best odds of finding their optimal experience. This will increase cross-visitation of parks as visitors more fully recognize the differences between parks, and could increase visitation as selected parks become more attractive to people with specialized interests.