

COLORADO
RIVER
OUTFITTERS
ASSOCIATION

COMMERCIAL RIVER USE
in the STATE of COLORADO 1988-2020

2020
YEAR END REPORT

EXECUTIVE SUMMARY

COMMERCIAL RIVER USE IN COLORADO

2020 Year End Report

Commercial rafting in Colorado for 2020 was among the most trying in the industry's history. The COVID-19 outbreak delayed the season opening by many weeks with most outfitters only beginning operations in the first half of June. Once rafting commenced outfitters were able to run at only partial capacities due to health restrictions and concerns. The uncertainty of the virus spread, regulations and restrictions, and the business environment made decision making for companies and hesitant rafters difficult.

Prior to COVID-19 impacts beginning in March, initial economic signals were positive and the industry was anticipating activity most likely on par with 2019. That optimism dissipated in the 2nd quarter as the virus spread. Reduced rafting participation is reflected in the 2020 economic impact on the state's economy. Due to high unemployment, the downturn in travel, and reduced discretionary spending this report reflects the significant impacts our industry encountered in 2020. However, given the uncertainty of the 2020 season due to COVID, outfitters displayed resiliency and adaptability in an unprecedented environment.

The 2020 river use in the State of Colorado totaled 430,175 user days, a reduction of 112,230 user days or a decline of 20.7% as compared to the 542,405 totals for 2019. Use in drainages such as the Blue, Clear Creek, Upper Animas, Piedra, Roaring Fork, San Juan and San Miguel was additionally affected by lower snowpack and early season warm weather. The late start of the season resulted in missed opportunities as valuable rafting flows went unused. Stretches of the Colorado and Arkansas showed remarkable resiliency as they reflected user numbers like 2019 despite the late start and season-long health restrictions.

The total industry-wide economic impact for 2020 was \$148,710,699. Compared to a 2019 impact of \$184,919,528, the 2020 numbers were decidedly less but were much more robust than anticipated.

As the industry looks ahead, the hope is that COVID-19 will be brought under control and that businesses of all types can reopen before the 2021 season. This should foster an economic recovery and encourage a return to pre-COVID-19 travel patterns.

The Colorado River Outfitters Association (CROA) compiled this study. Copies are available for download at:

<https://www.croa.org/wp-content/uploads/2021/04/2020-Commercial-Rafting-Use-Report.pdf>

Members of CROA adhere to a Code of Ethics and offer quality trips on all of Colorado's rivers.

COMMERCIAL USER DAYS IN THE STATE OF COLORADO 1997 - 2020

River	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	
Animas	37,000	36,000	45,000	29,000	42,000	12,000	34,500	35,470	52,700	42,500	44,322	42,250	
Animas - Upper	400	920	989	700	721	300	690	658	872	167	598	533	
Arkansas	235,931	250,098	243,709	250,861	252,213	139,178	214,555	203,840	228,091	237,160	239,887	214,234	
Blue	5,361	1,300	2,100	2,347	14	0	264	788	1,212	760	2,038	2,906	
Clear Creek	11,889	12,908	16,887	13,616	20,798	7,498	24,495	20,115	32,357	36,889	49,190	52,340	
Colorado - Glenwood	43,146	59,822	60,191	57,265	55,829	42,581	56,876	58,751	57,712	62,652	65,502	52,738	
Colorado - Upper	36,758	40,309	40,000	42,933	34,381	37,801	32,188	33,224	29,449	36,280	37,068	34,769	
Colorado - Horsethief - Ruby	4,875	4,171	4,410	4,508	4,188	2,324	3,222	3,383	3,318	2,810	2,761	3,283	
Colorado - Westwater	6,614	7,452	7,208	6,859	6,858	6,626	7,352	7,548	7,043	7,233	7,632	7,624	
Dolores	2,333	2,406	439	921	0	0	214	174	936	81	195	868	
Eagle - Upper	11,738	6,361	7,290	3,830	3,702	0	1,239	858	3,630	4,621	4,390	4,390	
Eagle - Lower	2,825	2,226	2,500	2,167	594	446	1,153	820	1,419	1,441	1,369	1,369	
Gore Creek - Vail													
Green/Yampa	7,545	7,938	7,360	8,539	7,825	5,617	7,134	6,826	6,627	6,500	5,813	6,235	
Gunnison Gorge	3,289	3,155	3,169	3,928	3,401	3,292	2,328	3,010	3,016	3,800	2,826	4,342	
Gunnison - Upper (Town Run)	1,774	1,420	1,720	1,400	2,690	1,334	1,590	1,982	2,112	2,212	2,500	2,669	
Gunnison - Escalante	2,340	899	1,011	1,884	1,887	1,044	2,113	2,988	3,363	2,265	3,272	2,106	
Gunnison - Forks to Austin													
Gunnison - Lake Fork	1,850	1,315	1,848	1,310	1,543	0	160	177	195	165	126	369	
North Platte	1,232	804	882	165	137	0	312	191	566	511	372	851	
Piedra	31	294	305	50	650	0	210	454	725	400	500	547	
Poudre	31,981	32,721	32,446	29,012	34,192	26,004	34,164	31,042	36,088	34,533	37,824	37,566	
Rio Grande	3,000	2,800	3,100	1,950	3,300	92	1,300	2,800	3,246	1,605	1,402	2,345	
Roaring Fork - Above Basalt	5,074	4,500	5,000	4,500	2,500	0	2,000	1,500	2,215	2,609	2,834	6,187	
Roaring Fork - Below Basalt	1,200	1,500	2,000	1,500	1,000	0	500	500	10	79	100	2,500	
San Juan - Pagosa	2,680	3,460	3,400	2,200	2,000	138	1,586	2,550	2,500	1,900	1,900	2,280	
San Miguel	2,000	2,500	3,442	1,379	3,625	120	1,959	2,212	4,493	2,800	2,943	5,969	
South Platte	3,137	3,650	1,306	2,035	2,055	453	935	836	901	655	690	1,150	
Taylor	13,612	15,367	15,367	13,989	14,287	11,176	14,734	14,750	14,972	15,127	15,112	14,332	
Total User Days	479,615	506,296	513,079	488,848	502,390	298,024	447,773	437,447	499,768	507,755	533,166	506,752	
% Change From Previous Year													
	2020	9.7%	5.6%	1.3%	-4.7%	2.8%	-40.7%	50.2%	-2.3%	14.2%	1.6%	5.0%	1.4%
User Day Change From Previous Year	42,232	26,681	6,783	-24,231	13,542	-204,366	149,749	-10,326	62,321	7,987	25,411	6,984	

Sources: National Park Service
 US Forest Service
 Bureau of Land Management
 Local Outfitters
 Colorado Parks & Wildlife

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 PO Box 1711
 Idaho Springs, CO 80452
 720-260-4135

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COMMERCIAL USER DAYS IN THE STATE OF COLORADO 1997 - 2020

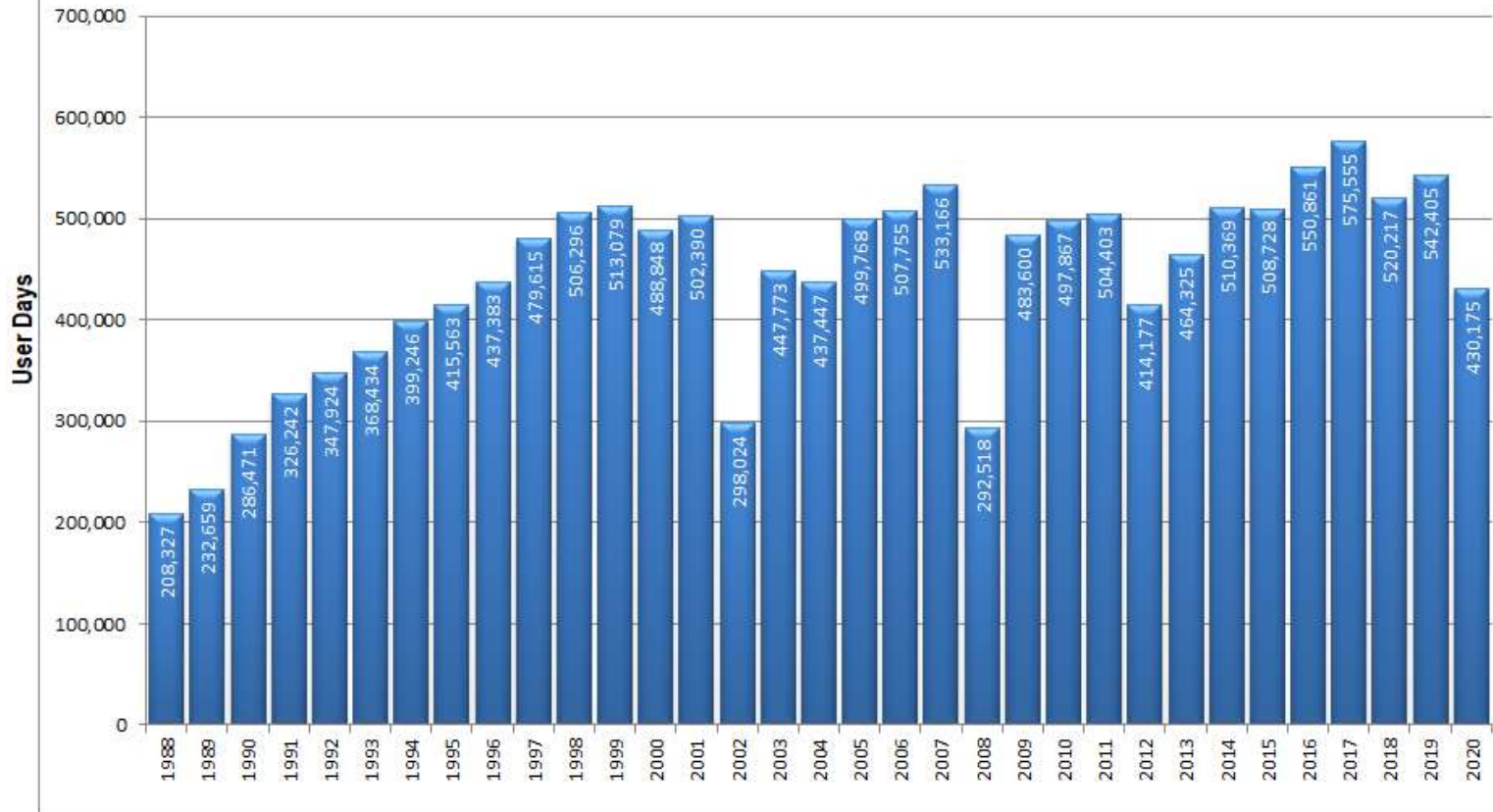
River	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Animas	41,921	41,000	45,000	38,000	33,659	37,000	34,117	35,991	34,069	28,495	37,553	33,120
Animas - Upper	500	411	411	603	600	678	No report	615	536	71	326	12
Arkansas	205,876	211,150	208,329	169,486	179,535	191,307	196,998	223,878	223,271	218,120	190,246	182,005
Blue	3,089	1,181	6,580	0	0	6,571	6,651	5,301	2,771	1,086	11,006	636
Clear Creek	50,167	51,301	60,644	35,422	61,172	72,224	65,617	77,783	87,077	66,174	95,063	52,044
Colorado - Glenwood	52,737	61,890	44,007	64,086	60,757	56,857	57,785	61,880	64,208	62,181	65,302	55,228
Colorado - Upper	33,077	40,730	39,012	41,811	40,420	40,337	41,352	37,071	47,915	50,681	35,777	46,375
Colorado - Horsethief - Ruby	3,090	2,718	2,907	3,099	754	3,535	2,787	1,112	3,978	993	1,122	1,268
Colorado - Westwater	6,833	7,621	6,069	5,623	6,992	6,432	6,522	6,478	6,522	6,654	7,324	4,190
Dolores	536	194	515	35	0	58	26	74	558	0	350	0
Eagle - Upper (Dowd Chutes)	1,374	1,640	1,286	13	359	1,134	570	606	745	428	399	1,076
Eagle (Below Edwards)	1,369	1,710	4,362	227	2,032	5,174	4,971	6,443	6,088	3,549	8,851	4,129
Gore Creek - Vail	300	1,000	2,500	900	900	500	404	601	500	0	324	98
Green/Yampa	4,309	4,803	4,218	7,983	9,694	11,581	11,476	10,196	13,917	15,645	No Report	3,755
Gunnison Gorge	3,956	1,390	2,148	1,579	3,431	2,152	3,205	3,584	3,861	4,787	4,039	4,553
Gunnison - Upper (Town Run)	2,669	2,669	2,669	1,150	3,387	3,387	3,083	3,276	3,548	3,276	2,129	
Gunnison - Escalante	2,549	1,784	2,749	3,028	1,434	1,936	1,154	868	1,088	187	149	27
Gunnison - Forks to Austin				1,100	303	302	484	305	731	991	1,254	1,617
Gunnison - Lake Fork	203	149	284	1,123	221	193	304	259	318	267	245	425
North Platte	712	482	850	143	265	230	336	179	305	No Report	34	5
Piedra	547	190	190	54	25	285	No report	337	318	17	249	41
Poudre	36,991	37,392	37,869	22,780	37,214	37,225	37,934	41,192	38,134	38,741	37,707	21,481
Rio Grande	2,313	1,229	1,589	2,103	596	3,691	2,511	2,387	2,694	131	No Report	156
Roaring Fork - Above Basalt	4,248	2,404	6,672	112	1,696	5,210	5,038	4,377	4,420	560	6,751	1,045
Roaring Fork - Below Basalt	1,263	1,366	912	736	458	1,070	895	410	869	831	7,245	338
San Juan - Pagosa	4,107	4,986	6,171	778	3,475	3,764	4,949	4,850	3,948	1,012	5,517	0
San Miguel	3,782	1,762	1,900	1,828	1,235	3,921	5,438	5,064	8,097	2,061	9,778	4,899
South Platte	750	383	430	484	713	371	473	788	No Report	No Report	No Report	No Report
Taylor	14,332	14,332	14,130	9,891	12,998	13,244	13,648	14,956	15,069	13,279	13,665	11,652
Total User Days	483,600	497,867	504,403	414,177	464,325	510,369	508,728	550,861	575,555	520,217	542,405	430,175
% Change From Previous Year	-4.6%	3.0%	1.3%	-17.9%	12.1%	9.9%	-0.3%	8.3%	4.5%	-9.6%	4.3%	-20.7%
User Day Change From Previous Year	-23,152	14,267	6,536	-90,226	50,148	46,044	-1,641	42,133	24,694	-55,338	22,188	-112,230

Sources: National Park Service
 US Forest Service
 Bureau of Land Management
 Local Outfitters
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COMMERCIAL USER DAYS IN COLORADO 1988-2020



ECONOMIC IMPACT OF COMMERCIAL RIVER RAFTING IN COLORADO

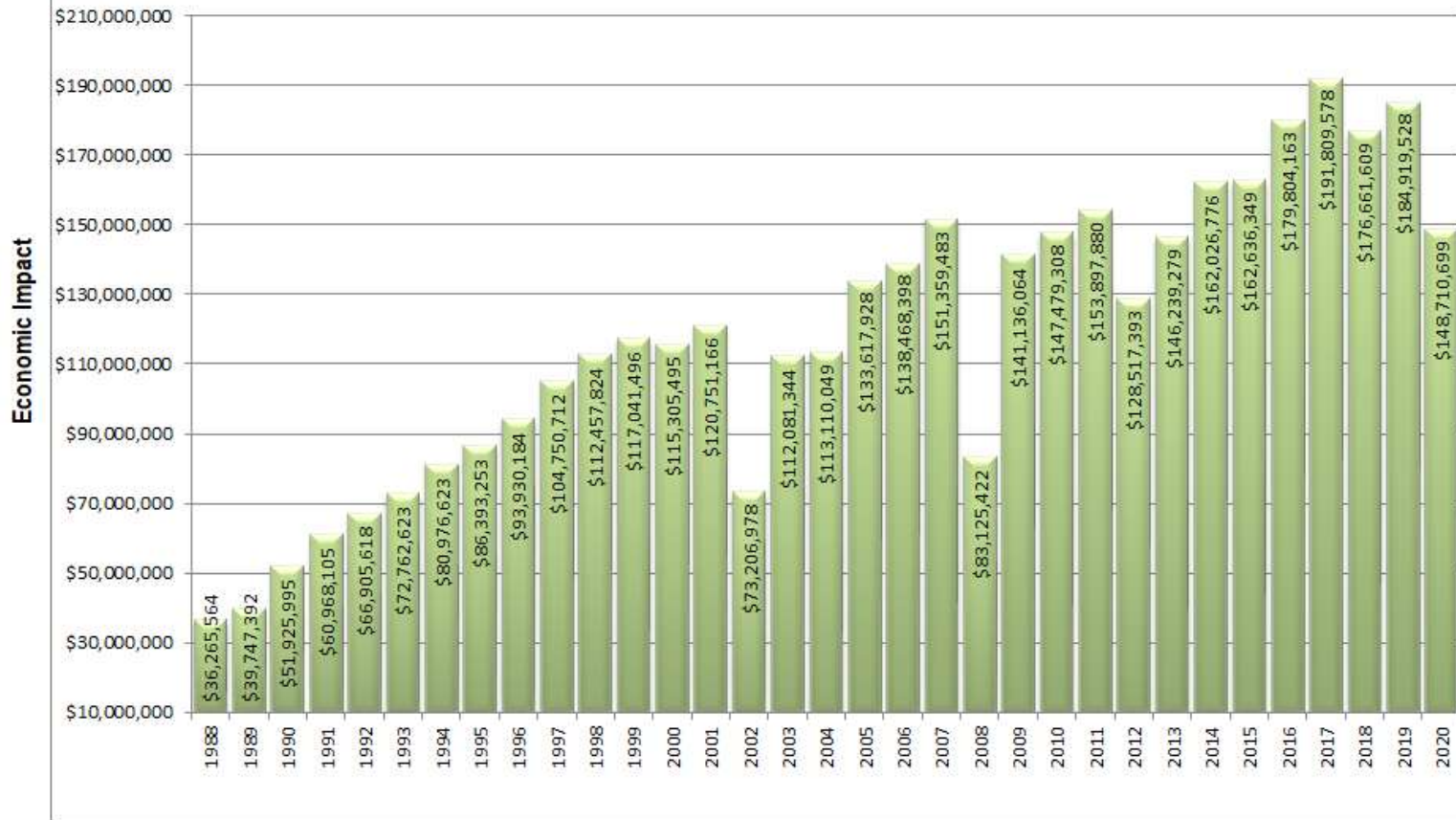
YEAR	TOTAL USER DAYS	INFLATION RATE (CPI)	EXPENDITURES- INFLATION ADJUSTED	DIRECT EXPENDETURES	ECONOMIC IMPACT	% CHANGE
1988	208,327		rt	\$14,166,236	\$36,265,564	
1989	232,659	4.6%	\$66.73	\$15,526,325	\$39,747,392	9.6%
1990	286,471	6.1%	\$70.81	\$20,283,592	\$51,925,995	30.6%
1991	326,242	3.1%	\$73.00	\$23,815,666	\$60,968,105	17.4%
1992	347,924	2.9%	\$75.12	\$26,135,007	\$66,905,618	9.7%
1993	368,434	2.7%	\$77.15	\$28,422,900	\$72,762,623	8.8%
1994	399,246	2.7%	\$79.23	\$31,631,493	\$80,976,623	11.3%
1995	415,563	2.5%	\$81.21	\$33,747,364	\$86,393,253	6.7%
1996	437,383	3.3%	\$83.89	\$36,691,478	\$93,930,184	8.7%
1997	479,615	1.7%	\$85.31	\$40,918,247	\$104,750,712	11.5%
1998	506,296	1.7%	\$86.77	\$43,928,838	\$112,457,824	7.4%
1999	513,079	2.7%	\$89.11	\$45,719,334	\$117,041,496	4.1%
2000	488,848	3.4%	\$92.14	\$45,041,209	\$115,305,495	-1.5%
2001	502,390	1.9%	\$93.89	\$47,168,424	\$120,751,166	4.7%
2002	298,024	2.2%	\$95.95	\$28,596,476	\$73,206,978	-39.4%
2003	447,773	1.9%	\$97.78	\$43,781,775	\$112,081,344	53.1%
2004	437,447	3.3%	\$101.00	\$44,183,613	\$113,110,049	0.9%
2005	499,768	3.4%	\$104.44	\$52,194,503	\$133,617,928	18.1%
2006	507,755	2.0%	\$106.53	\$54,089,218	\$138,468,398	3.6%
2007	533,166	4.1%	\$110.89	\$59,124,798	\$151,359,483	9.3%
2008	292,518	0.1%	\$111.00	\$32,470,868	\$83,125,422	-45.1%
2009	483,600	2.7%	\$114.00	\$55,131,275	\$141,136,064	69.8%
2010	497,867	1.5%	\$115.71	\$57,609,105	\$147,479,308	4.5%
2011	504,403	3.0%	\$119.18	\$60,116,359	\$153,897,880	4.4%
2012	414,177	1.7%	\$121.21	\$50,202,107	\$128,517,393	-16.5%
2013	464,325	1.5%	\$123.03	\$57,124,719	\$146,239,279	13.8%
2014	510,369	0.8%	\$124.01	\$63,291,709	\$162,026,776	10.8%
2015	508,728	0.7%	\$124.88	\$63,529,824	\$162,636,349	0.4%
2016	550,861	2.1%	\$127.50	\$70,236,001	\$179,804,163	10.6%
2017	575,555	2.1%	\$130.18	\$74,925,616	\$191,809,578	6.7%
2018	520,217	1.9%	\$132.65	\$69,008,441	\$176,661,609	-7.9%
2019	542,405	2.3%	\$133.17	\$72,234,191	\$184,919,528	-3.6%
2020	430,175	1.4%	\$135.04	\$58,090,117	\$148,710,699	-19.6%

See glossary for above economic impact formulas and sources

Sources: National Park Service
 US Forest Service
 Bureau of Land Management
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ECONOMIC IMPACT OF COMMERCIAL RIVER RAFTING IN COLORADO 1988-2020



Sources: National Park Service
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 Local Outfitters

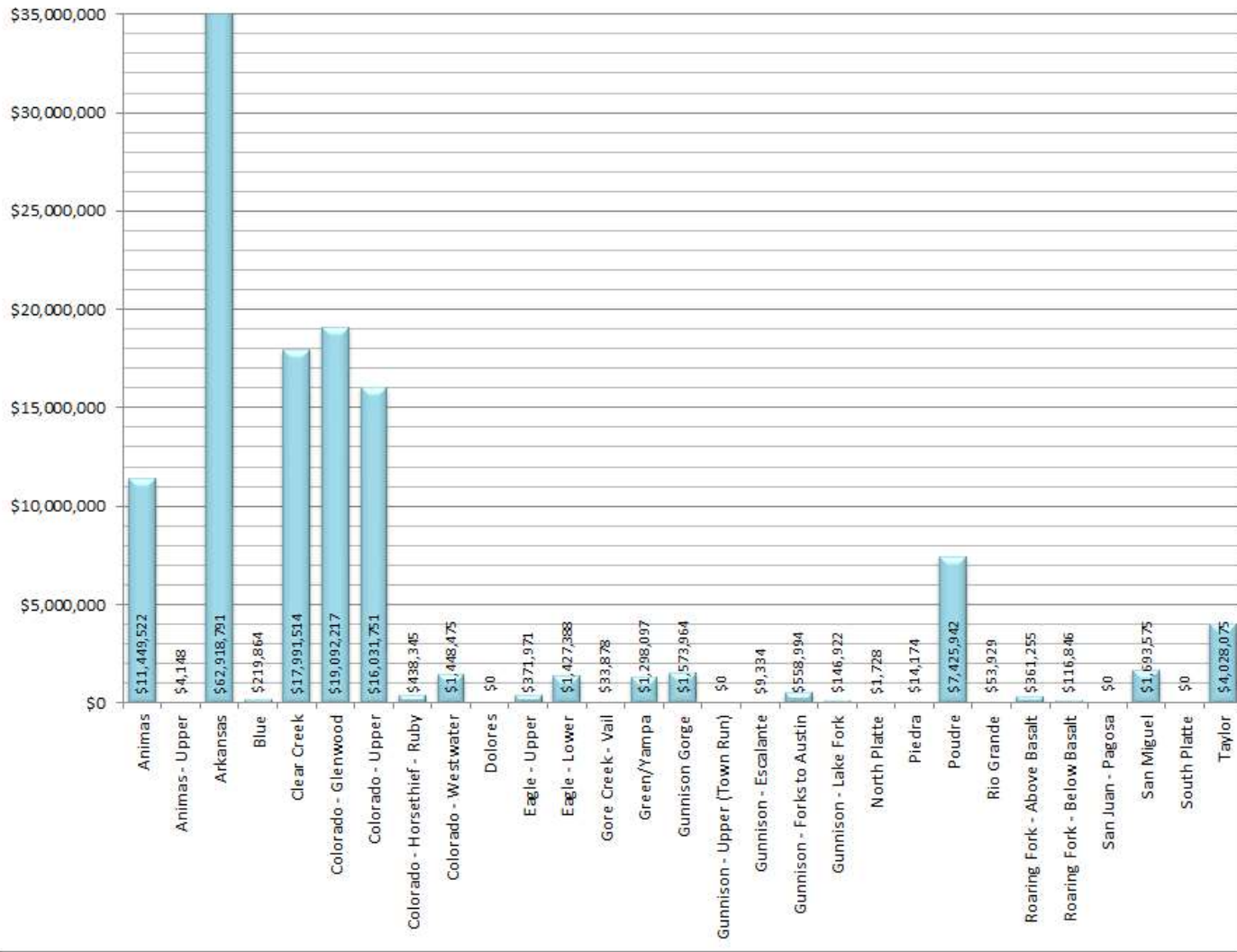
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INDIVIDUAL RIVER COMMERCIAL RAFTING STATISTICS - 3 YR RANGE

RIVER	2018	2019	2020	% CHANGE	% CHANGE	2018	2019	2020
	USER DAYS	USER DAYS	USER DAYS	'18 - '19	'19 - 20	% MARKET SHARE	% MARKET SHARE	% MARKET SHARE
Animas	34,069	28,495	33,120	-16.4%	16.2%	5.9%	5.5%	7.7%
Animas - Upper	536	71	12	N/A	N/A	0.1%	0.0%	0.0%
Arkansas	223,271	218,120	182,005	-2.3%	-16.6%	38.8%	41.9%	42.3%
Blue	2,771	1,086	636	-60.8%	-41.4%	0.5%	0.2%	0.1%
Clear Creek	87,077	66,174	52,044	-24.0%	-21.4%	15.1%	12.7%	12.1%
Colorado - Glenwood	64,208	62,181	55,228	-3.2%	-11.2%	11.2%	12.0%	12.8%
Colorado - Upper	47,915	50,681	46,375	5.8%	-8.5%	8.3%	9.7%	10.8%
Colorado - Horsethief - Ruby	3,978	993	1,268	-75.0%	27.7%	0.7%	0.2%	0.3%
Colorado - Westwater	6,522	6,654	4,190	2.0%	-37.0%	1.1%	1.3%	1.0%
Dolores	558	0	0	-100.0%	N/A	0.1%	0.0%	0.0%
Eagle - Upper	745	428	1,076	-42.6%	151.4%	0.1%	0.1%	0.3%
Eagle - Lower	6,088	3,549	4,129	-41.7%	16.3%	1.1%	0.7%	1.0%
Gore Creek - Vail	500	0	98	-100.0%	N/A	0.1%	0.0%	0.0%
Green/Yampa	13,917	15,645	3,755	12.4%	N/A	2.4%	3.0%	N/A
Gunnison Gorge	3,861	4,787	4,553	24.0%	-4.9%	0.7%	0.9%	1.1%
Gunnison - Upper (Town Run)	3,548	3,276	0	-7.7%	-100.0%	0.6%	0.6%	0.0%
Gunnison - Escalante	1,088	187	27	-82.8%	-85.6%	0.2%	0.0%	0.0%
Gunnison - Forks to Austin	731	991	1,617	35.6%	63.2%	0.1%	0.2%	0.4%
Gunnison - Lake Fork	318	267	425	-16.0%	59.2%	0.1%	0.1%	0.1%
North Platte	305	No Report	5	N/A	No Report	0.1%	No Report	No Report
Piedra	318	17	41	N/A	N/A	0.1%	0.0%	0.0%
Poudre	38,134	38,741	21,481	1.6%	-44.6%	6.6%	7.4%	5.0%
Rio Grande	2,694	131	156	-95.1%	N/A	0.5%	0.0%	N/A
Roaring Fork - Above Basalt	4,420	560	1,045	-87.3%	86.6%	0.8%	0.1%	0.2%
Roaring Fork - Below Basalt	869	831	338	-4.4%	-59.3%	0.2%	0.2%	0.1%
San Juan - Pagosa	3,948	1,012	0	-74.4%	-100.0%	0.7%	0.2%	0.0%
San Miguel	8,097	2,061	4,899	-74.5%	137.7%	1.4%	0.4%	1.1%
South Platte	No Report	No Report	No Report	N/A	N/A	No Report	No Report	No Report
Taylor	15,069	13,279	11,652	-11.9%	-12.3%	2.6%	2.6%	2.7%
Totals	575,555	520,217	430,175	-9.6%	-17.3%	100.0%	100.0%	99.1%

ECONOMIC IMPACT OF COMMERCIAL RIVER RAFTING IN COLORADO - 2020



2020 ECONOMIC IMPACT OF COMMERCIAL RIVER RAFTING IN COLORADO

RIVER	USER DAYS	DIRECT EXPENDITURES	ECONOMIC IMPACT
Animas	33,120	\$4,472,470	\$11,449,522
Animas - Upper	12	\$1,620	\$4,148
Arkansas	182,005	\$24,577,653	\$62,918,791
Blue	636	\$85,884	\$219,864
Clear Creek	52,044	\$7,027,935	\$17,991,514
Colorado - Glenwood	55,228	\$7,457,897	\$19,092,217
Colorado - Upper	46,375	\$6,262,403	\$16,031,751
Colorado - Horsethief - Ruby	1,268	\$171,229	\$438,345
Colorado - Westwater	4,190	\$565,811	\$1,448,475
Dolores	0	\$0	\$0
Eagle - Upper	1,076	\$145,301	\$371,971
Eagle - Lower	4,129	\$557,573	\$1,427,388
Gore Creek - Vail	98	\$13,234	\$33,878
Green/Yampa	3,755	\$507,069	\$1,298,097
Gunnison Gorge	4,553	\$614,830	\$1,573,964
Gunnison - Upper (Town Run)	0	\$0	\$0
Gunnison - Escalante	27	\$3,646	\$9,334
Gunnison - Forks to Austin	1,617	\$218,357	\$558,994
Gunnison - Lake Fork	425	\$57,391	\$146,922
North Platte	5	\$675	\$1,728
Piedra	41	\$5,537	\$14,174
Poudre	21,481	\$2,900,759	\$7,425,942
Rio Grande	156	\$21,066	\$53,929
Roaring Fork - Above Basalt	1,045	\$141,115	\$361,255
Roaring Fork - Below Basalt	338	\$45,643	\$116,846
San Juan - Pagosa	0	\$0	\$0
San Miguel	4,899	\$661,553	\$1,693,575
South Platte	No Report	Not Available	Not Available
Taylor	11,652	\$1,573,467	\$4,028,075
Totals	430,175	\$58,090,117	\$148,710,699

See glossary for above economic impact formulas and sources

Sources: National Park Service
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