

<b>CHAPTER 3</b>	<b>AFFECTED ENVIRONMENT .....</b>	<b>ERROR! BOOKMARK NOT DEFINED.</b>
3.3	CURRENT SOCIAL AND ECONOMIC CONDITIONS AND TRENDS .....	2
3.3.1	<i>General Economic Characteristics</i> .....	2
3.3.2	<i>Employment and Earnings by Industry</i> .....	15
3.3.3	<i>Public Finance and Government Services</i> .....	20
3.3.3.1	Government Revenues from BLM lands .....	20
3.3.3.2	Government Expenditures, Public Infrastructure and Services .....	20
3.3.4	<i>Social and Demographic Conditions</i> .....	26
3.3.4.1	Demographic Conditions .....	28
3.3.4.1.1	Demographics for Moffat County .....	<b>Error! Bookmark not defined.</b>
3.3.4.1.2	Demographics for Routt County .....	28
3.3.4.1.3	Social Conditions Related To Public Lands .....	30
3.3.4.1.4	Social and Economic Perspectives on Hunting and fishing .....	31
3.3.4.1.5	Social and Economic Perspectives on other Recreation .....	1
3.3.5	<i>Environmental Justice</i> .....	6
3.3.6	<i>Place-based Values</i> .....	2
3.3.6.1.1	Current Perspectives on Agricultural Land Values .....	2
3.3.7	<i>Summary</i> .....	4
3.4	REFERENCES .....	4

### 3.3 Current Social and Economic Conditions and Trends

Provide a general, short introduction to these sections, including applicable laws, requirements, and relevance in planning.

#### 3.3.1 General Economic Characteristics

The Little Snake RMPPA contains two main counties, Moffat and Routt, but also has overlap into several other counties. These main counties, while proximate to each other, exhibit quite different social and economic characteristics, with Moffat being much closer to a traditional rural county with a high dependence on agriculture, resource extraction industries, and essential services. Routt County, on the other hand, which contains Steamboat Springs and its ski area, is associated with high amenities, a relatively large influx of “amenity” migrants and discussions that, at times, revolve around the economic contribution of “starter castles”. This distinction comes clear through a series of comparisons, which are well developed in the Sonoran Institute’s Economic Profile System (EPS), a summary of which we reproduce here on the next two pages.

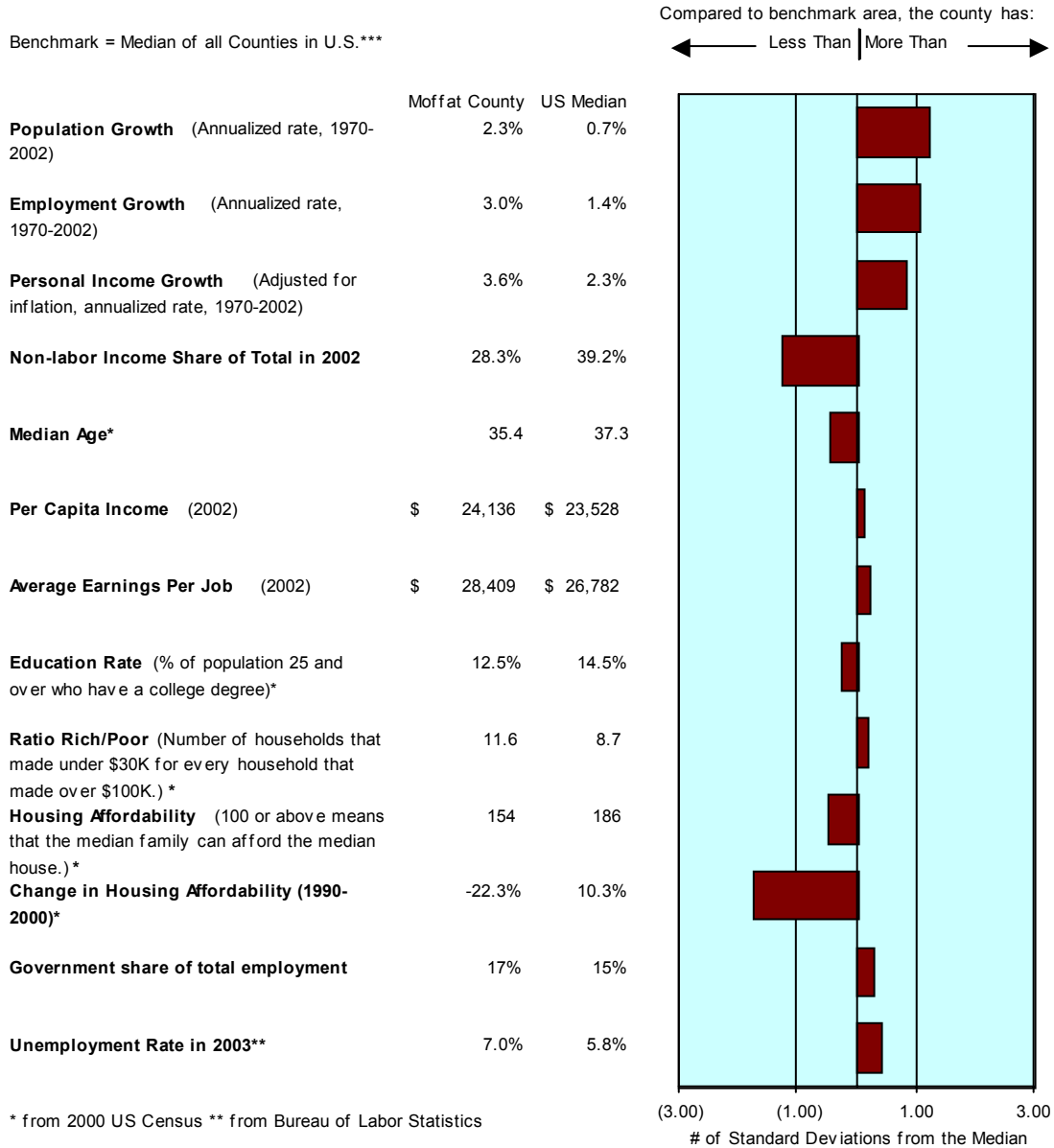
The first comparison regards population growth, for which both counties exceed the US average by a significant amount. However, Routt’s growth rate exceeds that of Moffat by nearly fifty percent. Similar conclusions are associated with the level of employment growth and personal income growth. Thus both counties are growing faster than the US average, which is true of most areas of Colorado; however, Routt County is certainly on a higher growth path. Related to these results, housing affordability has declined in both counties, but the absolute level of affordability in Routt of 82 means that a family with the median income in Routt County could only meet 82 percent of median housing costs. A roughly similar percentage decline in housing affordability was seen in Moffat County, although it was still quite affordable relative to housing in Routt.

A number of other perspectives follow from these central facts. Per capita income in 2002 was just slightly above the US average in Moffat County, at \$24,136, while it is about \$36,976 in Routt County, more than 50% higher than Moffat’s. This does not appear to be driven by the differences in wages, which were \$28,409 in Moffat versus \$31,732 in Routt. This difference was only 11.7 percent. One part of the explanation is the unemployment rate in the two counties, which is much higher in Moffat. Thus, if one has a job in Moffat, the earnings are relatively close to those in Routt, but residents of the former county are twice as likely to be unemployed as those in the latter.

Other effects might be related to the level of education, which was clearly much higher in Routt than in Moffat, but this difference should generally show up in the level of wages. A further dimension in this income difference might be the dependence of the two counties on non-labor income, for which the position is more similar than might be expected (28.3% in Moffat versus 29.7% in Routt County). Perhaps the largest difference, and one, which can be indirectly related to the educational difference, is the ratio of rich to poor. In Routt County, there are just 1.4 families making less than \$30,000 for every family earning above \$100,000, while in Moffat County there are 11.6 families in the lower category.

**Moffat County, Colorado**

**Figure 3.1: Performance Comparisons**

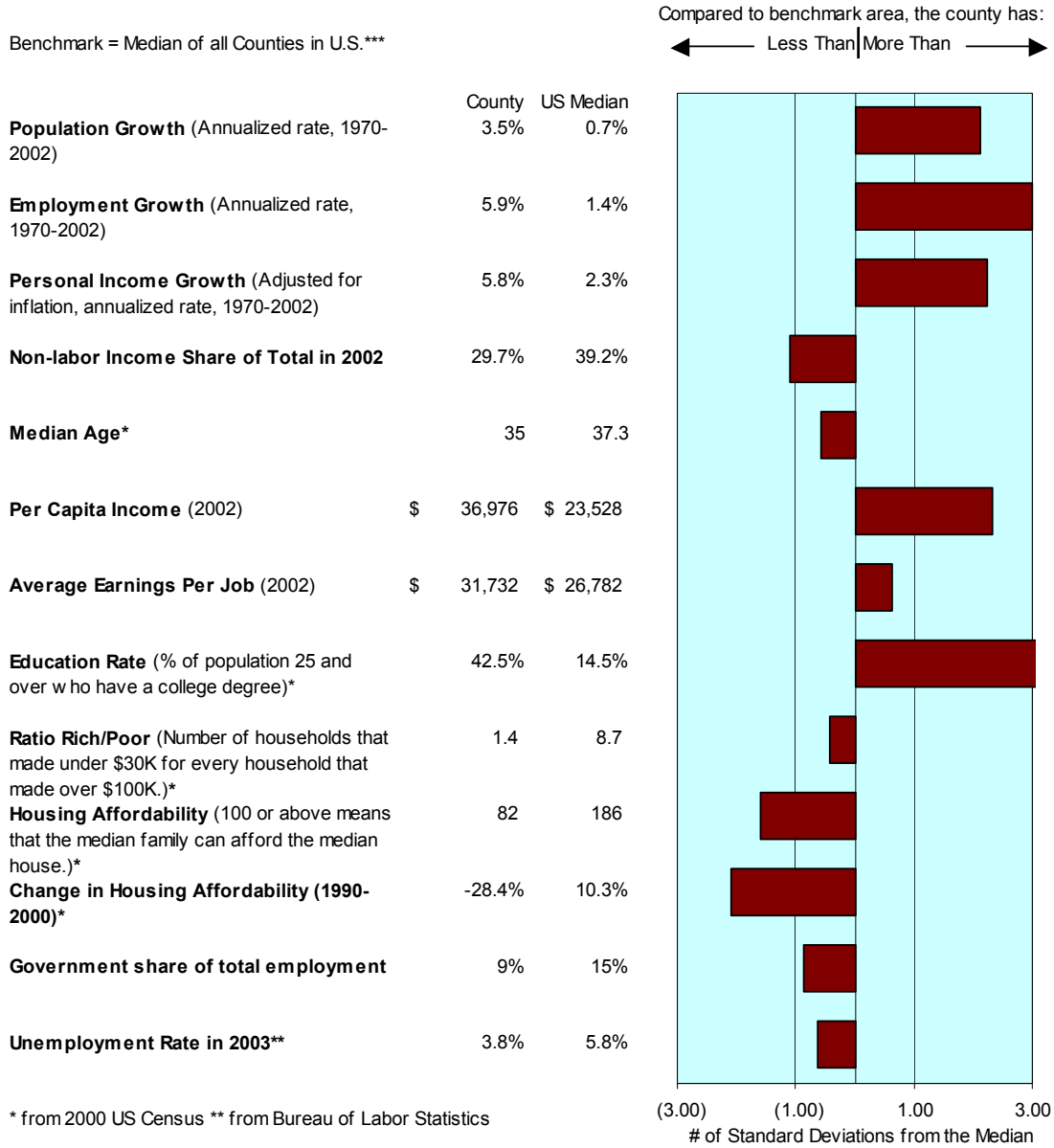


\* from 2000 US Census \*\* from Bureau of Labor Statistics

\*\*\*Median is the middle value of a list of numbers. This is different from mean (average), which is the sum of all the numbers in a list divided by the number of numbers in the list.

**Routt County, Colorado**

**Figure 3.2: Performance Comparisons**



\*\*\*Median is the middle value of a list of numbers. This is different from mean (average), which is the sum of all the numbers in a list divided by the number of numbers in the list.

Other differences include the government share of employment, which is 17% in Moffat but only 9% in Routt County. The Moffat county value is somewhat above the national average, but with considerable Federal activity via the Bureau of Land Management and the Dinosaur National monument, it is logical that this would be the case. The very low value in Routt may mean the presence of the ski area and other natural amenities leads to higher demand for private sector employment than in Moffat. The following sections make extended comparisons and draw out some of the essential features of the two economies that are needed for the analysis of BLM management decisions.

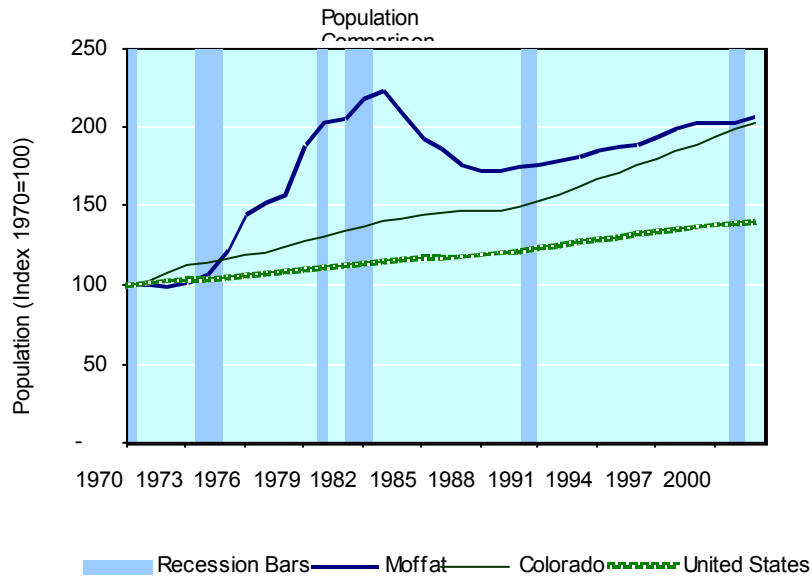
**Population trends.** The growth in population is presented graphically in the following Figures 3.3 and 3.4 (again from the EPS system). The expected upward trends are found, given the growth rates described earlier. The truly remarkable part of these two graphs is the steep upward trend in population growth in Moffat County from 1974 to 1984, following the oil boom of the 1970s and early 1980s. This infers more than a doubling of population during those ten years, from slightly more than 6,000 people in the county in 1974 to over 14,000 in 1984. This was followed by a decline of nearly 3,000 people, or 20% in the following five years. This is truly one of the more dramatic changes in populations experienced anywhere. The Routt County graphs show a similar but far more moderated response to the oil boom of the 1970s and early 1980s.

In summary, there may have been a temporary growth over the long-term trend of about 4,000 persons in Moffat County during this era. A future oil and gas price spike may yield the same response, the extent of which will in part be related to decisions made in regard to openings of land to oil and gas drilling on BLM lands. Thus, a later bump in population similar to the earlier one, with its associated economic impacts, needs to be considered as a possibility.

**Employment.** The graphs showing employment trends over the last thirty-two years are given in Figures 3.5 and 3.6. Job levels in Routt County are over six times that of 1970, while the state of Colorado had 2.86 times the number of jobs in 2002 as in 1970. These two figures compare favorably to the national figure, which grew by 1.83 times during that time period. In contrast, after the growth in Moffat County due to the oil price increase in the 1970s, job creation has been much slower than in the rest of the state and just about at the average level of the US.

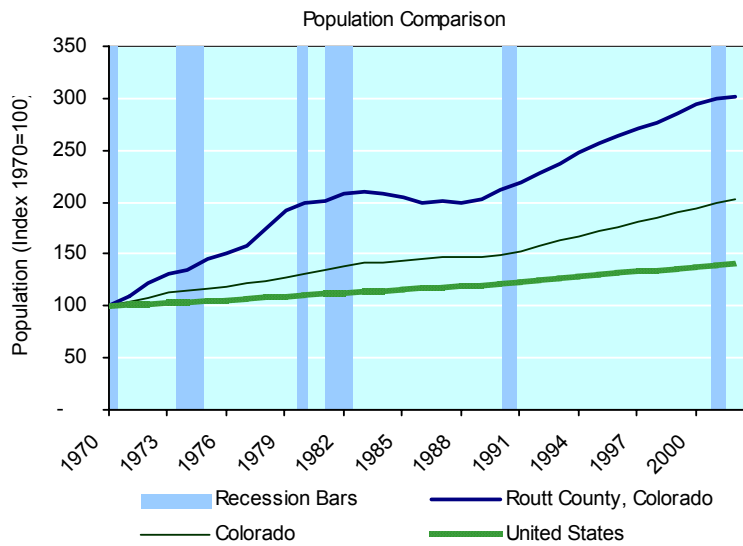
In Figures 3.7 and 3.8, the changes in separate industrial sectors are shown, which refines the behavior of the economy. It is seen in those graphs that the boom in Moffat County was associated in great part with an increase in construction jobs, which have been flat since that era. After the peak in the 1980s, mining employment has declined steadily. In contrast, government employment has grown steadily if not dramatically over this time period. Manufacturing is seen to be small part of total employment and does not change much, nor do agricultural jobs (although there was shift from production to agricultural service employment). Similar to the transition across the entire country, the main growth in jobs has been in the services and professional areas. (This series ends in 2000 because a different system of industrial classification, NAICS was started. See EPS for a discussion).

**Figure 3.3: Population Growth in Moffat County Compared to the State and the Nation**



Source: BEA REIS 2002 Table CA30

**Figure 3.4: Population Growth in Routt County Compared to the State and the Nation**



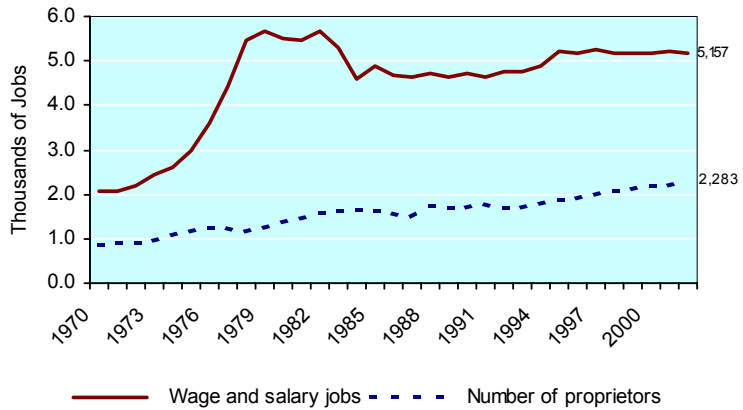
Source: BEA REIS 2002 Table CA30

**Moffat County, Colorado**

**Figure 3.5: Employment**

**Total Employment**

- Employment of proprietors contributed to 31% of new employment from 1970 to 2002, and 58% of new employment since 1992.
- In 1970, proprietors represented 29.7% of total employment; by 2002, they represented 30.7%.

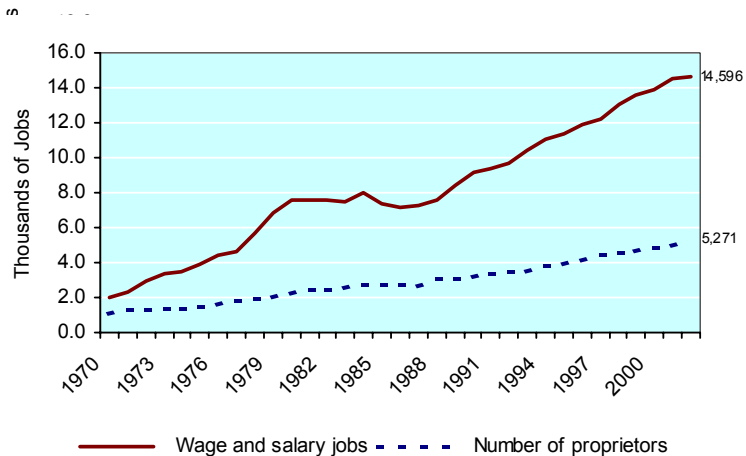


**Routt County, Colorado**

**Figure 3.6: Employment**

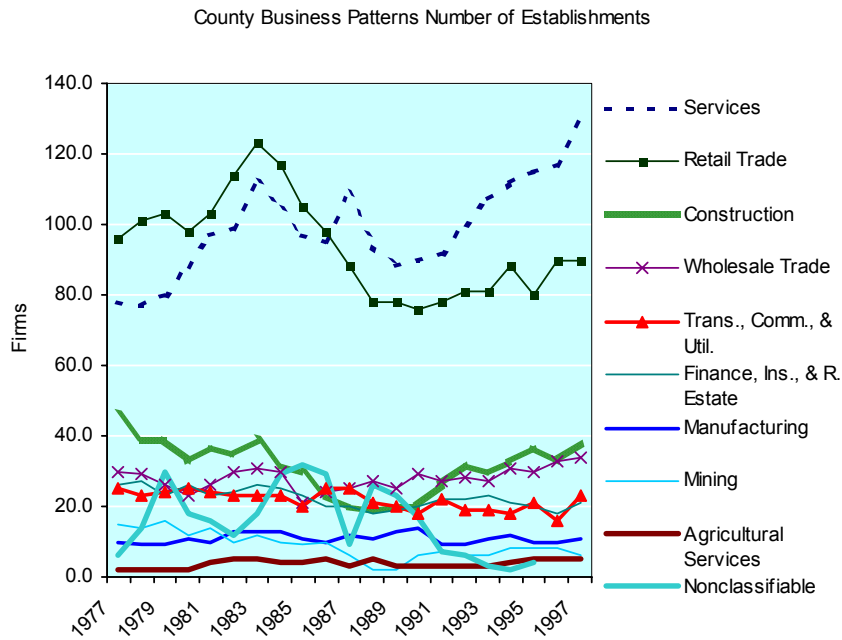
**Total Employment**

- Employment of proprietors contributed to 25% of new employment from 1970 to 2002, and 27% of new employment since 1992.
- In 1970, proprietors represented 35.2% of total employment; by 2002, they represented 26.5%.



**Moffat County, Colorado**

**Figure 3.7: Firms by Industry (SIC)**



**Routt County, Colorado**

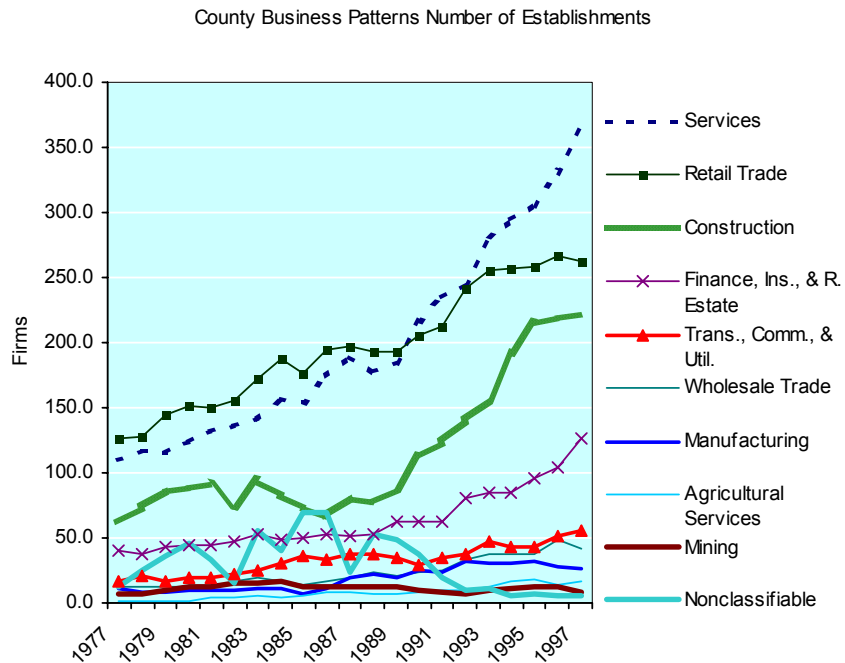
**Figure 3.8: Firms by Industry (SIC)**

**Growth**

- The employment category whose share of total gained the most was services, which went from 27.5% in 1977 to 32.2% in 1997.

**Decline**

- The category whose share of total shrank the most was retail trade, which went from 31.8% in 1977 to 23.3% in 1997.



The Routt County pattern of employment growth, shown in Figure 3.8, provides more detail on the types of services that expand with a sustained and high influx of population. Services in general, retail trade, finance insurance and real estate, and construction are the sectors with the highest rates of change over the past thirty years. These figures also show the importance of proprietors in the economy, for which there was an upward trend in both counties. However, the growth rates led to an increased prevalence of proprietors in Moffat County (from 29.7% of employment to 30.7%) but a decreased proportion in Routt County (declining from 35.2% to 26.5% of total employment).

**Commuting.** Another important dimension of the two counties in the Little Snake RMPPA is their linkage from commuters across county lines. The final two figures taken from the EPS database, Figures 3.9 and 3.10, show this relation. First, with regard to Moffat County, the outflow of earnings has been flat to slightly declining over the past twenty years, suggesting that the county has not seen much in-migration for work purposes. However, the inflows of earnings have grown strongly and consistently over this time period, from about \$25 million in the early 1980s to nearly \$60 million in 2002. As noted in the figure, the difference between inflows and outflows of earnings amounts to 13.1% of total income in the county. The behavior in Routt County is just the opposite. Outflows of earnings far exceed inflows and have been trending upward, while inflows have been flat to declining. The most remarkable part of this is that the inflows to Moffat County are nearly identical to the outflows from Routt County. Thus, plausible conclusion is that, essentially, these flows come almost totally from the linkage between these two counties. This of course makes sense, as the two counties are relatively far from other population centers but provide demand for employment and a supply. These commuter flows are important to both counties.

**Output by sector.** The employment graphs presented earlier give one indication of the size and importance of different sectors. We give another perspective in the following charts, figures 3.11 and 3.12, in which the output, or sales, percentages of each sector are presented. This is an important added perspective to earnings and employment as it shows that certain sectors, which might not have extensive employment, still can be important to the economy. The chart shows that moffat county has a full 40% of its economy based on minerals and energy, which is followed by services at 21%. Agriculture is a nontrivial contributor to the economy as well, at 16% of total sales values. The government provides a further 9% of output of the economy. This shows clearly the relative dependence on sectors typically associated with a rural setting and an economy based on resource extraction.

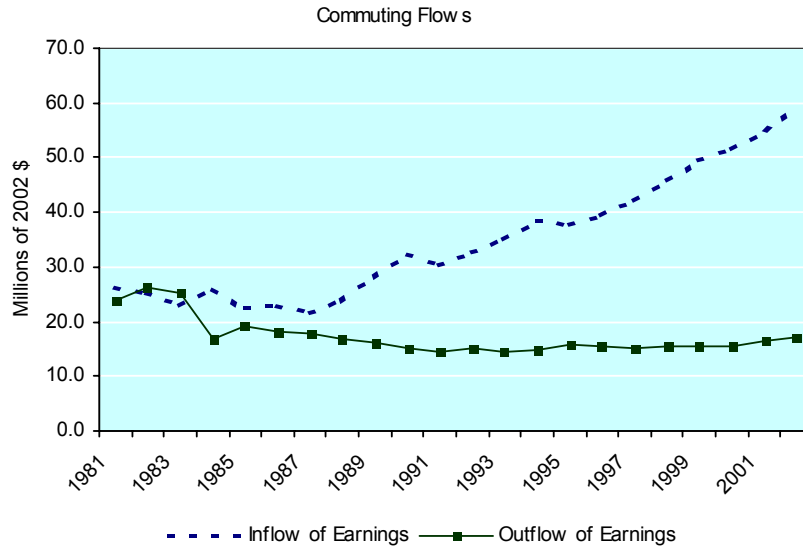
The figure for Routt County shows a very different pattern of industrial activity. Services, as in most modern economies, are most prevalent, at 36% of total sales values, which is followed by construction and manufacturing, accounting for 21% of the economy when measured by sales. The energy and minerals sector, at 13%, is roughly equivalent to the food service and retailing sector, which accounts for 14%. The other sectors are smaller contributors than their counterparts in Moffat County.

**Moffat County, Colorado**

**Figure 3.9: Commuting**

**Inflow & Outflows**

- Commuting data suggests that Moffat County, Colorado is a bedroom community. (Income derived from people commuting out of the county exceeds the income from people commuting into the county.) The net difference represents 13.1% of total income in the county.

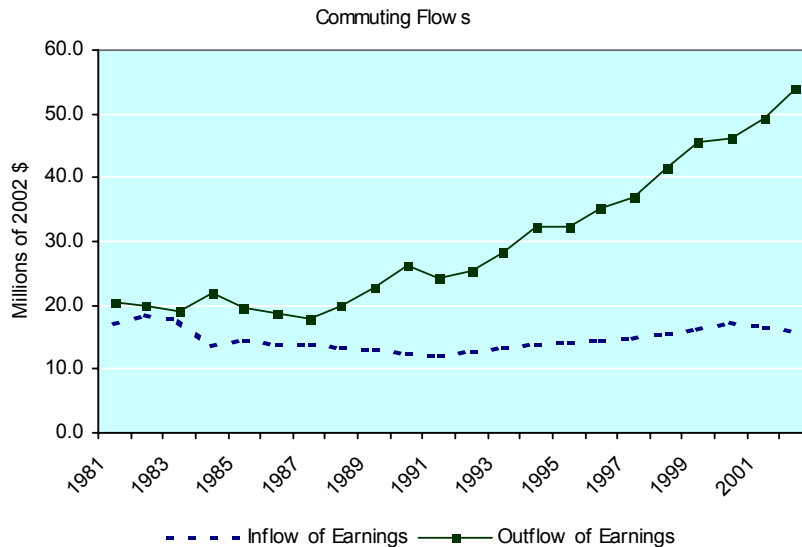


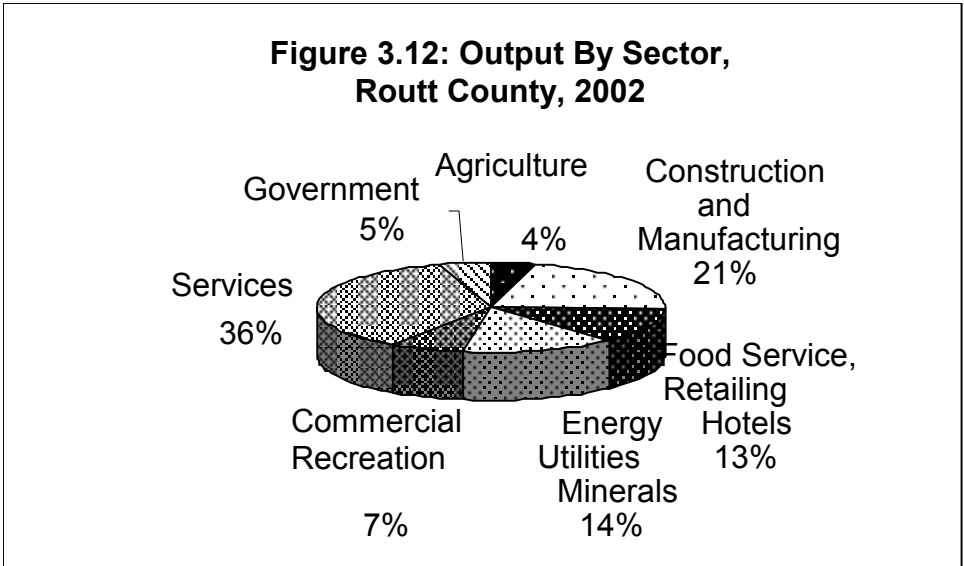
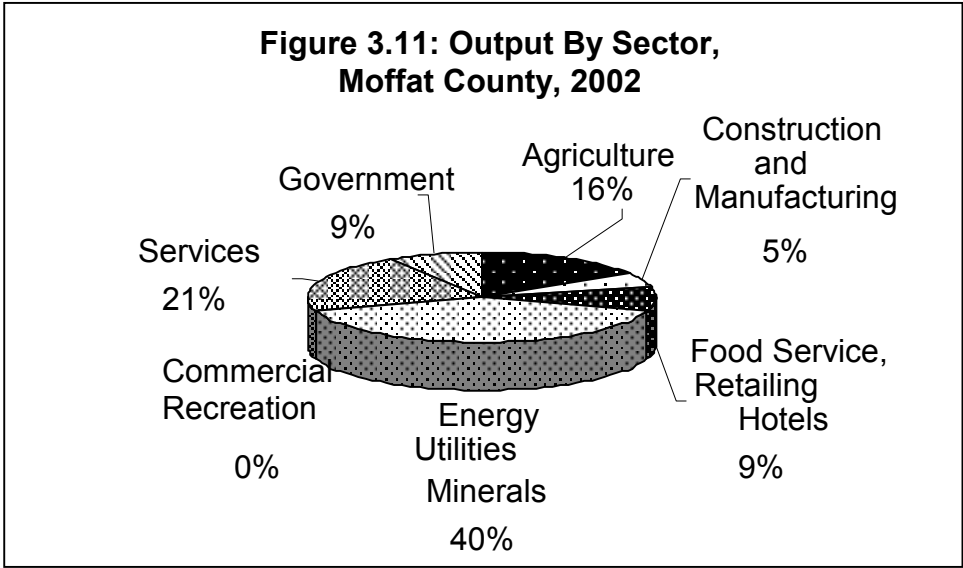
**Routt County, Colorado**

**Figure 3.10: Commuting**

**Inflow & Outflows**

- Commuting data suggests that Routt County, Colorado is an employment hub. (Income derived from people commuting into the county exceeds the income from people commuting out of the county.) The net difference represents 5.0% of total income in the county.





**Land Use and Ownership.** A final perspective in this overview is related to the patterns of land use and ownership in the two counties. These values are contained in Tables 3.2, 3.3 and 3.4. First, Table 3.2 shows the key owners of land in the two counties and by implication, the types of uses of land. Moffat County contains over three million acres of land, making it just about twice the size of Routt County. Over half of that land is owned by the Federal Government in Moffat County (57%) but slightly less in Routt County (44%). Most of the Federal land in Moffat County is under the BLM jurisdiction and thus is under review in this assessment. (BLM manages 88% of the Federal Land). The other major Federal land manager is the US Park Service, and which oversees about 9% of the US government-owned land. Most of this is presumably in the Dinosaur National Monument. State ownership is a minor percentage of the total land in both counties.

The remaining land in private hands is presented in the final column of Table 3.2. This amounts to 37% of total land in Moffat County and 51% in Routt County. Most of the private land would appear to be in agricultural uses, which are presented in Table 3.3. (However, there is a question of whether the agricultural land overlaps with the BLM land used for grazing. If so, there is more private land in non-agricultural uses than reported here). By far, most of the agricultural land in Moffat County is in rangeland, with only about sixteen percent under crops in 2002. However, there has been a growth in land under crops of about six percent between the two agricultural censuses reported here. This situation is similar in Routt County.

The final table in this section shows the acreage in different categories of land and their assessed values. The picture is very much the same as that reported in the earlier tables, except that it becomes clear that all other uses of land are small when compared to agricultural land use and Federal or State uses. Additionally, this table shows the assessed values of the oil and gas industry, upon which significant property taxes are paid. It also demonstrates that the value of both oil and gas properties are much higher in Moffat than Routt counties.

**Table 3.2: Land Ownership by County (acres)**

Column	1=2+4+5	2	3				4	5
County	Total Land Area	Total State Land	Federal Land by Agency				Total Federal	Private Land
			BLM	US Park Service	US Forest Service	Fish and Wildlife		
Moffat	3,043,411	197,890	1,527,188	152,613	41,579	11,945	1,733,326	1,112,195
Routt	1,511,706	70,236	84,958	0	585,049	0	670,007	771,463

State of Colorado Agriculture (Colorado Dept of Agriculture)

**Table 3.3: Agricultural Land Use, Agricultural Census 2002**

Land Use	Moffat County		Routt County	
	1997 (acres)	2002 (acres)	1997 (acres)	2002 (acres)
Total Land in Agriculture	1,034,760	1,017,612	na	741,239
Total Cropland	107,865	161,643	100,374	136,211
Harvested	56,599	D	57,548	44,987
Pasture and grazing	13,414	D	15,927	49,513
Other	37,852	66,300	26,899	41,711
Rangeland	926,895	855,969	na	605,028

**Table 3.4: Land value by classes, 2004**

	*dollars (Assessed)	** acres in 2005
<b>Moffat</b>		
Residential	35,964,440	22,432
Commercial	19,982,550	158
Industrial	1,114,520	71
Agricultural	7,436,800	1,063,877
Natural Resources (coal mines, gravel pits)	38,823,100	668
Vacant	4,856,510	10,155
Oil and Gas	75,931,900	
State Assessed	157,271,000	
Total Taxable	341,380,820	
exempt land (BLM, state, county)		2,507,129
<b>Routt</b>		
Residential	313,034,970	23,415
Commercial	161,214,760	2,258
Industrial	3,706,750	41
Agricultural	13,484,430	741,240
Natural Resources (coal mines, gravel pits)	15,408,910	
Oil and Gas	1,667,410	
Vacant	105,250,430	15,600
State Assessed	80,486,100	
Total Taxable	694,253,760	
exempt land (BLM, state, county)		624,973

\*Source: 34th Annual Report to the Governor and the general Assembly,  
Department of Local Affairs, Division of Property Taxation  
Section VI County Valuation by Classes 2004/2003

\*\* Source: Assessor Office

### 3.3.2 Employment and Earnings by Industry

Earnings and employment in the two main counties of the Little Snake RMPPA, Moffat and Routt counties, are examined in this section. Additionally, we report the total output of each industry, which was examined at fairly aggregate level in the earlier section using Figures 3.11 and 3.12. The table is broken into seven categories that we designate as sectors, which contain the thirty specific industries that are used in this analysis. The key dimensions of each industry group are discussed below. (More detail on some individual industries will be given in the following section). An important aspect of this presentation is that our aggregation of industries and data used come from the IMPLAN database for 2002. We specifically put the 528 sectors in that database together in specific ways to tailor the impacts to specific industries. The values presented in the sections below all come from the Table 3.1 at the end of this section.

**Agriculture.** Cattle ranching dominates the earnings and employment in this group of industries, with about 75% of both measures for this group derived from cattle activities in both counties. The cattle industry employs 296 people in Moffat County and 440 in Routt County. The other two significant production activities are pasture, which is closely related to cattle, and other animal agriculture, which, at least in Moffat County, is mainly lamb and sheep production. The entire sector employs over 550 persons in both counties and accounts for about 16% of industry output in Moffat County but only 4% in Routt County. The average wage for the sector was \$6,094 (total employee compensation divided by number of employees in the table) in Moffat and \$3,663 in Routt County. These figures of course suggest the part time nature of the activity for many people and the greater dependence on agriculture in Moffat County.

**Construction and Manufacturing.** Four industries contribute significantly to this sector. Three are in construction but we also add manufacturing. (We include manufacturing here as it is relatively small in both counties and this was the group that seemed to be closest). The largest industry in both counties was residential construction, accounting for 35% to 42% of employment in the sector, and 32% and 42% of total compensation of employees. The industry, however, is about ten times larger in Routt than in Moffat County, with 3,750 employees versus 325 employees. The overall sector accounts for about 5% of total industry output in Moffat County and 21% in Routt County. The average earnings in the sector were \$26,345 in Moffat and \$37,208 in Routt County. The relatively high growth in Routt's population based on the level of natural amenities is clearly shown in this comparison. The differences in annual wages per worker in the two counties may be based on the more extensive and varied types of construction, such as hotels and ski facilities, which require more specialized and more highly paid construction workers.

**Food Service, Retailing and Hotels.** The sector includes four industries that are often heavily dependent on tourism activity, and as such could be significantly affected by changes in the land use in the Little Snake RMPPA. In both counties, most employees are found in the food services and retailing industries, which together account for about 80% of employment within this group of industries in both counties. Once again, this sector is far larger in Routt than in Moffat County, as the sector employs 1,358 persons in Moffat and 4,539 in Routt. These industries account for about 9% of total industry output in Moffat County and 13% in Routt County. The average earnings for the sector was \$17,673 (total employee compensation divided by number of employees in the table) in Moffat and \$17,953 in Routt County. Given the large amount of

be affected significantly by the alternatives. Moreover, these are economic base industries that export their production and bring in new demand to the local economies. The largest industry by far is coal extraction, employing almost identical numbers in each county (599 in Moffat and 604 in Routt, or 56% of employment in this sector in Moffat and 49% in Routt). In Moffat, power transmission is a relatively large industry, employing 326 persons and accounting for 43% of the output in this group. (Much of the coal mined in Moffat County is used in power generation and is thus an input to the power transmission sector)

Oil and gas is a relatively small part of this industrial group but provides a significant amount of taxes and also may be a sector with considerable growth potential, leading to significant population and employment expansion if energy prices remain high. This sector is similar in both counties, as the sector employed 1,066 persons in Moffat during 2002 and 1,224 in Routt. This sector accounts for about 40% of total industry output in Moffat County versus only 14% in Routt County. The average earnings in the sector was \$59,947 (total employee compensation divided by number of employees in the table) in Moffat and \$57,144 in Routt County. Again, given commuting between these two counties and the similar in skills required, it makes sense that the wages should be similar.

**Commercial Recreation.** Many of the BLM management alternatives will have an impact on this industry, so while smaller than some of the others listed here, there is likely to be relatively large effects, so we have separated outfitters (which also picked up the ski industry in Routt County) and recreation and put them into their own industries. Clearly, this is a small industry in Moffat County, accounting for less than 1% of total employment, but owing to skiing, is quite significant in Routt County, where it accounts for 8% of workers. Average wages were \$9,564 in Moffat County versus \$21,398 in Routt County, mainly due to the different types of activities involved.

One important comment needs to be made here. The recreation reported in this section refers to the *production* of recreation activities by *commercial* operators. It is not the *consumption* of recreation by hunters, fisherman, off road vehicles, etc. The latter will be a component of final demand in our analysis, where each hunter spends a certain amount per day during his or her days in the County. The presentation later in the document suggests that elk hunter spend in total \$7.95 million, and all hunters and fishermen spent \$14.5 million. Some of these expenditures would be on commercial recreation, but there would also be spending on hotels, food services, and other retail goods, which would add to the sales value of the other sectors shown in Table 3.1. However, they would be attributed to the final consumption activity of hunting or fishing.

**Services.** The services in this sector are tied to many differing activities in the economy. Many are directly related to population and income growth, including health, auto repair, finance, insurance and real estate, and housing services. Additionally, health services would grow faster with increases in retirees. The sector is reasonably evenly divided across each service industry included, suggestions that the demand for each service distributed evenly, as each is required to a similar degree by most persons in the economy. In terms of proportions, health is the largest service, with 540 employees in Moffat and 1,096 in Routt County.

This sector is more than four times as large in Routt as in Moffat County, as services employed 1,699 persons in Moffat during 2002 and 6,765 in Routt. This group of industries accounts for about 21% of total industry output in Moffat County versus 36% in Routt County. (Half of the Routt County value is related to housing services, and finance, insurance and real estate). The average earnings for the sector were \$26,381 (total employee compensation divided by number of

employees in the table) in Moffat and \$24,361 in Routt County. These averages do not reflect the variation of wages across industries, which ranged from \$17,639 in automobile repair to \$36,463 in wholesale trade in Moffat County. The range in Routt County is wider, with the minimum average wage earned in the finance, insurance and real estate sector. This might suggest many part time real estate agents in the economy. The highest salaries in Routt County were earned in the wholesale trade industry, at \$54,595.

**Government and Education.** The final sector we observe is the government and education sector, which is generally tied to the population size in the two counties, but in Moffat County, it is further increased by the existence of two Federal agencies (and in Routt there is extensive Forest Service land as well, along with employment.). Government employment is clearly a significant component of total employment in both counties, and is based on both general government services and education. This sector accounts for about 17% of total employment in Moffat County versus only 7.4% in Routt County. (Because these are non-profit sectors, a measure of their contribution to the economy is better seen through employment as opposed to output). The average earnings in the sector were \$59,947 (total employee compensation divided by number of employees in the table) in Moffat and \$57,144 in Routt County. Again, given commuting between these two counties and the similar in skills required, it makes sense that the wages should be similar.

Table 3.1: Output, and Employment Values for Routt and Moffat Counties, 2002

Industry	Moffat County			Routt County		
	Industry Output*	Employee Employment	Employee Compensation*	Industry Output*	Employee Employment	Employee Compensation*
<b>Agriculture:</b>						
cattle	87.201	296	2.108	62.034	440	1.563
Crop	1.027	10	0.009	1.951	23	0.062
Other agriculture	0.873	18	0.121	1.135	10	0.005
Other animal agriculture	21.369	240	1.045	3.031	59	0.142
pasture	8.11	19	0.27	10.77	53	0.374
Subtotal	118.58	583	3.553	78.921	585	2.146
<b>Construction and Manufacturing</b>						
commercial construction	6.469	78	1.87	88.388	1,075	40.06
heavy construction	6.692	70	1.704	91.353	964	36.506
manufacturing	10.877	63	2.251	18.724	139	4.319
residential construction	15.927	114	2.737	217.654	1,572	58.644
Subtotal	39.965	325	8.562	416.119	3750	139.529
<b>Food Service, Retailing and Hotels</b>						
food services	15.239	444	4.734	74.178	1,860	27.477
food/bev retailing	11.926	181	5.174	23.06	394	9.686
hotels	3.627	107	1.286	32.737	480	11.479
retailing	32.585	626	12.813	114.99	1,805	32.847
Subtotal	63.377	1358	24.007	244.965	4539	81.489
<b>Energy, Utilities and Minerals</b>						
coal	139.063	599	38.046	176.686	604	44.72
oil gas	20.047	61	2.145	6.326	17	1.124
power	127.096	326	20.741	58.262	125	9.508
transport	9.391	73	2.789	25.087	375	10.694
water	0.763	7	0.182	10.413	103	3.898
Subtotal	296.36	1066	63.903	276.774	1224	69.944
<b>Recreation</b>						
outfitters	0.693	14	0.178	131.983	1,463	33.507
recreation	1.054	25	0.195	4.346	174	1.521
Subtotal	1.747	39	0.373	136.329	1637	35.028

Table 3.1, cont.: Output, and Employment for Routt and Moffat Counties, 2002

Industry	Moffat County			Routt County		
	Industry Output*	Employee Employment	Employee Compensation*	Industry Output*	Employee Employment	Employee Compensation*
<b>Services</b>						
Health	35.025	540	16.519	87.718	1,096	40.078
auto repair and services	17.492	277	4.886	21.735	321	6.743
communication	8.361	53	1.714	29.75	181	6.331
Finance Insurance	17.613	198	3.712	313.658	2,690	37.192
housing services	25.906	0	0	61.061	0	0
services	25.391	300	8.273	108.732	1,490	39.509
other services	6.101	148	3.047	34.869	723	20.541
wholesale trade	16.993	183	6.671	36.71	264	14.413
<b>Subtotal</b>	<b>152.882</b>	<b>1699</b>	<b>44.822</b>	<b>694.233</b>	<b>6765</b>	<b>164.807</b>
<b>Government</b>						
government	50.394	622	33.488	71.421	902	44.225
state & local education	15.827	431	15.827	21.243	576	21.243
<b>Subtotal</b>	<b>66.221</b>	<b>1053</b>	<b>49.315</b>	<b>92.664</b>	<b>1478</b>	<b>65.468</b>
<b>Totals</b>	<b>739.113</b>	<b>6,124</b>	<b>194.537</b>	<b>1,939.94</b>	<b>19,978</b>	<b>558.412</b>

\*Millions of dollars

### 3.3.3 Public Finance and Government Services

#### 3.3.3.1 Government Expenditures, Public Infrastructure and Services

##### County Budgets

Tables 3.2 and 3.3 include the counties' revenues and expenditures in nominal values and their percentage growth rates over the period 1991 to 2002. The breakdown of revenues and expenditures is also given as a percentage of their total values for the year 2002. We address each county's setting separately below.

##### Moffat County

In 2002, Moffat County relied primarily on intergovernmental revenues and taxes, which accounted respectively for 50% (up from 38% in 1991) and 40% of total revenues. The category total state (which include grants, shared revenues, payments in lieu of taxes and receipts of charges, including many of the oil and gas receipts shown in the following section) increased from 32% to 42% of total revenues during the period 1991 to 2002. This category declined from 83% of total intergovernmental revenues in 1991 to 79% in 1996, and then increased back to 85% in 2002. Other fast growing categories are: general sales/use taxes, representing 20% of total taxes in 2002, and social services, which reached 13% of total revenues in 2002. General property tax revenues were 73% of total taxes in that year.

Expenditures more than doubled in nominal terms over the eleven years examined here. In 2002, total public works for roads and services was 25% of total operating expenditures (down from 37% in 1991), while social services accounted for about 20% (up from 14% in 1991) of total operating expenditures. In 2002, the capital outlay for acquisition of capital goods, land, buildings, equipment and other improvements was about 38% of total operating expenditures in magnitude, a nine fold increase over the 1991 figure. The total debt service increased from zero to 3% of total operating expenditures in magnitude.

During the period 1991 to 2002, the budget surplus above operating expenditures has quadrupled in nominal terms and increased from 13% to 21% of total revenues. The budget balance calculated over total expenditures, which include the substantial capital outlay and the service payment in 2002, went from an almost balanced budget in 1991 to more than \$3 million deficit in nominal terms in 2002, or about 14% of total revenues.

## Moffat County

## General Government Activities, Financial Compendium

**Revenues**

	1991	1996	2002/1991		
			2002* growth rate	Allocations	
Total Revenue	12,347,965	14,921,265	22,167,117	80%	100%
Total Taxes	6,437,479	8,060,615	8,768,905	36%	40%
General Property	5,670,571	6,887,372	6,382,810	13%	29%
Specific Ownership	242,714	419,243	495,371	104%	2%
General Sales and Use	483,716	692,321	1,733,462	258%	8%
Franchise	-	-	-		
Employment Occupation	-	-	-		
Other	40,478	61,679	157,262	289%	1%
Licenses and Permits	6,786	11,364	16,657	145%	0%
Intergovernmental Revenue	4,706,204	5,056,067	10,938,614	132%	49%
Total Federal	761,563	1,005,522	1,589,068	109%	7%
Total State	3,904,726	4,015,018	9,269,120	137%	42%
Highway Users Tax	2,204,053	2,752,590	3,373,754	53%	15%
Cigarette Tax	2,606	4,333	2,824	8%	0%
Motor Veh Reg Fees	17,596	21,271	22,803	30%	0%
Conservation Trust	15,971	26,740	30,190	89%	0%
Social Services	941,896	1,092,056	2,816,425	199%	13%
Other	722,604	118,028	3,023,124	318%	14%
Total Other Units	39,915	35,527	80,426	101%	0%
Charges for Service	811,639	974,417	1,317,797	62%	6%
Fines and Forfeits	-	-	-		0%
Miscellaneous Revenue	385,857	818,802	1,125,144	192%	5%
Transfer from Enterprise Activities	-	-	-		

**Expenditures**

	1991	1996	2002/1991		
			2002 growth rate	Allocations	
General Government	1,998,448	2,186,006	3,827,708	92%	22%
Judicial	313,729	304,695	335,298	7%	2%
Total Public Safety	1,431,128	1,673,334	2,585,487	81%	15%
Law Enforcement and Jail	1,374,689	1,512,354	2,277,764	66%	13%
Fire	13,148	15,360	19,131	46%	0%
Other	43,291	145,620	288,592	567%	2%
Total Public Works	4,089,013	3,933,104	4,641,071	14%	27%
Roads and Highways	3,973,575	3,540,868	4,296,140	8%	25%
Solid Waste Services	115,438	392,236	344,931	199%	2%
Other	-	0	-		0%
Health	377,583	669,439	842,382	123%	5%
Culture and Recreation	828,358	1,334,384	1,440,599	74%	8%
Social Services	1,525,139	1,718,568	3,471,855	128%	20%
Miscellaneous Expenditures	131,133	819,200	303,731	132%	2%

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Total Operating Expenditures	10,694,531	12,638,730	17,448,131	63%	100%
Transfers to Other Govs and Enterprises	699,164	665,563	674,210	-4%	4%
Capital Outlay	714,883	587,984	6,637,432	828%	38%
Principal Payments	-	0	30,000		0%
Interest Payments	-	0	576,414		3%
Total Expenditures	12,108,578	13,892,277	25,366,187	109%	145%

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Financial Compendium, 1991, 1996, updates.

<http://dola.colorado.gov/cedis/compendium/compCnty3.cfm>

## Routt County

In 2002, Routt County's major revenues came from general taxation, which accounted for 56% of total revenues, or \$13 million. The sources of these revenues were mostly from general property taxes and sales/use taxes, respectively 60% and 35% of total tax revenues. The second major source of revenues was intergovernmental revenue for almost \$8 million, or 26% of total revenues in 2002. The fastest growing revenue sources were, in order of relative magnitude: social services, which more than tripled, followed by charges for services, specific ownership taxes on certain vehicles and mobile equipment, and general sales/use tax, which taken individually represent a small fractions of the total, but all together rose to more than \$10 million of revenues or 44% of total revenues in 2002.

In nominal values the total county expenditures increased from \$13 million to \$21 million over the eleven years period 1991 to 2002, or less than doubled. The surplus, calculated over operating expenditures, increased from 12% to 20% of total revenues in the period.

The major expenditures, in absolute nominal terms in 2002, were general government, roads/highways and public safety, each of them for about \$5 million or 25% of the total operating expenditures. The category road/highways decreased in relative importance in the county budget, from 38% of total operating expenditures in 1991.

The fastest growing expenditure in the period were transfers to other governments/ enterprises, and general government, both with a rate of increase exceeding by 75% the average increase in expenditures over the period. The next categories showing fast growth rate were social services and total public safety. The category culture and recreation more than quadrupled over the period, although it remained a very small fraction of total expenditures. In 2002 the county did not have any capital outlay, debt service payments nor solid and waste service expenditures.

## Routt County

## General Government Activities, Financial Compendium

## Revenues

				2002/1991	
	1991	1996	2002*	growth rate	2002 % Allocation
Total Revenue	11,885,280	15,685,263	23,679,050	99%	100%
Total Taxes	6,339,045	8,966,722	13,200,204	108%	56%
General Property	3,915,146	5,413,013	7,793,946	99%	33%
Specific Ownership	287,831	456,722	753,243	162%	3%
General Sales and Use	2,116,008	3,079,489	4,616,996	118%	19%
Franchise	-	-	-	-	0%
Employment Occupation	-	-	-	-	0%
Other	20,060	17,498	36,019	80%	0%
Licenses and Permits	3,255	-	-	-100%	0%
Intergovernmental Revenue	3,522,038	4,184,452	6,165,735	75%	26%
Total Federal	995,203	1,071,623	1,643,054	65%	7%
Total State	2,259,387	2,911,209	4,463,922	98%	19%
Highway Users Tax	1,365,745	1,760,149	2,241,331	64%	9%
Cigarette Tax	18,347	17,316	13,744	-25%	0%
Motor Veh Reg Fees	32,764	39,541	47,653	45%	0%
Conservation Trust	28,994	47,914	54,424	88%	0%
Social Services	579,820	842,980	1,858,914	221%	8%
Other	233,717	203,309	247,856	6%	1%
Total Other Units	267,448	201,620	58,759	-78%	0%
Charges for Service	1,231,927	1,836,822	3,274,754	166%	14%
Fines and Forfeits	-	-	-	-	0%
Miscellaneous Revenue	789,015	697,267	1,038,357	32%	4%
Transfer from Enterprise Activities	-	-	-	-	-

## Expenditures

Categories				2002/1991	
	1991	1996	2002	growth rate	Allocations
General Government	1,829,067	3,247,669	4,973,866	172%	26%
Judicial	348,817	376,511	482,521	38%	3%
Total Public Safety	1,945,706	3,092,043	4,776,376	145%	25%
Law Enforcement and Jail	1,153,255	1,810,767	2,739,241	138%	15%
Fire	-	23,124	95,395	-	1%
Other	792,451	1,258,152	1,941,740	145%	10%
Total Public Works	3,475,010	4,766,268	4,960,492	43%	26%
Roads and Highways	3,475,010	4,766,268	4,960,492	43%	26%

Solid Waste Services	-	-	-		0%
Other	-	-	-		0%
Health	428,876	475,633	876,753	104%	5%
Culture and Recreation	109,663	127,929	475,100	333%	3%
Social Services	776,535	969,810	2,004,506	158%	11%
Miscellaneous Expenditures	130,396	155,258	318,884	145%	2%
Total Operating Expenditures	9,044,070	13,211,121	18,868,498	109%	<b>100%</b>
Transfers to Other Govs and Enterprises	936,934	1,017,441	2,573,918	175%	14%
Capital Outlay	1,977,301	-	-	-100%	0%
Principal Payments	1,029,567	485,000	-	-100%	0%
Interest Payments	388,327	190,833	-	-100%	0%
Total Expenditures	13,376,199	14,904,395	21,442,416	60%	

Financial Compendium, 1991, 1996, updates.

<http://dola.colorado.gov/cedis/compendium/compCnty3.cfm>

### 3.3.3.2 Government Revenues from BLM lands

This section reports the results of a thorough examination of the revenues obtained from oil and gas industry, which was completed by Tinneal Gerber of the Moffat County Finance Department. The main results are summarized in Table 3.4 and reported here. Four types of taxes are levied on the oil and gas industry that yielded total revenues of \$948,153 in 2002, and which grew to an estimated value of \$1,079,814 in 2005, an increase of about 14%. The largest and most consistent source of revenue was the Federal Mineral Lease tax revenues, which are collected by the Minerals Management Service in the US Department of Interior. Colorado receives \$30-60 million from the US government, which is distributed to Colorado counties based on CRS 34-63, and the amounts follow the residence reports of employees within the industry. The fact that this is so consistent suggests stability of the employees in the area, and perhaps in the leases held.

The second largest category of taxes is the PILT, or Payment in Lieu of Taxes, which are Federal payments to local governments to help offset losses in property taxes due to Federal ownership of acreage with a county. The annual PILT allocation makes payments to counties on the basis of reported federally owned acres in a county and uses a formula from the PILT Act that includes population, receipt sharing payments, and the amount of Federal land within the affected county. The funds are allocated each year. In most years, this seems to be in the neighborhood of \$200,000 to \$300,000 for Moffat County, but during 2003, the value of PILT jumped to \$635,390. The reason for this will be investigated.

The two other categories of taxes levied on the oil and gas industry are property taxes, which can be changed based on the assessed value of the oil and gas improvements on Federal land, and severance taxes, which are related to the number of employees within a county. This latter tax is related to production rather than the number of leases and is not solely related to production activity on Federal land, as is receipts from PILT. In the estimates for property taxes in the table, the assessed value of the property ranged between \$39.6 million in 2003 and \$95.1 million in 2005. The mill levy was 20.872. The Moffat County Finance Department estimated that about two-thirds of the assessed value of the oil and gas industry could be found on public lands. These figures and assumptions lead to the values in the table. The severance tax related to BLM land was derived from the recognition that eleven employees worked on Federal lands, which represented eight percent of the total employees in oil and gas in the county. Thus, eight percent of the total severance tax received was attributed to the BLM activity and is reported in the table. This appears to be a very small number.

Referring back to the previous section on the revenues and expenditures of the county governments, the taxes discussed here are found in the intergovernmental transfers from the Colorado state government to the counties. Under intergovernmental transfers, these revenues can be found in the "Other" category, which was about \$3 million in total during 2002. Thus, about one third of this category would be from oil and gas taxes, and most of the remaining part would be from coal, we assume. Overall, the revenues from oil and gas activities that can be attributed to public lands appear to be about 4.5% of total revenues. Had these revenues come from a sector based on sales taxes, this would be consistent with an industry with about \$20 million in sales.

Table 3.4: Total Revenue Received due to Permitting of Federal Lands

	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
Property Tax	\$ 89,209.32	\$ 55,361.36	\$ 106,485.38	\$ 133,050.81
Severance Tax	\$ 4,463.28	\$ 3,679.92	\$ 3,748.08	\$ 6,763.02
Federal Mineral Lease	\$ 576,482	\$ 620,015	\$ 661,654	\$ 640,000
Total	<u>\$670,154.60</u>	<u>\$ 679,056.28</u>	<u>\$ 771,887.46</u>	<u>\$ 779,813.83</u>
<b>Other Federal Land Revenues</b>				
PILT	\$ 277,999	\$ 635,390	\$ 317,051	\$ 300,000
<b>Grand Total</b>	<b><u>\$948,153.60</u></b>	<b><u>\$1,314,446.28</u></b>	<b><u>\$1,088,938.46</u></b>	<b><u>\$1,079,813.83</u></b>

### 3.3.4 Social and Demographic Conditions

#### 3.3.4.1 Demographic Conditions

##### 3.3.4.1.1 Demographics for Moffat County

In 2005, Moffat County has a projected 13,560 residents, ranking it at about the median population of Colorado counties. In 2000, 9,189, or 70%, of the county's population resided in Craig, the county seat. From 1970 to 2002, Moffat County population grew by 6,897 people, a 106% increase in population, or 2.3% per year. Over that period, Moffat County's population growth rate has been faster than the state of Colorado and the United States. However, from 1990 to 2000, Moffat County grew by a steady 16.1% while Colorado boomed by 30.6%. Population growth estimates from the Colorado Department of Local Affairs predict that the population of the county will grow by an average rate of 1.2% annually over the next 20 years. Population growth in the county does not appear to be sensitive to national booms and recessions, though it is sensitive to changes in the oil and gas industry.

Moffat County is relatively sparsely populated with a population density of 2.8 persons per square mile. By comparison, the state of Connecticut, which is similar in land area, has a population density of 679 persons per square mile and the state of Colorado has an average population density of 41.5 persons per square mile.

Moffat County is slightly less female than the rest of the state and the nation, having 48.1% of the county population is female, compared to 49.6% statewide and 51% nationwide. The leading industries in the county (e.g. agriculture, oil and gas) tend to be more male dominated, potentially explaining this difference. Ethnically, the county is overwhelmingly 'White, Non-Hispanic,' although there are important Hispanic and Asian populations in evidence. The correlation among ethnicity, race and income in Moffat County is discussed more in the Environmental Justice section.

According to the 2000 U.S. Census, 6.8% of the county's population is under 5 years old and 28.5% of the population is under 18 years old, slightly above the state level of 25.6%. The largest age category of county residents is ages 40 to 44 yrs. The fastest growing age category is 45-49 yr olds and the median age was 35.4 yrs in 2000, up from 31.9 in 1990. Of the county's total population, 23% was under the age of 15 yrs, 14% was 15 to 24 yrs, 29.9% was between 25 and 44 yrs, 23.8% was between 45 and 65 yrs, and 9.4% of the population was over the age of 65 yrs.

The 2000 Census indicates 79.6% of the population has a high school diploma, compared to 86.9% of the statewide population. Twelve and a half percent of the county has a bachelor's degree or higher, while 32.7% of the state's population has earned a bachelor's degree.

In 2000, Moffat County had 4,983 households in 5,635 housing units with an average of 2.58 people per household, somewhat higher than the state average. The home ownership rate in the county was 72.1% and 16.4% of the housing units were in multi-unit structures. Two-person

households are the most frequently reported in the County, accounting for one third of all households. Single-person households account for 24% of the total, followed by three-person households (17%), four-person (16%), and households with five or more people (10%).

In summary, Moffat County's population is increasing at a moderate rate, is concentrated in Craig, is largely 'white, is growing somewhat older, is more male than average, and is somewhat less educated than average.

### 3.3.4.1.2 Demographics for Routt County

In 2005, Routt County has a projected 22,103 residents, ranking it above the median population of Colorado counties. In 2000, 9,815, or 50%, of the county's population resided in Steamboat Springs, the county seat. From 1970 to 2002, Routt County population grew by 13,635 people, a 202% increase in population, or 3.5% per year. Over that period, Routt County's population growth rate has been faster than the state of Colorado and the United States. However, from 1990 to 2000, Routt County continued to outpace the growth of Colorado, adding 40% to its population steady versus the quite sizable growth in Colorado of 30.6%. Population growth estimates from the Colorado Department of Local Affairs predict that the population of the county will grow by an average rate of 1.9% annually over the next 20 years. Population growth in the county does not appear to be sensitive to national booms and recessions, though it is sensitive to changes in the oil and gas industry.

Routt County is relatively sparsely populated with a population density of 8.0 persons per square mile. By comparison, the state of Connecticut, which is similar in land area, has a population density of 679 persons per square mile and the state of Colorado has an average population density of 41.5 persons per square mile.

Routt County is substantially less female than the rest of the state and the nation, having 46% of the county population being, compared to 49.6% statewide and 51% nationwide. The leading industries in the county (e.g. agriculture, oil and gas, and skiing) tend to be more male dominated, potentially explaining this difference. Ethnically, the county is overwhelmingly 'White, Non-Hispanic,' although there are important Hispanic and Asian populations in evidence. The correlation among ethnicity, race and income in Routt County is discussed more in the Environmental Justice section.

According to the 2000 U.S. Census, 5.5% of the county's population is under 5 years old and 22.6% of the population is under 18 years old, slightly lower than the state level of 25.6%. The largest age category of county residents is ages 45 to 49 yrs. The fastest growing age category is also the 45-49 yr olds and the median age was 35.0 yrs in 2000, up from 32.5 in 1990. Of the county's total population, 18.4% was under the age of 15 yrs, 14.4% was 15 to 24 yrs, 36.5% was between 25 and 44 yrs, 25.7% was between 45 and 65 yrs, and 5.0% of the population was over the age of 65 yrs.

The 2000 Census indicates 95.3% of the population has a high school diploma, compared to 86.9% of the statewide population. A relatively high 42.5% of the county has a bachelor's degree or higher, while 32.7% of the state's population has earned a bachelor's degree.

In 2000, Routt County had 4,983 households in 5,635 housing units with an average of 2.58 people per household, somewhat higher than the state average. The home ownership rate in the county was 72.1% and 16.4% of the housing units were in multi-unit structures. Two-person households are the most frequently reported in the County, accounting for one third of all households. Single-person households account for 24% of the total, followed by three-person households (17%), four-person (16%), and households with five or more people (10%).

In summary, Routt County's population is increasing at a moderate rate, is less concentrated in Steamboat Springs than Moffat County's is in Craig, is largely 'white, is growing somewhat older, is quite a bit more male than average, and is significantly more educated than average.

○ **Social Conditions Related To Public Lands**

In 2001, Moffat County, with the support and encouragement of its commissioners, engaged in a survey of attitudes and preferences for the use of federal public lands in the county. We conducted a two page mail survey of attitudes and uses of public lands among Moffat County residents. Survey respondents were asked about general and proposed changes in public lands within Moffat County, access, importance to the local economy, their current and projected uses of public lands, and their preferences for public lands in the county. In addition to an overall public perspective, we hypothesize that there may be at least four distinct groups of opinions on these matters: 1) Moffat County residents who own significant amounts of land; 2) Residents who do not own substantial acreages; 3) Nonresidents with acreage; and 4) Nonresident nonlandowners.

A survey was created and distributed to a total of 2,800 residents and non-residents of Moffat County, Colorado in order to elicit preferences for public lands management within the county. County landowners were identified through the county assessor's office. A list was purchased from a survey sampling company that listed addresses and telephone number of county residents. A master list was created that contained a total of more than 6,000 names once duplicates were removed. Nonlandowners were randomly sampled. All landowners who own 100 acres or more (700 individuals) were included in the survey distribution, because they are such a small population in general.

Overall, a majority of respondents see federal lands as important the Moffat County economy and tax base. That said, they feel the best way to make use of these federal lands is with a multiple use management strategy. While the survey respondents do not generally want to see expansions to Dinosaur National Monument, creation of Vermillion National Monument, or designation of any additional BLM wilderness areas, if any of these proposals were to go through the respondents would like them to allow for multiple use activities such as grazing and oil/gas/mineral exploration and production. The desire for lands to permit grazing on federal lands goes hand in hand with the prominent role ranching plays in the county economy. Overall, there is no desire for any new land designations that would take away current land use practices.

Most statistical differences between means of the various respondent subgroups were not policy relevant. However, the few cases where it was important for policy were for both questions involving gas/oil/mineral exploration and production. There is potential for nonresident nonlandowners to switch from neutral to disagree for policies addressing gas/oil/mineral exploration and production in the proposed Vermillion National Monument, and for resident nonlandowners and nonresident landowners to switch from neutral to either disagree or agree for gas/oil/mineral exploration and production in additions to Dinosaur National Monument. This makes the case that multiple use is the preferred land planning strategy when it includes grazing and motorized recreation, but opinions diverge when it comes to multiple use involving gas/oil/mineral exploration and production. This issue is potentially more controversial.

In terms of public policy implications, particular attention must be paid to the relationship between landowners and nonlandowners. Landowners control the private land resources in the county and arguably have the most to gain or lose financially from policies affecting land use. Nonlandowners constitute the vast majority of local taxpayers and, probably, voters. As a result, local policy is likely to be driven by

nonlandowners. When the preferences of these two groups are at cross purposes, local public policy concerns can be expected. However, as a group, resident nonlandowners were rarely in opposition to resident landowners on matters of land use covered in this survey, if perhaps less vociferous in their support or opposition to the various measures proposed. It would be wise to take the stances of the various stakeholder groups into consideration when evaluating the efficacy of potential incentive based or regulatory measures to guide local land use and economic development.

- **Social and Economic Perspectives on Hunting and fishing**

An important dimension of the Moffat and Routt County economies that is significantly affected by BLM management decisions is the range of recreational activities in these counties. Ideally, BLM should systematically collect recreation visitor use data to capture the full range of these potential uses in the RMPPA. However, there was a reluctance expressed to rely on the BLM's recreation management information system data. We are nonetheless able to present several dimensions of the recreation activities. Despite this limitation, we present several dimensions in this section that come from the Colorado Division of Wildlife's survey results.

#### Hunting and Fishing

A recent report by BBC Consulting for the Colorado Division of Wildlife (CDOW) looked at the economic impacts of hunting and fishing in both Routt and Moffat counties. The first table below shows their calculations of direct expenditures in each of six categories of hunting and fishing activities. The largest in both counties is elk hunting, followed by fishing. Fishing is quite a bit more important in Routt than in Moffat County. The values in Routt tend to be larger than those in Moffat. The secondary effects (multipliers through the economy) add about 75% to the direct expenditures in both counties. The last columns show the total values in Colorado for perspective, which indicates that the state in total derives much more revenue and economic activity from fishing than the hunting activity that is most important in the counties in the BLM Little snake RMPPA.

The second table shows how revenues are split between resident and non-resident. Once again, the values for Colorado are also provided for perspective. Moffat county revenues are very dependent on non-residents, with 81.6% of sales from these hunters. Routt County is similar but has about 10 percent more of its revenues from local hunters. These jurisdictions are still much higher than the overall state, which receives about half of its revenue from out of state hunters. The breakdown from the fishing and expenses by CDOW are similar in both counties and across the state, with about 65 percent of income from local fishermen.

**Table 1:** Expenditures in Hunting and Fishing, Moffat and Routt Counties, and all Colorado, 2004

	Moffat County		Routt County		Colorado	
	Thousands dollars	% of Direct Expenditures	Thousands dollars	% of Direct Expenditures	Thousands dollars	% of Direct Expenditures
Tot. Direct Expenditures	14,500	100%	23,600	100%	845,300	100%
Deer	2,420	17%	2,320	10%	54,600	6%
Elk	7,950	55%	10,540	45%	191,500	23%
Other Big game	120	1%	170	1%	6,600	1%
Small Game	1,510	10%	1,810	8%	85,100	10%
Fishing	2,160	15%	8,140	34%	458,700	54%
COW	570	4%	600	3%	48,800	6%
Indirect Expenditures	11,000	76%	18,300	78%	668,700	79%
Total	25,500		41,900		1,514,500	

Source: BBC Consulting

The data presented above is not adequate for the purposes of our analysis, which requires that we be able to see these activities in terms of hunter and fisher days, rather than just totals. Therefore, we went to the CDOW database and constructed the number of hunter days in elk and deer hunting for 2004. These figures are contained below and indicate relatively equivalent numbers of hunters in both counties, with a somewhat larger number of days spent in Routt County by elk hunters.

Elk Hunting in Routt and Moffat Counties,  
Harvest, Success Rate, Numbers of Hunters and Hunter days  
2004

	Routt	Moffat	Total
Harvest	7,259	8,593	15,852
Hunters	23,031	18,989	42,021
Success rate	32	45	38
Hunter days	101,155	72,783	173,939

Deer Hunting in Routt and Moffat Counties,  
Harvest, Success Rate, Numbers of Hunters and Hunter days  
2004

	Routt	Moffat	Total
Harvest	3,192	5,269	8,462
Hunters	6,980	7,915	1,495
Success rate	46	67	57
Hunter days	27,801	26,699	54,499

○ **Social and Economic Perspectives on other Recreation**

The BLM does not systematically collect recreation visitor use data in the RMPPA. BLM is reluctant to rely on its recreation management information system data. This of course makes performing any quantitative analysis of recreation use, recreation impacts as well as an economic analysis of recreation difficult. Both regional economic analysis (e.g., jobs and county income) and economic value of recreation to visitors depends upon visitor use estimates. The data does not have to be perfect. That is the nature of estimates, whether of recreation or wildlife. Therefore we develop our own recreation use estimates below based on our limited sampling this summer and fall.

In the spirit that having some information quantitative information on the economic effects of recreation is better than treating it only qualitatively as is being done in the recreation section, CSU planned to conduct visitor counts and visitor intercept sampling during the summer and fall of 2005. Due to delays in completing the cooperative agreement with CSU, only limited sampling was possible during the summer and fall. This section reports on the inferences regarding recreation use and initial analysis of visitor expenditures based on surveys returned to date. Once all of the second mailing surveys are returned or our

cut-off date reached, the expenditure analysis will be updated and we will consider whether it is worthwhile to perform any statistical analysis of the economic value of recreation.

In consultation with the Little Snake Field Office, 15 recreation sites were identified to query visitors about their use. We also sampled at many (but not all of these). These sites are shown on map X. That was given to visitors in the survey packet.

[Insert map of recreation sites]

These sites are:

1. Cedar Mountain Picnic Area/Trailhead
2. Duffy Mountain Trailhead
3. Duffy Mountain River Access
4. West Juniper Mountain Trailhead & River Access
5. East Juniper Mountain Trailhead
6. Thornburg Draw Trailhead
7. South Cross Mountain Trailhead
8. East Cross Mountain River Access
9. West Cross Mountain River Access
10. Twelve Mile Mesa Trailhead
11. Bear Valley Trailhead
12. Irish Canyon Interpretive Site
13. Irish Canyon Campground
14. Rocky Reservoir Campground
15. Sand Wash Basin Entrance
16. Vermillion Falls (site not included on map).

Generally speaking, many of those sites identified as trailheads are part of the Yampa Valley trail used for mountain biking, hiking, horseback riding and motorized use in some segments. To avoid conflicting with visitors recreation experience, on river access we tended to focus on take out points rather than put-ins. Several of the river access sites are administered jointly by BLM and the Colorado State Parks (e.g., Duffy Mountain River Access). Some areas such as West Juniper Mountain trailhead emphasizes non motorized recreation with hiking, horseback riding and mountain biking. This area was heavily used on the day we did our training as there were five tents and several vehicles.

Irish Canyon Interpretive Site consists primarily of a large petroglyph panel. The Irish Canyon Campground consists of seven sites and is a no fee site. Sand Wwash Basin is a major OHV area used by motorcycles and ATV's throughout the large basin. Each interviewer would drive to the site and count vehicles when they arrived. Depending on the schedule, the interviewer would remain on-site for 2-3 hours (the amount of time on-site was recorded). If visitors appeared during this time, the interviewer would, introduce themselves as part of the CSU study, obtain commitment to take a mail-back survey package, and obtain the visitors name and address for our follow up mailings.

Due to lack of a cooperative agreement in force during the summer and early fall, only the following days were sampled:

Two interviewers for July 2, 3, and 4: Total surveys handed out were 14 surveys  
One interviewer for September 3, 4 and 5th: Total surveys handed out were 7 surveys  
One interviewer for October 7, 8<sup>th</sup>: Total surveys handed out were 9 surveys (with 5 of them filled out on site). It would be desirable to re-sample in the spring to have a more complete sample of visitors.

To date we have 20 surveys returned out of the 30 handed out. This represents a 66% response rate, a reasonably good one.

**Table 1. Locations of Visitors**

Sites	# of Interviews	Residence of Visitors
Cedar Mountain Picnic Area/Trailhead	5	Craig
Duffy Mountain Trailhead		
Duffy Mountain River Access	3	Craig
East Juniper Mountain Trail & River Access	2	Craig/Hayden
West Juniper Mountain Trail & River Access		
Thornburg Draw Trailhead		
South Cross Mountain Trailhead		
East Cross Mountain River Access		
West Cross Mountain River Access &	3	Craig
Twelve Mile Mesa Trailhead		
Bear Valley Trailhead		Not sampled
Irish Canyon Interpretive Site	6	Craig, Rock Spgs, Green Riv
Irish Canyon Campground		
Rocky Reservoir Campground		
Sand Wash Basin Area	11	Craig

To estimate visitor use we utilized the number of vehicles observed at the site and the number of surveys handed out (one to each group). This number was then expanded to all weekends and holidays over a six month season using reciprocal of the number of days sampled to the number of weekend days and holidays in a six month season. This assumes visitor use on non-holiday weekdays is essentially zero. We further expanded based on the hours sampled versus the hours the site was available for recreation. The resulting sample expansion factor was multiplied by the number of vehicles and surveys handed out. To convert vehicles to visitor days, we used the returned surveys that provided site specific estimates of annual number of trips, group size and average length of stay.

Theses estimates are based on small sample sizes thus provide an approximate estimate of use. We suspect that use is not zero at many sites estimated as zero, but it is low enough during the July through October time period that our coarse sampling time period did not observe any visitors. Sites with low use levels would have to be sampled more intensively to obtain an accurate estimate of use, but whether the sampling costs would be justified with such low use estimates is an open question.

**Table 2 Estimated Number of Vehicles and Estimated Visitor Days**

	Vehicles	Visitor Days
1. Cedar Mountain Picnic Area/Trailhead	503	68,416
2. Duffy Mountain Trailhead	0	0
3. Duffy Mountain River Access	551	4,400
4. West Juniper Mountain Trailhead & River Access	416	3,321
5. East Juniper Mountain Trailhead	126	1,009
6. Thornburg Draw Trailhead	0	0
7. South Cross Mountain Trailhead	0	0
8. East Cross Mountain River Access	N/A	
9-10. West Cross Mtn River Access & 12 Mile Mesa Trail	1,016	61,339
11. Bear Valley Trailhead	NA	
12. Irish Canyon Interpretive Site	648	2,303
13. Irish Canyon Campground	355	1,262
14. Rocky Reservoir Campground	158	562
15. Sand Wash Basin Entrance	1,837	161,000
16. Vermillion Falls (site not included on map).	0	0

NA means not sampled.

**Table 3 Primary Recreation Activities at Each Site**

Sites	Reported Recreation Activities
Cedar Mountain Picnic Area/Trailhead	Hiking, Picnicking
Duffy Mountain River Access	Rafting
East Juniper Mountain Trail & River Access	Rafting
West Juniper Mountain Trail & River Access	
West Cross Mountain River Access	Fishing, Hiking, Camping, Viewing
Twelve Mile Mesa Trailhead	Hiking, Biking
Irish Canyon Interpretive Site	Rockart, picnic, wildlife viewing
Sand Wash Basin Area	Motorcycles, ATV, Camping

Table 4. Average Expenditures of Visitors

		Spent in Moffat/ Routt Counties	Cost	Total Trip Size	Group
Site 1	Cedar Mtn		\$3.00	\$3.00	1
	% Moffat & Routt		100%		
Site 3-4	Duffy/E Juniper	Average	\$170.00	\$198.33	2
	% Moffat & Routt		86%		
Site 9-10	West Cross& 12 Mile	Average	\$108.42	\$150.00	1.3
	% Moffat & Routt		72%		
Site 12	Irish Canyon	Average	\$58.67	\$76.33	1.7
	% Moffat & Routt		77%		
Site 15	Sand Wash	Average	\$114.47	\$156.88	1.3
	% Moffat & Routt		73%		

The Craig and Steamboat area appear to capture a sizeable portion of total visitor spending, with about three-fourths of total visitor spending having been made in Routt and Moffat counties.

This information may be used in the input output model to calculate income and employment related to recreation in the No Action alternative in Chapter 4: Environmental Consequences.

### 3.1.1 Environmental Justice

Executive Order 12898, issued on February 11, 1994, requires the BLM is to identify and address as actions, leases, and authorizations that cause disproportionately high and adverse impacts to minority populations, low-income communities, and Tribes.

**Definitions:** There are four key terms and definitions used by BLM in its Instruction Memorandums to the field to interpret and implement this Executive Order.

- Environmental Justice - *The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. Fair treatment means that no group of people, including racial, ethnic, or socioeconomic group should bear a disproportionate share of the negative environmental consequences resulting from industrial, municipal, and commercial operations or the execution of federal, state, local, and tribal programs and policies.*
- Minority - *Individual(s) classified by OMB's Directive No. 15 as Black/African American, Hispanic, Asian and Pacific Islander, American Indian, Eskimo, Aleut, and other non-white persons.*
- Minority Population - *Minority populations are identified as either: (1) the minority population of the affected area exceeds 50 percent, or (2) the minority population percentage of the affected area is meaningfully greater than the minority population percentage in the general population or other appropriate unit of geographic analysis.*
- Low-Income Population - *Persons living below the poverty level.*

#### Application to the RMPPA

Moffat and Routt counties have a relatively small proportion of the population that would be considered a minority compared to Colorado or the western U.S. Based on the table below about 8% of Moffat County and 2% of Routt County are Hispanic. Less than 1% of Moffat and Routt Counties are African American or American Indian or Asian American.

In terms of low income populations about 21% of Moffat county households earn less than \$20,000. This varies by race. Below the average are whites with 13% and zero percent for Asian Americans. Hispanics are just below the county average at 19% making below \$20,000. In contrast 100% of African American and 61% of Native American households make less than \$20,000. In Routt County about 14% of the county households earn less than \$20,000. White households are right at this average of 14%, while Native American households are actually below this average with just 9% making below \$20,000. Asian Americans have 18% of their households making \$20,000 or less. The percentage of Hispanic households making below \$20,000 is 19%, higher than the county average. About 44% of African American households make \$20,000 or less.

For the purposes of the later analysis of BLM management alternatives, the link between the income distributions given below and the economic impacts translated from the various outcomes of the alternatives needs to be understood in order to fully assess the issues related to environmental justice. The Census data below provides a good picture of the *household* distributions by race and ethnicity, but they do not indicate what *economic sectors* those households receive income from and therefore what the

actual impact on various groups from a change in management practice will be. Thus, if an alternative opens more land for oil and gas drilling, there will be an increased economic activity from that growth. This will lead to more wages earned that will be distributed across income and ethnicity in particular ways. A different scenario would lead to impacts across these groups in other proportions. At present, we can add to the income distribution picture below the added features of average wages across sectors. That shows a considerable range of wages earned by sector, running from \$10,198 in food service and accommodations to \$65,679 in utilities. Thus, different consequences of management alternatives will lead to different types of impacts on the jobs available and the associated wages, with resulting changes in the positions of different income and racial groups. To our knowledge, the exact translation of wages earned by sector of economic activity to income distribution does not exist in Census data, so we will need to make some assumptions in that regard. As we approach the analysis, we can get wage disruption from the State Demographer's Office, which will be a refinement of the table below contained average wages.

Income	Household Income in 1999, Moffat County, Colorado						
	Households						
	Total	African American	American Indian	Asian American	Other races	Hispanic	White
Total households:	5,155	12	18	12	200	419	4,494
Less than \$10,000	408	12	9	0	30	39	318
\$10,000 to \$14,999	297	0	0	0	22	41	234
\$15,000 to \$19,999	362	0	2	0	40	39	281
\$20,000 to \$24,999	291	0	0	0	11	30	250
\$25,000 to \$29,999	390	0	0	0	18	55	317
\$30,000 to \$34,999	415	0	0	8	24	49	334
\$35,000 to \$39,999	292	0	0	4	9	48	231
\$40,000 to \$44,999	489	0	0	0	20	33	436
\$45,000 to \$49,999	280	0	7	0	8	25	240
\$50,000 to \$59,999	522	0	0	0	18	28	476
\$60,000 to \$74,999	671	0	0	0	0	18	653
\$75,000 to \$99,999	596	0	0	0	0	14	582
\$100,000 to \$124,999	70	0	0	0	0	0	70
\$125,000 to \$149,999	34	0	0	0	0	0	34
\$150,000 to \$199,999	12	0	0	0	0	0	12
\$200,000 or more	26	0	0	0	0	0	26

Data Set: Census 2000 Summary File 3 (SF 3) - Sample Data

Variables

African American ( P151.B). HOUSEHOLD INCOME IN 1999 (BLACK OR AFRICAN AMERICAN ALONE HOUSEHOLDER)  
 American Indian P151C. HOUSEHOLD INCOME IN 1999 (AMERICAN INDIAN AND ALASKA NATIVE ALONE HOUSEHOLDER) [  
 Asian American (P151D). HOUSEHOLD INCOME IN 1999 (ASIAN ALONE HOUSEHOLDER)  
 Other Races (P151F And P151G). HOUSEHOLD INCOME IN 1999 (SOME OTHER RACE ALONE OR TWO OR MORE RACES AS HOUSEHOLDERS)  
 Hispanic (P151H). HOUSEHOLD INCOME IN 1999 (HISPANIC OR LATINO HOUSEHOLDER)  
 White (P151I). HOUSEHOLD INCOME IN 1999 (WHITE ALONE, NOT HISPANIC OR LATINO HOUSEHOLDER)

## Household Income in 1999, Routt County, Colorado

Income	Households						
	Total	African American	American Indian	Asian American	Other races	Hispanic	White
Total households:	8497	9	43	44	81	183	8137
Less than \$10,000	360	2	2	8	8	10	330
\$10,000 to \$14,999	385	0	0	0	13	13	359
\$15,000 to \$19,999	461	2	2	0	4	12	441
\$20,000 to \$24,999	347	0	10	0	0	9	328
\$25,000 to \$29,999	403	0	0	0	9	6	388
\$30,000 to \$34,999	447	0	3	10	3	8	423
\$35,000 to \$39,999	501	0	3	0	3	14	481
\$40,000 to \$44,999	564	0	2	0	13	12	537
\$45,000 to \$49,999	472	0	8	0	1	9	454
\$50,000 to \$59,999	902	0	0	0	0	12	890
\$60,000 to \$74,999	1112	5	0	8	13	40	1046
\$75,000 to \$99,999	1238	0	11	18	5	22	1182
\$100,000 to \$124,999	535	0	2	0	7	2	524
\$125,000 to \$149,999	326	0	0	0	2	7	317
\$150,000 to \$199,999	192	0	0	0	0	7	185
\$200,000 or more	252	0	0	0	0	0	252

Data Set: Census 2000 Summary File 3 (SF 3) – Sample Data

Variables are:

African American ( P151.B). HOUSEHOLD INCOME IN 1999 (BLACK OR AFRICAN AMERICAN ALONE HOUSEHOLDER)

American Indian P151C. HOUSEHOLD INCOME IN 1999 (AMERICAN INDIAN AND ALASKA NATIVE ALONE HOUSEHOLDER) [

Asian American (P151D). HOUSEHOLD INCOME IN 1999 (ASIAN ALONE HOUSEHOLDER)

Other Races (P151F And P151G). HOUSEHOLD INCOME IN 1999 (SOME OTHER RACE ALONE OR TWO OR MORE RACES AS HOUSEHOLDERS)

Hispanic (P151H). HOUSEHOLD INCOME IN 1999 (HISPANIC OR LATINO HOUSEHOLDER)

White (P151I). HOUSEHOLD INCOME IN 1999 (WHITE ALONE, NOT HISPANIC OR LATINO HOUSEHOLDER)

Table 2: Average Annual Wage by Industry, 2001 to 2003

	2001	2002	2003
<b>Transformative</b>	Adjusted to 2003 Dollars		
Agriculture & Ag Services	\$16,368	\$16,035	\$16,085
Construction	29735	27798	25812
Mining	54154	54581	54324
Manufacturing	31441	30090	30855
<b>Distributive</b>			
Utilities	61389	59205	65679
Transportation & Warehousing	33636	37754	37510
Wholesale Trade	31220	33283	34480
<b>Retail Trade</b>			
Motor Vehicle & Part Dealers	38040	32407	38835
Building Material & Garden Supply	19916	19803	24906
Food & Beverage	24622	25595	26274
All Other Retail	17285	17747	17806
<b>Services</b>			
<b>Consumer</b>			
Other Services	21103	21255	21468
Arts, Entertainment & Recreation	15015	14623	12935
Accomodations & Food Services	9491	9560	10198
Personal Services	15274	14519	13829
<b>Professional</b>			
Information	29677	29730	31621
Finance & Insurance	30548	31260	31351
Real Estate	31658	27560	31151
Professional & Technical	17756	18835	20058
<b>Social</b>			
Health	22480	25072	26391
Education	14369	14667	14667
<b>Government</b>	31347	31567	31845
<b>County Average for All Industries</b>	30659	31295	31919
<b>Statewide Average for All Industries</b>	39433	38878	38942

### 3.1.2 Place-based Values

Routt and Moffat County society demonstrates many features considered typical of the Intermountain West. The mix of public and private lands, of wild rivers, open meadows, alpine climes, wildlife and cattle, harsh winters and temperate, dry summers, help to create a human ecology as diverse as the natural environment that attracted it. The social fabric of the region is clearly rooted in the Old West, but substantially adapted to New West ideas and ideals. All are closely tied to the native and environmental features of the landscape

Directly or indirectly the county economy is based upon its natural resource base. Economies dominated by cattle and sheep ranching, timber extraction, oil and gas have increasingly given way to year round outdoor recreation (e.g., hunting, skiing, fishing, mountain biking, etc) and amenity migrants, including retirees, lone eagles and telecommuters. Directly, the Moffat economy is largely dependent on the base industries of mining and power generation while the Routt economy is now largely tourism driven. These base industries generate new dollars in the economy and fuel a growing service sector. Service and trade industries represent the fastest growing segments of the Moffat County economy and seem poised to continue their growth in the coming years. Another important generator of outside dollars is the large non-labor income generated from government transfer payments and retirement incomes. The growth of the service sector through tourism and retirees as engines of economic development are largely due to the richness of the natural resource base and rural lifestyle the region offers. Thus, the natural resource base indirectly drives the economic base in this case. The primary drivers of this economy may, therefore, be at crosspurposes.

Here you will see Carharts and cappuccinos, steak and sushi, shreaders and shearers, conservationists and cowboys, often in the same place and sometimes associated with the same person. The vast majority of the private lands are still held in traditional uses. However, substantial pressures to alter the landscape and the traditional way of life are ubiquitous. The somewhat uneasy evolution of these sometimes competing and sometimes coincident world views will shape the future of human and non-human ecology in the region through the foreseeable future. Economic development strategies for Moffat and Routt Counties must consider both private and public lands management alternatives and pay close attention to the direct, indirect, induced and the nonpecuniary costs and benefits of economic development alternatives. As such, any long term economic development plan for the county must take the role of mining, drilling, agriculture, outdoor recreation and amenity migrants into explicit consideration.

#### ○ **Current Perspectives on Agricultural Land Values**

One topic that illustrates well the merging of issues and ideas between the Old West and the New West is attitudes on the preservation of agricultural lands. A recent MS thesis by Nicholas Magnin “The Value of Ranchland to Routt County residents, 1995-2005” is useful in this regard. The following discussion is taken from a summary of that work entitled “The Societal Value of Ranchland to Routt County residents, 1995-2005,” which can be found as Economic Development Report 05-01 at <http://dare.agsci.colostate.edu/csuagecon/extension/pubstools.htm>. This paper was written by Nicholas Magnan, Andrew Seidl, C.J. Mucklow, and Deborah Alpe. The substance of that summary follows:

Among the principal growth related concerns of Routt county residents is the conversion of privately held farms and ranches on large tracts of land into rural residential properties. Only the productive value of ranchland is fully captured in its market price. Other valuable features of ranchland are reflected indirectly in the market (e.g., viewscape, recreation). And for some very real and important values of ranchland (e.g., culture, environmental quality), market signals scarcely exist at all.

Consequently, the market will undervalue the contribution of ranchland to society and market transactions will result in less ranchland than would be socially desirable. Here, we estimate the non-productive benefits of Routt County ranchland that accrue to Routt County residents. We will use an economic valuation method called contingent valuation to replicate a study done in Routt County a decade ago. This estimate will contribute to our understanding of the implications of local land use change and policies on local residents. In August of 2004, surveys were sent to 1,074 registered voters and a return rate of 44% was obtained from the sample.

**Survey approach.** The survey used in this study is nearly identical Rosenberger (1996) and Rosenberger and Walsh (1997) in order to obtain data that allow for intertemporal comparisons for the value of ranch open space in Routt County. These studies confronted residents with a hypothetical referendum regarding ranch open space conservation. Residents were asked what the ideal amount of ranchland to conserve would be and if they would vote “yes” on a referendum to conserve that amount of ranchland. These questions were asked in that order to set up the CVM question that asked what dollar amount would be the highest they would have to pay and still vote “yes” on the referendum.

### Summary of results

- Practically no change from 1994 to 2004 was observed concerning a referendum to protect ranch open space. In 1994, 96.5% of respondents said they would have voted “yes” on such a referendum at no cost to them. In 2004, 93.7% said they would. When the referendum would cost respondents at least \$1.00, 91.1% said they would have voted “yes” in 1994, 91.3% in 2004.
- Respondents in 1994 would be willing to pay a maximum of \$182.02 on average to protect local ranch open space through the county government. In 2004 the average WTP reported rose to \$220.38. The mean WTP for ranchland in and around Steamboat Springs rose from \$90.09 to \$119.41. The mean WTP for ranchland elsewhere in Routt County increased from \$94.68 to \$105.58. Residents were WTP more for conservation in the Steamboat Springs region in 2004 than they were in 1994, and at least as much in other areas in the county.
- The number of households in Routt County in 2004 was about 9,890. Using mean WTP values, the total annual benefit of ranch open space conservation to Routt residents was \$2,175,800 in 2004 or nearly three times the 2005 county program budget of \$748,000. Using the median values the total annual benefit of ranch open space conservation was \$989,000 in 2004. Over a 30 yr time horizon, the total value of ranchlands accruing to current Routt residents is approximately \$20-30 million.
- The 1994 and 2004 surveys both asked respondents to rate a series of natural and man made features of Routt County regarding their contribution to their wellbeing. The rank order of characteristic categories changed slightly from 1994 to 2004. In 1994 the highest rated characteristic categories were natural environment, ranch open space and recreation investments, followed by western ranch culture, community services and urban development. In 2004 the highest rated characteristics were natural environment, ranch open space and western heritage, followed by community services, recreation attributes and urban characteristics.
- The factors that increase residents’ likelihood of voting “yes” on a referendum to protect ranch open space at no cost were how important they felt the issue was (positively), the distance they live from ranchland (positively), their age (negatively until middle age, then positively), the number of years they have lived in the county (negatively), and if they come from an agricultural background (positively). The factors that influenced residents’ likelihood to vote “yes” on a referendum to protect ranch open space at a cost of at least \$1.00 are the how important they felt the issue was (positively), their income (positively),

their age (negatively until middle age then positively) and the number of years they have lived in the county (negatively).

- Residents' WTP to protect ranch open space were influenced by how important they felt the issue was (positively), the amount they wished to protect (positively), their incomes (positively), and whether they come from an agricultural background (positively). Ranch open space in and around Steamboat Springs was treated separately from ranch open space elsewhere in the county and residents were sensitive to these differences.
- From the comparative statistics and economic **References** models it appears that income is the primary determinant of WTP. Of all the demographic changes occurring in Routt County, only income showed to influence WTP to protect ranch open space. Increasing income could mean more funds available to support conservation initiatives, but it is likely that land values will increase as well, causing additional pressure to develop.

### 3.1.3 Summary

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