

# Grand County Tourism Revitalization Plan Tourism Conditions Memorandum

November 2024



**Grand County**  
Colorado

Prepared for:



**Grand County**  
Colorado



**GRAND COUNTY**  
COLORADO ★ USA

Prepared by:



Antero Group

# EXECUTIVE SUMMARY

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Grand County, Colorado will always be a captivating destination celebrated for its abundance of natural beauty and diverse attractions. The region's allure, evidenced by its iconic Rocky Mountain National Park, charming towns like Grand Lake, Granby, Fraser, and others, draws a significant number of visitors year-round. However, amidst its popularity and myriads of attractions, Grand County grapples with challenges. The County's popularity as a tourist destination places a strain on the delicate balance between visitors and the local population. Maintaining the County's unique character and local community identity while catering to the needs of visitors requires a delicate equilibrium. Additionally, balancing the preservation of natural landscapes with the increasing demands of tourism infrastructure presents an ongoing challenge.

This memorandum is intended to document data points and conditions within Grand County to provide a baseline understanding of recent trends and information. Subsequent documents and reporting will build on this information, focusing on implementation tasks and tools that will help Grand County prioritize responsible tourism, strong local business, and community-supported activities. Funded by the Grand County Tourism Board and supported by Grand County Economic Development, the project aims to support Grand County's efforts to diversify tourism geographically and seasonally, encouraging visitors to explore lesser-known areas and visit during shoulder seasons in an effort to alleviate pressure on popular spots.

Topics highlighted in this memorandum include data related to:

- ▶ **Visitor Statistics:** Tourism dropped during COVID-19 but has since recovered, with over 7.3 million visitors in 2023. July is the peak month for tourists, and visitors stay an average of 2.2 days. Lodging options include hotels, motels, resorts, short-term rentals, camping, and other unique lodging options.
  - ▶ **Tourism assets:** Highlighting the tourism draws throughout the County to help encourage extended shoulder seasons, distribution of tourist activities geographically throughout the County, and ease pressure in overpopulated destinations.
  - ▶ **Housing:** Surging housing costs have made it difficult for employees to find affordable housing, which impacts workforce retention and tourism service quality. Housing availability is declining, with home values rising by 84% since 2010, while median incomes increased by only 31%. This imbalance contributes to affordability issues and potential economic instability.
  - ▶ **Population changes:** Grand County's population is growing and aging, leading to increased housing demand, strains on services, and shifting workforce demographics. While population growth can drive economic benefits, an aging population increases the demand for health services and senior housing but also presents opportunities for younger workforce entry.
  - ▶ **Workforce:** The top employment sectors – Accommodation and Food Service, Arts, Entertainment, and Recreation, and Retail Trade – employ over 4,000 workers. However, many workers commute from outside the county, highlighting the need for local workforce housing. Also, these sectors are linked to tourism, which due to its seasonal nature contributes to a seasonal workforce.
  - ▶ **Sustainable tourism:** Grand County emphasizes sustainable tourism, guided by the 2023 Sustainable Tourism Strategic Plan. Community engagement and minimal environmental impact are central themes.
- This memorandum serves as a baseline for understanding recent trends and data, recommending regular updates to inform decision-making and support tourism, business, and community activities.

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*Appendix D: Accommodations Comprehensive List*

*Appendix E: Details Regarding Each Camping Area*



# ACRONYMS

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<b>AADT</b>	Annual Average Daily Traffic
<b>AMI</b>	Area Median Income
<b>BOCC</b>	Board of County Commissioners
<b>CDOT</b>	Colorado Department of Transportation
<b>DOLA</b>	Colorado Department of Local Affairs
<b>GCCTB</b>	Grand County Colorado Tourism Board
<b>NWCCOG</b>	Northwest Colorado Council of Governments
<b>RMNP</b>	Rocky Mountain National Park
<b>STR</b>	Short-term Rentals

# 01

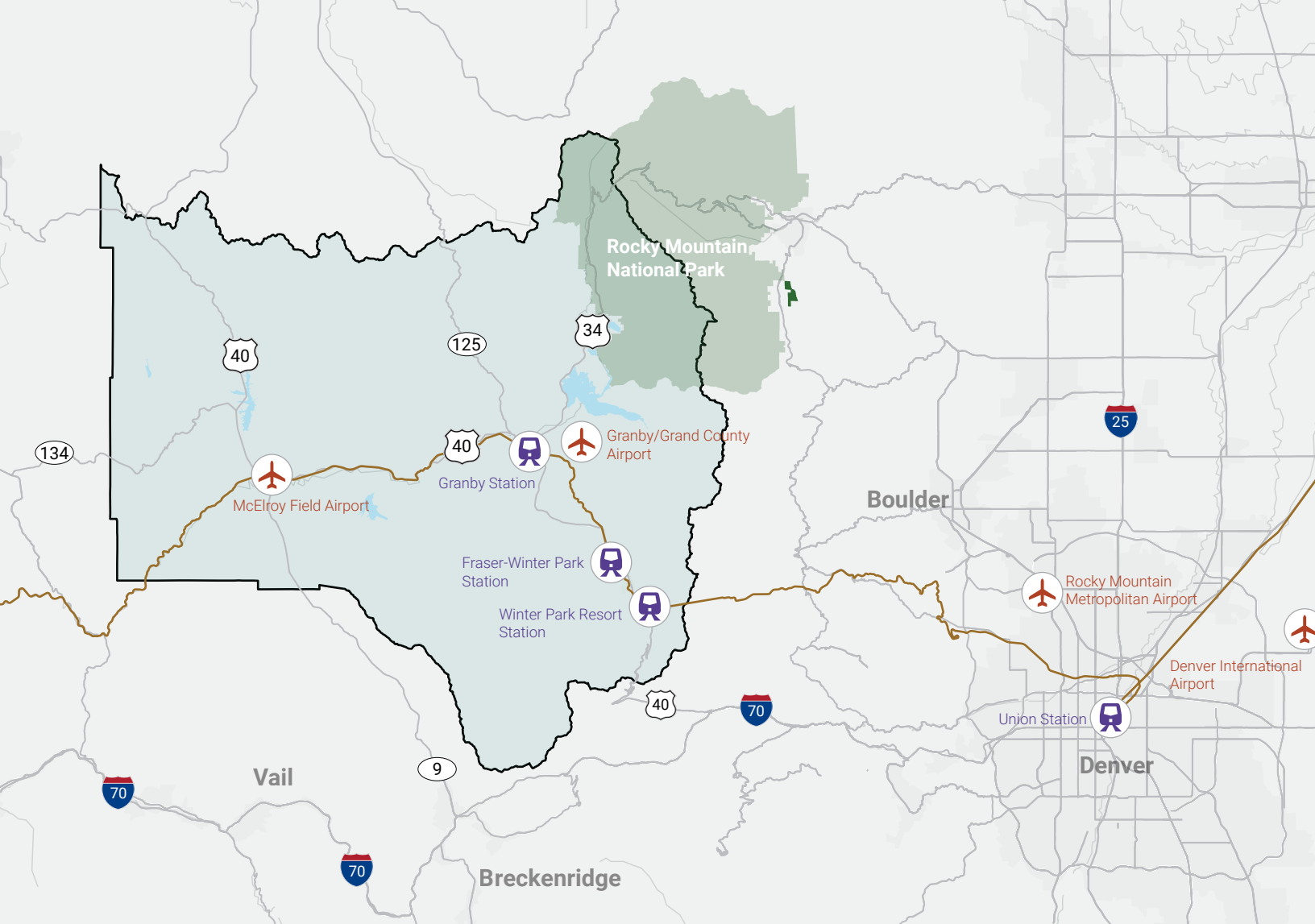
# INTRODUCTION

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This Grand County Tourism Conditions Memorandum (“Memorandum”) provides a detailed summary, along with data resources, as a supporting document to the Grand County Tourism Revitalization Plan project. This project, funded jointly by the Grand County Tourism Board and the Economic Development Administration, is intended to provide analysis and tools that help to diversify tourism in Grand County geographically and seasonally. With respect to geography, the goal is to provide strategies and tools to encourage visitors to explore parts of the county that may not receive as much attention, while also reducing negative impacts on areas with significant tourism pressure. In regard to seasonality, the goal is to extend tourism to include the shoulder seasons in the spring and fall, and also encourage visitors to spend more time here during the less busy weeks. This Memorandum provides a snapshot of factors that influence Grand County’s tourism. It can and should be revisited with some regularity to ensure that Grand County and the towns, businesses, and residents within it have relevant information to guide decision making.

*Photo: GCCTB*





## THE GRAND COUNTY APPEAL

With its breathtaking landscapes and abundant recreational opportunities, Grand County has long been a magnet for visitors, attracting nature enthusiasts and adventure seekers alike. Located just 70 miles from Denver and its international airport, Grand County is a convenient destination for regional and international visitors. Grand County serves as an idyllic retreat, offering an escape into pristine wilderness and authentic mountain towns.

The County offers a variety of tourism options and activities for visitors, including hiking, camping, skiing, fishing, dining, and more. There is an abundance of natural attractions, including Rocky Mountain National Park, Arapaho National Forest, and miles of trails. Visitors

also enjoy the mountain towns throughout the County, each with its own distinct identity. The town of Grand Lake is nestled between Rocky Mountain National Park and Grand Lake, Colorado's largest and deepest natural lake. Their downtown includes a historic, Western-style boardwalk with local restaurants and shops. Granby serves as the County's central hub, connecting various regions through US-40, US-34, and CO-125. Fraser and Tabernash offer a host of outdoor activities, including hiking, biking, and skiing, as well as local businesses. For tourists seeking a restful getaway, Hot Sulphur Springs and Parshall present a tranquil retreat with access to natural hot springs. Kremmling, known as the "Sportsman's Paradise," takes pride in its access to

some of the County's most pristine wilderness areas, such as Williams Fork Reservoir and Wolford Mountain Reserve. Winter Park has been a destination for winter sports enthusiasts for nearly 100 years. The County's extensive network of hiking trails, pristine lakes for fishing and boating, and charming mountain towns collectively contribute to the region's overall appeal.

In recent years, Grand County's tourism economy has experienced significant growth, which has presented some challenges. The influx of visitors has placed pressure on local resources, businesses, and the environment. Rising costs in development and construction paired with varying capacities across local organizing has made it difficult to keep up with infrastructure and trail maintenance. Housing costs and resources for area employees have become more expensive and less available as second homeowners and short-term rentals become a larger part of the housing stock. Housing availability and affordability have been a barrier to workforce attraction and retention, as many workers cannot afford to live in the County. Environmental conditions such as wildfires, flash flooding, tree canopy degradation, and reduced snowfall have become an increasing concern as the effects of climate change become more evident across the region. The East Troublesome Fires in 2020 devastated the area and recovery is ongoing. Balancing the influx of tourists with environmental preservation and local community needs remains a critical challenge for the County.

This document provides a summary of the conditions that inform the tools and plan that will be developed at later stages of this project, including implementation elements. Because tourism is such a dynamic industry, it is important to regularly revisit this data. In addition, communicating this information to County and Town officials and employees, Chambers of Commerce, developers, and non-profit organizations will ensure cohesion and transparency around the tourism economy. Maintaining relevant data will be valuable when making decisions around capital improvements and economic development.

## THE STRUCTURE

The following sections will cover the existing conditions present throughout the County that impact Grand County's residents and workforce, where and how tourism shapes the County, and the how the built environment impacts development. The timeframes for data collection have been included, but for practical purposes most of the data has been collected through 2023. These following sections are broken up into:

- ▶ **Community Profile:** This section provides a summary of relevant baseline data, including demographics, housing, workforce, and regulatory data.
- ▶ **County Assets:** This section discusses the various assets and infrastructure the County over sees.
- ▶ **Visitor Data:** This section includes visitor statistics, tourism assets, and environmental conditions



*Photo: GCCTB*

# 02

# COMMUNITY PROFILE

This community profile provides an overview of a range of data and statistics, including demographics, business, workforce, housing, and planning and zoning. The purpose of this profile is to offer a summary of the community's current state, enabling stakeholders, policymakers, and residents to better understand its dynamics, strengths, challenges, and opportunities.



Photo: GCCTB

# DEMOGRAPHICS

Demographic data is a fundamental tool for understanding the regional development and how it relates to the tourism industry. It helps tailor area offerings, marketing strategies, and infrastructure development to meet the needs and preferences of both residents and tourists, ultimately contributing to the growth and sustainability of the whole County. The following data shows the population, age, family size, race, educational attainment, housing, median home value, and average income for the Grand County and for each town that contributes to the tourism industry. Further analysis of workforce, occupations, industries, and housing will be explored in subsequent sections.

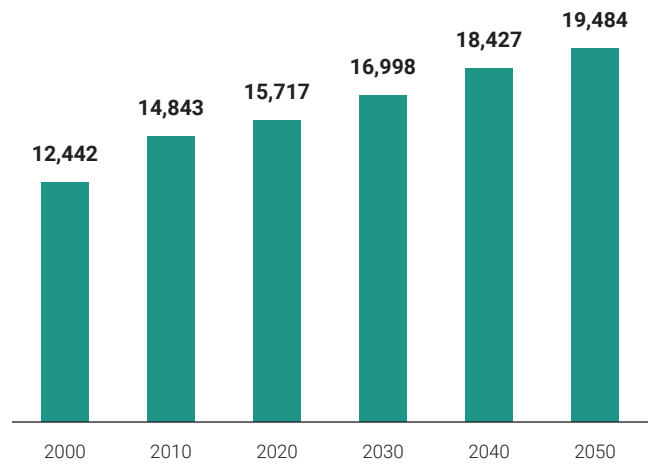
## Population

Over the past two decades, Grand County has witnessed steady growth with its population increasing by approximately 26% since 2000. According to the Colorado State Demographers Office, it is projected that the population of Grand County will continue to grow by an additional 23% by the year 2050 (as shown in **Figure 2.1**).

## Age

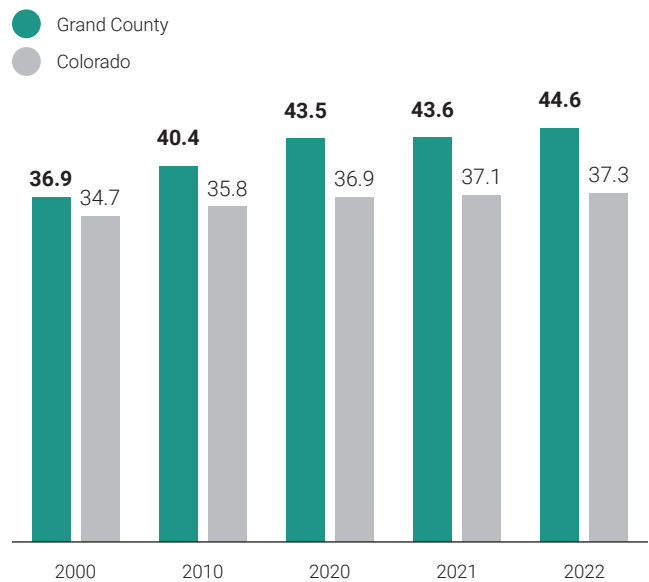
In the year 2022, the median age of the population is 44.6, whereas in the year 2000, it was 36.9 (**Figure 2.2**). In contrast, Colorado's median age is currently 37.3 in 2022. Grand County's population is 7.3 years older than the state of Colorado overall. This points to an aging population, which can limit the workforce in the future.

**Figure 2.1.** Population of Grand County



Sources: U.S. Census Bureau 2000, 2010, 2020, Colorado Department of Local Affairs: State Demography Office 2022.

**Figure 2.2.** Median Age

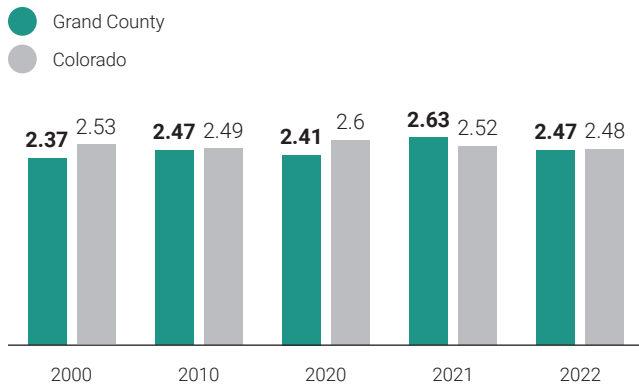


Sources: U.S. Census Bureau Decennial Census 2000, 2010, 2020, U.S. Census Bureau ACS 5-Year Estimate 2021-2022.

## Household Size

The average household size has remained relatively steady since 2000 and is comparable to the overall state of Colorado. In 2000, the typical household size averaged 2.37, but has since grown to an average of 2.47 (Figure 2.3).

**Figure 2.3.** Average Household Size



Sources: U.S. Census Bureau Decennial Census 2000, 2010, 2020, U.S. Census Bureau ACS 5-Year Estimates 2021-2022.

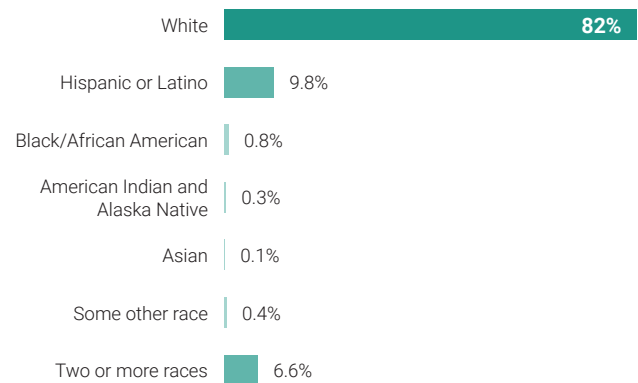
## Education

The majority of Grand County's residents (94.7%) have achieved a high school diploma or higher, and a significant percentage (66.4%) have pursued some form of higher education. Only 22% have engaged in higher education without completing their degree (Figure 2.5). About one-third of the population holds a bachelor's degree, and 15.8% have earned a graduate/professional degree. A small proportion (5.3%) of residents have not completed their high school education.

## Race

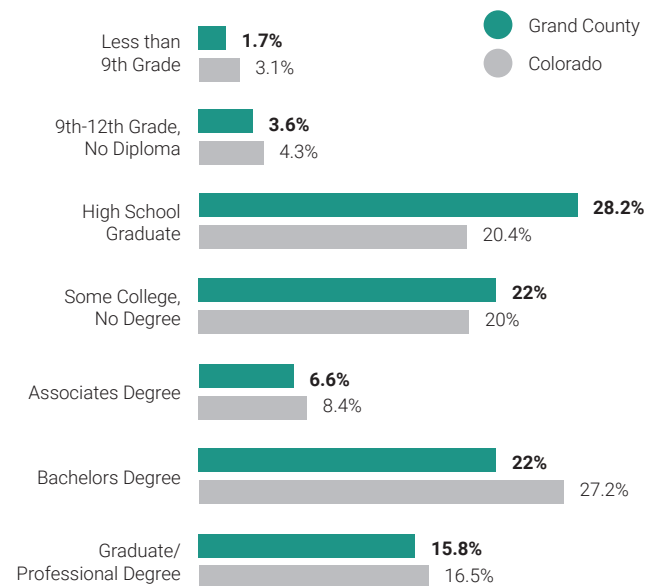
Grand County's population is primarily white, comprising 82% of the population (Figure 2.4). Hispanic/Latino makes up almost 10% of the population, followed by two or more races. African American, American Indian and Alaska Native, Asian, and some other races are all under 1% of the population.

**Figure 2.4.** Race



Source: U.S. Census Bureau ACS 5-Year Estimates 2022.

**Figure 2.5.** Education

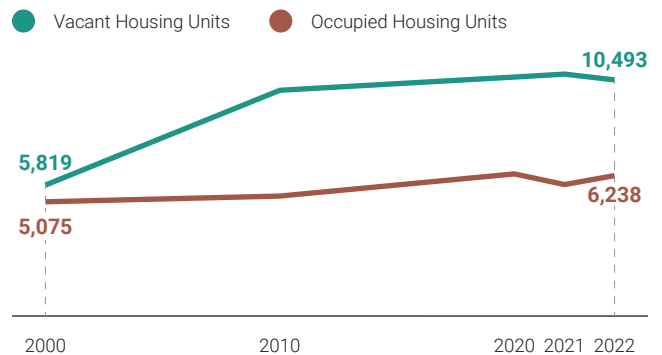


Source: U.S. Census Bureau ACS 5-Year Estimates 2022.

# HOUSING

The number of occupied households in Grand County has increased by 39% since 2000, while the total housing units have seen a 34% rise during the same period. The number of vacant housing units has seen a significant growth of 64.5% since 2000 (**Figure 2.6**). It is important to mention that the vacant category, as defined by the U.S. Census Bureau, includes seasonally occupied homes and short-term rentals.

**Figure 2.6.** Housing



Sources: U.S. Census Bureau Decennial Census 2000, Colorado Department of Local Affairs: State Demography Office 2010, 2020, 2021.

## Vacant Housing

The U.S. Census Bureau classifies vacant properties into seven categories (**Figure 2.7**). The largest portion of vacant housing in Grand County falls under the seasonal, recreational, and occasional use category. This category has seen a 13.5% increase since 2010. Housing designated for migrant workers has dropped to 9 units since 2021, while the number of housing units available for rent has shown growth, with a 32% increase since 2010.

Providing housing for employees in Grand County poses a significant challenge. To sustain the workforce and accommodate future job expansion, approximately 1,000 housing units are required by 2027. The Fraser River Valley: Housing Needs Assessment Update reveals that around 170 employees left the Fraser River Valley because they could not find housing. Moreover, 530 individuals rejected job offers due to the unavailability of affordably priced housing. This situation has far-reaching

**Figure 2.7.** Vacant Housing

	2010	2020	2021	2022
Total	10,032	10,619	10,750	10,493
For rent	395	458	433	522
Rented, not occupied	29	57	36	56
For sale only	641	83	68	15
Sold, not occupied	132	31	73	88
For seasonal, recreational, or occasional use	8,309	9,460	9,610	9,436
For migrant workers	27	30	30	9
Other vacant	499	500	500	367

**+13.5%**  
between 2010 and 2022

Sources: U.S. Census Bureau Decennial Census 2010, 2020, U.S. Census Bureau ACS 5-Year Estimates 2021-2022.

\* Due to the volatility of the housing market, there are some areas in the vacant property data that differ from the previous housing data.

consequences for the tourism industry, such as staffing difficulties, heightened seasonal fluctuations, reduced contributions to the local economy, and diminished service quality. However, there are existing housing solutions, and several more will become available in the near future as detailed in **Figure 2.8**.

Housing initiatives are a priority for Grand County. Even with the anticipated developments throughout the County, there is still a shortage of available housing. Further details can be found in the Grand County Study Area and Fraser River Valley Housing Needs Assessments found in **Appendix A**.

**Figure 2.8.** Current and Planned Development

Town	Current/Planned Development	# of Homes/Units	Own/Rent	Target Market	Deed Restricted?
Fraser	Wapiti Meadows	50	Rent	Employees	Yes
	Old Town Apartments	60	Rent	30-60% AMI	Yes, 50 out of 60
	Koselig on Main	20	Rent	Under 80% AMI	Yes, 2 out of 20
Granby	Smith Creek Crossing	311	Own and Rent	Employees and Visitors	80% Year-round
	Rodeo Grounds	91	Rent	Local Families	Yes
	ADU Program	TBD	Rent	Employees	Yes
	HWY 40 Workforce Housing	100 Apartments 77 Townhomes 50 Duplexes 40 Single Family Homes	Own and Rent	Employees and Local Families	Yes
	Sun Outdoors Rocky Mountains	Manufactured Homes	Own and Rent/ Lease	Any	No
	Grand Living Senior Homes	24 Units	Rent	62+ and Disabled Persons 30% AMI	Yes
Grand Lake	Black Bear Lodge	TBD	TBD	Employees	TBD
	Mary Drive	TBD	TBD	Locals	TBD
	Matthews	TBD	TBD	Locals	TBD
	Portal Crossing	6	Own	Employees	Yes
Hot Sulphur Springs	Habitat Lots	7	Own	Low Income Locals	Yes
	Duplex Development	4-8	Own	Locals/Summit	No
	Silver Spruce Apartments	20 Units	Rent	62+ and Disabled Persons 30% AMI	Yes
Unincorporated	Byers Peak Ranch	87	Own	Local and 2nd Homeowners	No
Winter Park	Millers Inn	18	Own and Rent	Employees	Yes
	Hideaway Junction	10	Own	Employees	Yes
	Hideaway Place Apartments	38	Rent	Employeed	Yes
	Fireside Creek	50	Rent	80-120% AMI	Yes

Sources: Grand County and Fraser River Valley Housing Needs Assessment, Grand County.



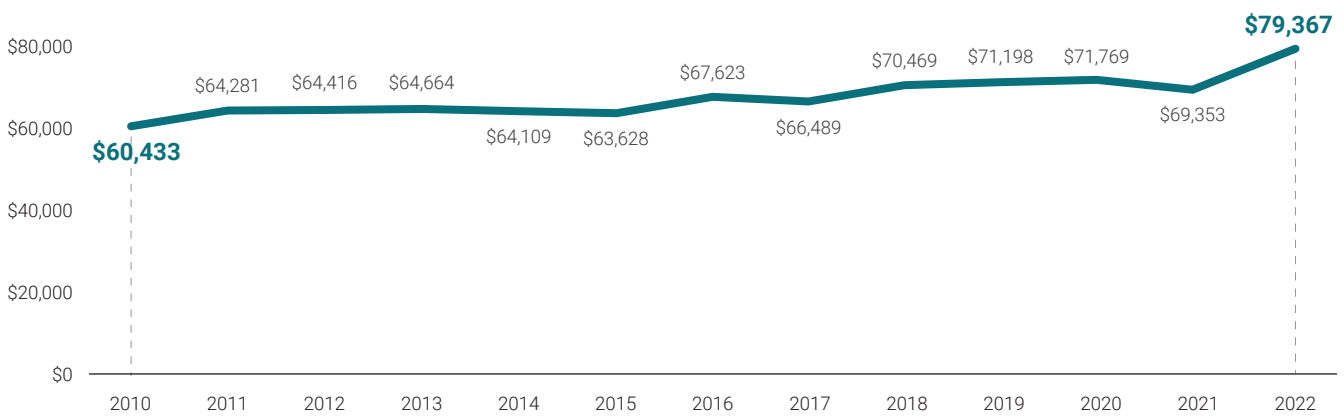
## Median Household Income

The County's median household income has increased by 31% from \$60,433 in 2010 to \$79,367 in 2022. Median income prior to 2022 has remained relatively stagnant. When comparing median income to median home values, median home values have risen 46% from 2010 to 2022, but the median income has only risen 14.8% in the same time period (**Figure 2.9**).

## Median Home Value

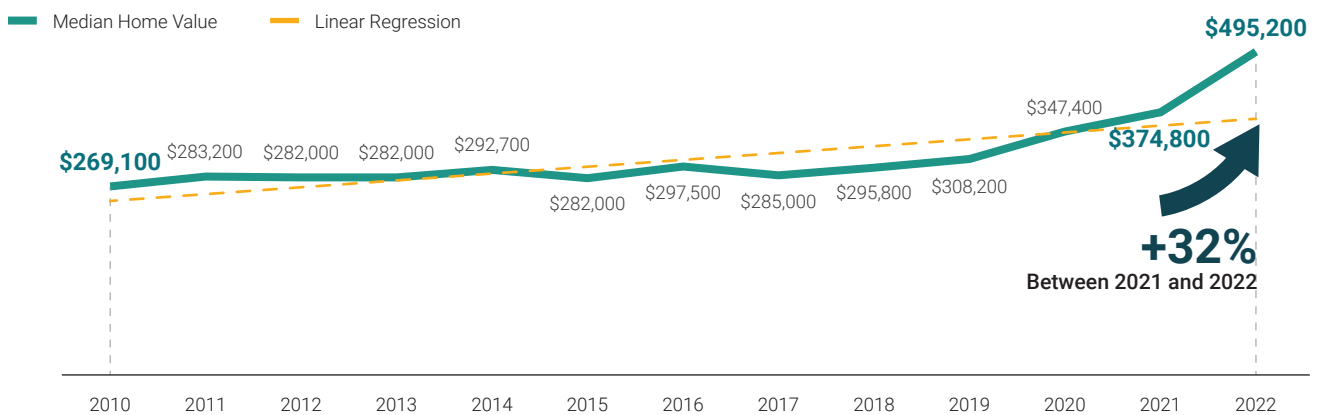
The median home value in Grand County has significantly increased since 2010. From 2010 to 2022, the median home value has increased by \$226,100, or 84%, with the 2022 median home value reaching a total of \$495,200. While an increase over time is expected, median home values are rising quickly. Between 2021 and 2022, there was a 32% rise in median home value. (**Figure 2.10**).

**Figure 2.9.** Median Household Income



Sources: U.S. Census Bureau Decennial Census 2010, 2020, U.S. Census Bureau ACS 5-Year Estimates 2011-2019, 2021-2022.

**Figure 2.10.** Median Home Value



Sources: U.S. Census Bureau Decennial Census 2010, 2020, U.S. Census Bureau ACS 5-Year Estimates 2011-2019, 2021-2022.

# BUSINESS AND LABOR INSIGHTS

Business and workforce data are crucial for guiding economic development strategies by identifying sectors that align with local skills and expertise. This information aids in addressing skill gaps, ensuring that education and training programs meet the demands of the job market. Additionally, industry and workforce data contribute to informed decision-making, helping communities attract businesses, create job opportunities, and foster sustainable economic growth.

## Total Sales

As reported by the Northwest Colorado Council of Governments (NWCCOG), businesses in Grand County are collectively generating nearly one billion in sales revenue. Detailed information regarding the top ten businesses in terms of sales can be found in the **Figure 2.11**.

## Total Employer Establishments

Grand County is currently home to 1,046 establishments. In 2023, a total of 8,127 jobs were provided by these businesses. Detailed information regarding the leading businesses by the number of employees can be found in the **Figure 2.12**.

**Figure 2.11.** Top Ten Businesses by Sales

Business	Sales
Ferrellgas	\$ 53,776,000
City Market	\$ 32,306,000
Mountain Parks Electric Inc	\$ 29,410,000
Safeway	\$ 27,460,000
Grand Fuel Depot	\$ 23,901,000
Granby Barn Store	\$ 23,901,000
Silver Stem Fine Cannabis	\$ 16,485,000
Kerber's Oil Co	\$ 11,951,000
Hideaway Park Brewery	\$ 10,410,000
Moffat Station Restaurant & Brew	\$ 10,410,000

Sources: Data Axle, Esri 2023.

\* Only businesses that disclosed sales were shown in this figure.

**Figure 2.12.** Top Twelve Businesses by Number of Employees

Business	Number of Employees
Winter Park Resort	1,500
C Lazy U Ranch	150
Farmhouse G L	100
City Market	100
Safeway	85
U.S. Forestry Department	80
Lodge at Sunspot Restaurant	77
Winter Park Mountain Lodge	75
The Roofing Company	70
West Portal Station	60
Deno's Mountain Bistro	60
Hi Country Haus Condominiums	60

Sources: Data Axle, Esri 2023.

\* Only businesses that disclosed the number of employees were shown in this figure.

## Top Industries

The top five industries by number of jobs provided in Grand County according to NWCCOG are seen in **Figure 2.13**. Accommodation and Food Service, Arts, Entertainment and Recreation, Retail Trade, Construction, and Public Administration sectors collectively contribute either directly or indirectly to the tourism industry, accounting for 68.9% of the County's total jobs.

## Commuting Data

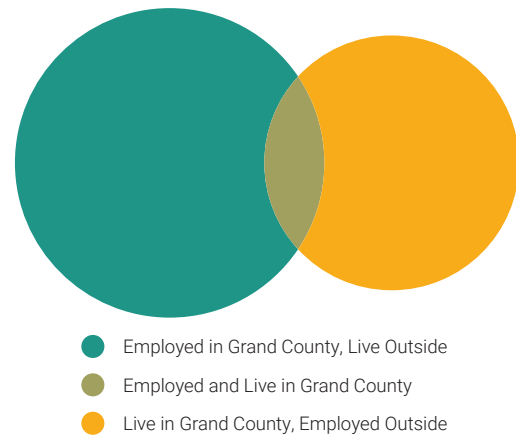
According to data provided by the U.S. Census Bureau, there are discernible commuting patterns among workers in relation to Grand County. In 2021, 4,168 individuals commuted to Grand County for employment opportunities, while 2,947 residents of Grand County ventured beyond the County's borders for work. Additionally, the data reveals that 2,742 individuals both live and work within Grand County (**Figure 2.14**). This data indicates that most of the workforce in Grand County lives outside of the county and that a substantial portion of individuals leave the County for work.

**Figure 2.13.** Top Industries based on number of jobs

Industry	Number of Jobs
Accommodations and Food Service	2,017
Arts, Entertainment, and Recreation	1,846
Retail Trade	842
Construction	753
Public Administration	559

Source: NWCCOG Regional Economic Update Q1 2024.

**Figure 2.14.** Inflow/Outflow of Workers for Grand County



Source: U.S. Census Bureau On the Map 2021.

\*2021 is the most recent data from the U.S. Census Bureau and the number of employees displayed are not current employment figures.

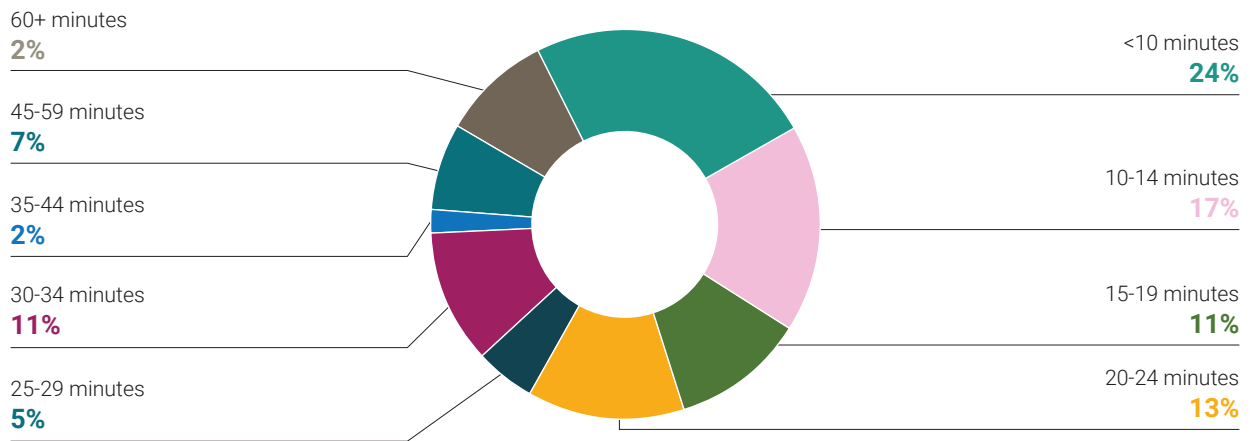
## Travel Times

According to the Census Bureau, a significant portion of commuters spend under 10 minutes in their daily commute to work, representing 24.4% of the total. Only a small fraction of commuters devotes over 60 minutes to their commute for work, with the majority of commuters completing their commute in less than 24 minutes (**Figure 2.15**).

## Means of Transportation to Work

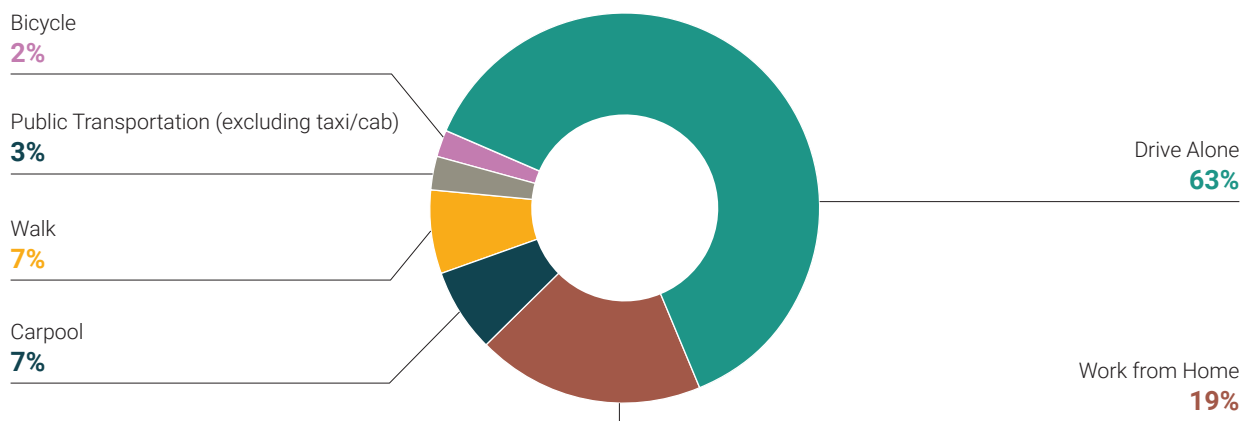
The majority of workers in Grand County drive alone to work. Only 3.2% of workers utilize public transportation. A significant portion of workers (18.7%) work from home. (**Figure 2.16**).

**Figure 2.15.** Commuting Times



Source: U.S. Census Bureau ACS 5-Year Estimates 2022.

**Figure 2.16.** Means of Transportation to Work



Source: U.S. Census Bureau ACS 5-Year Estimates 2022.

# ZONING

Zoning provides a structured framework for development, ensuring that land use aligns with community goals and needs. These processes help manage growth, prevent haphazard development, and enhance the overall quality of life for residents by promoting efficient land utilization and infrastructure development. Additionally, zoning contributes to economic stability by fostering a business-friendly environment and preserving the character and aesthetics of the community.

The zoning ordinances in Grand County were revised in 2022. The predominant zoning in the County is Forest (**Figure 2.17**). Most of the land in the County is federally owned, which restricts the potential growth of each town. Individual town zoning is not designated on the following map however growth areas on the map surround each Town. In most instances, these growth areas encompass a 3-mile radius around the Town boundaries. Following Grand County's 1997 and 2011 Master Plans, some of the core growth strategies include:

- ▶ Concentrating urban density residential development and a majority of commercial and industrial development within specified growth areas surrounding existing towns and established growth areas (such as Tabernash and Silver Creek).
- ▶ Taking proactive measures to promote the availability of housing.
- ▶ Implementing reduced maximum net density requirements in Forestry and Open Zone Districts, with consideration given to adopting the performance zone concept to encourage innovative site layouts that prioritize the preservation of open space, wildlife habitats, and active ranching land.
- ▶ Incorporating natural area protection regulations into the development review standards embedded in the zoning regulations and subdivision design standards outlined in the subdivision regulations.
- ▶ Undertaking measures to safeguard productive agricultural activities in relation to land use.
- ▶ Enhancing and potentially modifying existing County design and site planning review standards to ensure the development meets high-quality standards.
- ▶ Encouraging both the County and towns to adopt consistent subdivision improvement standards governing elements like roads, sidewalks, landscaping, and similar features for all development within community growth areas.
- ▶ Collaborating to maintain and enhance water quality and quantity in rivers and streams, as well as air quality throughout Grand County.

**Figure 2.17.** County Zoning



Source: Grand County 2022.  
\* Zoning can be differed by township.

Areas like Grand County that are dependent on visitors for economic stability have established Tourism-zoned areas. These areas allocated for Tourism and Business zoning have expanded allowances. The Tourist District serves as a space primarily catering to tourist-oriented retail activities. While these zoning areas are mainly situated along federal and state highways, they also permit residential usage within these designated districts. The permitted uses include:

- ▶ Single and multi-family dwellings,
- ▶ Boarding houses, bed & breakfasts, and rooming houses,
- ▶ Churches, schools, or hospitals,
- ▶ Medical and dental clinics,
- ▶ Playgrounds and parks,
- ▶ Outdoor recreational areas,
- ▶ Cabins, lodges, motels, hotels, and conference facilities,
- ▶ Private or commercial riding stables,
- ▶ Commercial use,
- ▶ Dams and reservoirs,
- ▶ Wind energy systems that are smaller than thirty-five feet in height,
- ▶ Telecommunications infrastructure, and
- ▶ Short-term rentals.

The array of permitted uses with the Tourism-zoned areas reflects a commitment to fostering a vibrant and inclusive community. These districts can host essential community facilities such as churches, schools, and hospitals, as well as recreational elements like playgrounds, parks, and outdoor areas.

**Zoning**

- Accommodations
- Business/Commercial
- Estate
- Forest
- Mobile Home
- Residential
- Tourism
- Unclassified
  
- Growth Areas
- Town Boundary
- Major Roadways

# KEY TAKEAWAYS

## DEMOGRAPHICS

### Steady Population Growth

Grand County has experienced steady population growth and is expected to **continue growing through 2050**. While population growth offers economic benefits, it also leads to increased housing demand, strains on infrastructure and services, and potential environmental impacts.

### Aging Population

An aging population will increase the **demand for health services and senior housing**, potentially creating a workforce demand as well. It also presents an **opportunity for younger generations** to enter the workforce, and for businesses in Grand County to retain a younger workforce.

### 82% White

While the majority of the population is white, efforts to make tourism **more equitable** and **promote diversity and inclusion** are important.

### 94.7% have a high school diploma or GED

The presence of a **highly educated population** indicates the potential benefit of establishing educational institutions like trade schools or community colleges to retain local learners and encourage them to stay in the County.

## HOUSING

### 39% Increase in Occupied Housing Units

The number of available housing units in Grand County is going down and owning a home may be **challenging for first-time buyers** due to affordability.

### Excessive Seasonal Housing

An excessive increase in seasonal housing can lead to **housing affordability problems, loss of community identity, and overdependence on tourism for economic stability**. Strategies to address this issue should include updated policies, zoning regulations, taxation policies, and diversifying the local economy.

### 32% Increase in Home Values between 2021 and 2022

Home values have surged by over 32% between 2021 and 2022, with the **median home values at \$495,200**. While this brings economic benefits, it also has negative implications.

### 31% Increase in Median Household Income since 2010

While median household incomes have only increased by just over 31% since 2010, home values have risen by 84% during the same period. It may be leading to increased **debt burdens, rising rent prices, and the potential for income inequality**.



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## 1,000 Housing Units

To sustain the workforce and accommodate future job expansion, approximately **1,000 housing units are required by 2027**.

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## 170 Employees Left

The Fraser River Valley area lost 170 employees who left due to a **lack of housing**, according to the Fraser River Valley's Housing Needs Assessment.

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## 530 Individuals Rejected Job

Because of the **unavailability of affordably priced housing**, 530 people rejected the job offers.

## BUSINESS AND LABOR INSIGHTS

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### 1,046 Businesses

Grand County is home to 1,046 businesses that generated **over one billion in sales revenue** in 2023. These businesses employed **8,127 workers**.

---

### 68.9% Contribute to Tourism

**Accommodation and Food Service, Arts, Entertainment and Recreation, Retail Trade, Construction, and Public Administration sectors** collectively contribute either directly or indirectly to the tourism industry, accounting for 68.9% of the County's total jobs.

---

### 60% Workforce Live Outside the County

**Most of Grand County's workforce lives outside the County.** The amount of workers who live and work in Grand County is slightly higher than the number of Grand County residents who work outside the County.

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### <10 Minutes of Average Commuting

**A quarter** of Grand County workers have a commute **under 10 minutes**. Most residents **drive to work**, but a significant portion works from home.

# 03

# COUNTY ASSETS

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For the purposes of this document, we consider County Assets to include finances, transportation, and utility infrastructure. Adequate finances enable service provision and infrastructure investments, contributing to reliable and consistent public services. A well-maintained transportation network supports economic growth, facilitates accessibility, and enhances residents' quality of life. Reliable utility access, including water, electricity, and sanitation, is fundamental for daily living, business operations, and the overall socio-economic vitality of the County. Effective management and strategic planning of these assets are paramount for building a thriving and resilient community.

*Photo: GCCTB*

# COUNTY FINANCES

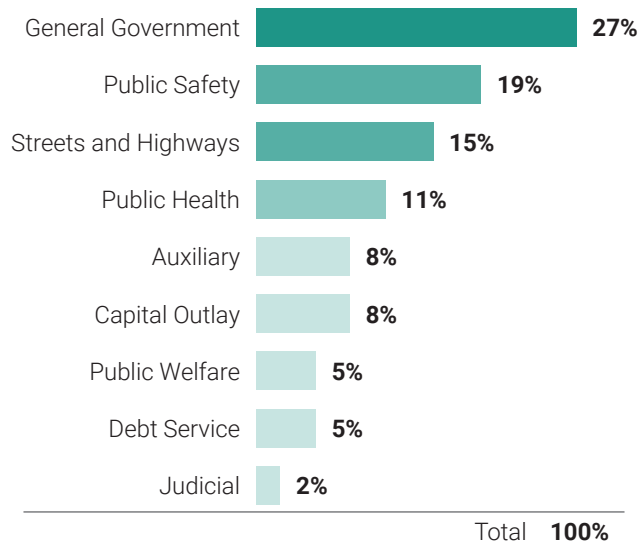
As of the close of 2023, the unrestricted fund balance stood at \$24.4 million. This balance accounts for projected expenses related to wildfires, which, in turn, bolster the County’s fund balance and its capacity to finance emergency response efforts and disaster mitigation. According to the data presented in Grand County’s Annual Report, General Government accounts for 27% of the total expenditures, Public Safety comprises 19%, and Streets & Highways constitute 15% (Figure 3.1).

The primary sources of revenue for Grand County are Intergovernmental Grants and Contributions (28%),

Property Taxes (24%), and Sales Taxes (19%) (Figure 3.2). In 2023, retail-related activities were similar with \$12.3 million compared to the 2022 value of \$12.1 million. 2023 sales tax collections are the highest the County has experienced due to tourism and a robust economy, as well as consistent taxation of online sales transactions and excise taxes on marijuana sales. Sales tax rates differ throughout the County. The table below shows the tax rates for each area in 2024 (Figure 3.3).

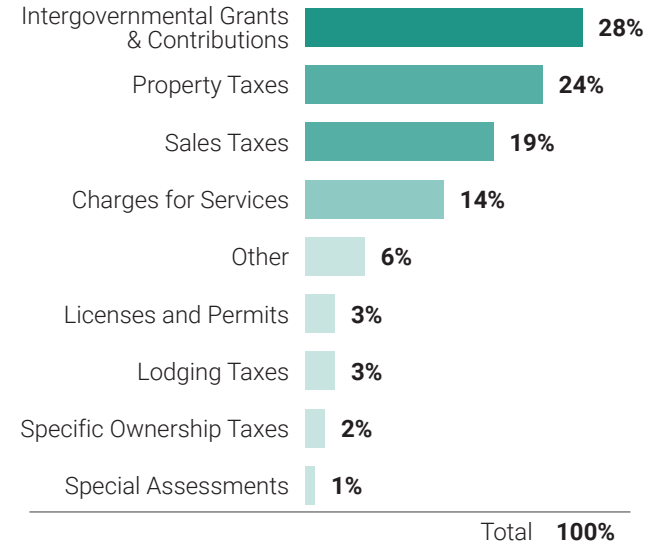
With the exception of Winter Park, the County’s lodging tax rate currently stands at 1.8%, contributing \$2.1 million tax revenue. Winter Park administers and collects its own lodging tax due to its Home Rule status.

**Figure 3.1.** Total Expenses



Source: 2023 Grand County Annual Report.

**Figure 3.2.** Total Revenue



Source: 2023 Grand County Annual Report.

**Figure 3.3.** Sales Tax Rates 2024

Colorado	Grand County	Fraser	Granby	Grand Lake	Hot Sulphur Springs	Kremmling	Winter Park
2.9%	4.2%	9.2%	8.2%	9.2%	8.2%	8.2%	11.2%

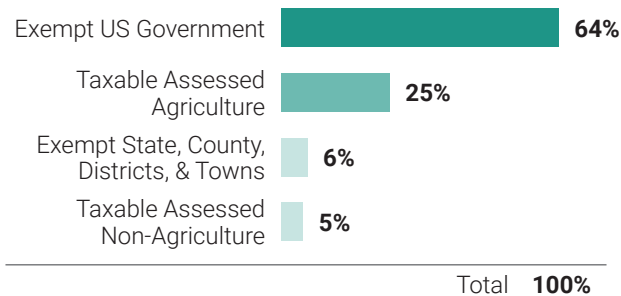
Source: 2024 Colorado Sales Tax Lookup.

\* This sales tax rate is the minimum combined value. The total rate could be higher based on specific address.

The majority of land in Grand County falls under ownership of the federal government, the State, the County, Districts, or Towns, making up 70% of the total property. This portion retains tax-exempt status. Nevertheless, there remains a taxable portion, accounting for 30% of the property taxes (**Figure 3.4**).

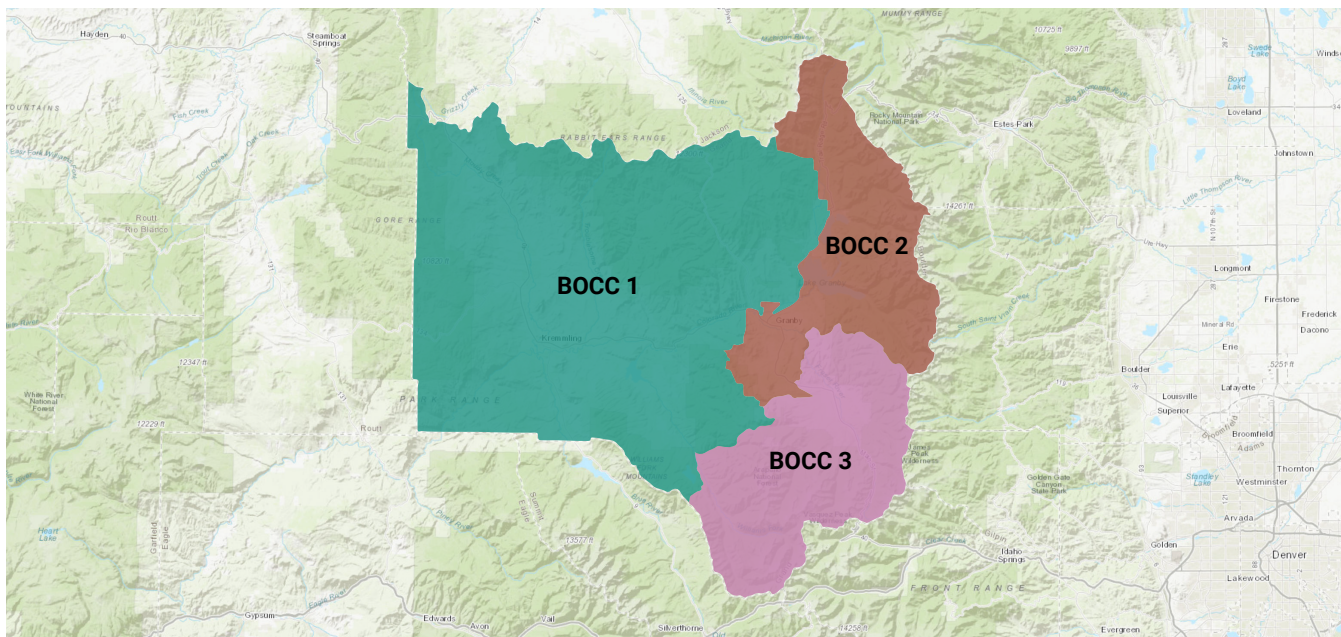
Sales tax revenues help measure tourism growth, population, and commercial activity within each District in Grand County. There are three Districts in Grand County: Winter Park/Fraser Valley (BOCC1), Three Lakes (BOCC2), and Mainstem (BOCC3) (**Figure 3.5**).

**Figure 3.4.** Taxable and Non-Taxable Entities



Source: 2023 Grand County Annual Report.

**Figure 3.5.** Grand County Districts



Source: 2022 Grand County Annual Report.

**Figure 3.6.** Sales Tax Revenue by District

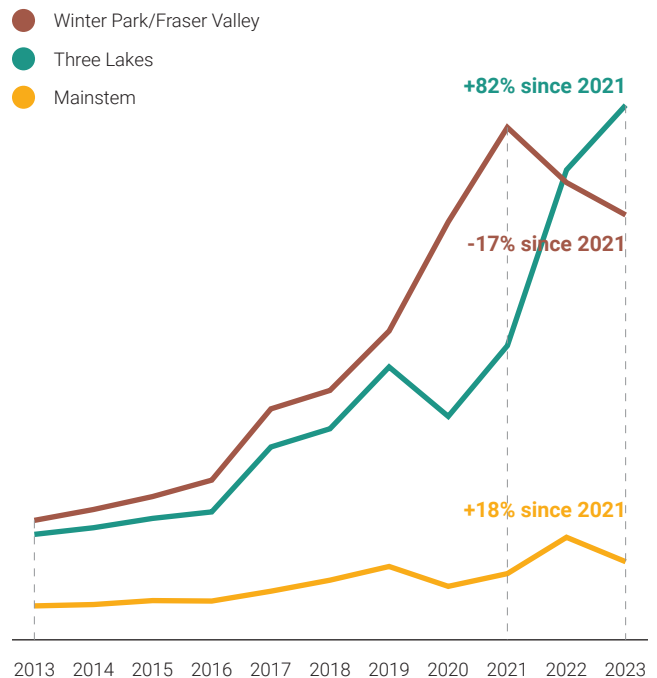
Year	Winter Park/Fraser Valley		Three Lakes		Mainstem	
	Sales Tax Revenue	Percent Change	Sales Tax Revenue	Percent Change	Sales Tax Revenue	Percent Change
2023	\$ 5,010,749	-7%	\$ 6,304,974	+14%	\$ 921,370	-24%
2022	\$ 5,393,209	-11%	\$ 5,541,579	+60%	\$ 1,209,200	+55%
2021	\$ 6,043,412	+23%	\$ 3,469,031	+32%	\$ 780,644	+24%
2020	\$ 4,928,736	+35%	\$ 2,635,039	-18%	\$ 630,569	-27%
2019	\$ 3,642,150	+24%	\$ 3,217,999	+29%	\$ 864,866	+23%
2018	\$ 2,941,499	+8%	\$ 2,489,307	+9%	\$ 703,495	+23%
2017	\$ 2,723,632	+45%	\$ 2,274,111	+51%	\$ 573,282	+25%
2016	\$ 1,883,418	+11%	\$ 1,508,627	+5%	\$ 457,218	-1%
2015	\$ 1,689,754	+10%	\$ 1,432,074	+8%	\$ 462,674	+11%
2014	\$ 1,536,943	+9%	\$ 1,321,922	+6%	\$ 416,097	+4%
2013	\$ 1,408,835	+7%	\$ 1,243,538	+5%	\$ 399,957	+3%

Source: 2023 Grand County Annual Report.

The Grand County Annual Budget Report breaks down sales revenue by each corresponding district. The table above shows the sales tax revenue and the percent change of each District from 2013 to 2023 (**Figure 3.6**).

From 2013 to 2023, sales tax revenues have typically grown in all Districts. Three Lakes and Mainstem saw a notable decrease in sales tax revenue in 2020, likely because of the COVID-19 pandemic’s effects on travel and spending. The Winter Park/Fraser Valley District has consistently held the highest sales tax revenue since 2013. However, in 2022 and 2023, the Three Lakes District outpaced the Winter Park/Fraser Valley District, marking a significant shift. The sales tax revenue in the Winter Park/Fraser Valley District declined by 7% from 2022 to 2023, while the Three Lakes District experienced a 14% increase during the same period. The Mainstem District saw a 24% decrease in sales tax revenues (**Figure 3.7**). According to the 2023 Grand County Annual Report, sales tax revenues are mainly being used for major capital improvements for the County.

**Figure 3.7.** Sales Tax Revenue by District



Source: 2023 Grand County Annual Report.

# TRANSPORTATION

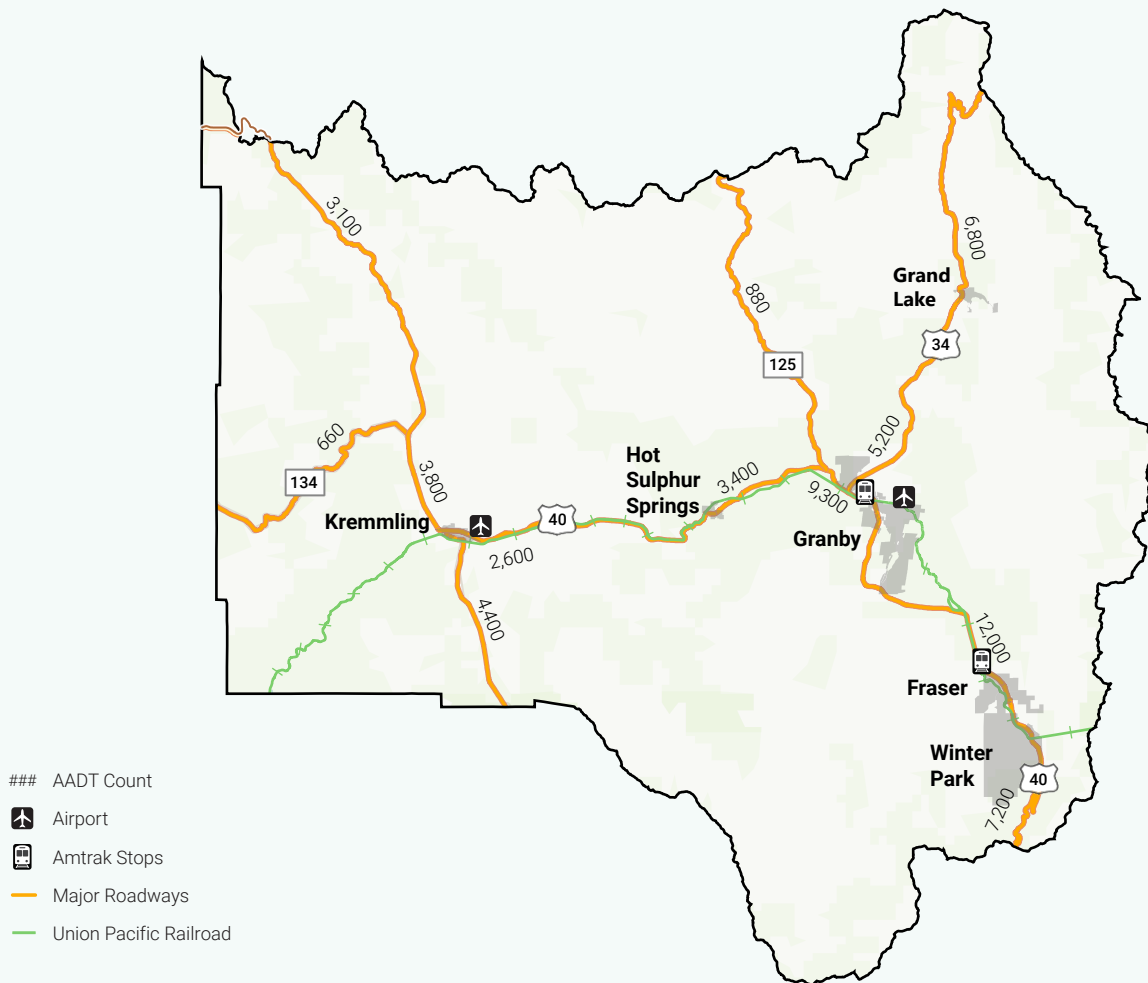
A well-maintained transportation network is vital for economic growth. Efficient roads and public transit options help support businesses and job opportunities.

## Transportation Network

Visiting and getting around Grand County is made possible through several modes of transportation, including driving, flying, taking a train, or by bus. The primary driving routes frequently utilized are US-40 and US-34. Near Winter Park, US-40 sees an average of 12,000 vehicles daily (**Figure 3.8**). In the vicinity of Grand

Lake and its route towards Rocky Mountain National Park, US-34 accommodates approximately 6,800 daily vehicles. Traffic volumes tend to be lower on the western side of Grand County at around 660 vehicles daily west of Kremmling.

**Figure 3.8.** Transportation Network in Grand County

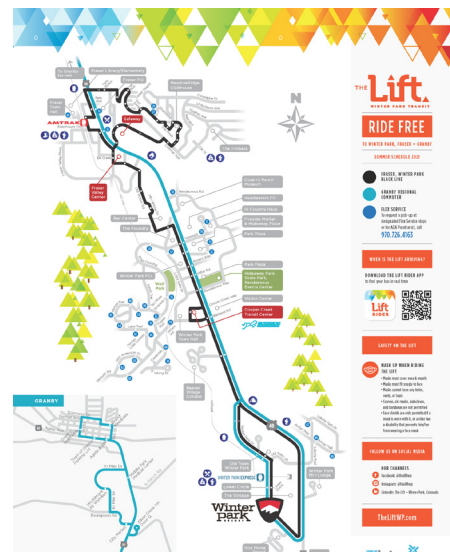


Sources: CDOT 2022, Amtrak Guide 2023, Grand County.

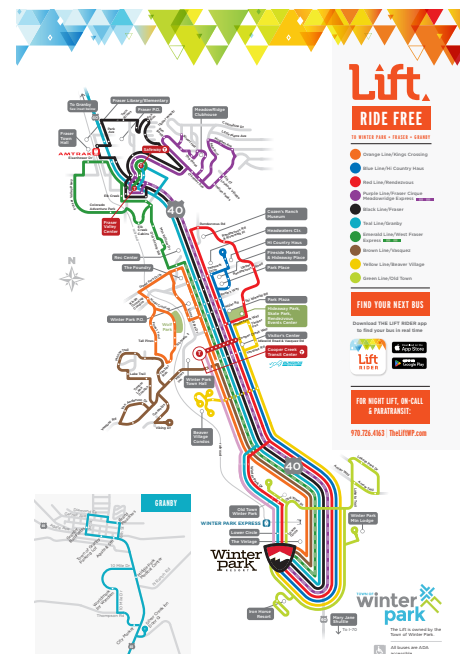
The California Zephyr train journey, running from Chicago to San Francisco, includes two stops in Grand County at Fraser/Winter Park and Granby. Two local airports within Grand County are situated in Kremmling and Granby. McElroy Field Airport (20V) in Kremmling is a significant economic asset for the town, primarily serving business and recreational travelers. The Grand County Airport (GNB) located in Granby is also frequently used for recreational travel purposes.

Buses are the most accessible and affordable option for public transit in Grand County. Greyhound buses serve Hot Sulphur Springs, Granby, Winter Park, and Fraser. The Bustang Outrider Route also provides bus transportation from Denver to Craig, with stops in Winter Park, Fraser, Tabernash, Granby, Hot Sulphur Springs, Parshall, and Kremmling. Additionally, The Lift bus system offers complimentary rides from Winter Park Resort to Downtown Winter Park, Fraser, and Granby (**Figure 3.9**). There are currently no bus or train options that stop in Grand Lake.

**Figure 3.9.** The Lift Route Map Summer and Winter Service 2023



Summer



Winter

Source: The Lift: Winter Park Transit.

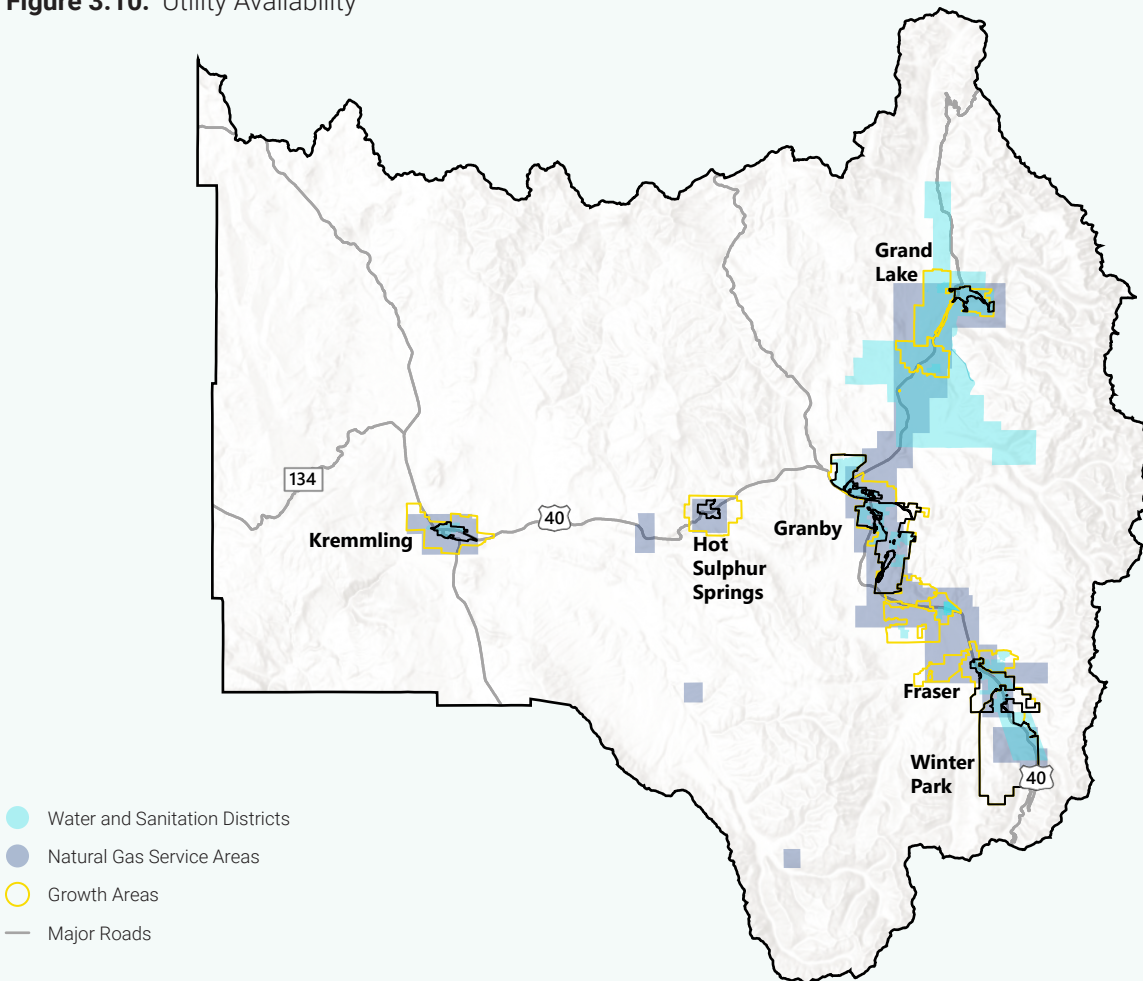
# UTILITY INFRASTRUCTURE

Access to reliable utilities such as water, electricity, gas, sanitation, and broadband is fundamental for residents and visitors. Access to utilities plays a crucial role in stimulating economic development, providing potential businesses with the opportunity to access essential services.

## Utility Availability

The map displayed in **Figure 3.10** illustrates utility districts in Grand County. Access to vital services such as electricity, natural gas, sanitation, and water is essential for future planning endeavors. The yellow boundaries on the map represent regions where growth is anticipated, highlighting their utility accessibility. These areas may be of interest to towns seeking expansion to accommodate both residents and visitors. The map designates water and sanitation service districts in blue, with most areas having convenient access. Purple areas indicate the availability of natural gas.

**Figure 3.10.** Utility Availability



Sources: Grand County, Colorado State University.

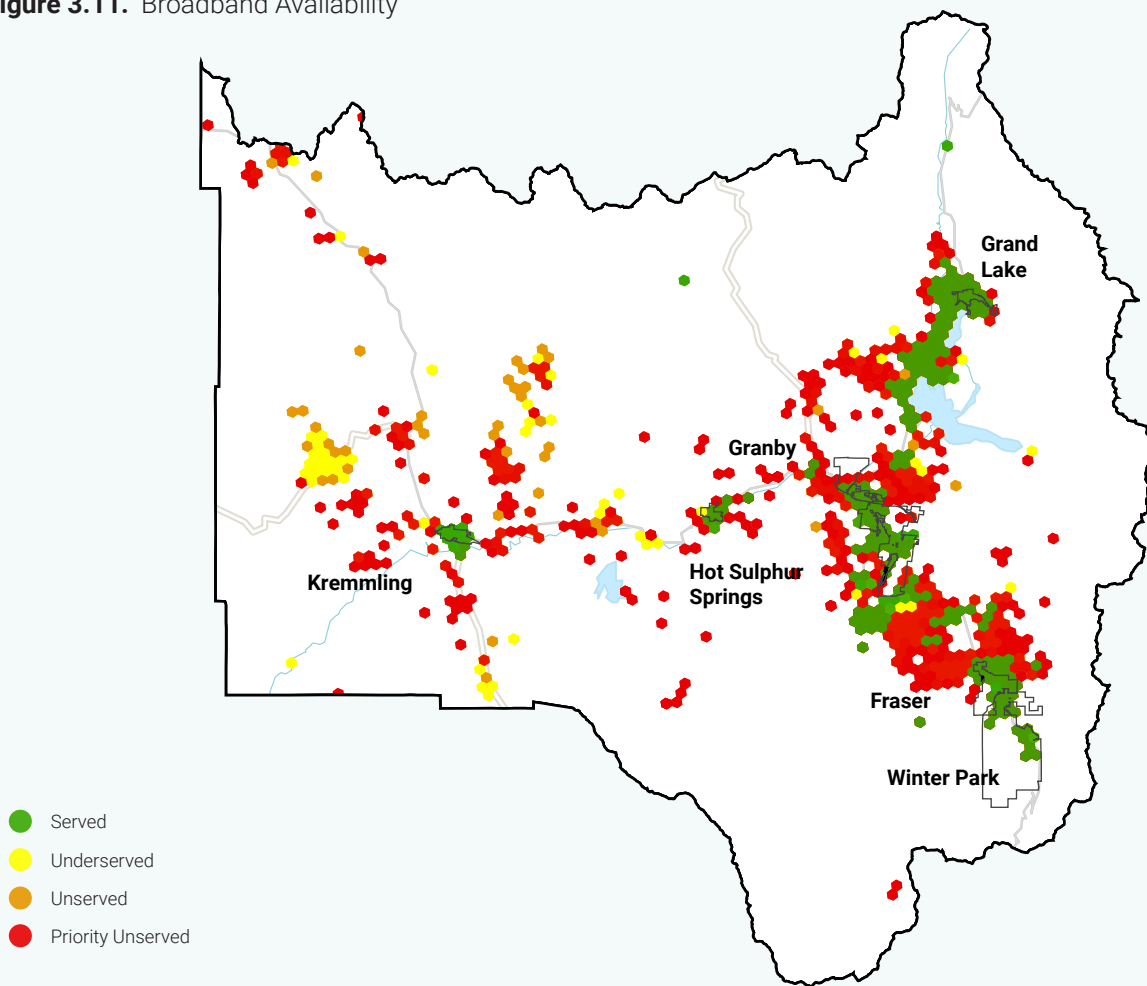


## Broadband Availability

Because of the remote nature of numerous regions within Grand County, there is a lack of internet connectivity in many places. While more densely populated areas enjoy high-speed internet access, swaths of land between towns are not served by broadband. Most of the wilderness and forested areas are devoid of broadband services (**Figure 3.11**). The Colorado Broadband Office has identified numerous priority zones that are still underserved, pinpointing locations where increased broadband coverage is required. These priority areas are primarily situated between towns with higher population

densities. Access to broadband is crucial for residents who depend on the internet for their businesses, online education, and communication needs. Visitors, too, rely on dependable broadband connectivity to navigate the County and access information conveniently and easily.

**Figure 3.11.** Broadband Availability



Source: FCC Broadband Data Collection 2023.

# KEY TAKEAWAYS

## COUNTY FINANCES

### \$24.4 Million

The **unrestricted fund balance**, as of the close of 2023, was \$24.4 million, accounting for projected expenses related to wildfires and bolstering emergency response and disaster mitigation efforts.

### \$12.3 Million

In 2023, **retail-related activities** were \$12.3 million, which was similar compared to the 2022 value of \$12.1 million.

### 70% Tax-Exempt Property

Approximately 70% of the land in Grand County is tax-exempt, **owned by entities such as the federal government, State, County, Districts, or Towns.**

### 14% Increase in Sales Revenue at Three Lakes District

From 2013 to 2023, sales tax revenues **generally grew in all districts.** Three Lakes District surpassed Winter Park/Fraser Valley with 14% increase from 2022 to 2023, while Winter Park/Fraser Valley District declined by 7%.

## TRANSPORTATION

### Drive Routes

Primary driving routes are US-40 and US-34, with US-40 near Winter Park experiencing around **12,000** daily vehicles, and US-34 near Grand Lake handling approximately **6,800** daily vehicles.

### Local Airports

Two local airports, **McElroy Field Airport** (20V) in Kremmling and **Grand County Airport** (GNB) in Granby, serve business and recreational travelers.

### Bus Services

**Greyhound** serves Hot Sulphur Springs, Granby, Winter Park, and Fraser. The **Bustang Outrider Route** also provides bus transportation from Denver to Craig, with stops in Winter Park, Fraser, Tabernash, Granby, Hot Sulphur Springs, Parshall, and Kremmling. In addition, the **Lift bus system** offers complimentary rides from Winter Park Resort to Downtown Winter Park, Fraser, and Granby.

### Train Services

The **California Zephyr** train makes stops in Granby, Fraser, and Winter Park.

## UTILITY INFRASTRUCTURE

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### Access to Vital Services

Access to vital services like **electricity, natural gas, sanitation, and water** present mainly throughout the towns.

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### Growth Areas

Growth areas are designated surrounding each town, highlighting the areas **intended accommodate expansion**.

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### Lacking Internet Connectivity

Due to the **remote nature** of many regions in Grand County, there is a **lack of internet connectivity in numerous places**. While densely populated areas enjoy high-speed internet, broadband services are absent in wilderness and forested regions.

# 04

## VISITOR DATA

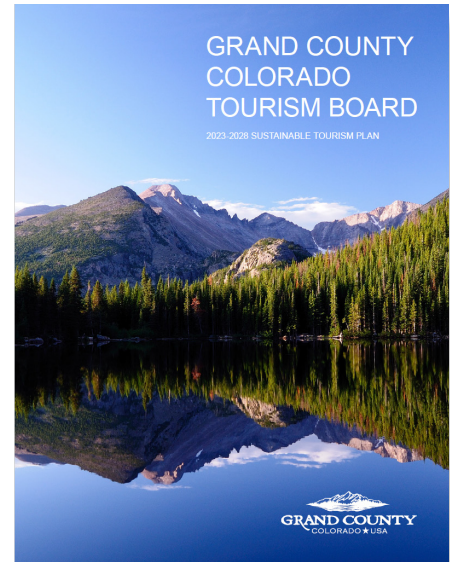
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Grand County provides a diverse array of activities throughout the year, with a predominant focus on outdoor pursuits. Particularly significant is the surge in visitors during the summer months. The spending patterns of both visitors and residents play a pivotal role in shaping the local economy and ensuring regional stability. Despite surpassing pre-pandemic visitor numbers, the County faces challenges associated with the burgeoning tourism industry, posing potential threats to the local economy, which is heavily reliant on tourism. Key challenges include an overreliance on tourism, heightened strain on infrastructure, and impacts on the surrounding environment.

*Photo: GCCTB*

# SUSTAINABLE TOURISM

Grand County emphasizes the importance of sustainable tourism in bolstering its economy, a commitment underscored in its 2023 Sustainable Tourism Strategic Plan. This strategic initiative outlines the region's dedication to promoting tourism practices that align with environmental conservation, ensuring long-term benefits for both the local economy and the surrounding natural environment.



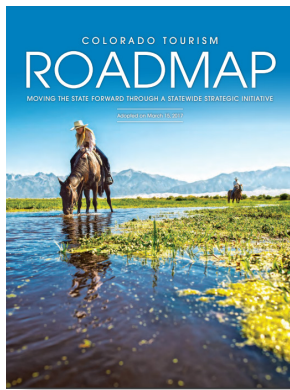
## The Tourism Board Sustainable Tourism Plan

The Sustainable Tourism Strategic Plan is designed to guide the County's tourism industry towards responsible growth, aiming to enhance the local quality of life while preserving the natural environment. This plan serves as a roadmap, delineating five strategic imperatives:

- ▶ **Engaging the Community:** Foster an ongoing dialogue within the community to highlight the benefits and value of tourism.
- ▶ **Enhancing Countywide Experiences:** Strengthen and diversify experiences throughout the county, ensuring a vibrant and sustainable tourism economy year-round.
- ▶ **Environmental Stewardship:** Responsibly manage and steward the region's environment and natural resources, prioritizing conservation efforts.

- ▶ **Infrastructure Advocacy:** Advocate for the development of infrastructure that aligns with the evolving needs of both residents and visitors.
- ▶ **Quality of Life Enhancement:** Positively contributes to the overall quality of life for residents, recognizing the interconnectedness of tourism and community well-being.

These five guiding principles serve as the foundation for establishing direct and measurable goals, each accompanied by success indicators to evaluate progress and ensure the plan's effectiveness in steering the tourism industry towards sustainable practices. This plan can be found in **Appendix B**.



## Colorado Tourism Roadmap

The Colorado Tourism Roadmap (“Roadmap”) was initiated in May 2016 by the Colorado Tourism Office (CTO) to optimize the state’s burgeoning tourism industry, which had experienced significant growth, surpassing the national average. The roadmap, developed in collaboration with the Colorado Tourism Board, serves as a guide for the CTO and industry partners to identify and prioritize opportunities for maximizing economic and lifestyle benefits. The Roadmap proposes initiatives under each pillar, such as collaborative marketing efforts, the expansion of Destination Management Organizations, sustainable tourism practices, and leveraging the tourism industry’s influence for improvements in transportation infrastructure. It emphasizes the importance of understanding and appreciating the economic and quality-of-life impacts of the visitor industry while addressing challenges to ensure sustainable growth. The plan can be found in **Appendix C**.



## Leave No Trace

In 2017, CTO partnered with Leave No Trace for Outdoor Ethics. Leave No Trace focuses on educating people as the most cost effective and minimal resource intensive solution to land protection. There are 7 principles promoted including:

- ▶ Plan Ahead and Prepare,
- ▶ Travel and Camp on Durable Surfaces,
- ▶ Dispose of Waster Properly,
- ▶ Leave What You Find,
- ▶ Minimize Campfire Impacts,
- ▶ Respect Wildlife, and
- ▶ Be Considerate of Others.

## Colorado’s Outdoor Principles

Colorado developed several principles that are followed by organizations such as Colorado Parks and Wildlife. These principles serve as a set of guidelines to promote the progress of outdoor recreation and conservation. These seven principles include:

- ▶ Public Lands
- ▶ Private Lands
- ▶ Working Together
- ▶ Minimize Impact
- ▶ Management and Education
- ▶ Science-based Decisions
- ▶ Stable Funding

# VISITOR STATISTICS

Visitor statistics help assess the economic impact of tourism, inform planning, guide marketing efforts, and forecast trends. These statistics are essential for the sustainable and well-managed development of tourist destinations.

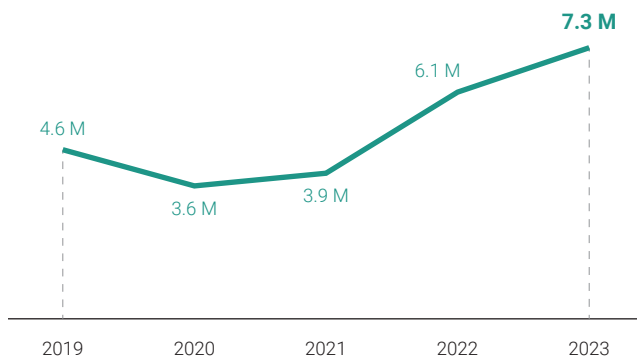
The total trips in Grand County significantly dropped in 2020 and 2021 due to the COVID-19 pandemic. Since 2021, the number of total trips has climbed to over 7.3 million (Figure 4.1).

Visitation varies significantly depending on the season. July is the busiest month of the year (2.5 million total trips) followed by August, September, then December in

2022 (Figure 4.2). According to Datafy, in 2022, about 6.1 million total trips were made to Grand County. 58.8% of visitors were from Colorado while 41.2% were from out of state or international. The term "shoulder season" refers to the period between peak and off-peak seasons. In Grand County, the shoulder season/off-peak seasons are in April/May in the spring and October/November in the fall.

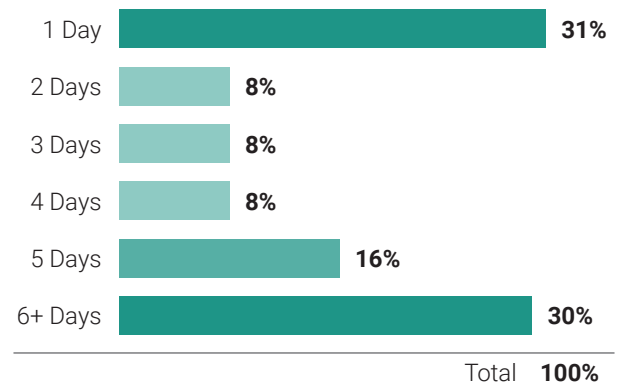
Visitors stayed on average 2.2 days, roughly the span of a weekend. However, 30% stayed over 6 days. The next most common length of stay is day trips, which account for about 31% of visits. (Figure 4.3).

**Figure 4.1.** Total Visitor Days in Grand County from 2019-2023



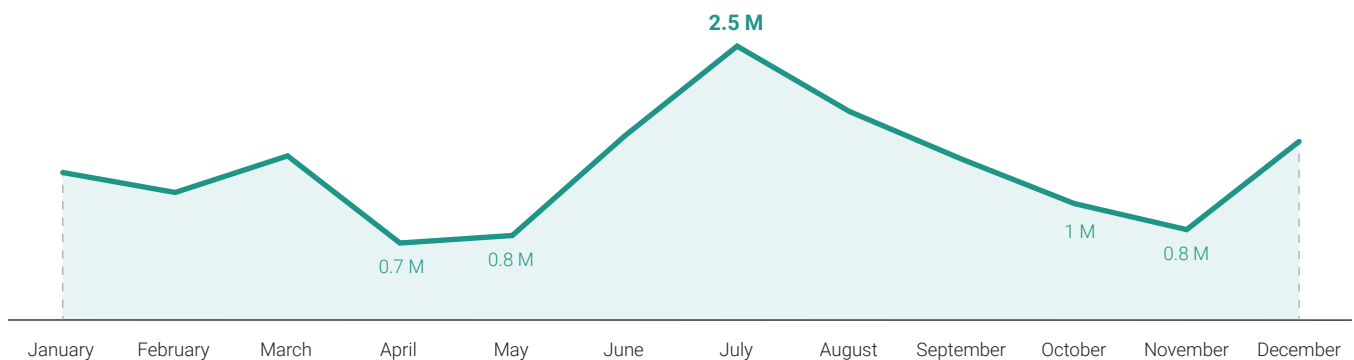
Source: Datafy 2019-2023.

**Figure 4.3.** Visitor Days by Length of Stay in 2023



Sources: Datafy 2023.

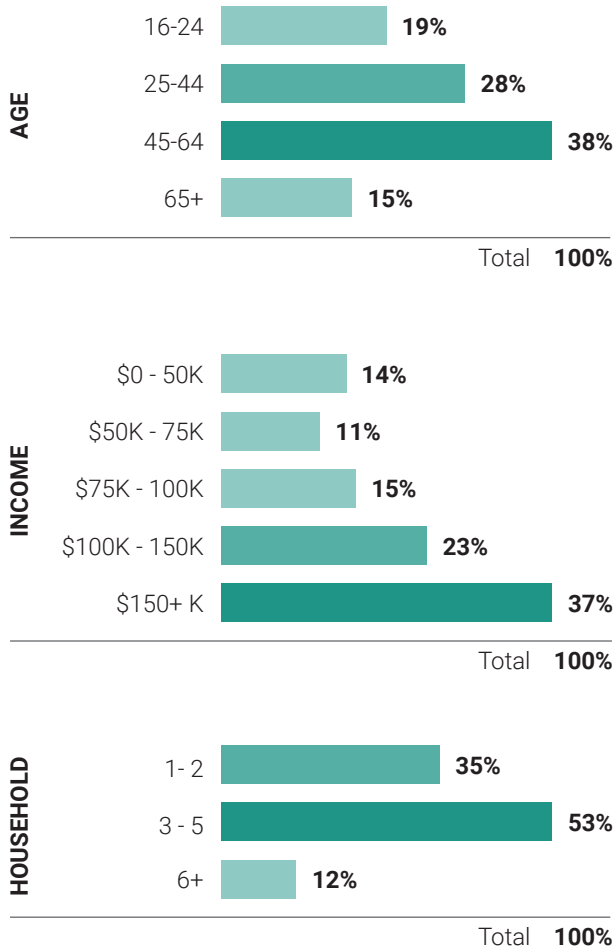
**Figure 4.2.** Total Visitor Days by Month in 2023



Source: Datafy 2023.

The majority of visitors were between the ages of 45-64, earned more than \$150,000, and were households with 3-5 people (**Figure 4.4**).

**Figure 4.4.** Visitor Demographics in 2023



Source: Datafy 2023.

## Visitor Profiles

In 2023, a Sustainable Tourism Plan was formulated for the advancement of tourism efforts in Grand County. As part of this strategy, profiles for visitors were established to bolster year-round tourism and cater to mid-week and off-season travelers. The study identified three distinct visitor categories that frequently visit Grand County, engaging in a diverse range of tourism activities:

- ▶ **Experience Travelers:** Typically mature individuals with grown children, possessing an annual income exceeding \$150,000. They prefer unique hotel experiences, engaging in arts and cultural activities, and may be considering a second home purchase.
- ▶ **Young Reconnectors:** Couples and individuals seeking brief getaways from urban settings, desiring relaxation, and immersion in nature. They appreciate culinary experiences, arts, history, and music, often engaging in activities such as hiking, fly fishing, Nordic skiing, and paddle-boarding.
- ▶ **Off-Peak Weekend Warrior Families:** Families with an appetite for adventure, seeking affordable dining and lodging options and who also enjoy indoor activities when the weather turns. Their activities are centered around hiking, skiing, rafting, biking, and they have an interest in off-season offerings.



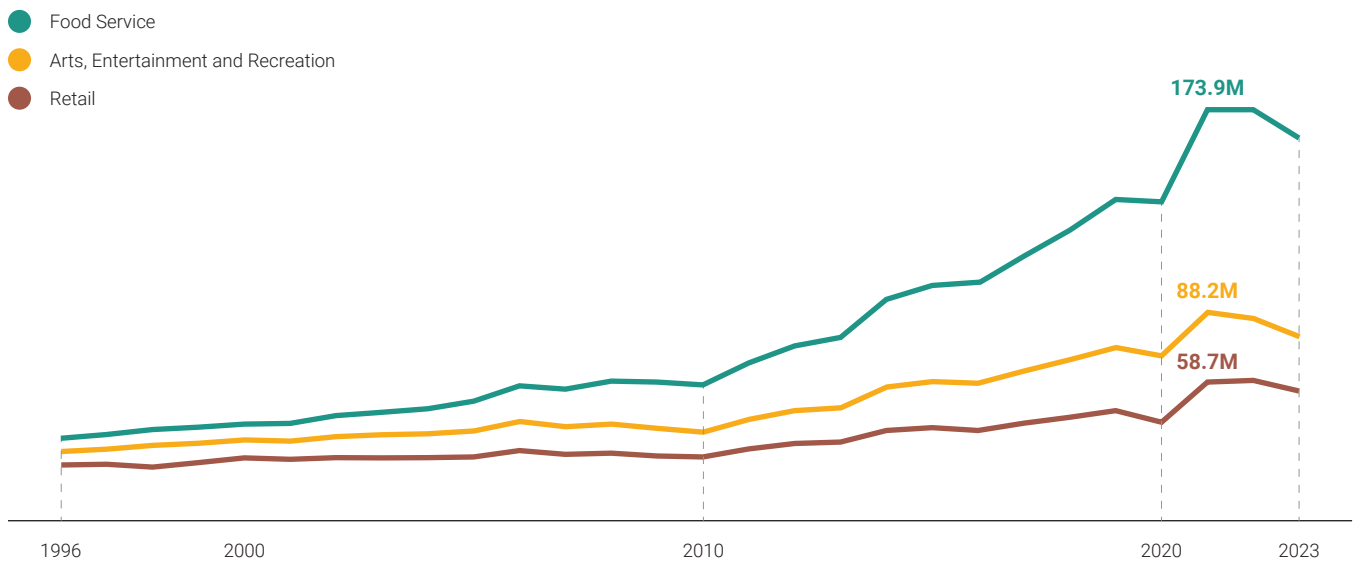
## Visitor Spending

Visitors to Grand County make a substantial impact on the local economy. Since 2019, Grand County has outperformed previous years in all visitor spending categories. Visitor spending has rebounded since the pandemic with 2021 and 2022 being the highest recorded visitor spending in history. Food service has seen an increase of about 20% since 2019. (Figure 4.5).

Tourists contribute a substantial portion of their expenditures to arts, entertainment, and recreational activities. Spending in 2021 and 2022 resembles the pre-pandemic expenditure patterns with continued increases in spending with a rise of about 34% since 2020 (Figure 4.5).

Retail expenditure has remained relatively stable, yet it dipped in 2020 during the pandemic. However, since 2020, retail spending has increased by almost 32% in 2022. (Figure 4.5).

Figure 4.5. Visitor Spending in 2023



Source: Colorado Tourism Office - Dean Runyan Associates Travelstats.com 2023.

# TOURISM ASSETS

Grand County has an abundance of tourism opportunities that span the calendar year. Each season presents a unique array of activities, and each town within the County possesses distinct attractions catering to various segments of the tourism industry. Below is a comprehensive list of activities throughout the County broken down by seasonality.

Alpine Slide					Festival				
Archery					Fishing/Fly Fishing				
ATV					Golfing				
Backcountry Huts					Guided Tours				
Biking					Hayrides				
Birding					Hiking				
Boating					Horseback Riding				
Camping					Hot Air Balloon Rides				
Canoeing					Hot Springs				
Cross Country Skiing					Hunting				
Cyclocross					Ice Fishing				
Dog Sledding					Ice Skating				
Events					Kayaking				
Fat Biking					Llama Packing				



fresh green sprout for **SPRING**



white and lavender columbine bloom for **SUMMER**



yellow fall leaves of Aspen tree for **FALL**



snowflake for **WINTER**

Mountain Biking



Skiing



Museums



Sledding



OHV



Sleigh Rides



Paddle Boarding



Snowboarding



Recreation Centers



Snowmobiling



Restaurants



Snowshoeing



Rifle Range



Spa



River Rafting



Stargazing



Rock Climbing



Summer Tubing



Rodeos



Swimming



RV Park



Theaters



Scenic Drive



Tubing



Scenic Spots



Wildlife Watching



Shopping



Ziplining



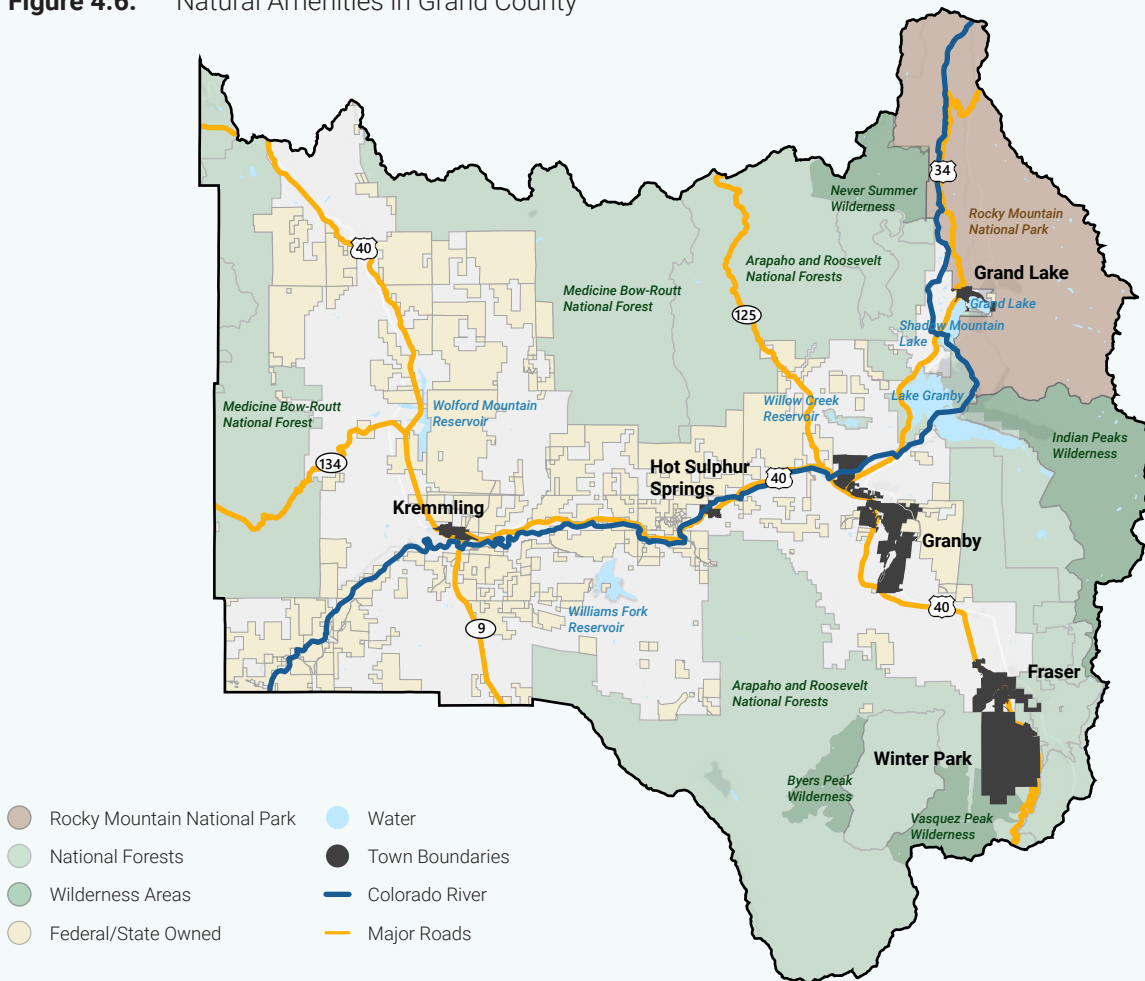
## Natural Area Attractions

Grand County has an abundance of natural area attractions, with more than 70% of its land dedicated to wilderness areas, federal parks, national parks, forests, and reservoirs. An Important tourist magnet is the Rocky Mountain National Park, which welcomed 433,854 visitors through the Grand Lake entrance in 2022. Other popular destinations include the Arapaho and Roosevelt National Forests, the Medicine Bow-Routt National Forest, Wolford Mountain Reservoir, and Williams Fork Reservoir (**Figure 4.6**). Wilderness areas situated within these national forests are also highly favored by visitors. The Colorado River stands as one of Grand County's most cherished resources and serves as a major attraction for river rafters, fishing enthusiasts, and kayakers.

## Trail Connectivity

Grand County boasts an extensive network of trails spanning over 1,000 miles, with about 96 trailheads that link various towns in the area. Some trails are seasonal while others are open year-round. Trail-use varies from allowing hiking, biking, horseback riding, ATV, skiing, or snowshoeing.

**Figure 4.6.** Natural Amenities in Grand County



Sources: USDA, US Forest Service 2023.

The most popular routes and activities include:



### **Rocky Mountain National Park (West Side)**

Part of the Rocky Mountains, the National Park spans into Grand County and offers numerous hiking trails such as the Tonahutu/Big Meadow/Onahu Creek Trail, the Continental Divide Trail, and the East Inlet Trail.



### **Continental Divide Trail**

The Grand County section of the Continental Divide Trail offers hikers the chance to experience the breathtaking beauty of the Continental Divide. The trail weaves through Arapaho National Forest and Rocky Mountain National Park. The trail offers entry to secluded and untouched wilderness regions as it spans across the entire state of Colorado.



### **Fraser River Trail**

This scenic multi-use trail follows the Fraser River, connecting the towns of Winter Park and Fraser. It is a popular destination for walkers, joggers, and cyclists. The trail provides stunning views of the surrounding mountains.



### **Fraser to Granby Trail**

This relatively flat and easy trail connects the towns of Fraser and Granby, providing a peaceful route through meadows and forests. It is ideal for a leisurely bike ride or a family hike.



### **Vasquez Peak Wilderness Trails**

For those seeking a more challenging hiking experience, the Vasquez Peak Wilderness Area offers a range of trails with steep terrain and stunning alpine vistas. The area is particularly popular among experienced hikers.



### **Mountain Biking Trails**

Grand County is renowned for its mountain biking trails. Options like the Trestle Bike Park in Winter Park, the Fraser Valley Trail, and the Tipperary Creek Trail cater to riders of various skill levels.



### **Snowshoeing and Cross-Country Skiing Trails**

During the winter months, many of the hiking and biking trails transform into snowshoeing and cross-country skiing trails. Grand County has excellent options for winter sports enthusiasts.



### **Hot Sulphur Springs Trails**

The Hot Sulphur Springs area has a network of trails around the Town and the Colorado River, offering a mix of short hikes and walks with opportunities to explore the local scenery and wildlife.

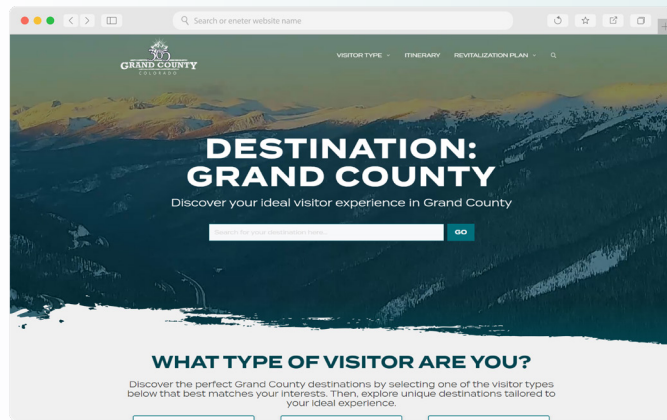
Trail conditions, regulations, and seasonal closures vary throughout the County. However, resources such as the Colorado Trail Explorer (COTREX - <https://trails.colorado.gov/>), local visitor centers, or ranger stations offer up to date trail information. COTREX is an interactive mapping application displaying trail systems across

Colorado. It showcases diverse activities, complete with corresponding routes, and provides information on trail seasonality and closures. COTREX was created in partnership with Colorado Department of Natural Resources, Colorado Parks and Wildlife, and Natural Atlas .

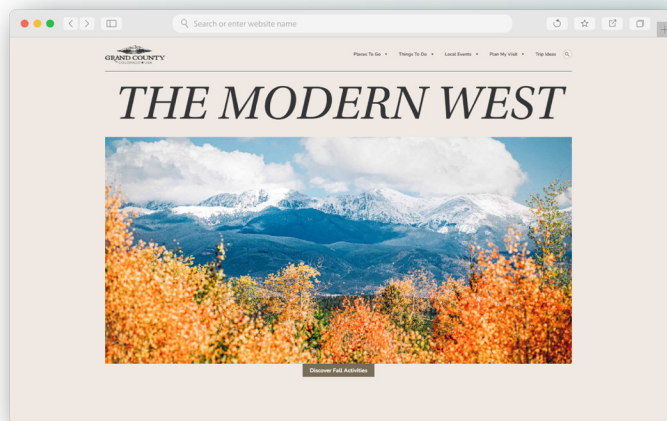
## Marketing and Promotional Initiatives

Marketing and promotional activities in Grand County play a pivotal role in driving economic growth and drawing attention to local businesses and attractions. Through a combination of traditional and digital marketing strategies, Grand County showcases their unique offerings to residents and tourists alike. These efforts often involve campaigns that highlight cultural events, natural beauty, historical landmarks, and local businesses, all designed to foster community engagement and boost the County's reputation. Some of the marketing and promotional initiatives in Grand County are shown right:

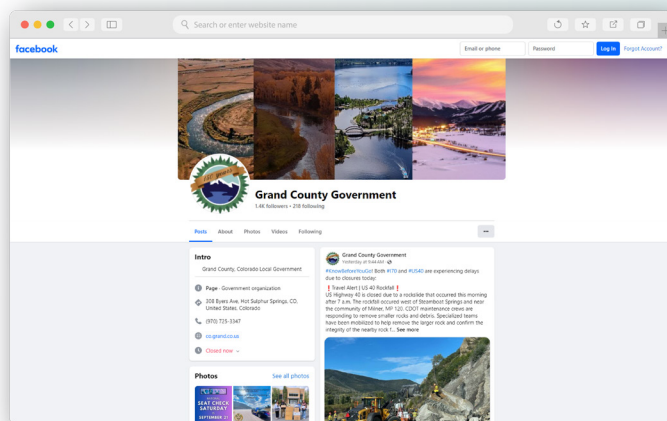
Grand County 365



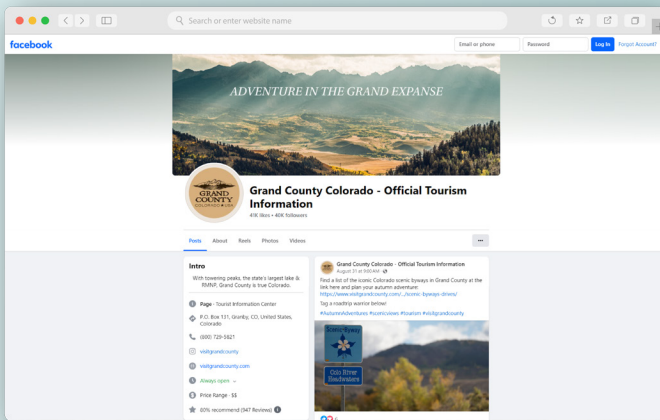
Visit Grand County Website



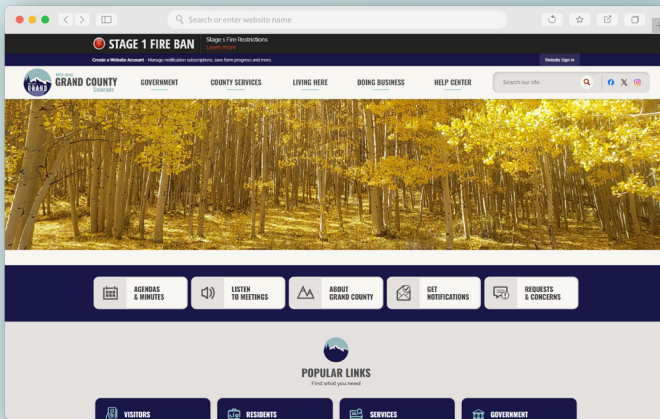
Grand County Tourism Facebook



## Grand County Government Facebook



## Work in Grand



## Grand County Colorado Municipal Website



# ACCOMMODATIONS

Grand County provides a wide variety of lodging options, including hotels, motels, short-term rentals, RV sites, and camping facilities. The following table (**Figure 4.7**) displays the various accommodation types offered in Grand County, along with the corresponding quantities. For a comprehensive list, please refer to **Appendix D**. Unique options include tipis, wagons, jupes, glamping tents, airstreams, and hostels.

Within federal and public campgrounds, there are more than 1,500 sites available for both paid reservations and dispersed camping. Even though many campgrounds shut down during the winter season, a number of dispersed camping locations, along with sites at Williams Fork and Wolford Mountain Reservoir, stay open for year-round use (**Figure 4.7**).

The most sought-after camping locations include RMNP, Never Summer (within RMNP), Arapaho and Roosevelt National Forest, Stillwater, and Indian Peaks (**Figure 4.8**). Camping rates and site availability fluctuate based on factors like group size and the time of year, ranging from \$11 per night to \$127. Other areas feature dispersed camping. Details regarding each camping area can be found in **Appendix E**.

**Figure 4.7.** Accommodation Types in Grand County and Estimated Amount

Accommodation Type	# of Businesses	Total Units
Short-term Rentals		3,200+
Campsites and RV Park	35+	2,150+
Hotels and Motels	24+	750+
Resorts and Dude Ranches	10+	725+
Unique Options	12+	110+
Cabins	18+	90+

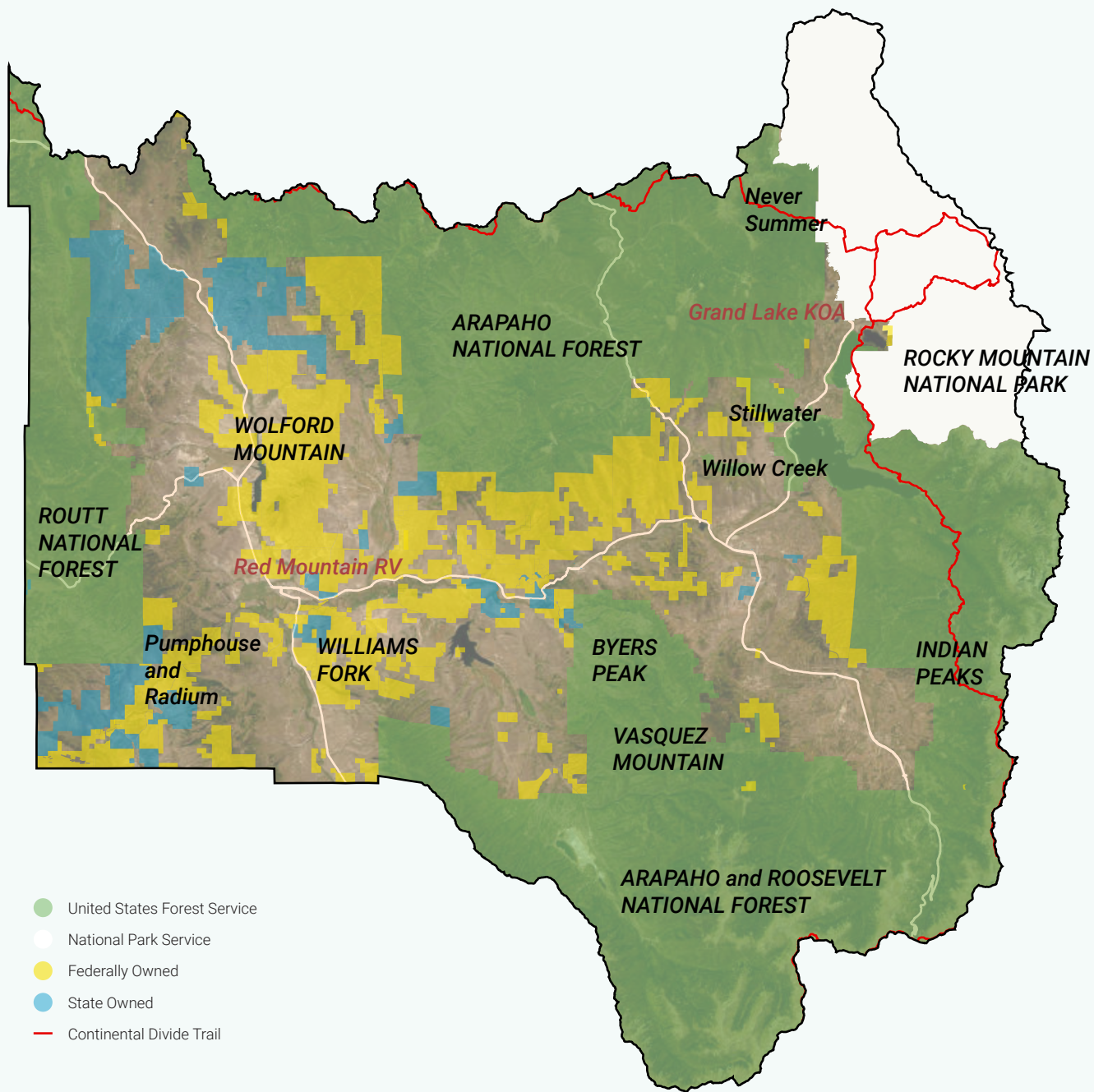
*\*Data collected is an estimate of Grand County's available accommodations, data was collected through ESRI Community Analyst, U.S. Census Bureau, advertised accommodations, and online searches*

Wolford Campground & Marina, Kremmling

Photo: GCCTB



**Figure 4.8.** Camping Areas in Grand County

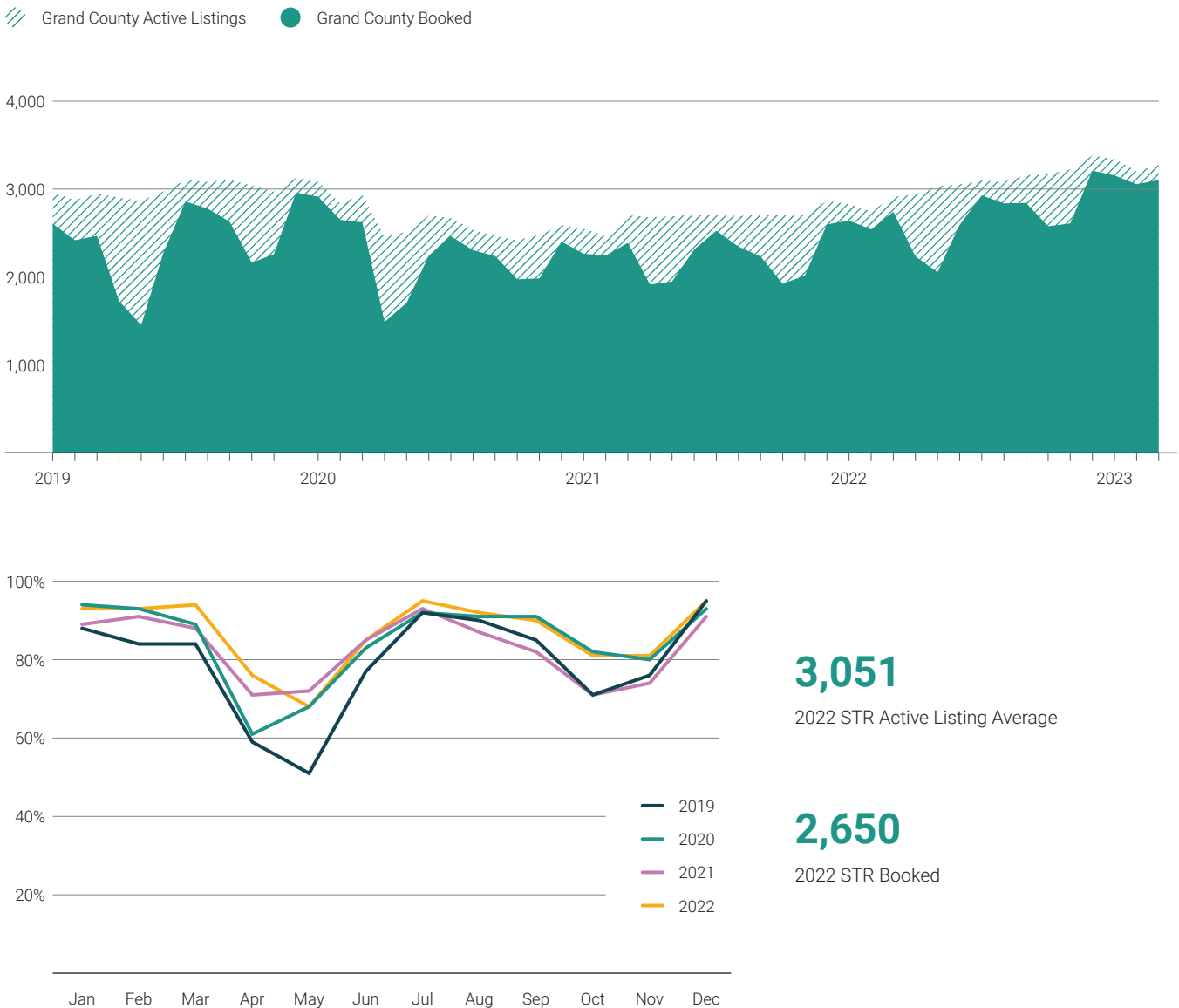


## Short-term Rentals

Short-term rentals (“STR”) constitute a significant portion of Grand County’s accommodation options. Although there has been an uptick in bookings since 2019, the demand for housing has not outpaced the available supply. From 2019, booked STRs have grown approximately by 11%, whereas the average number of active listings has only grown by about 2%. This suggests that in 2019, there may have been an oversaturation of

STRs, and by January 2023, the balance between STR supply and demand has remained stable (**Figure 4.9**). However, if the number of booked STRs continues to rise, it may necessitate investing in alternative lodging options which may be a preferable approach to accommodate the growing tourist population. There are currently about 3,200 short-term rentals throughout the County.

**Figure 4.9.** Short-Term Rental Supply and Demand January 2019 - March 2023



Source: AirDNA.

## Lodging Types

Lodging types throughout the County varies from town to town. Towns like Winter Park and Grand Lake have the largest number of accommodations compared to other areas of the County. The lodging included in the following table includes cabins, dude ranches, hotels, motels, resorts, and unique options that are greater than one room. It does not include short-term rentals, campsites, RV sites, or individual vacation rentals (Figure 4.11). The lodging options available in each Town in Grand County vary by season. While many accommodations are available year-round, much of the lodging closes during the slower seasons, usually April-May and October-November.

**Figure 4.10.** Estimated Lodging Statistics by Area

Town	Total Units
Fraser/Tabernash	170+
Granby	465+
Grand Lake	295+
Hot Sulphur Springs/Parshall	50+
Kremmling	100+
Winter Park	595+
<b>Total</b>	<b>1,685+</b>

*\*The number of rooms was determined by online searches of individual accommodation websites, Colorado Tourism, Grand County Tourism, calling individual establishments, and ESRI Community Analyst, the numbers are rounded to the nearest tenth; Seasonality posted online may differ from actual hours as many accommodations close without notice due to a low number of reservations. Capacity is based on average hotel occupant limits per room. This data does not include short-term rentals or campsites. [Data from November 2023].*



**Drowsy Water Ranch**

Photo: GCCTB

# ENVIRONMENTAL CONDITIONS

In Grand County, there is a possibility of being cut off due to highway or road closures, so the County typically maintains a three-day supply of essential goods. According to Grand County's Hazard Mitigation Plan, the closure of Berthoud Pass, for instance, can cause ski resorts to lose an estimated \$100,000 per hour. While Grand County residents are accustomed to severe weather, challenges arise when individuals cannot access essential medical supplies or grocery stores. The 2020 Grand County Hazard Mitigation Plan identified various environmental conditions for the region, encompassing avalanches, disease outbreaks, droughts, flooding, hazardous material releases, severe winter weather, and wildfires. Of these, wildfires stand out as the primary concern for the County, with a brief history of such incidents provided below. The following conditions hold the potential to affect tourism:

## **AVALANCH**

The majority of avalanches happen in sparsely populated regions, but certain high-risk areas, including Granby, Winter Park, Berthoud Pass, Chicken Hill, and Gravel Mountain experience more avalanches than the rest of the County. These avalanches can impact US-40, which serves as Grand County's busiest thoroughfare. Avalanches are most common in February, followed by March and January.

## **DROUGHT**

Drought causes a significant impact on various economic activities in Grand County and stands as a primary catalyst for wildfires. Given Colorado's semi-arid nature, drought is a recurring phenomenon throughout the state. In the Grand County region, droughts frequently stem from insufficient winter snowfall or extended hot and arid periods that precede winter. These warm and dry periods also increase the demand for water, intensifying the drought conditions. Droughts can lead to economic loss, including the closure of hiking trails, limited access to hunting areas, reduced water availability, and decreased park visitation due to increased fire risks.

## **FLOODING**

Flooding, triggered by rainfall or snowmelt, is common in Grand County. The presence of hydrophobic soils resulting from wildfires inhibits rainfall absorption, leading to increased runoff, erosion, and the downstream accumulation of sediment in channels. The Grand County area is particularly susceptible to flash floods, mainly stemming from snowmelt-induced stream flooding. Such flooding has the potential to affect local infrastructure, consequently impacting economic activities and accessibility.

## **SEVERE WINTER WEATHER**

Winter weather, encompassing snow, ice, blizzard conditions, and extreme cold, possesses the potential to induce severe conditions capable of paralyzing a region. These conditions may lead to the stranding of commuters, disruption of the supply chain, and interference with emergency or medical services. Winter weather can result in the toppling of trees, roof collapses, downed power and telephone lines, increased hazards for motorists, reduced visibility, and frigid temperatures that can cause frostbite, hypothermia, and even loss of life.

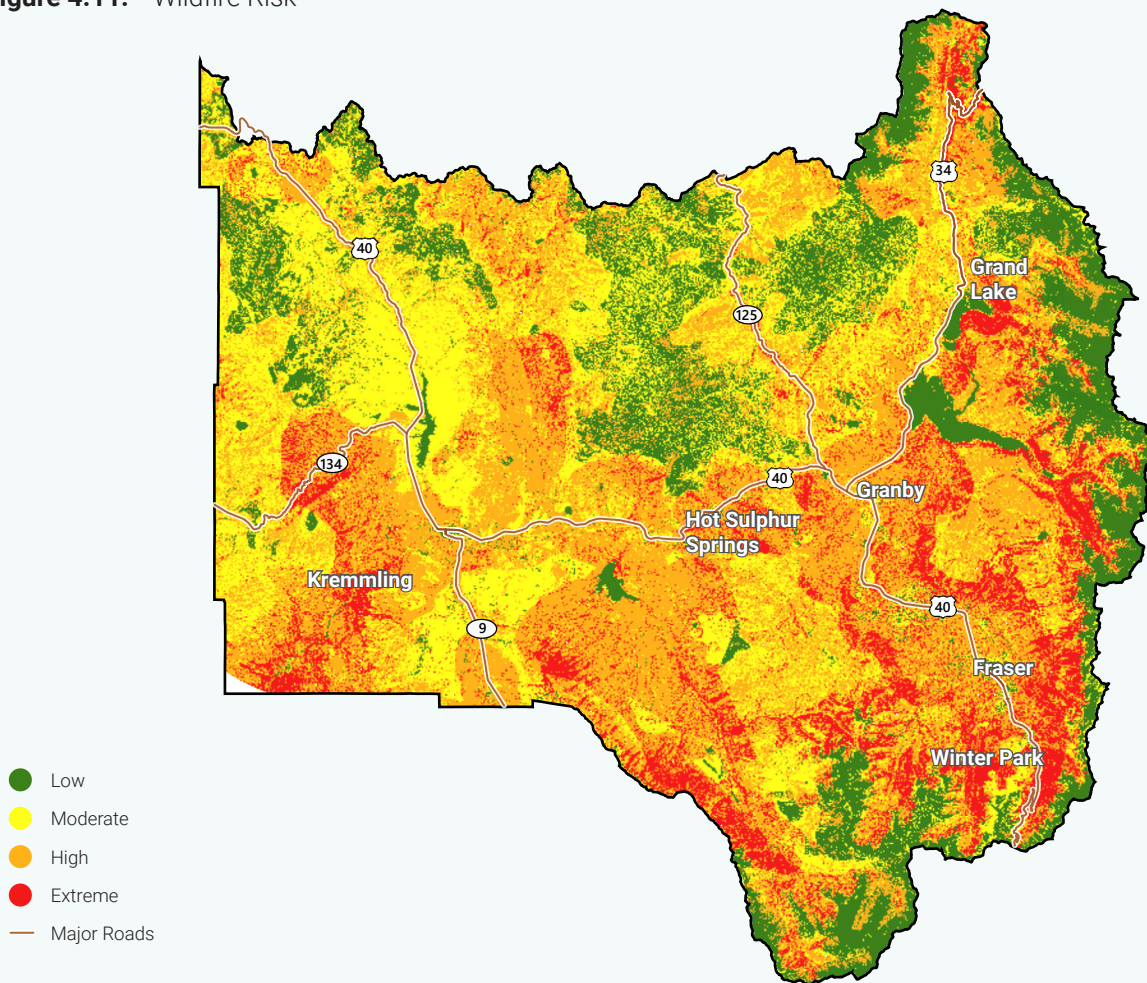
## **WILDFIRE**

Wildfire-prone zones encompass over 50% of the planning area in Grand County. Given that a substantial portion of the County's land remains predominantly undeveloped and under public management, it remains susceptible to periodic wildfire incidents. The peak fire season, occurring in July, coincides with the period when Grand County receives the highest number of visitors. Wildfires possess the potential to cause an extreme influence on the local economy, involving both property destruction and other adverse consequences.

**East Troublesome Fire**, October 2020 - The fire originated east of Kremmling and shifted eastward towards Grand Lake and Granby. Advancing at a rate of 6,000 acres per hour, the fire swept through lodgepole pine forests and the neighborhoods west of US Highway 34. Ultimately, the fire consumed 193,812 acres, prompted the mandatory evacuation of 35,000 people, destroyed 366 homes and 189 structures, and claimed the lives of two people. The East Troublesome Fire is Colorado's second largest recorded fire. Adverse weather conditions, marked by high winds, dryness, drought, a significant number of dead and beetle-killed trees, and poor overnight humidity recovery, contributed to this unprecedented fire behavior.

Although a significant majority of fires (67%) are smaller than a quarter of an acre, the potential for property damage remains considerable even for relatively small fires. **Figure 4.11** shows areas in Grand County with a heightened likelihood of wildfires. Areas near Winter Park, Fraser, and Grand Lake are all in close proximity to regions that are identified as having an extreme risk of wildfires.

**Figure 4.11.** Wildfire Risk



Source: Grand Fire and SWCA Environmental Consultants 2022.

# KEY TAKEAWAYS

## SUSTAINABLE TOURISM

### Sustainable Tourism

Grand County emphasizes sustainable tourism as a key element in its economic development, as outlined in the 2023 Sustainable Tourism Strategic Plan.

### Leave No Trace

Colorado's partnership with Leave No Trace focuses on educating people for minimal resource-intensive solutions to land protection.

### Seven Principles

Colorado developed seven principles guiding outdoor recreation and conservation, emphasizing public and private land balance, collaboration, minimizing impact, science-based decision, and stable funding.

### Colorado Tourism Roadmap

Initiated in 2016, the Colorado Tourism Roadmap guides the state's tourism industry with a focus on maximizing economic and lifestyle benefits.

## VISITOR STATISTICS

### 7.3M+ Total Trips

Total trips in Grand County dropped significantly in 2020 and 2021 due to COVID-19 but have since **climbed to over 7,300,000 in 2023**.

### Visitation Peaks in July

Visitation peaks in July, with **3.2 million visitor days**, followed by August, September, and December in 2023.

### 2.2 Days of Average Stay

The majority of visitors stay an average of 2.2 days, with **29.6% staying over 6 days**.

### Lodging Options

Grand County offers various lodging options, including **resorts, dude ranches, hotels, motels, short-term rentals, RV sites, camping facilities, and unique options** like tipis, covered wagons, and jupes.

### 20% Increased Spending for Food Services

A **20% increase in spending at food services** has been observed between 2020 and 2023.

### Stable Retail Expenditure

Retail expenditure has remained relatively stable but has recorded an **31% growth since 2020**.

## ENVIRONMENTAL CONDITIONS

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### East Troublesome Fire

**The East Troublesome Fire in October 2020** was the second-largest recorded fire in Colorado, causing extensive destruction and casualties.

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### Hazards

Hazard closures, such as Berthoud Pass, can result in significant economic losses for ski resorts (e.g., an estimated \$100,000 per hour).

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### Wildfires

Besides immediate impacts, wildfires can lead to future flooding, erosion, and landslides, posing additional threats to the environment and infrastructure.

# 05

## CONCLUSION

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Grand County will always be a captivating destination celebrated for its abundance of natural beauty and diverse attractions. The region's allure, evidenced by its iconic Rocky Mountain National Park, charming towns like Grand Lake, Granby, Fraser, and others, draws a significant number of visitors year-round. However, amidst its popularity and myriad attractions, Grand County grapples with challenges. The surge in visitors places a strain on the delicate balance between visitors and local populations. Maintaining the County's unique character and local community identity while catering to the needs of visitors requires a delicate equilibrium. Additionally, balancing the preservation of natural landscapes with the increasing demands of tourism infrastructure presents an ongoing challenge.

This memorandum is intended to document data points and conditions within Grand County to provide a baseline understanding of recent trends and information, as well as providing a library of important resources and plans. To optimize the value and utility of this document, Grand County should make this memorandum and data available to residents, communities, and key organizations in the area. It is advisable to update data points on an annual basis to ensure that trends are recognized such that area officials and staff can react, as necessary. Subsequent documents and reporting will build on this information, focusing on implementation tasks and tools that will help Grand County prioritize tourism- and business-support activities.

*Photo: GCCTB*





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# APPENDIX A

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Grand County Study Area and Fraser River Valley Housing Needs Assessment

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# APPENDIX B

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Sustainable Tourism Strategic Plan

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# APPENDIX C

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## Colorado Tourism Roadmap

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# APPENDIX D

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## Accommodations Comprehensive List

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# APPENDIX E

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Details Regarding Each Camping Area