

ECONOMIC CONTRIBUTION & IMPACTS OF ARIZONA'S STATE PARKS

FY2020



June 2021

Dari Duval, Ashley K. Bickel, George Frisvold
UNIVERSITY OF ARIZONA COOPERATIVE EXTENSION
DEPARTMENT OF AGRICULTURAL & RESOURCE ECONOMICS

Acknowledgements

The authors would like to thank the Arizona State Parks Board and the staff of Arizona State Parks and Trails for their collaboration and support of this study. The authors would also like to thank the Hospitality Research & Resource Center at Northern Arizona University for performing the survey administration and data collection required for this analysis.

© 2021 The Department of Agricultural and Resource Economics, The University of Arizona.

Any products, services or organizations that are mentioned, shown or indirectly implied in this publication do not imply endorsement by The University of Arizona.

Issued in furtherance of Cooperative Extension work, acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, Jeffrey C. Silvertooth, Associate Dean & Director, Extension & Economic Development, College of Agriculture Life Sciences, The University of Arizona.

The University of Arizona is an equal opportunity, affirmative action institution. The University does not discriminate on the basis of race, color, religion, sex, national origin, age, disability, veteran status, or sexual orientation in its programs and activities.

Contents

Executive Summary	6
Introduction	9
Data & Methods	17
Visitor Survey	18
Visitor Spending Patterns.....	19
Economic Impact & Contribution Analyses.....	19
Park Spending Patterns	21
Alamo Lake State Park	21
Buckskin Mountain State Park.....	22
Catalina State Park.....	23
Cattail Cove State Park.....	23
Dead Horse Ranch State Park.....	24
Fool Hollow Lake Recreation Area.....	25
Fort Verde State Historic Park.....	25
Granite Mountain Hotshots Memorial State Park.....	26
Homolovi State Park	27
Jerome State Historic Park.....	27
Kartchner Caverns State Park	28
Lake Havasu State Park.....	29
Lost Dutchman State Park.....	29
Lyman Lake State Park.....	30
McFarland State Historic Park.....	31
Oracle State Park	31
Patagonia Lake State Park.....	32
Picacho Peak State Park	33
Red Rock State Park	33
Riordan Mansion State Historic Park.....	34
River Island State Park.....	35
Roper Lake State Park	35
Slide Rock State Park.....	36

Tombstone Courthouse State Historic Park.....	37
Tonto Natural Bridge State Park.....	38
Tubac Presidio State Historic Park.....	38
Yuma Territorial Prison & Colorado River State Historic Parks.....	39
County Economic Impact Analysis Results.....	41
Apache County.....	42
Cochise County.....	43
Coconino County.....	44
Gila County.....	45
Graham County.....	46
La Paz County.....	47
Mohave County.....	48
Navajo County.....	49
Pima County.....	50
Pinal County.....	51
Santa Cruz County.....	52
Yavapai County.....	53
Yuma County.....	54
State Economic Contribution Analysis Results.....	55
Effects of COVID-19 on State Park Visits.....	56
Summary.....	58
References.....	60
Appendix.....	61
Appendix A - Survey Instrument.....	61
Appendix B - Visitor Spending Patterns for All Visitors (Local & Non-Local).....	69
Appendix C - Spending Pattern Derivation Process.....	78

Figures

Figure 1. Statewide Economic Contribution of Arizona State Park Visitor Spending & County Economic Impacts of Non-Local Arizona State Park Visitor Spending, 2020.....	7
Figure 2. Map of Arizona State Parks & Arizona Counties.....	9
Figure 3. Average Monthly Visits, Top 5 & All Other Parks, 2010-2019.....	11
Figure 4. Monthly Visits to Arizona State Parks & 12-Month Moving Average Trend, July 1990 to December 2020	12
Figure 5. U.S. Community Mobility Report - Change in Time Spent by Location Compared to Pre-Pandemic Baseline	13
Figure 6. Data Sources & Estimation Process.....	17
Figure 7. Relationship between Sales, Value Added, and Labor Income.....	21
Figure 8. Total Monthly State Park Visitors, Year-Over-Year Comparison 2019 & 2020	56
Figure 9. Monthly Visits to Non-Historic Arizona State Parks & Monthly Visits to Historic State Parks & Kartchner Caverns, Year-Over-Year Comparison 2019 & 2020.....	56

Tables

Table 1. Units in Arizona State Park System by County	10
Table 2. Annual Visits to Arizona State Parks, Fiscal Years 2014 & 2020 and Percent Change.....	15
Table 3. Total State Park Visitor Survey Observations & Usable Visitor Expenditure Responses by Park.....	18
Table 4. Spending Category Mapping to IMPLAN Industries	20
Table 5. Alamo Lake State Park Non-Local Visitor Spending Pattern.....	22
Table 6. Buckskin Mountain State Park Non-Local Visitor Spending Pattern	22
Table 7. Catalina State Park Non-Local Visitor Spending Pattern.....	23
Table 8. Cattail Cove State Park Non-Local Visitor Spending Pattern.....	24
Table 9. Dead Horse Ranch State Park Non-Local Visitor Spending Pattern.....	24
Table 10. Fool Hollow Lake Recreation Area Non-Local Visitor Spending Pattern	25
Table 11. Fort Verde State Historic Park Non-Local Visitor Spending Pattern.....	26
Table 12. Granite Mountain Hotshots Memorial State Park Non-Local Visitor Spending Pattern	26
Table 13. Homolovi State Park Non-Local Visitor Spending Pattern.....	27
Table 14. Jerome State Historic Park Non-Local Visitor Spending Pattern	28
Table 15. Kartchner Caverns State Park Non-Local Visitor Spending Pattern.....	28
Table 16. Lake Havasu State Park Non-Local Visitor Spending Pattern	29
Table 17. Lost Dutchman State Park Non-Local Visitor Spending Pattern	30
Table 18. Lyman Lake State Park Non-Local Visitor Spending Pattern.....	30
Table 19. McFarland State Historic Park Non-Local Visitor Spending Pattern	31
Table 20. Oracle State Park Non-Local Visitor Spending Pattern.....	32
Table 21. Patagonia Lake State Park Non-Local Visitor Spending Pattern.....	32
Table 22. Picacho Peak State Park Non-Local Visitor Spending Pattern	33

Table 23. Red Rock State Park Non-Local Visitor Spending Pattern.....	34
Table 24. Riordan Mansion State Historic Park Non-Local Visitor Spending Pattern.....	34
Table 25. River Island State Park Non-Local Visitor Spending Pattern	35
Table 26. Roper Lake State Park Non-Local Visitor Spending Pattern.....	36
Table 27. Slide Rock State Park Non-Local Visitor Spending Pattern	37
Table 28. Tombstone Courthouse State Historic Park Non-Local Visitor Spending Pattern	37
Table 29. Tonto Natural Bridge State Park Non-Local Visitor Spending Pattern	38
Table 30. Tubac Presidio State Historic Park Non-Local Visitor Spending Pattern	39
Table 31. Yuma Territorial Prison & Colorado River State Historic Parks Non-Local Visitor Spending Pattern ...	39
Table 32. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Apache County.....	42
Table 33. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Cochise County	43
Table 34. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Coconino County.....	44
Table 35. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Gila County.....	45
Table 36. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Graham County.....	46
Table 37. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: La Paz County.....	47
Table 38. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Mohave County.....	48
Table 39. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Navajo County.....	49
Table 40. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Pima County.....	50
Table 41. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Pinal County.....	51
Table 42. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Santa Cruz County	52
Table 43. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Yavapai County.....	53
Table 44. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Yuma County.....	54
Table 45. Total (Local & Non-Local) Visitor Spending at All Parks.....	55
Table 46. Statewide Economic Contribution of Arizona State Park Visitor Spending	55
Table 47. Summary of Statewide Economic Contribution Results	58
Table 48. Comparison of Study Results to Past Studies.....	59

Executive Summary

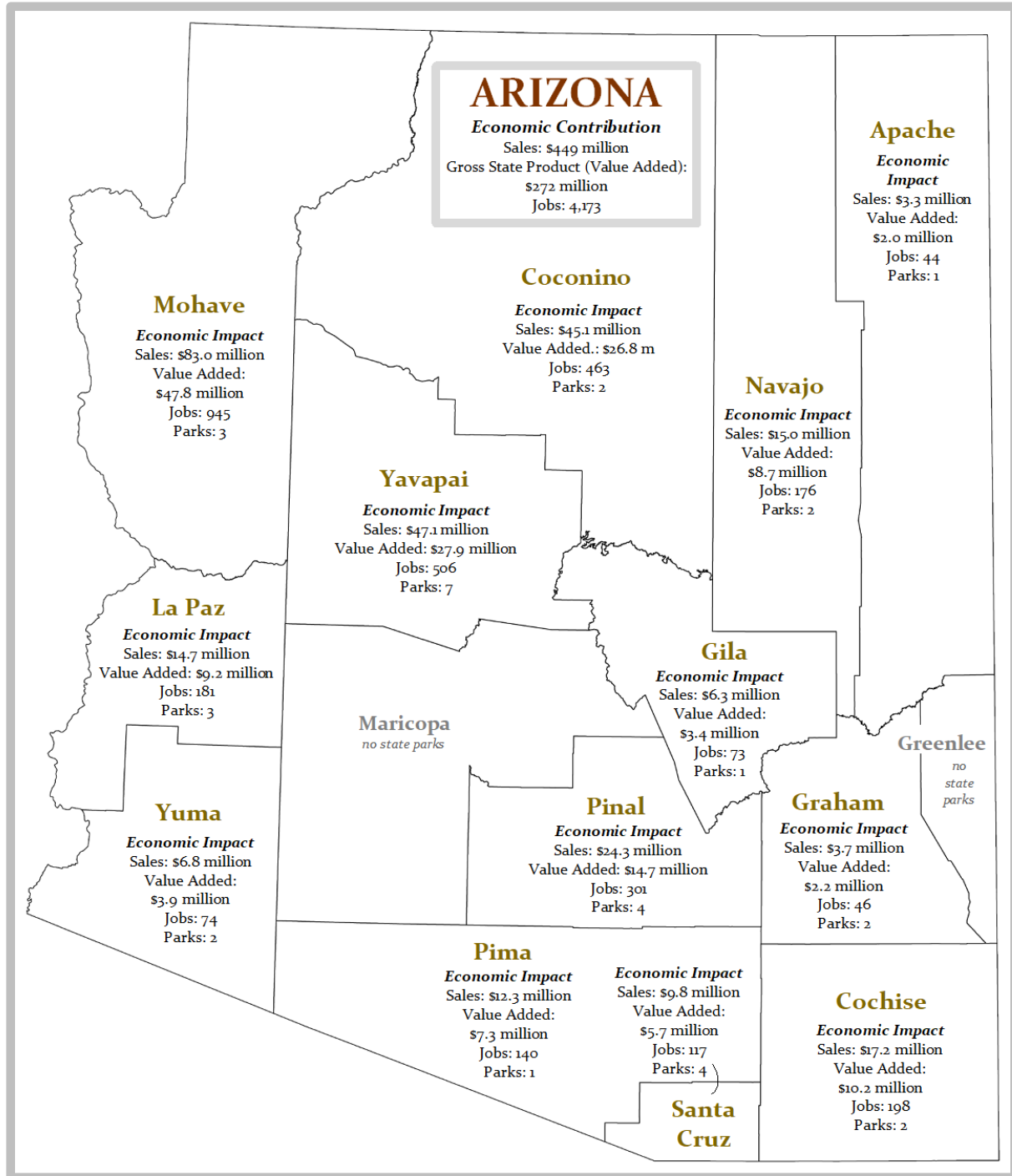
What is the study about?

This study presents an analysis of the importance of Arizona State Parks to the state's economy and to the 13 county economies where state parks are located. The study measures two types of economic effects: county economic impacts and state economic contributions. Both measures are rooted in visitor spending. State parks attract visitors, often from outside the local area, that spend money on such things as lodging, meals, and incidental expenditures. This spending is important to local economies, supporting businesses and jobs, and creating additional rounds of spending in the local economy, known as economic multiplier effects. Spending by non-local visitors, attracted to state parks from outside the local area, represents net new money circulating in the local economy, and therefore is considered as an *economic impact*. This study presents county-level economic impact estimates for all counties in Arizona with state parks. We also consider *all* (local and non-local) visitor spending in and around state parks in estimating the *economic contribution* of state parks to Arizona's economy. An economic contribution analysis presents a snapshot of existing economic activity surrounding a particular industry or attraction; however, it does not differentiate where spending is coming from. In other words, spending by local residents is simply money being recirculated within the local economy and does not generate net new economic activity within the region's economy. Finally, we present a brief analysis of the effect of the COVID-19 pandemic on visits to Arizona State Parks to provide context on the level of visits observed during fiscal year 2020.

What did the study find?

- In 2020, the statewide economic contribution of visitor spending in and around Arizona State Parks, including multiplier effects, was \$449 million in sales, also known as economic output. Arizona State Parks contributed an estimated \$272 million to Arizona's Gross State Product, the state equivalent of Gross Domestic Product. Through visitor spending in local economies, Arizona's state parks supported an estimated 4,200 jobs statewide.
- Total spending by all visitors to Arizona State Parks was an estimated \$332 million in 2020. This includes all spending in and within 50 miles of state parks.
- At the county-level, the study considered the economic impacts of non-local visitors to state parks making expenditures in and around the parks (Figure 1). The largest county-level economic impact was in Mohave County with roughly \$83 million in sales, including multiplier effects, and an estimated 945 jobs.
- Since the 2014 economic impact study, total expenditures by non-local visitors to Arizona State Parks are estimated to have increased by over 20%. While non-local expenditures per visit actually decreased between 2014 and 2020 (by 6%), visits to Arizona State Parks grew by nearly 30%, leading to higher overall spending in the state.
- The COVID-19 pandemic led to a decrease in Arizona State Park visits in calendar year 2020 compared with visits in calendar year 2019, with overall visits down by 7.6%. Excluding historic state parks and Kartchner Caverns which were closed temporarily for safety precautions, however, visits to all other parks were in fact 1% higher than in 2019. Visits to historic state parks and Kartchner Caverns were 50% lower than in 2019.

Figure 1. Statewide Economic Contribution of Arizona State Park Visitor Spending & County Economic Impacts of Non-Local Arizona State Park Visitor Spending, 2020



How was the study done?

This study relies on a survey of visitors to Arizona State Parks between July 2019 and September 2020 which collected information on visitor spending and origin. Average visitor spending patterns were developed for each park to estimate both non-local and total visitor spending occurring in and within 50 miles of each state park. Visitors are considered local when they reside within the same county as the park or if they reside in zip codes that fall within a 50-mile radius of the park. Shares of visitors with spending in each expenditure category were developed and used in conjunction with annual state park visitation statistics to estimate total spending for each park. Regional and state economic multiplier effects were estimated using the IMPLAN 3.1 model and data.

Introduction

Arizona's state parks are a key component of the state's outdoor recreation and tourism-based economy. Located in 13 of the state's 15 counties (excluding Greenlee and Maricopa counties) (Figure 2), the State Parks and State Natural Areas provide outdoor recreation opportunities for the public, preserve locations of important historical significance, and conserve scenic natural areas throughout the state.

The Arizona State Parks system currently manages 34 sites. This includes 21 parks, 10 historic parks, and 3 natural areas (Table 1). Three facilities have yet to be opened to the public. Yavapai County has the most sites, with seven, followed by Pinal and Santa Cruz Counties, which have four each.

Figure 2. Map of Arizona State Parks & Arizona Counties

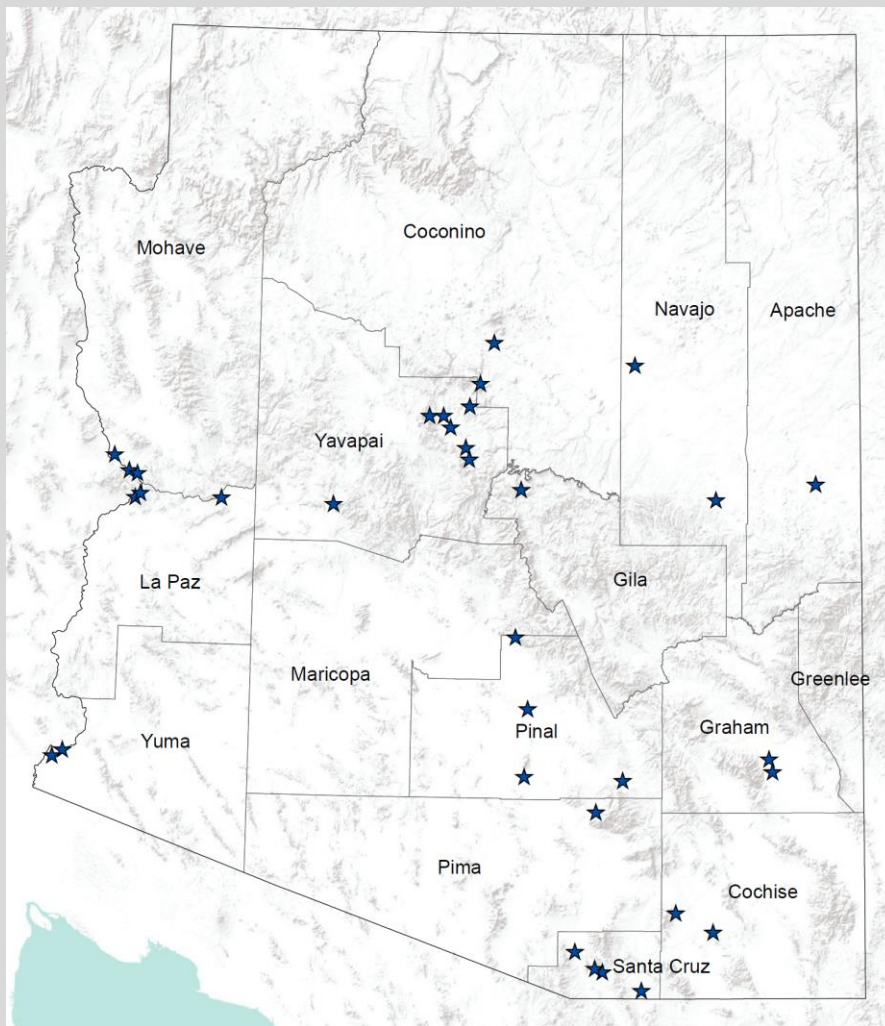


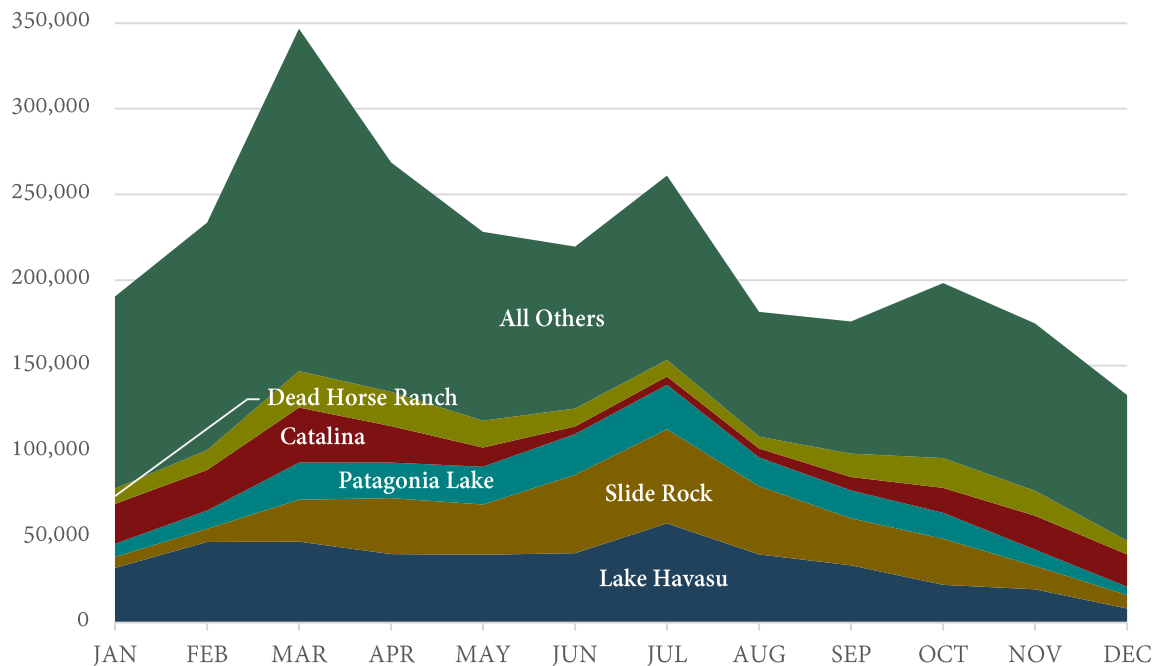
Table 1. Units in Arizona State Park System by County

Park Unit	County
Lyman Lake State Park	Apache
Kartchner Caverns State Park	Cochise
Tombstone Courthouse State Historic Park	Cochise
Riordan Mansion State Historic Park	Coconino
Slide Rock State Park	Coconino
Tonto Natural Bridge State Park	Gila
Dankworth Pond State Park	Graham
Roper Lake State Park	Graham
Alamo Lake State Park	La Paz
Buckskin Mountain State Park	La Paz
River Island State Park	La Paz
Cattail Cove State Park	Mohave
Havasu Riviera State Park*	Mohave
Lake Havasu State Park	Mohave
Fool Hollow Lake Recreation Area	Navajo
Homolovi State Park	Navajo
Catalina State Park	Pima
Lost Dutchman State Park	Pinal
McFarland State Historic Park	Pinal
Oracle State Park	Pinal
Picacho Peak State Park	Pinal
Patagonia Lake State Park (incl.)	Santa Cruz
San Rafael State Natural Area*	Santa Cruz
Sonoita Creek State Natural Area	Santa Cruz
Tubac Presidio State Historic Park	Santa Cruz
Dead Horse Ranch State Park (incl. Verde River Greenway State Natural Area)	Yavapai
Fort Verde State Historic Park	Yavapai
Granite Mountain Hotshots Memorial State Park	Yavapai
Jerome State Historic Park	Yavapai
Red Rock State Park	Yavapai
Rockin' River Ranch State Park*	Yavapai
Verde River Greenway State Natural Area	Yavapai
Colorado River State Historic Park	Yuma
Yuma Territorial Prison State Historic Park	Yuma

* Not yet open to the public. For brevity, these parks are excluded from subsequent tables.

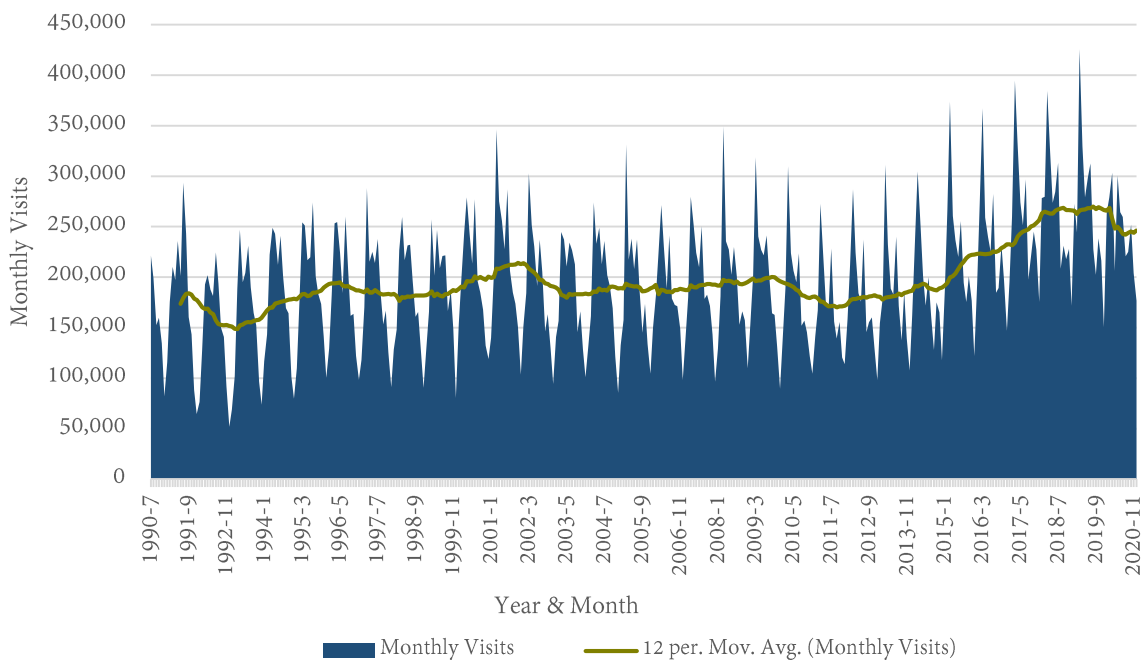
The top five state parks in terms of total visits in FY2020 were Lake Havasu State Park (533,757 visits), Slide Rock State Park (345,739 visits), Catalina State Park (257,692 visits), Patagonia Lake State Park (235,224 visits), and Dead Horse Ranch State Park (205,793 visits). These five parks accounted for over half (53%) of total visits to Arizona State Parks in FY2020. Visits to Arizona State Parks vary seasonally (Figure 3). Across the state parks system, on average, peak visitation occurs in March, with secondary peaks in July and October. Some parks see their highest levels of visitors in summer months, such as Lake Havasu, Slide Rock, and Fool Hollow Lake state parks. Other parks see most visitation during winter months, such as Catalina State Park and Lost Dutchman State Park. Finally, other parks receive most visits during spring and fall months, such as Dead Horse Ranch State Park. Parks with peak visitation during summer months tend to be water-based recreation parks like Lake Havasu and Slide Rock, or parks in higher elevation areas with cooler temperatures. Parks with peak visitation during spring, fall, and winter months tend to be located in warmer regions of the state. This seasonality in visits implies that economic activity linked to state parks visitors does not occur uniformly throughout the year, but rather fluctuates and is concentrated during seasons when conditions are best for outdoor recreation.

Figure 3. Average Monthly Visits, Top 5 & All Other Parks, 2010-2019



In recent years, visits to Arizona State Parks have increased significantly. This follows years of stable visitation or even some years of decline due to state budget cuts following the 2009 recession. The 2020 global pandemic and its impact on state park visits interrupted this growth trend, which began roughly around 2014 (Figure 4).

Figure 4. Monthly Visits to Arizona State Parks & 12-Month Moving Average Trend, July 1990 to December 2020

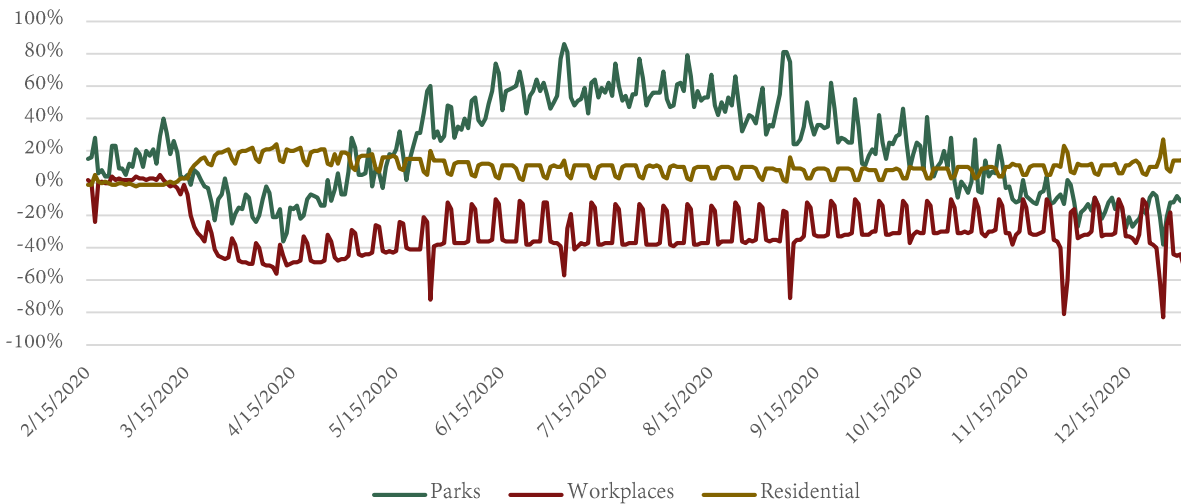


Source: Arizona State Parks

Despite a modest decline in visits (7.6%) between calendar years 2019 and 2020 due principally to closure of some parks as a precautionary measure during the COVID-19 pandemic, state parks have remained immensely popular. In fact, parks have provided an option for relatively safe, socially-distanced outdoor activities.

The benefits that recreation amenities like parks and trails bring to people are multi-faceted. For example, they can provide an outlet for physical activity and exercise, enhance quality of life, and even protect important habitats and ecosystems. The benefits of parks have been particularly pronounced during the pandemic. Nationally, the amount of time spent in parks has increased significantly compared to a pre-pandemic baseline (Figure 5). This mobility information is based on anonymized cellphone location data collected by Google and presented for purposes of comparing changes in peoples' mobility and time spent in different locations before and after the onset of the pandemic. Park areas included in the mobility data include local parks, national parks, public beaches, marinas, dog parks, plazas, and public gardens (Google, 2021).

Figure 5. U.S. Community Mobility Report - Change in Time Spent by Location Compared to Pre-Pandemic Baseline



Source: Google (2021); Oscillations are due to day-of-week effects (the reduction in time at workplaces from the pre-COVID baseline is most pronounced during weekdays)

The benefits of parks can be measured in a variety of ways. Some measures are monetary in nature, while others cannot be easily monetized. Similarly, some measures are based on market transactions (the purchase or sale of a good or service), while others are not. This study measures two types of economic effects of state parks: local (county) *economic impacts* and statewide *economic contributions*. Both measures are rooted in visitor spending. State parks attract visitors, often from outside the local area, that spend money on such things as lodging, meals, and incidental expenditures. This spending is important to local economies, supporting businesses and jobs. Many state parks are located in rural areas where visitor spending is an important source of livelihood for residents.

Economic impacts consider net new spending in a local economy. In this analysis, we examine the spending of non-local visitors within state parks and surrounding areas and estimate the economic impact of state parks to each county. One can also consider expenditures by all visitors, including local visitors. Because expenditures by people who live in the region do not represent the introduction of outside money into the local economy, this represents a distinct type of effect, referred to as an *economic contribution*. It presents a snapshot of existing economic activity surrounding a particular industry or attraction. However, one can assume that had local residents not spent their income on a visit to the local state park, they would have spent it locally on something else. For example, you might have prepared a picnic lunch, but had you not gone to the park you would have eaten anyway. So, there would be no net increase in grocery expenditures. This study considers the economic contribution of Arizona State Parks at the state-level by including the spending of all visitors, regardless of origin.

Both types of analysis account for the multiplier effects of visitor spending. *Multiplier effects* occur when local businesses and residents employed by those business purchase goods and services from other local businesses. For example, visitors that dine in a restaurant stimulate a chain of transactions that support economic activity in other

industries within the county. To serve its diners, the restaurant must hire cooks, servers, and other employees, purchase ingredients, and pay for other goods and services necessary for running the restaurant (rent, utilities, insurance, marketing, etc.). When these are purchased from within the county, they support jobs and wages in those businesses providing the goods and services. These are called *indirect multiplier effects*. Similarly, when a restaurant employee spends their income at a local business, this also supports additional rounds of local economic activity, known as *induced multiplier effects*.

In addition to estimating the economic impacts and contributions of Arizona’s state parks, this study also examines trends in visitation since the last economic impact study from FY2014. Notably, the visitor survey that this study relies upon was carried out during the 2020 COVID-19 pandemic which overlapped with fiscal year 2020, the time frame of this study. In consideration of the unusual circumstances, we present an analysis of changes in visits over time and the potential effects of the pandemic on state park visitation.

Between FY2014 and FY2020, Arizona’s state parks experienced an overall 29% increase in visits. For the 2014 Visitor Survey and economic impact study, visitor spending and economic impact estimates reflected a total of 27 parks. Park operations were modified in 2010 in an effort to keep parks open to the public during the economic downturn occurring at that time. The agency entered into cooperative agreements with six local communities to help operate parks in their communities. Additionally, three parks were operated part-time and six parks operated on a shortened weekly schedule of anywhere between two to six days per week. During the 2020 Visitor Survey, Arizona State Parks (ASP) managed 34 State Parks and Natural Areas. All ASP-operated parks currently open to the public at the time were open year-round, open seven days per week, and five parks were operated by local community partners.

Due to COVID-19, beginning in March 2020, capacity limits, closures, and restrictions were implemented at all parks to increase visitor safety and to maintain CDC guidelines. Recreation parks, campgrounds and cabins remained open with limited capacity for day use and camping. Historic parks closed for a limited time and then reopened with limited indoor capacity and mask mandates. Two historic parks remained closed throughout quarter four of fiscal year 2020 and into fiscal year 2021. Additionally, cave tours at Kartchner Caverns State Park were initially closed and then resumed with reduced capacity (from 20 to 6 people per tour) as well as a reduction in the number of tours. These changes are evidenced in a comparison of park visits between FY2014 and FY2020. While most outdoor recreation-focused parks experienced a strong increase in visitation over the period, parks that were closed for public safety during the beginning of the pandemic generally saw lower visitation for FY2020 compared with FY2014 (Table 2).



Table 2. Annual Visits to Arizona State Parks, Fiscal Years 2014 & 2020 and Percent Change

Park	FY14	FY20	Percent Change
Alamo Lake State Park	32,950	66,744	102.6%
Boyce Thompson Arboretum State Park*	79,290	N/A	N/A
Buckskin Mountain State Park	78,669	79,896	1.6%
Catalina State Park	171,186	257,962	50.7%
Cattail Cove State Park	55,628	118,556	113.1%
Colorado River State Historic Park	8,983	10,339	15.1%
Dankworth Pond State Park*	N/A	N/A	N/A
Dead Horse Ranch State Park	153,273	205,793	34.3%
Fool Hollow Lake Recreation Area	96,360	143,103	48.5%
Ft. Verde State Historic Park	11,446	7,880	-31.2%
Granite Mountain Hotshots Memorial State Park	N/A	25,025	N/A
Havasu Riviera State Park	N/A	N/A	N/A
Homolovi State Park	17,081	22,168	29.8%
Jerome State Historic Park	47,111	34,492	-26.8%
Kartchner Caverns State Park	153,001	124,810	-18.4%
Lake Havasu State Park	385,136	533,757	38.6%
Lost Dutchman State Park	124,290	201,685	62.3%
Lyman Lake State Park	13,774	62,492	353.7%
McFarland State Historic Park	8,910	4,673	-47.6%
Oracle State Park	5,346	13,629	154.9%
Patagonia Lake State Park	189,575	235,224	24.1%
Picacho Peak State Park	61,431	96,876	57.7%
Red Rock State Park	64,040	70,190	9.6%
Riordan Mansion State Historic Park	21,510	14,334	-33.4%
River Island State Park	24,971	33,560	34.4%
Rockin' River Ranch State Park	N/A	N/A	N/A
Roper Lake State Park	65,431	83,756	28.0%
San Rafael State Natural Area	N/A	N/A	N/A
Slide Rock State Park	214,150	345,739	61.4%
Sonoita Creek State Natural Area*	N/A	N/A	N/A
Tombstone State Historic Park	43,883	36,200	-17.5%
Tonto Natural Bridge State Park	111,449	87,690	-21.3%
Tubac Presidio State Historic Park	11,873	5,883	-50.5%
Verde River Greenway State Natural Area*	N/A	N/A	N/A
Yuma Territorial Prison State Historic Park	59,602	46,796	-21.5%
TOTAL	2,310,349	2,971,844	28.6%

* Dankworth Pond SP data is included in Roper Lake SP, Sonoita Creek SNA is included in Patagonia Lake SP and Verde River Greenway SNA is included in Dead Horse Ranch SP. Boyce Thompson Arboretum is not included for FY2020 because the tri-partite agreement between Arizona State Parks, Boyce Thompson Arboretum, and the University of Arizona expired and was not renewed. Source: Arizona Office of Tourism (2021)

Beyond COVID-19 pandemic-related safety measures, notable changes in park operation between the 2014 and 2020 surveys include:

- Colorado River State Historic Park moved from operating 5 days a week to 6 days a week.
- Fort Verde State Historic Park moved from operating 5 days a week to 7 days a week.
- Lyman Lake State Park transitioned from operating seasonally to year-round.
- Oracle State Park moved from operating weekend-only hours to 7 days a week.
- Picacho Peak State Park moved from operating seasonally to year-round.
- Slide Rock State Park had a closure in 2014 due to wildfire, while in 2020 it was open year-round.
- A closure of the bridge at Tonto Natural Bridge State Park in 2020 resulted in decreased visitation.
- Yuma Territorial Prison State Historic Park moved from operating 5 days a week to 6 days a week.

In the following section, we present the data and methods used to estimate visitor spending and the regional economic effects of that spending.

Data & Methods

Economic impact and contribution analyses measure what are known as economic *multiplier effects*. When visitor spending (or “demand”) is generated within a particular industry or business (*direct effect*), in order to provide that good or service, the business or industry in turn requires inputs of goods and services to operate and provide the good or service demanded. Some of those inputs will be purchased within the local economy, and this effect continues, while dissipating due to non-local purchases of inputs. This cascade of business-to-business purchases, made in order to operate and serve customers, is known as *indirect multiplier effects*. Another effect occurs when individuals employed in businesses or industries spend their income on household goods and services within the local economy, known as *induced effects*. Again, the effect dissipates gradually in subsequent rounds of purchases due to purchases fulfilled from outside the local economy. Adding the direct, indirect, and induced effects, we obtain the *total economic impact or contribution*, which is typically larger than the direct effect. The ratio of the total economic contribution or economic impact to the direct effect is known as the *multiplier*.

While the terms *economic impact* and *economic contribution* are often used interchangeably, they are in fact different analyses measuring different phenomena. Economic contributions are defined as “the gross changes in a region’s existing economy that can be attributed to a given industry, event, or policy” (Watson, et al., 2007, p. 17). Meanwhile, an economic impact is defined as “[t]he net changes in *new economic activity* associated with an industry, event, or policy in an existing regional economy” (Watson, et al., 2007, p. 17, emphasis added). The subtle difference between these two definitions lies in the distinction between gross and net changes in an economy. Watson, et al. (2007) characterize contribution analyses as “descriptive analysis” that say “nothing about how spending on one industry may crowd out spending in another industry” (p. 17). Meanwhile, economic impacts are characterized as “bringing new revenues into the region that would otherwise not occur in the region” (p. 18).

This report presents the statewide economic contribution of Arizona’s state parks, and individual county-level economic impacts of each county’s state parks. Whereas the statewide economic contribution analysis presented in this report includes the spending of all visitors regardless of their county or state of origin, local economic impacts exclude the spending of local residents to account for the “net” change in new economic activity that defines an economic impact. Separate visitor spending patterns were constructed for each park: one excluding local residents’ spending and one including local residents’ spending (presented in Appendix B).

These visitor spending patterns were combined with the number of annual visitors (Table 2) to estimate the *direct effects*, or the total spending in and around Arizona state parks. *Indirect* and *induced economic multiplier effects* were estimated using the IMPLAN 3.1 model and data (IMPLAN Group, LLC, 2019). Figure 6 illustrates the data used in estimating economic impacts and contributions in this study.

Figure 6. Data Sources & Estimation Process



Visitor Survey

This study relies on a survey of visitors to Arizona State Parks between July 2019 and September 2020. A total of 10,037 observations were collected from 28 of Arizona’s state parks and natural areas (Table 3). The survey asked visitors to report their spending in and within 50 miles of the state park. Other questions asked about visitor characteristics and their experience and satisfaction with their visit. Of the total 10,037 survey responses, 8,983 included usable visitor expenditure data.

Table 3. Total State Park Visitor Survey Observations & Usable Visitor Expenditure Responses by Park

Park	Observations	Parties with Expenditure Response
Alamo Lake State Park	435	351
Boyce Thompson Arboretum State Park*	N/A	N/A
Buckskin Mountain State Park	422	388
Cattail Cove State Park	401	361
Catalina State Park	418	366
Dead Horse Ranch State Park*	433	381
Fool Hollow Lake Recreation Area	454	394
Fort Verde State Historic Park	421	390
Granite Mountain Hotshots Memorial State Park	445	370
Homolovi State Park	453	382
Jerome State Historic Park	364	338
Kartchner Caverns State Park	437	407
Lake Havasu State Park	399	366
Lost Dutchman State Park	419	371
Lyman Lake State Park	425	378
McFarland State Historic Park	125	113
Oracle State Park	156	140
Patagonia Lake State Park*	419	388
Picacho Peak State Park	361	333
Red Rock State Park	350	328
Riordan Mansion State Historic Park	274	256
River Island State Park	384	325
Roper Lake State Park*	438	407
Slide Rock State Park	370	338
Tombstone Courthouse State Historic Park	327	293
Tonto Natural Bridge State Park	379	355
Tubac Presidio State Historic Park	205	188
Yuma Territorial Prison State Historic Park*	323	276
TOTAL	10,037	8,983

* Dankworth Pond SP is included in Roper Lake SP, Sonoita Creek SNA is included in Patagonia Lake SP, Verde River Greenway SNA is included in Dead Horse Ranch SP, and Colorado River State Historic Park is included in Yuma Territorial Prison State Historic Park. Boyce Thompson Arboretum is not included for FY2020 because the tri-partite agreement between Arizona State Parks, Boyce Thompson Arboretum, and the University of Arizona expired and was not renewed.

Survey responses for which all expenditure categories were unanswered were considered as non-responders (unusable responses) and were excluded from the analysis. Responses in which one or more categories were unanswered but others contained a zero or positive value were considered as responders and any blank categories were assigned a value of zero.

These data were used to estimate visitor spending for each state park (methods are described below), which constitutes the foundation of the economic impact and economic contribution analyses.

Visitor Spending Patterns

To estimate the economic impacts and contributions of state park visitors, it was necessary to construct average spending patterns for visitors to each state park. This was done for non-local visitors alone (county level economic impacts), as well as all visitors (state level economic contribution, including both local and non-local visitors). Visitors are considered non-local when they reside outside the same county as the park they're visiting and do not reside in a zip code within a 50-mile radius of the park. An average visitor spending pattern was constructed for each park based on survey respondents' reported spending in a number of categories (lodging, camping fees and charges, admission, recreation and entertainment fees, and auto expenses, including gas, among others). Survey respondents reported spending for their entire visitor party and the number of people in their party. This information was used to derive an average per-person per-visit spending pattern. A detailed description of the derivation of the spending patterns (both non-local as well as local and non-local combined) is presented in Appendix C. To arrive at an estimate of total spending for each park, the average spending patterns were applied to annual visits to each park and the percent of respondents reporting each expense, to account for the fact that not all visitors report expenses in every category. This assumption means that if 50% of survey respondents report spending on lodging when visiting a specific park, we assume that 50% of visitors to the park also spend on lodging. Park-level spending patterns for non-local visitors are presented in the body of this report. Spending patterns for both local and non-local visitors combined are presented in Appendix B.

Economic Impact & Contribution Analyses

For this study's economic impact and economic contribution analyses, economic multiplier effects were estimated using the IMPLAN 3.1 model and data (IMPLAN Group, LLC, 2019). County economic impact analyses were run using the IMPLAN county model corresponding to the county where the state park is located. Visitor spending by category was modeled as industry changes. The statewide economic contribution analysis used the state model and similarly modeled visitor spending by category as industry changes. Visitor spending by category was assigned to IMPLAN industries as detailed in Table 4.

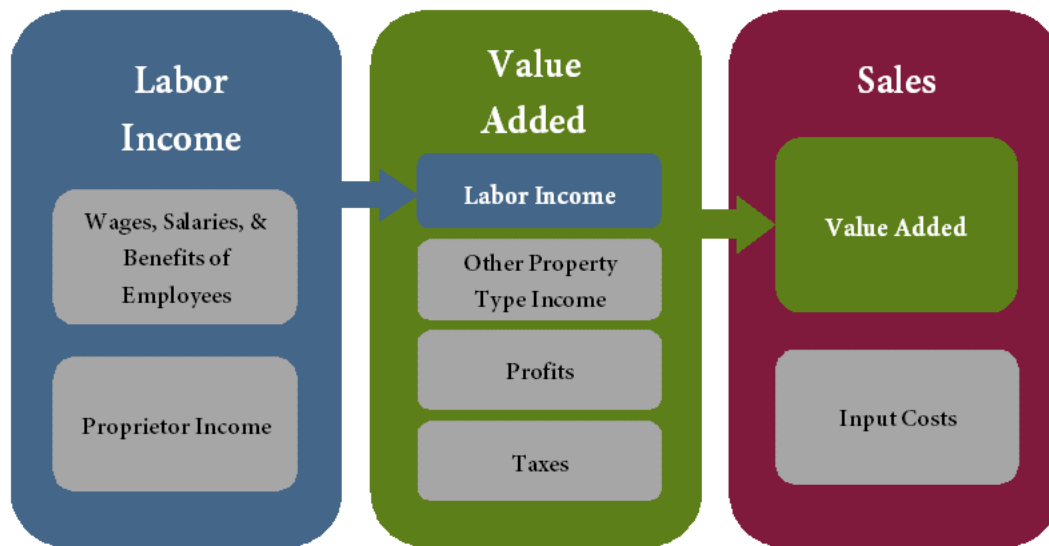
Table 4. Spending Category Mapping to IMPLAN Industries

Spending Category	IMPLAN Industry
Admission, recreation, and entertainment fees	504 Other amusement and recreation industries
Camping fees and charges	508 Other accommodations
Lodging	507 Hotels and motels, including casino hotels
Groceries	406 Retail - Food and beverage stores*
Food & beverage	509 Full-service restaurants
Retail shopping	411 Retail - General merchandise stores*
Auto expenses	408 Gasoline stores
Any other expenses	412 Retail - Miscellaneous store retailers*

* For expenditures at retail (groceries, retail shopping, and other expenses), visitor spending was captured in IMPLAN as gross retail sales, and retail margins were calculated within the model.

Both economic impacts and economic contributions are presented in different measures. **Sales**, also referred to as output, measures the total value of transactions within the economy. In that sense, it may double count some economic activity occurring within a region because the final sales value of a good or service includes all inputs to production. For example, if a restaurant sold food that was made using produce from a local farm, the cost of the produce from the local farm would get counted twice: once as the sale of produce, and once as part of the meal sold to the restaurant customer. **Value added** is a measure that avoids double-counting inputs to production. It measures the net value of a good and service above and beyond the value of inputs. Value added includes labor income, profits and other rents, and taxes. **Labor income**, a component of value added, measures wages, salaries, and benefits to employees, as well as business owner income. The relationship between these three measures is presented in Figure 7. Because these measures are components of one another, they are not additive and convention is to report them separately. Finally, beyond these measures, economic impacts and contributions can also be measured in terms of the number of jobs that are supported through direct, indirect, and induced multiplier effects. Tax revenues, a component of value added, are often presented separately because they are of interest to local governments as they consider policies that may impact businesses and industries, thereby influencing the local tax base.

Figure 7. Relationship between Sales, Value Added, and Labor Income



Park Spending Patterns

Using the methods described above, the following are the average park spending patterns for non-local visitors. We present average per-party expenditures, average per-visitor expenditures, and the estimated share of total visitors that are non-local visitors and report positive (non-zero) expenditures in each category. Details of this calculation are presented in Appendix C. The average per visitor expenditure (column 4) and percent of total visitors that are non-local and have spending (column 3) are combined with total visitation numbers to estimate the total value of non-local visitor spending for each park. These spending patterns are for non-local visitors only, which is defined as individuals that reside outside of the county where the park is located, as well as outside of any zip codes that are within 50 miles of the park. Spending patterns for all visitors (local and non-local) used for the statewide economic contribution analysis are presented in Appendix B.

Alamo Lake State Park

Alamo Lake State Park in La Paz County is located along the Bill Williams River, created by the Alamo Dam project constructed by the U.S. Army Corps of Engineers (Arizona State Parks, 2021). In addition to water-based recreation, the park offers fishing, and overnight camping. In FY2020, the park was open year-round and received 66,744 total visits. Table 5 presents average per-party expenditures for non-local visitors to the park, and the corresponding average per-visitor spending for non-local visitors. This is simply calculated by dividing the average per-party expenditures by the average party size for non-local visitors to the park (4.1 people per party). Additionally, the share of total visitors to the park that are non-local and reported expenditures in each category is presented. This share is applied to the total annual visits to the park to estimate combined non-local spending in the park in each expenditure category. Among non-local visitors to Alamo Lake State Park, the most common expenditure was on camping fees and charges, followed by auto expenses, including gas. The highest average

expenditure was on lodging, though only a small share of visitors reported spending on lodging in or within 50 miles of the park. More commonly, non-local visitors reported spending on camping fees and charges.

Table 5. Alamo Lake State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$66.31	10.3%	\$16.16
Camping fees & charges	\$99.35	59.8%	\$24.21
Lodging	\$173.25	5.7%	\$42.23
Groceries	\$74.54	29.3%	\$18.17
Food & beverage	\$49.79	16.2%	\$12.13
Retail shopping	\$40.34	10.8%	\$9.83
Auto expenses	\$85.89	35.6%	\$20.93
Any other expenses	\$149.04	19.9%	\$36.33

Buckskin Mountain State Park

Buckskin Mountain State Park is a recreational state park situated on the Colorado River near Parker, Arizona in La Paz County. Opened in 1967, the park provides recreational infrastructure and river access (Arizona State Parks, 2021). In FY2020, the park received 79,896 visits and was open year-round. The most common expenditures for non-local visitors to Buckskin Mountain State Park were camping fees and charges, groceries, and auto expenses, including gas (Table 6). The highest average expenditure was on admission, recreation, and entertainment fees. The average party size for non-local visitors to the park was 4.1 people.

Table 6. Buckskin Mountain State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$260.71	21.1%	\$63.10
Camping fees & charges	\$252.73	63.4%	\$61.16
Lodging	\$259.53	3.9%	\$62.81
Groceries	\$185.50	58.2%	\$44.89
Food & beverage	\$106.35	42.5%	\$25.74
Retail shopping	\$83.83	26.3%	\$20.29
Auto expenses	\$137.75	58.0%	\$33.34
Any other expenses	\$222.65	14.7%	\$53.88

Catalina State Park

Catalina State Park was created through legislative action in the 1970s to preserve an area north of Tucson in Pima County (Arizona State Parks, 2021). The park opened in 1983 and today offers recreational opportunities such as camping and hiking. There were a total of 257,962 visits to the park in FY2020 and the park operated year-round. Camping fees and charges, groceries, and auto expenses (including gas) were the most common expenses among non-local visitors to the park (Table 7). The highest average per-visitor expenditure was on ‘any other expenses’, though only a small share of visitors reported expenditures in this category. The average party size for non-local visitors was 4.6 people.



Table 7. Catalina State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$129.05	11.1%	\$28.05
Camping fees & charges	\$142.15	31.0%	\$30.90
Lodging	\$150.00	2.5%	\$32.60
Groceries	\$167.13	27.1%	\$36.32
Food & beverage	\$115.80	23.3%	\$25.17
Retail shopping	\$99.08	13.3%	\$21.53
Auto expenses	\$88.75	26.9%	\$19.29
Any other expenses	\$300.66	8.0%	\$65.34

Cattail Cove State Park

Cattail Cove State Park is one of three state parks located along the shores of Lake Havasu. The park is located in Mohave County and offers lake access for recreation (Arizona State Parks, 2021). The park operated year-round in FY2020, receiving a total of 118,556 visitors. Auto expenses (including gas), groceries, and camping fees and charges were the most common expenses for non-local visitors to the park (Table 8). The highest average expenditure was on lodging, but only a small share of visitors reported spending on lodging in or within 50 miles of the park. A higher share of non-local visitors reported spending on camping fees and charges. The average party size for non-local visitors to the park was 2.9 people.

Table 8. Cattail Cove State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$68.66	13.7%	\$23.61
Camping fees & charges	\$218.39	30.6%	\$75.10
Lodging	\$489.43	3.8%	\$168.30
Groceries	\$192.65	31.1%	\$66.25
Food & beverage	\$128.14	24.0%	\$44.06
Retail shopping	\$116.86	13.9%	\$40.19
Auto expenses	\$174.84	32.8%	\$60.12
Any other expenses	\$194.85	9.3%	\$67.00

Dead Horse Ranch State Park

Dead Horse Ranch State Park was first opened in 1977 and is located near the town of Cottonwood on the Verde River in Yavapai County (Arizona State Parks, 2021). The park offers camping, cabins, hiking, and water-based recreation. The park was open year-round and received 205,793 visitors in FY2020. Visitation to Verde River Greenway State Natural Area is included as part of Dead Horse Ranch State Park, therefore visitation and spending for Dead Horse Ranch are inclusive of visitation and spending by visitors to Verde River Greenway. Camping fees and charges, auto expenses (including gas), food and beverage, and groceries were the most common expenses by non-local visitors (Table 9). The highest average expenditure was on lodging, but the most common expenditure was on camping fees and charges. The average party size for non-local visitors to the park was 2.8 people.

Table 9. Dead Horse Ranch State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$52.05	21.0%	\$18.46
Camping fees & charges	\$130.89	47.8%	\$46.42
Lodging	\$589.35	5.2%	\$209.01
Groceries	\$99.13	40.9%	\$35.16
Food & beverage	\$125.84	40.9%	\$44.63
Retail shopping	\$101.59	21.3%	\$36.03
Auto expenses	\$84.00	43.3%	\$29.79
Any other expenses	\$162.57	11.0%	\$57.65

Fool Hollow Lake Recreation Area

Fool Hollow Lake Recreation Area was opened in 1994 as a partnership between Arizona State Parks, the City of Show Low, the U.S. Forest Service, and Arizona Game and Fish (Arizona State Parks, 2021). The park operated year-round in FY2020 and received a total of 143,103 visits. The park is located in Navajo County and offers lake access for recreation and camping. The most common expenditures among park visitors are camping fees and charges, auto expenses (including gas), and groceries (Table 10). The highest average expenditure was on lodging, though only a small share of total visitors spent on lodging in and within 50 miles of the park. More commonly, non-local visitors spend on camping fees and charges. The average party size for non-local visitors to the park was 3.3 people.



Table 10. Fool Hollow Lake Recreation Area Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$61.95	19.8%	\$18.79
Camping fees & charges	\$150.02	52.8%	\$45.51
Lodging	\$634.93	6.9%	\$192.61
Groceries	\$93.51	51.3%	\$28.37
Food & beverage	\$89.70	35.8%	\$27.21
Retail shopping	\$81.65	21.6%	\$24.77
Auto expenses	\$88.68	52.0%	\$26.90
Any other expenses	\$169.93	11.7%	\$51.55

Fort Verde State Historic Park

Fort Verde State Historic Park, located in Yavapai County, was opened and dedicated in 1970 (Arizona State Parks, 2021). The fort was established in the 1870s and served as a military base for the U.S. Army. In FY2020, the park operated seven days per week, however, in response to the COVID-19 pandemic, the park was closed between March 2020 and June 2020. The park received 7,880 visitors in FY2020. The most common expenditures among non-local park visitors were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 11). The highest average expenditure was on lodging, and roughly a quarter of visitors were both non-local and reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.6 people.

Table 11. Fort Verde State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$39.13	65.1%	\$14.78
Camping fees & charges	\$131.51	15.6%	\$49.68
Lodging	\$446.74	26.4%	\$168.77
Groceries	\$94.41	27.9%	\$35.67
Food & beverage	\$110.79	50.5%	\$41.85
Retail shopping	\$83.76	24.6%	\$31.64
Auto expenses	\$74.28	42.1%	\$28.06
Any other expenses	\$220.44	4.1%	\$83.28

Granite Mountain Hotshots Memorial State Park

Granite Mountain Hotshots Memorial State Park was established to honor the lives of 19 wildland firefighters who perished during the Yarnell Hill Fire in 2013 (Arizona State Parks, 2021). The park includes a hiking trail and memorial. The park opened to the public in 2016 and is located in Yavapai County. In FY2020 the park was open year-round and received 25,025 visits. The most commonly reported expenditures by non-local visitors to this park were food and beverage and auto expenses, including gas (Table 12). The highest average expenditure was on lodging, though a relatively small share of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.8 people.

Table 12. Granite Mountain Hotshots Memorial State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$25.73	7.0%	\$9.33
Camping fees & charges	\$107.05	5.1%	\$38.84
Lodging	\$191.38	12.7%	\$69.43
Groceries	\$92.28	13.5%	\$33.48
Food & beverage	\$73.92	38.6%	\$26.81
Retail shopping	\$75.30	7.3%	\$27.32
Auto expenses	\$54.22	28.4%	\$19.67
Any other expenses	\$44.40	1.4%	\$16.11

Homolovi State Park

Homolovi State Park opened in 1993 and was established to protect and conserve the Homolovi archaeological sites which were inhabited between AD 620 and 1400 (Arizona State Parks, 2021). The site, located in Navajo County, is of great cultural significance to the Hopi people. The park was open year-round in FY2020 and received 22,168 visits. The most commonly reported expenses by visitors to the park are camping fees and charges and auto expenses, including gas (Table 13). Only a small share of visitors reported spending on lodging in and within 50 miles of the park. The average party size for non-local visitors was 2.2 people.

Table 13. Homolovi State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$40.85	12.3%	\$18.26
Camping fees & charges	\$67.99	65.2%	\$30.40
Lodging	\$215.86	1.8%	\$96.50
Groceries	\$81.30	33.0%	\$36.35
Food & beverage	\$54.98	31.4%	\$24.58
Retail shopping	\$68.41	18.1%	\$30.58
Auto expenses	\$74.81	56.8%	\$33.44
Any other expenses	\$136.07	19.9%	\$60.83

Jerome State Historic Park

Jerome State Historic Park opened in 1965 and celebrates the state’s mining history (Arizona State Parks, 2021). The park consists of a museum located in the historic Douglas family mansion. The park is located in Yavapai County and was open 7 days per week in FY2020. However, in response to the COVID-19 pandemic, the park was closed between March 2020 and June 2020 and reopened with limited capacity. The park received a total of 34,492 visits in FY2020. The most commonly reported expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 14). The highest average expenditure was on lodging and nearly one-third (32.8%) of total visitors were of non-local origin and reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors was 2.9 people.



Table 14. Jerome State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$38.84	72.5%	\$13.41
Camping fees & charges	\$157.61	5.3%	\$54.40
Lodging	\$639.31	32.8%	\$220.67
Groceries	\$129.21	30.2%	\$44.60
Food & beverage	\$166.82	63.3%	\$57.58
Retail shopping	\$157.75	39.6%	\$54.45
Auto expenses	\$90.06	43.2%	\$31.09
Any other expenses	\$272.00	4.1%	\$93.89

Kartchner Caverns State Park

Kartchner Caverns State Park, located in Cochise County, was opened and dedicated in 1999 for conservation of a network of living limestone caves discovered in the 1970s (Arizona State Parks, 2021). The park offers cave tours, camping, and cabins. In response to the COVID-19 pandemic, cave tours were cancelled between March 2020 and June 2020. Tours were reopened in July 2020 with limited capacity. In FY2020, the park received a total of 124,810 visits. The most common expenditures reported by park visitors were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 15). The highest per-person expenditure was on lodging, and roughly a fifth of visitors reported being of non-local origin and spending on lodging in or within 50 miles of the park. The average party size for non-local visitors was 3.1 people.

Table 15. Kartchner Caverns State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$79.75	59.0%	\$25.42
Camping fees & charges	\$152.16	24.8%	\$48.50
Lodging	\$223.11	17.4%	\$71.12
Groceries	\$94.88	25.1%	\$30.24
Food & beverage	\$96.55	45.0%	\$30.78
Retail shopping	\$88.43	26.8%	\$28.19
Auto expenses	\$102.24	38.8%	\$32.59
Any other expenses	\$126.93	6.9%	\$40.46

Lake Havasu State Park

Lake Havasu State Park, located in Mohave County, was acquired in 1965 and was the second water-based recreation park within the Arizona State Parks system (Arizona State Parks, 2021). The park is one of three located on the shores of Lake Havasu and offers recreation facilities and camping. The park was open year-round in FY2020 and received a total of 533,757 visits, making it the most-visited park in the Arizona State Park system. The most commonly reported expenditures by non-local visitors were groceries, food and beverage, auto expenses (including gas), and camping fees and charges (Table 16). The highest average expenditure was on lodging, though non-local visitors spent on camping fees and charges more frequently than on lodging in the local area. The average party size for non-local visitors was 4.4 people.



Table 16. Lake Havasu State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$99.67	27.6%	\$22.90
Camping fees & charges	\$211.92	45.4%	\$48.70
Lodging	\$792.21	12.8%	\$182.04
Groceries	\$194.10	53.3%	\$44.60
Food & beverage	\$150.69	53.0%	\$34.62
Retail shopping	\$143.46	31.1%	\$32.96
Auto expenses	\$194.01	51.6%	\$44.58
Any other expenses	\$330.52	9.3%	\$75.95

Lost Dutchman State Park

Lost Dutchman State Park is located in Pinal County outside the Phoenix metropolitan area and abuts the Tonto National Forest (Arizona State Parks, 2021). The park offers outdoor recreation facilities, camping, and cabins. In FY2020, the park was open year-round and received a total of 201,685 visits. The most commonly reported expenditures by park visitors were food and beverage, auto expenses (including gas), groceries, and camping fees and charges (Table 17). The highest average expenditure was on lodging, though only a small share of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.7 people.

Table 17. Lost Dutchman State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$54.87	22.6%	\$20.31
Camping fees & charges	\$220.38	34.0%	\$81.57
Lodging	\$503.26	6.2%	\$186.27
Groceries	\$151.59	35.8%	\$56.11
Food & beverage	\$120.64	36.4%	\$44.65
Retail shopping	\$131.58	19.7%	\$48.70
Auto expenses	\$116.63	35.8%	\$43.17
Any other expenses	\$195.38	6.5%	\$72.31

Lyman Lake State Park

Lyman Lake State Park, located on the Little Colorado River in Apache County, opened in 1961 (Arizona State Parks, 2021). The park offers water-based recreation and camping. The park was open year-round in FY2020 and received a total of 62,491 visits. The most commonly reported expenditures by visitors to the park were camping fees and charges, auto expenses (including gas), and groceries (Table 18). The highest average expenditure was on lodging, though just only a small share of visitors reported spending on lodging in or within 50 miles of the park. Nearly 60% of non-local visitors reported spending on camping. The average party size for non-local visitors to the park was 3.2 people.

Table 18. Lyman Lake State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$74.29	10.8%	\$23.46
Camping fees & charges	\$111.63	58.7%	\$35.25
Lodging	\$199.21	6.3%	\$62.91
Groceries	\$79.81	44.2%	\$25.20
Food & beverage	\$54.88	21.4%	\$17.33
Retail shopping	\$46.44	20.4%	\$14.67
Auto expenses	\$72.57	46.3%	\$22.92
Any other expenses	\$147.76	12.2%	\$46.66

McFarland State Historic Park

McFarland State Historic Park was established in 1979 to preserve the original Pinal County Courthouse built in 1878 (Arizona State Parks, 2021). The park serves as a museum offering exhibits and events to visitors. In 2020, the Town of Florence Chamber of Commerce operated the park, which was open six days per week. In response to the COVID-19 pandemic, the park was closed between March 2020 and February 2021. The park received a total of 4,683 visits in FY2020. The most commonly reported expenditures by non-local visitors to the park were food and beverage, auto expenses (including gas), and retail shopping (Table 19). The highest average expenditure was on lodging, though only a small share of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 3.0 people.

Table 19. McFarland State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$97.14	6.2%	\$32.86
Camping fees & charges	\$145.29	6.2%	\$49.14
Lodging	\$196.62	11.5%	\$66.50
Groceries	\$62.07	12.4%	\$20.99
Food & beverage	\$62.24	30.1%	\$21.05
Retail shopping	\$106.79	16.8%	\$36.12
Auto expenses	\$52.45	25.7%	\$17.74
Any other expenses	\$60.00	4.4%	\$20.29

Oracle State Park

Oracle State Park opened in 2001 and was established to conserve the natural area, protect wildlife habitat, and preserve the Kannally Ranch house and other historic structures on the park (Arizona State Parks, 2021). Located in Pinal County, the park offers outdoor recreation opportunities such as hiking and mountain biking, and the park offers access to the Arizona Trail which passes through the park. The park was open year-round in FY2020 and received a total of 13,629 visits. The most commonly reported expenditures by non-local park visitors were auto expenses (including gas), food and beverage, and groceries (Table 20). The highest average expenditure was on lodging, however, generally few visitors reported spending in each category. The average party size for non-local visitors to the park was 3.2 people.



Table 20. Oracle State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$41.73	7.9%	\$12.95
Camping fees & charges	\$199.00	3.6%	\$61.76
Lodging	\$666.67	2.9%	\$206.90
Groceries	\$115.42	8.6%	\$35.82
Food & beverage	\$122.27	10.7%	\$37.94
Retail shopping	\$58.00	5.0%	\$18.00
Auto expenses	\$142.63	13.6%	\$44.26
Any other expenses	N/A	0.0%	N/A

Patagonia Lake State Park

Patagonia Lake State Park, in Santa Cruz County, was built in the 1960s and became a state park in 1975 (Arizona State Parks, 2021). The park offers water-based recreation, hiking, and camping. Visitation to Sonoita Creek State Natural Area is included in visits to Patagonia Lake. The park was open year-round in FY2020 and received a total of 235,224 visitors, including visits to Sonoita Creek State Natural Area. The most commonly reported expenditures by non-local park visitors were camping fees and charges, groceries, and auto expenses, including gas (Table 21). The highest average expenditure was on lodging, though a much higher share of visitors reported spending on camping in or within 50 miles of the park. The average party size for non-local visitors to the park was 4.1 people.

Table 21. Patagonia Lake State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$50.85	22.9%	\$12.44
Camping fees & charges	\$115.55	43.6%	\$28.28
Lodging	\$151.45	2.8%	\$37.06
Groceries	\$87.31	41.8%	\$21.37
Food & beverage	\$59.85	25.8%	\$14.65
Retail shopping	\$79.11	19.1%	\$19.36
Auto expenses	\$69.49	35.1%	\$17.00
Any other expenses	\$75.05	5.7%	\$18.36

Picacho Peak State Park

Picacho Peak State Park, located in Pinal County, opened in 1968 and was established to conserve an area of geological, botanical, and historical significance. In addition to its iconic trail and via-ferrata route to the top of the peak, the park offers camping and wildlife viewing to visitors. The park was open year-round in FY2020 and received a total of 96,876 visitors. The most common expenditures for visitors to the park were auto expenses (including gas), admission, recreation, and entertainment fees, and camping fees and charges (Table 22). The highest average expenditure was on lodging, though only a small share of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 3.5 people.



Table 22. Picacho Peak State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$37.77	35.7%	\$10.87
Camping fees & charges	\$122.40	34.2%	\$35.23
Lodging	\$693.07	4.2%	\$199.48
Groceries	\$94.97	30.9%	\$27.33
Food & beverage	\$79.44	27.9%	\$22.87
Retail shopping	\$60.44	17.1%	\$17.40
Auto expenses	\$103.25	36.0%	\$29.72
Any other expenses	\$128.62	6.3%	\$37.02

Red Rock State Park

Opened in 1991 in Yavapai County, Red Rock State Park was established to maintain public access to Oak Creek's riparian corridor. The park offers wildlife viewing and hiking to visitors. The park was open year-round in FY2020 and received a total of 70,190 visitors. The most common expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 23). The highest average expenditure was on lodging, and a significant proportion of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.8 people.

Table 23. Red Rock State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$42.28	75.0%	\$15.27
Camping fees & charges	\$153.18	5.2%	\$55.31
Lodging	\$721.28	40.9%	\$260.44
Groceries	\$102.51	38.1%	\$37.01
Food & beverage	\$145.00	61.3%	\$52.36
Retail shopping	\$117.04	32.3%	\$42.26
Auto expenses	\$90.46	46.3%	\$32.66
Any other expenses	\$224.50	6.7%	\$81.06

Riordan Mansion State Historic Park

Riordan Mansion State Historic Park, located in Coconino County, was opened to the public in 1983. The mansion is an arts and crafts-style home consisting of two wings connected by a rendezvous room and was built in 1904 from local materials by Charles Whittlesey, the architect of the El Tovar Hotel at the Grand Canyon (Arizona State Parks, 2021). The park offers tours of the mansion and grounds which includes artifacts, architecture, and Flagstaff history. The park was operated through an agreement with the Arizona Historical Society in FY2020. In response to the COVID-19 pandemic, the park closed in April 2020 and remained closed through March 2021. The park received a total of 14,334 visits in FY 2020. The most common expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, lodging, and auto expenses, including gas (Table 24). The highest average expenditure was on lodging, and nearly half of visitors were non-local and reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 4.3 people.

Table 24. Riordan Mansion State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$49.26	74.2%	\$11.39
Camping fees & charges	\$283.20	5.9%	\$65.46
Lodging	\$639.22	46.1%	\$147.75
Groceries	\$101.51	28.5%	\$23.46
Food & beverage	\$151.46	65.6%	\$35.01
Retail shopping	\$87.68	36.3%	\$20.27
Auto expenses	\$66.89	43.4%	\$15.46
Any other expenses	\$313.67	5.9%	\$72.50

River Island State Park

River Island State Park is a unit of Buckskin Mountain State Park located in La Paz County on the shores of the Colorado River. The park offers river access for water-based recreation, camping, and hiking. The park was open year-round in FY2020 and received a total of 33,560 visits. The most common expenditures by non-local visitors to the park were camping fees and charges, auto expenses (including gas), and groceries (Table 25). The highest average expenditure was on lodging, though only a very small share of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.8 people.



Table 25. River Island State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$97.51	13.2%	\$34.63
Camping fees & charges	\$163.99	67.1%	\$58.24
Lodging	\$453.43	2.2%	\$161.04
Groceries	\$112.55	55.7%	\$39.97
Food & beverage	\$89.78	42.5%	\$31.88
Retail shopping	\$74.35	23.1%	\$26.40
Auto expenses	\$102.72	57.2%	\$36.48
Any other expenses	\$273.46	18.2%	\$97.12

Roper Lake State Park

Roper Lake State Park, of which Dankworth Pond is a sub-unit, offers water-based recreation and camping to visitors near the Safford area in Graham County. The park was open year-round in FY2020 and received a total of 83,756 visits. The most common expenditures by non-local visitors to the park were camping fees and charges, groceries, and auto expenses, including gas (Table 26). The highest average expenditure was on lodging, though a much higher share of visitors report spending on camping fees or charges in or within 50 miles of the park. The average party size for non-local visitors to the park was 4.0 people.

Table 26. Roper Lake State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$59.78	16.5%	\$15.13
Camping fees & charges	\$95.41	57.5%	\$24.15
Lodging	\$132.95	5.4%	\$33.65
Groceries	\$82.16	50.4%	\$20.79
Food & beverage	\$67.26	31.7%	\$17.02
Retail shopping	\$83.49	17.2%	\$21.13
Auto expenses	\$69.98	47.4%	\$17.71
Any other expenses	\$100.10	15.2%	\$25.33

Visitors to nearby Dankworth Pond State Park, located in Graham County, are tracked at Roper Lake State Park. A visitor survey was administered at Dankworth Pond, however, due to a low number of survey responses collected, they were combined with survey responses from Roper Lake State Park. Visitation and spending for Roper Lake State Park is inclusive of visitation and spending associated with Dankworth Pond State Park.

Slide Rock State Park

Slide Rock State Park is a widely popular recreation site located in Oak Creek Canyon in Coconino County and is known for its natural beauty and water-based recreation opportunities. The park offers swimming, fishing, hiking, and other nature-based activities. The park was open year-round in FY2020, however, capacity was limited during the summer of 2020, due to COVID-19. The park received a total of 345,739 visits in FY2020, the second-most-visited site in the Arizona State Parks system. The most common expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 27). The highest average expenditure was on lodging, with 39.3% of visitors reporting being of non-local origin and spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 5.1 people.



Table 27. Slide Rock State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$76.27	72.2%	\$14.84
Camping fees & charges	\$114.62	7.7%	\$22.31
Lodging	\$519.01	39.3%	\$101.01
Groceries	\$110.54	36.1%	\$21.51
Food & beverage	\$179.12	56.8%	\$34.86
Retail shopping	\$134.77	28.7%	\$26.23
Auto expenses	\$98.43	46.4%	\$19.16
Any other expenses	\$554.63	7.1%	\$107.95

Tombstone Courthouse State Historic Park

Tombstone Courthouse State Historic Park preserves the historic structure built in 1882 that at the time served as the Cochise County Courthouse when Tombstone was the county seat. Opened in 1959, the state park was the state’s first operating state park. The park offers a museum with exhibits for visitors. In response to the COVID-19 pandemic, the park was closed between March 2020 and June 2020 and reopened with limited capacity. The park received a total of 36,200 visits in FY2020. The most common expenditures by non-local visitors to the park include admission, recreation, and entertainment fees, food and beverage, retail shopping, and auto expenses, including gas (Table 28). The highest average expenditure was on lodging, with roughly one-quarter of visitors reporting spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.7 people.

Table 28. Tombstone Courthouse State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$166.45	72.0%	\$61.19
Camping fees & charges	\$143.10	10.2%	\$52.60
Lodging	\$306.83	26.3%	\$112.79
Groceries	\$83.65	16.4%	\$30.75
Food & beverage	\$119.54	57.3%	\$43.94
Retail shopping	\$84.00	34.5%	\$30.88
Auto expenses	\$71.86	34.5%	\$26.42
Any other expenses	\$285.19	8.9%	\$104.84

Tonto Natural Bridge State Park

Tonto Natural Bridge State Park, located in Gila County, opened in 1991 and includes a natural bridge and historic lodge. The park was open year-round during FY2020, however, capacity was limited during the summer of 2020 due to COVID-19, and some additional trails were closed due to construction on the park, including a closure of the natural bridge. The park received a total of 87,690 visits in FY2020. The most common expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 29). The highest average expenditure was on lodging, with roughly one-quarter of visitors reporting spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 3.3 people.



Table 29. Tonto Natural Bridge State Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$22.75	75.2%	\$6.92
Camping fees & charges	\$108.58	3.4%	\$33.03
Lodging	\$367.04	25.4%	\$111.66
Groceries	\$74.15	27.0%	\$22.56
Food & beverage	\$84.76	53.8%	\$25.78
Retail shopping	\$63.63	21.4%	\$19.36
Auto expenses	\$46.94	42.0%	\$14.28
Any other expenses	\$124.17	3.4%	\$37.77

Tubac Presidio State Historic Park

Tubac Presidio State Historic Park was established to preserve the ruins of the San Ignacio de Tubac presidio, the oldest Spanish presidio in Arizona, constructed in 1752. The park is located in Santa Cruz County and offers museum exhibits, gardens, trails, and day use areas. In 2020, the park was operated by the Tubac Historical Society and closed between March 2020 and June 2020 in response to the COVID-19 pandemic, reopening with limited capacity. The park received a total of 5,883 visits in FY2020. The most common expenditures by non-local visitors to the park were food and beverage, admission, recreation, and entertainment fees, and auto expenses, including gas (Table 30). The highest average expenditure was on lodging, though only a small portion of visitors reported spending on lodging in or within 50 miles of the park. The average party size for non-local visitors to the park was 2.4 people.

Table 30. Tubac Presidio State Historic Park Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$28.32	41.5%	\$11.78
Camping fees & charges	\$193.70	5.3%	\$80.54
Lodging	\$941.33	14.4%	\$391.41
Groceries	\$131.68	14.9%	\$54.75
Food & beverage	\$134.32	42.0%	\$55.85
Retail shopping	\$127.98	24.5%	\$53.21
Auto expenses	\$50.94	26.1%	\$21.18
Any other expenses	\$309.38	4.3%	\$128.64

Yuma Territorial Prison & Colorado River State Historic Parks

Yuma Territorial Prison State Historic Park is dedicated to preservation of the Yuma Territorial prison, constructed in 1876. The park is located in Yuma County and includes a museum in addition to the prison facility. In 2020 the park operated 6 days per week and was closed between March 2020 and June 2020 in response to the COVID-19 pandemic, reopening with limited capacity. The park received a total of 46,796 visits in FY2020. The most common expenditures by non-local visitors to the park were admission, recreation, and entertainment fees, food and beverage, and auto expenses, including gas (Table 31). The highest average expenditure was on ‘any other expenses’, though only a small share of visitors reported expenditure falling in this category. The average party size for non-local visitors to the park was 2.7 people.

Table 31. Yuma Territorial Prison & Colorado River State Historic Parks Non-Local Visitor Spending Pattern

Category	Average per Party Expenditure	% of Total Visitors That Are Non-Local & Have Spending	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	\$24.17	72.8%	\$8.95
Camping fees & charges	\$178.72	10.5%	\$66.20
Lodging	\$382.94	27.9%	\$141.85
Groceries	\$190.53	21.4%	\$70.57
Food & beverage	\$93.64	44.9%	\$34.69
Retail shopping	\$100.66	26.4%	\$37.29
Auto expenses	\$71.86	38.0%	\$26.62
Any other expenses	\$394.33	3.3%	\$146.07

Colorado River State Historic Park, located nearby in Yuma County, is located on the grounds of the U.S. Army Quartermaster Depot, built in 1864. The location served as a supply base for military operations in western states, transporting goods via the Colorado River. Visitor survey data were collected for Colorado River State Historic Park, but were combined with Yuma Territorial Prison because of a low number of responses. The expenditure pattern developed for Yuma Territorial Prison State Historic Park includes responses from Colorado River State Historic Park and was applied to both parks. The park operated 6 days per week and received a total of 10,339 visits in fiscal year 2020. In response to the COVID-19 pandemic, the park was closed between March 2020 and June 2020 and reopened with limited capacity.

County Economic Impact Analysis Results

This report presents estimates of the county-level economic impacts of Arizona’s state parks. Specifically, the analysis measures the net new visitor spending generated within a county economy by non-local visitors to state parks within that county, as well as the regional multiplier effects of their spending. Non-local visitors are defined as visitors residing outside of the county where the state park is located, and not residing in a zip code that falls within a 50-mile radius of the park. Excluding these visitors helps to control for the fact that had local visitors not spent their income on activities related to a local state park visit, they most likely would have spent it on something else within the local economy.

For each county where Arizona State Parks are located (13 of 15 Arizona counties), we start by presenting estimated non-local visitor spending by expenditure category for each state park and for all state parks within the county, combined. We then

present estimated economic impacts in terms of sales (economic output), value added (gross domestic product), labor income (wages and salaries of employees, and business owner income), jobs (full- and part-time), and tax revenues (state and local government combined, and federal government). Within each of these impact types, tax revenues excluded, impacts are divided into direct, indirect,



induced, and total impacts. Direct impacts measure the net-new visitor spending in the county associated with state park visitors. Indirect impacts measure the ripple effect of business-to-business transactions that occur when businesses serving state park visitors require additional inputs to provide goods and services to those visitors. Finally, induced impacts measure the economic activity created when individuals employed in businesses serving state park visitors spend their income locally. Combined, these three effects constitute the total economic impact due to state park visitors.

Apache County

Table 32 presents estimated non-local visitor spending and county economic impacts of state parks in Apache County.

Table 32. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Apache County

	Lyman Lake SP	Total
Non-Local Visitor Spending		
Admission, recreation, & entertainment fees	\$159,000	\$159,000
Camping fees & charges	\$1,293,700	\$1,293,700
Lodging	\$249,600	\$249,600
Groceries	\$695,900	\$695,900
Food & beverage	\$232,100	\$232,100
Retail shopping	\$186,700	\$186,700
Auto expenses	\$663,000	\$663,000
Any other expenses	\$354,900	\$354,900
County Economic Impacts		
<i>Sales (Output)</i>		
Direct Impact	\$2,571,900	\$2,571,900
Indirect Impact	\$417,400	\$417,400
Induced Impact	\$299,300	\$299,300
TOTAL	\$3,288,700	\$3,288,700
<i>Value Added (Gross Regional Product)</i>		
Direct Impact	\$1,574,600	\$1,574,600
Indirect Impact	\$96,100	\$96,100
Induced Impact	\$167,700	\$167,700
TOTAL	\$1,950,800	\$1,950,800
<i>Labor Income</i>		
Direct Impact	\$1,070,600	\$1,070,600
Indirect Impact	\$96,100	\$96,100
Induced Impact	\$72,300	\$72,300
TOTAL	\$1,239,000	\$1,239,000
<i>Jobs</i>		
Direct Impact	39	39
Indirect Impact	3	3
Induced Impact	2	2
TOTAL	44	44
<i>Tax Impacts</i>		
Federal Government	\$315,700	\$315,700
State & Local Government	\$201,400	\$201,400

*Totals may not sum due to rounding

Cochise County

Table 33 presents estimated non-local visitor spending and county economic impacts of state parks in Cochise County.

Table 33. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Cochise County

	Kartchner Caverns SP	Tombstone Courthouse SHP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$1,870,900	\$1,595,200	\$3,466,000
Camping fees & charges	\$1,502,200	\$195,000	\$1,697,200
Lodging	\$1,548,500	\$1,073,000	\$2,621,500
Groceries	\$946,000	\$182,400	\$1,128,400
Food & beverage	\$1,727,100	\$912,100	\$2,639,100
Retail shopping	\$942,200	\$385,300	\$1,327,500
Auto expenses	\$1,579,100	\$329,600	\$1,908,700
Any other expenses	\$347,400	\$336,800	\$684,200
County Economic Impacts			
<i>Sales (Output)</i>			
Direct Impact	\$7,809,800	\$4,217,300	\$12,027,100
Indirect Impact	\$1,501,400	\$865,700	\$2,367,100
Induced Impact	\$1,840,900	\$980,400	\$2,821,300
TOTAL	\$11,152,100	\$6,063,400	\$17,215,500
<i>Value Added (Gross Regional Product)</i>			
Direct Impact	\$4,929,600	\$2,569,100	\$7,498,800
Indirect Impact	\$679,600	\$387,300	\$1,066,900
Induced Impact	\$1,049,400	\$558,800	\$1,608,200
TOTAL	\$6,658,700	\$3,515,300	\$10,173,900
<i>Labor Income</i>			
Direct Impact	\$3,415,800	\$1,803,700	\$5,219,500
Indirect Impact	\$441,500	\$249,400	\$690,900
Induced Impact	\$530,800	\$282,700	\$813,400
TOTAL	\$4,388,000	\$2,335,800	\$6,723,800
<i>Jobs</i>			
Direct Impact	101	58	159
Indirect Impact	12	7	18
Induced Impact	14	7	21
TOTAL	126	72	198
<i>Tax Impacts</i>			
Federal Government	\$906,400	\$482,400	\$1,388,800
State & Local Government	\$886,000	\$493,400	\$1,379,400

*Totals may not sum due to rounding

Coconino County

Table 34 presents estimated non-local visitor spending and county economic impacts of state parks in Coconino County.

Table 34. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Coconino County

	Riordan Mansion SHP	Slide Rock SP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$121,100	\$3,705,000	\$3,826,100
Camping fees & charges	\$55,000	\$593,300	\$648,300
Lodging	\$976,200	\$13,742,600	\$14,718,800
Groceries	\$95,900	\$2,684,900	\$2,780,800
Food & beverage	\$329,300	\$6,846,800	\$7,176,100
Retail shopping	\$105,500	\$2,602,700	\$2,708,200
Auto expenses	\$96,100	\$3,076,700	\$3,172,800
Any other expenses	\$60,900	\$2,650,100	\$2,710,900
County Economic Impacts			
<i>Sales (Output)</i>			
Direct Impact	\$1,602,300	\$28,761,200	\$30,363,500
Indirect Impact	\$359,600	\$6,458,400	\$6,818,000
Induced Impact	\$400,500	\$7,492,100	\$7,892,600
TOTAL	\$2,362,500	\$42,711,600	\$45,074,100
<i>Value Added (Gross Regional Product)</i>			
Direct Impact	\$977,500	\$17,676,800	\$18,654,200
Indirect Impact	\$190,800	\$3,333,400	\$3,524,200
Induced Impact	\$235,300	\$4,401,700	\$4,637,000
TOTAL	\$1,403,600	\$25,411,800	\$26,815,400
<i>Labor Income</i>			
Direct Impact	\$598,800	\$11,409,000	\$12,007,800
Indirect Impact	\$128,100	\$2,187,500	\$2,315,600
Induced Impact	\$126,800	\$2,371,100	\$2,497,900
TOTAL	\$853,600	\$15,967,700	\$16,821,300
<i>Jobs</i>			
Direct Impact	18	340	358
Indirect Impact	3	45	48
Induced Impact	3	54	57
TOTAL	23	439	463
<i>Tax Impacts</i>			
Federal Government	\$179,200	\$3,325,300	\$3,504,600
State & Local Government	\$183,800	\$3,362,300	\$3,546,200

*Totals may not sum due to rounding

Gila County

Table 35 presents estimated non-local visitor spending and county economic impacts of state parks in Gila County.

Table 35. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Gila County

	Tonto Natural Bridge SP	Total
Non-Local Visitor Spending		
Admission, recreation, & entertainment fees	\$456,500	\$456,500
Camping fees & charges	\$97,900	\$97,900
Lodging	\$2,482,200	\$2,482,200
Groceries	\$534,900	\$534,900
Food & beverage	\$1,216,500	\$1,216,500
Retail shopping	\$363,400	\$363,400
Auto expenses	\$525,500	\$525,500
Any other expenses	\$112,000	\$112,000
County Economic Impacts		
<i>Sales (Output)</i>		
Direct Impact	\$4,727,700	\$4,727,700
Indirect Impact	\$875,200	\$875,200
Induced Impact	\$720,400	\$720,400
TOTAL	\$6,323,300	\$6,323,300
<i>Value Added (Gross Regional Product)</i>		
Direct Impact	\$2,663,900	\$2,663,900
Indirect Impact	\$376,100	\$376,100
Induced Impact	\$398,600	\$398,600
TOTAL	\$3,438,600	\$3,438,600
<i>Labor Income</i>		
Direct Impact	\$1,640,300	\$1,640,300
Indirect Impact	\$271,500	\$271,500
Induced Impact	\$166,000	\$166,000
TOTAL	\$2,077,800	\$2,077,800
<i>Jobs</i>		
Direct Impact	60	60
Indirect Impact	7	7
Induced Impact	6	6
TOTAL	73	73
<i>Tax Impacts</i>		
Federal Government	\$457,300	\$457,300
State & Local Government	\$549,800	\$549,800

*Totals may not sum due to rounding

Graham County

Table 36 presents estimated non-local visitor spending and county economic impacts of state parks in Graham County.

Table 36. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Graham County

	Roper Lake SP**	Total
Non-Local Visitor Spending		
Admission, recreation, & entertainment fees	\$208,600	\$208,600
Camping fees & charges	\$1,162,800	\$1,162,800
Lodging	\$152,300	\$152,300
Groceries	\$877,200	\$877,200
Food & beverage	\$451,900	\$451,900
Retail shopping	\$304,400	\$304,400
Auto expenses	\$703,500	\$703,500
Any other expenses	\$323,200	\$323,200
County Economic Impacts		
<i>Sales (Output)</i>		
Direct Impact	\$2,703,100	\$2,703,100
Indirect Impact	\$356,600	\$356,600
Induced Impact	\$597,200	\$597,200
TOTAL	\$3,656,900	\$3,656,900
<i>Value Added (Gross Regional Product)</i>		
Direct Impact	\$1,714,000	\$1,714,000
Indirect Impact	\$158,400	\$158,400
Induced Impact	\$335,300	\$335,300
TOTAL	\$2,207,800	\$2,207,800
<i>Labor Income</i>		
Direct Impact	\$1,169,300	\$1,169,300
Indirect Impact	\$98,600	\$98,600
Induced Impact	\$158,500	\$158,500
TOTAL	\$1,426,300	\$1,426,300
<i>Jobs</i>		
Direct Impact	38	38
Indirect Impact	3	3
Induced Impact	5	5
TOTAL	46	46
<i>Tax Impacts</i>		
Federal Government	\$324,900	\$324,900
State & Local Government	\$301,900	\$301,900

*Totals may not sum due to rounding; ** Includes Dankworth Pond State Park

La Paz County

Table 37 presents estimated non-local visitor spending and county economic impacts of state parks in La Paz County.

Table 37. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: La Paz County

	Alamo Lake SP	Buckskin Mtn. SP	River Island SP	Total
Non-Local Visitor Spending				
Admission, recreation, & entertainment fees	\$110,600	\$1,065,400	\$153,800	\$1,329,800
Camping fees & charges	\$966,900	\$3,098,300	\$1,311,000	\$5,376,300
Lodging	\$160,600	\$194,000	\$116,400	\$471,000
Groceries	\$355,800	\$2,089,300	\$747,100	\$3,192,200
Food & beverage	\$131,500	\$874,500	\$454,300	\$1,460,300
Retail shopping	\$71,000	\$426,100	\$204,500	\$701,700
Auto expenses	\$497,600	\$1,544,600	\$700,600	\$2,742,800
Any other expenses	\$483,500	\$632,500	\$591,700	\$1,707,700
County Economic Impacts				
Sales (Output)				
Direct Impact	\$1,889,500	\$6,766,100	\$2,834,600	\$11,490,200
Indirect Impact	\$192,900	\$671,300	\$283,400	\$1,147,500
Induced Impact	\$322,400	\$1,197,000	\$493,300	\$2,012,700
TOTAL	\$2,404,700	\$8,634,400	\$3,611,200	\$14,650,400
Value Added (Gross Regional Product)				
Direct Impact	\$1,226,900	\$4,446,500	\$1,851,500	\$7,525,000
Indirect Impact	\$86,000	\$293,200	\$123,300	\$502,500
Induced Impact	\$190,600	\$707,600	\$291,600	\$1,189,800
TOTAL	\$1,503,500	\$5,447,300	\$2,266,400	\$9,217,200
Labor Income				
Direct Impact	\$877,300	\$3,287,100	\$1,345,600	\$5,510,100
Indirect Impact	\$55,300	\$182,500	\$77,500	\$315,300
Induced Impact	\$73,400	\$272,400	\$112,200	\$458,000
TOTAL	\$1,006,000	\$3,742,000	\$1,535,300	\$6,283,300
Jobs				
Direct Impact	27	94	40	162
Indirect Impact	1	5	2	8
Induced Impact	2	7	3	11
TOTAL	31	106	45	181
Tax Impacts				
Federal Government	\$220,300	\$815,400	\$330,300	\$1,366,000
State & Local Government	\$194,400	\$654,900	\$286,300	\$1,135,500

*Totals may not sum due to rounding

Mohave County

Table 38 presents estimated non-local visitor spending and county economic impacts of state parks in Mohave County.

Table 38. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Mohave County

	Cattail Cove SP	Lake Havasu SP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$382,400	\$3,373,500	\$3,755,900
Camping fees & charges	\$2,724,600	\$11,788,500	\$14,513,100
Lodging	\$763,200	\$12,477,200	\$13,240,400
Groceries	\$2,446,300	\$12,683,300	\$15,129,600
Food & beverage	\$1,256,000	\$9,796,000	\$11,052,000
Retail shopping	\$663,900	\$5,480,200	\$6,144,100
Auto expenses	\$2,337,000	\$12,287,200	\$14,624,200
Any other expenses	\$738,000	\$3,765,700	\$4,503,700
County Economic Impacts			
Sales (Output)			
Direct Impact	\$7,091,100	\$48,270,100	\$55,361,200
Indirect Impact	\$1,590,800	\$10,887,300	\$12,478,100
Induced Impact	\$2,042,200	\$13,094,500	\$15,136,700
TOTAL	\$10,724,100	\$72,252,000	\$82,976,000
Value Added (Gross Regional Product)			
Direct Impact	\$4,448,100	\$29,593,500	\$34,041,600
Indirect Impact	\$664,200	\$4,591,000	\$5,255,300
Induced Impact	\$1,150,900	\$7,379,600	\$8,530,500
TOTAL	\$6,263,300	\$41,564,000	\$47,827,400
Labor Income			
Direct Impact	\$3,070,500	\$19,515,800	\$22,586,300
Indirect Impact	\$414,100	\$2,875,300	\$3,289,400
Induced Impact	\$602,900	\$3,866,200	\$4,469,100
TOTAL	\$4,087,500	\$26,257,300	\$30,344,800
Jobs			
Direct Impact	99	644	743
Indirect Impact	12	82	94
Induced Impact	15	93	108
TOTAL	126	819	945
Tax Impacts			
Federal Government	\$936,200	\$6,139,500	\$7,075,700
State & Local Government	\$841,000	\$5,794,900	\$6,635,900

*Totals may not sum due to rounding

Navajo County

Table 39 presents estimated non-local visitor spending and county economic impacts of state parks in Navajo County.

Table 39. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Navajo County

	Fool Hollow Lake RA	Homolovi SP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$532,400	\$49,800	\$582,200
Camping fees & charges	\$3,438,000	\$439,200	\$3,877,300
Lodging	\$1,888,800	\$39,200	\$1,928,000
Groceries	\$2,081,300	\$265,800	\$2,347,100
Food & beverage	\$1,393,400	\$171,200	\$1,564,600
Retail shopping	\$764,600	\$122,500	\$887,100
Auto expenses	\$2,003,100	\$421,200	\$2,424,200
Any other expenses	\$861,300	\$268,300	\$1,129,600
County Economic Impacts			
Sales (Output)			
Direct Impact	\$9,119,000	\$1,069,600	\$10,188,500
Indirect Impact	\$1,933,300	\$225,200	\$2,158,500
Induced Impact	\$2,379,900	\$296,100	\$2,676,000
TOTAL	\$13,432,200	\$1,590,900	\$15,023,000
Value Added (Gross Regional Product)			
Direct Impact	\$5,673,200	\$681,900	\$6,355,100
Indirect Impact	\$820,100	\$92,500	\$912,600
Induced Impact	\$1,297,500	\$161,400	\$1,459,000
TOTAL	\$7,790,900	\$935,800	\$8,726,600
Labor Income			
Direct Impact	\$3,821,700	\$480,500	\$4,302,200
Indirect Impact	\$492,200	\$54,200	\$546,400
Induced Impact	\$651,400	\$81,000	\$732,500
TOTAL	\$4,965,300	\$615,800	\$5,581,100
Jobs			
Direct Impact	124	15	140
Indirect Impact	15	2	16
Induced Impact	18	2	20
TOTAL	157	19	176
Tax Impacts			
Federal Government	\$1,094,100	\$132,900	\$1,227,000
State & Local Government	\$1,051,000	\$130,300	\$1,181,300

*Totals may not sum due to rounding

Pima County

Table 40 presents estimated non-local visitor spending and county economic impacts of state parks in Pima County.

Table 40. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Pima County

	Catalina SP	Total
Non-Local Visitor Spending		
Admission, recreation, & entertainment fees	\$801,700	\$801,700
Camping fees & charges	\$2,472,600	\$2,472,600
Lodging	\$209,700	\$209,700
Groceries	\$2,543,700	\$2,543,700
Food & beverage	\$1,510,600	\$1,510,600
Retail shopping	\$738,600	\$738,600
Auto expenses	\$1,337,000	\$1,337,000
Any other expenses	\$1,354,100	\$1,354,100
County Economic Impacts		
Sales (Output)		
Direct Impact	\$7,131,000	\$7,131,000
Indirect Impact	\$2,149,900	\$2,149,900
Induced Impact	\$3,029,300	\$3,029,300
TOTAL	\$12,310,200	\$12,310,200
Value Added (Gross Regional Product)		
Direct Impact	\$4,521,800	\$4,521,800
Indirect Impact	\$1,035,000	\$1,035,000
Induced Impact	\$1,710,700	\$1,710,700
TOTAL	\$7,267,500	\$7,267,500
Labor Income		
Direct Impact	\$3,265,400	\$3,265,400
Indirect Impact	\$633,900	\$633,900
Induced Impact	\$928,100	\$928,100
TOTAL	\$4,827,400	\$4,827,400
Jobs		
Direct Impact	104	104
Indirect Impact	15	15
Induced Impact	22	22
TOTAL	140	140
Tax Impacts		
Federal Government	\$994,700	\$994,700
State & Local Government	\$901,400	\$901,400

*Totals may not sum due to rounding

Pinal County

Table 41 presents estimated non-local visitor spending and county economic impacts of state parks in Pinal County.

Table 41. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Pinal County

	Lost Dutchman SP	McFarland SHP	Oracle SP	Picacho Peak SP	Total
Non-Local Visitor Spending					
Admission, recreation, & entertainment fees	\$927,400	\$9,500	\$13,900	\$376,400	\$1,327,100
Camping fees & charges	\$5,587,300	\$14,200	\$30,100	\$1,168,400	\$6,800,000
Lodging	\$2,329,000	\$35,800	\$80,600	\$812,500	\$3,257,800
Groceries	\$4,056,600	\$12,200	\$41,800	\$819,000	\$4,929,700
Food & beverage	\$3,277,100	\$29,600	\$55,400	\$618,600	\$3,980,800
Retail shopping	\$1,932,600	\$28,400	\$12,300	\$288,500	\$2,261,800
Auto expenses	\$3,121,200	\$21,300	\$81,900	\$1,037,400	\$4,261,800
Any other expenses	\$943,500	\$4,200	\$0	\$226,200	\$1,173,800
County Economic Impacts					
Sales (Output)					
Direct Impact	\$15,318,700	\$109,200	\$216,200	\$3,700,200	\$19,344,300
Indirect Impact	\$1,881,500	\$13,900	\$27,800	\$468,800	\$2,392,000
Induced Impact	\$2,017,700	\$13,100	\$25,400	\$479,300	\$2,535,500
TOTAL	\$19,217,900	\$136,200	\$269,500	\$4,648,200	\$24,271,800
Value Added (Gross Regional Product)					
Direct Impact	\$9,628,400	\$65,900	\$129,900	\$2,305,600	\$12,129,800
Indirect Impact	\$774,100	\$5,800	\$11,700	\$193,300	\$984,800
Induced Impact	\$1,230,300	\$8,000	\$15,500	\$292,200	\$984,800
TOTAL	\$11,632,800	\$79,600	\$157,200	\$2,791,100	\$14,660,700
Labor Income					
Direct Impact	\$6,454,200	\$41,500	\$80,100	\$1,526,000	\$8,101,700
Indirect Impact	\$502,000	\$3,700	\$7,600	\$125,400	\$638,900
Induced Impact	\$455,000	\$3,000	\$5,700	\$108,100	\$571,800
TOTAL	\$7,411,200	\$48,200	\$93,500	\$1,759,500	\$9,312,400
Jobs					
Direct Impact	209	1	3	50	263
Indirect Impact	17	0	0	4	21
Induced Impact	13	0	0	3	17
TOTAL	239	2	3	57	301
Tax Impacts					
Federal Government	\$1,658,900	\$11,100	\$21,500	\$395,100	\$2,086,600
State & Local Government	\$1,536,700	\$11,900	\$23,100	\$382,900	\$1,954,600

*Totals may not sum due to rounding

Santa Cruz County

Table 42 presents estimated non-local visitor spending and county economic impacts of state parks in Santa Cruz County.

Table 42. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Santa Cruz County

	Patagonia Lake SP	Tubac Presidio SHP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$671,500	\$28,700	\$700,200
Camping fees & charges	\$2,897,100	\$25,200	\$2,922,300
Lodging	\$247,200	\$330,700	\$577,900
Groceries	\$2,098,500	\$48,000	\$2,146,500
Food & beverage	\$887,900	\$138,100	\$1,026,000
Retail shopping	\$868,500	\$76,600	\$945,100
Auto expenses	\$1,402,000	\$32,500	\$1,434,500
Any other expenses	\$244,900	\$32,200	\$277,100
County Economic Impacts			
Sales (Output)			
Direct Impact	\$6,135,400	\$588,100	\$6,723,400
Indirect Impact	\$1,595,700	\$174,500	\$1,770,100
Induced Impact	\$1,222,800	\$92,600	\$1,315,400
TOTAL	\$8,953,900	\$855,100	\$9,809,000
Value Added (Gross Regional Product)			
Direct Impact	\$3,940,300	\$338,900	\$4,279,200
Indirect Impact	\$623,800	\$66,000	\$689,800
Induced Impact	\$674,800	\$51,100	\$725,900
TOTAL	\$5,238,900	\$456,000	\$5,694,900
Labor Income			
Direct Impact	\$2,766,800	\$198,300	\$2,965,100
Indirect Impact	\$386,800	\$40,700	\$427,500
Induced Impact	\$328,400	\$24,900	\$353,300
TOTAL	\$3,482,000	\$263,900	\$3,745,900
Jobs			
Direct Impact	87	7	94
Indirect Impact	12	1	13
Induced Impact	9	1	10
TOTAL	108	9	117
Tax Impacts			
Federal Government	\$772,200	\$62,300	\$834,500
State & Local Government	\$679,800	\$72,400	\$752,200

*Totals may not sum due to rounding

Yavapai County

Table 43 presents estimated non-local visitor spending and county economic impacts of state parks in Yavapai County.

Table 43. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Yavapai County

	Dead Horse Ranch SP	Ft. Verde SHP	Granite Mtn. Hotshots MSP	Jerome SHP	Red Rock SP	Total
Non-Local Visitor Spending						
Admission, recreation, & entertainment fees	\$797,600	\$75,900	\$16,400	\$335,200	\$803,700	\$2,028,800
Camping fees & charges	\$4,563,200	\$61,200	\$49,900	\$99,900	\$201,200	\$4,975,500
Lodging	\$2,257,800	\$351,200	\$220,700	\$2,499,600	\$7,468,100	\$12,797,400
Groceries	\$2,962,400	\$78,600	\$113,200	\$464,200	\$990,100	\$4,608,500
Food & beverage	\$3,760,400	\$166,600	\$259,400	\$1,257,500	\$2,252,100	\$7,695,900
Retail shopping	\$1,576,300	\$61,400	\$49,900	\$744,600	\$958,600	\$3,390,700
Auto expenses	\$2,654,900	\$93,000	\$139,700	\$463,200	\$1,062,400	\$4,413,200
Any other expenses	\$1,307,900	\$26,900	\$5,400	\$134,100	\$381,600	\$1,856,100
County Economic Impacts						
Sales (Output)						
Direct Impact	\$14,190,500	\$736,400	\$634,600	\$4,761,400	\$11,809,500	\$32,132,400
Indirect Impact	\$2,810,000	\$153,300	\$127,600	\$975,200	\$2,417,500	\$6,483,700
Induced Impact	\$4,042,200	\$188,800	\$161,900	\$1,184,500	\$2,903,700	\$8,481,000
TOTAL	\$21,042,800	\$1,078,500	\$924,100	\$6,921,000	\$17,130,800	\$47,097,200
Value Added (Gross Regional Product)						
Direct Impact	\$9,141,400	\$453,700	\$389,600	\$2,910,600	\$7,240,500	\$20,135,900
Indirect Impact	\$1,252,300	\$70,200	\$57,600	\$448,700	\$1,133,600	\$2,962,300
Induced Impact	\$2,280,500	\$106,500	\$91,300	\$668,200	\$1,638,200	\$4,784,700
TOTAL	\$12,674,200	\$630,400	\$538,600	\$4,027,500	\$10,012,300	\$27,882,900
Labor Income						
Direct Impact	\$6,234,800	\$282,200	\$244,300	\$1,763,200	\$4,285,600	\$12,810,200
Indirect Impact	\$837,800	\$48,300	\$39,100	\$311,300	\$799,200	\$2,035,700
Induced Impact	\$1,174,900	\$54,900	\$47,000	\$344,300	\$844,000	\$2,465,200
TOTAL	\$8,247,600	\$385,400	\$330,500	\$2,418,800	\$5,928,800	\$17,311,100
Jobs						
Direct Impact	184	9	8	55	131	387
Indirect Impact	23	1	1	8	20	53
Induced Impact	32	2	1	9	23	66
TOTAL	238	12	10	73	174	506
Tax Impacts						
Federal Government	\$1,860,800	\$89,100	\$76,200	\$563,800	\$1,383,600	\$3,973,500
State & Local Government	\$1,562,800	\$84,300	\$70,300	\$553,200	\$1,364,800	\$3,635,400

*Totals may not sum due to rounding

Yuma County

Table 44 presents estimated non-local visitor spending and county economic impacts of state parks in Yuma County.

Table 44. Direct Spending by Non-Local Visitors & County Economic Impacts by Park: Yuma County

	Colorado River SHP	Yuma Territorial Prison SHP	Total
Non-Local Visitor Spending			
Admission, recreation, & entertainment fees	\$67,400	\$305,100	\$372,500
Camping fees & charges	\$71,900	\$325,500	\$397,400
Lodging	\$409,200	\$1,851,900	\$2,261,000
Groceries	\$156,000	\$706,000	\$862,000
Food & beverage	\$161,100	\$729,200	\$890,300
Retail shopping	\$102,000	\$461,500	\$563,500
Auto expenses	\$104,700	\$473,900	\$578,600
Any other expenses	\$49,200	\$222,900	\$272,100
County Economic Impacts			
Sales (Output)			
Direct Impact	\$845,000	\$3,824,500	\$4,669,500
Indirect Impact	\$180,600	\$817,300	\$997,900
Induced Impact	\$212,600	\$962,300	\$1,174,900
TOTAL	\$1,238,200	\$5,604,200	\$6,842,300
Value Added (Gross Regional Product)			
Direct Impact	\$507,600	\$2,297,700	\$2,805,300
Indirect Impact	\$85,600	\$387,300	\$472,900
Induced Impact	\$119,800	\$542,400	\$662,300
TOTAL	\$713,100	\$3,227,400	\$3,940,500
Labor Income			
Direct Impact	\$317,800	\$1,438,500	\$1,756,400
Indirect Impact	\$58,100	\$263,200	\$321,300
Induced Impact	\$65,800	\$297,900	\$363,700
TOTAL	\$441,800	\$1,999,600	\$2,441,400
Jobs			
Direct Impact	10	47	57
Indirect Impact	1	7	8
Induced Impact	2	7	8
TOTAL	13	60	74
Tax Impacts			
Federal Government	\$96,200	\$435,200	\$531,400
State & Local Government	\$101,800	\$460,900	\$562,800

*Totals may not sum due to rounding

State Economic Contribution Analysis Results

To calculate the total state-level economic contribution of Arizona State Parks, all visitor spending, regardless of whether spent by a local or non-local visitor, was included. Park spending patterns and the percent of visitors with reported spending (non-zero) were applied to annual visitation numbers for each park to estimate total direct spending for each park. Total spending by category was summed for all state parks, resulting in the following total spending within the state by both local and non-local visitors to Arizona State Parks (Table 45). Park-level spending patterns for all visitors (local and non-local) are presented in Appendix B.

Table 45. Total (Local & Non-Local) Visitor Spending at All Parks

Category	Direct Visitor Spending
Admission, recreation, and entertainment fees	\$22,999,200
Camping fees and charges	\$55,206,900
Lodging	\$60,569,300
Groceries	\$53,419,300
Food & beverage	\$49,162,500
Retail shopping	\$24,259,200
Auto expenses	\$47,691,600
Any other expenses	\$18,823,900
TOTAL	\$332,131,800

The total economic contribution of visitor spending in and within 50-miles of Arizona State Parks was modeled in IMPLAN using industry changes, and retail spending was modeled as gross retail spending. Direct, indirect, induced, and total effects are presented for employment, labor income, value added, and output (sales) in Table 46.

Table 46. Statewide Economic Contribution of Arizona State Park Visitor Spending

Impact Type	Direct Effect	Indirect Effect	Induced Effect	Total Effect
Employment	2,828	527	819	4,173
Labor Income	\$103,341,900	\$27,867,900	\$40,682,400	\$171,892,200
Value Added	\$152,858,100	\$45,011,700	\$73,711,000	\$271,580,900
Sales (Output)	\$234,664,900	\$87,034,800	\$127,696,500	\$449,396,200

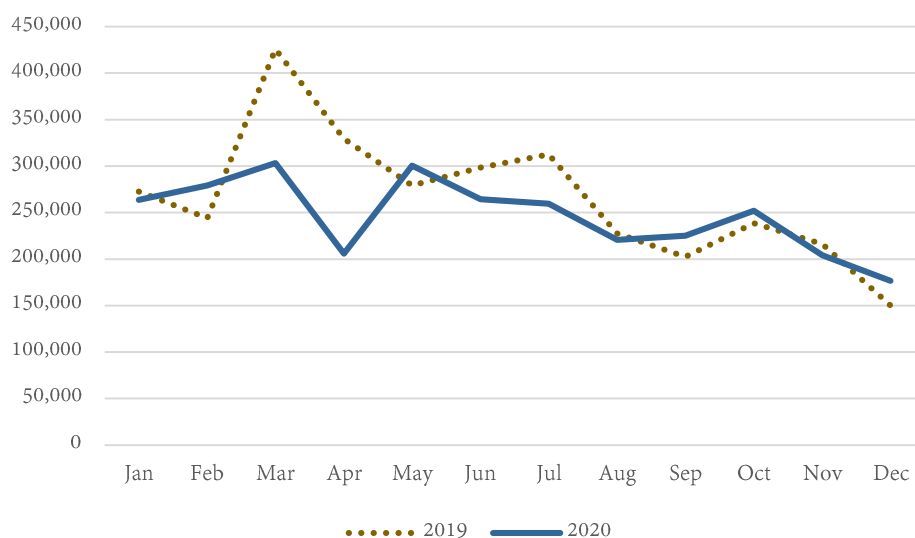
* Labor income, value added, and output are not additive.

Statewide, Arizona's state parks contribute nearly 4,200 jobs to the state economy, over \$270 million in Gross State Product, including over \$170 million in labor income, and nearly \$450 million in sales.

Effects of COVID-19 on State Park Visits

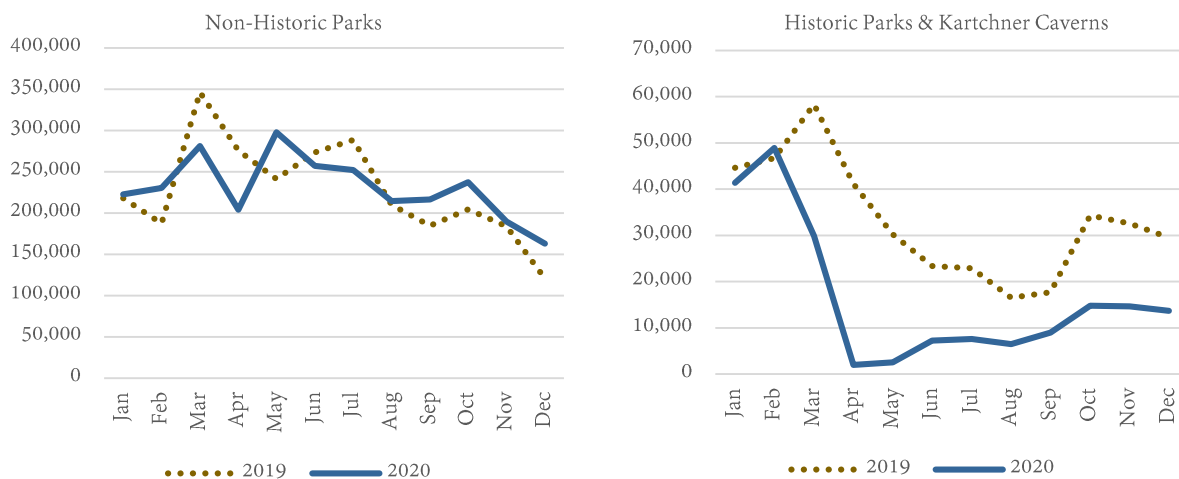
Total visits to Arizona State Parks in calendar year 2020 saw their largest declines relative to 2019 during the months of March, April, June, and July. These months coincide with the initial shutdown of many public places, as well as the summer peak in virus cases when Arizona had one of the highest rates of transmission in the world. Other months track closely with 2019 visits (Figure 8).

Figure 8. Total Monthly State Park Visitors, Year-Over-Year Comparison 2019 & 2020



The negative effect of COVID-19 on park visits fell disproportionately on state historic parks and parks with an indoor or enclosed setting, such as Kartchner Caverns (Figure 9). Non-historic parks saw a drop in visits relative to 2019 in March and April, but otherwise tracked closely, or even above 2019 levels.

Figure 9. Monthly Visits to Non-Historic Arizona State Parks & Monthly Visits to Historic State Parks & Kartchner Caverns, Year-Over-Year Comparison 2019 & 2020



Meanwhile, beginning in March, visits to state historic parks and Kartchner Caverns fell to nearly zero by April due to closures and gradually experienced more visits as some parks reopened, though visits still remained well below 2019 levels. Overall, 2020 visits were 7.6% lower than 2019 levels. Visits to non-historic parks, meanwhile, were 1% higher than in 2019, and visits to historic parks and Karchner Cavern were 50.2% lower than in 2019.



Summary

This study has presented the county-level economic impacts and state-level economic contribution of visitor spending in and around Arizona State Parks in Fiscal Year 2020. The study relied on a survey of visitors between July 2019 and September 2020.

The statewide economic contribution of Arizona State Parks, including multiplier effects, was \$449 million in sales, also known as economic output (Table 47). Arizona State Parks contributed an estimated \$272 million to Arizona’s Gross State Product, the state equivalent of Gross Domestic Product. Through visitor spending in local economies, Arizona’s state parks supported an estimated 4,200 jobs statewide. Total direct visitor spending by all visitors to Arizona State Parks was estimated at \$332 million in 2020. This includes all spending in and within 50 miles of state parks.

Table 47. Summary of Statewide Economic Contribution Results

Impact Type	Value
Statewide Visitor Spending	\$332 million
Total Economic Contribution, Including Multiplier Effects	
Sales (Output)	\$449 million
Gross State Product (Value Added)	\$272 million
Labor Income	\$172 million
Total Jobs Supported	4,173

These results derive from a significant increase in visits since the last economic impact analysis report in 2014. Since that time, sites have been added to the Arizona State Park system, and most recreation parks have experienced increases in visitation. Table 48 presents the results of this study with results of past studies. Results are presented in nominal dollars as reported in each study, as well as in inflation-adjusted 2020 dollars for purposes of comparison. A statewide economic impact using the methods of the previous studies was also estimated for purposes of comparison. For simplicity, we only present the economic impacts in terms of sales (output) for comparison across studies.



Table 48. Comparison of Study Results to Past Studies

	FY2007	FY2014	FY2020
Parks	27	27	34*
Total Visits	2,298,155	2,294,420	2,971,844
NOMINAL (REPORTED) VALUES	FY2007	FY2014	FY2020
Statewide Economic Impact (Output/Sales) (millions)	\$266.4	\$226.7	\$377.0
Statewide Economic Contribution (Output/Sales) (millions)	N/A	N/A	\$449.4
Direct Non-Local Visitor Spending (millions)	\$162.8	\$209.7	\$278.7
Direct Total Visitor Spending (millions)	N/A	N/A	\$332.1
Per Visitor Non-Local Spending	\$70.84	\$90.58	\$93.77
INFLATION-ADJUSTED VALUES (2020 USD)	FY2007	FY2014	FY2020
Statewide Economic Impact (Output/Sales) (millions)	\$332.6	\$247.9	\$377.0
Statewide Economic Contribution (Output/Sales) (millions)	N/A	N/A	\$449.4
Direct Non-Local Visitor Spending (millions)	\$203.2	\$229.3	\$278.7
Direct Total Visitor Spending (millions)	N/A	N/A	\$332.1
Per Visitor Non-Local Spending	\$88.42	\$99.03	\$93.77
CHANGE FROM PREVIOUS STUDY		FY07-FY14	FY14-FY20
Change in Total Non-Local Expenditures		12.83%	21.54%
Change in Visits		-0.16%	29.52%
Change in Non-Local Expenditures per Visit		13.01%	-6.17%

* Two of these sites are yet to be open to the public

Sources: AHRRC (2009), AHRRC (2015), Author Calculations

Since the 2014 study, total non-local expenditures increased by over 20%. This was driven by an increase in visits to Arizona State Parks, which increased by nearly 30% since the last study. Meanwhile, non-local expenditures per visit decreased by 6%. Nonetheless, the large increase in visits was more than enough to lead to higher overall spending. Some of the increase in visits is due to parks reopening on a year-round basis after closures due to state budget cuts. It's also interesting to note that this increase in visits was registered since the last report despite the COVID-19 pandemic which affected visits during FY2020. The visitor survey was carried out during the COVID-19 pandemic, which interrupted a sustained increasing trend in visits to Arizona State Parks. The pandemic led to a decrease in Arizona State Park visits in calendar year 2020 compared with visits in calendar year 2019, with overall visits down by 7.6%. An analysis shows, however, that excluding historic state parks and Kartchner Caverns (which were closed temporarily for visitor safety precautions), visits to all other parks were in fact 1% higher than in 2019. Meanwhile, visits to historic state parks and Kartchner Cavern were 50.2% lower than in 2019.

At the county-level, this study considered the economic impacts of non-local visitors to state parks making expenditures in and around the parks. The largest county-level economic impact was in Mohave County with roughly \$83 million in sales, including multiplier effects, and an estimated 945 jobs. Generally, the level of impacts at the county-level is related to the number of parks in the county, however, some especially popular parks drive visitation and economic impacts.

References

AHRRC (2009). The Economic Impact of Arizona State Parks: Executive Summary. Arizona Hospitality Research & Resource Center, Center for Business Outreach, The W.A. Franke College of Business, Northern Arizona University.

AHRRC (2015). The Economic Impact of Arizona State Parks FY14. Arizona Hospitality Research & Resource Center, Center for Business Outreach, The W.A. Franke College of Business, Northern Arizona University.

Arizona Office of Tourism (2021). State Park Visitation. Retrieved from <https://tourism.az.gov/data-trends/state-park-visitation/>

Google (2021). COVID-19 Community Mobility Reports. Retrieved from <https://www.google.com/covid19/mobility/index.html?hl=en>

IMPLAN Group, LLC (2019). IMPLAN 3.1. Huntersville, NC. IMPLAN.com.

Watson, P., Wilson, J., Thilmany, D., & Winter, S. (2007). Determining Economic Contributions and Impacts: What is the difference and why do we care? *Journal of Regional Analysis & Policy*, 37(2): 1-15.

Appendix

Appendix A - Survey Instrument

8490084799

ARIZONA STATE PARKS PARKS VISITOR SURVEY 2019-2020

Date of Visit: / / ID: - -

We would like to learn more about the experiences, preferences and opinions of visitors to Arizona State Parks. Please help us improve our parks by taking this survey. Thank you for your participation. We value your opinion.

1. Have you been to this Arizona State Park before? (check one) Yes No

If yes, how many times have you previously visited this park in the past 2 years, excluding the current visit? #

2. Have you visited any of these other state parks within the past 2 years? (select all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Alamo Lake State Park | <input type="checkbox"/> Homolovi State Park | <input type="checkbox"/> Riordan Mansion SHP |
| <input type="checkbox"/> Boyce Thompson Arboretum SP | <input type="checkbox"/> Jerome State Historic Park | <input type="checkbox"/> River Island State Park |
| <input type="checkbox"/> Buckskin Mountain State Park | <input type="checkbox"/> Kartchner Caverns State Park | <input type="checkbox"/> Roper Lake State Park |
| <input type="checkbox"/> Catalina State Park | <input type="checkbox"/> Lake Havasu State Park | <input type="checkbox"/> Slide Rock State Park |
| <input type="checkbox"/> Cattail Cove State Park | <input type="checkbox"/> Lost Dutchman State Park | <input type="checkbox"/> Sonoita Creek State Natural Area |
| <input type="checkbox"/> Colorado River State Historic Park | <input type="checkbox"/> Lyman Lake State Park | <input type="checkbox"/> Tombstone Courthouse SHP |
| <input type="checkbox"/> Dankworth Pond State Park | <input type="checkbox"/> McFarland State Historic Park | <input type="checkbox"/> Tonto Natural Bridge State Park |
| <input type="checkbox"/> Dead Horse Ranch State Park | <input type="checkbox"/> Oracle State Park | <input type="checkbox"/> Tubac Presidio SHP |
| <input type="checkbox"/> Fool Hollow Lake Recreation Area | <input type="checkbox"/> Patagonia Lake State Park | <input type="checkbox"/> Verde River Greenway SNA |
| <input type="checkbox"/> Fort Verde State Historic Park | <input type="checkbox"/> Picacho Peak State Park | <input type="checkbox"/> Yuma Territorial Prison SHP |
| <input type="checkbox"/> Granite Mountain Hotshots Memorial State Park | <input type="checkbox"/> Red Rock State Park | |

3. How far in advance did you plan this trip? Unplanned trip Two to three months
 One to two weeks More than three months
 Three to four weeks

4. Where is your current residence? (check one box and fill in the zip code of your residence(s))

- | | | |
|---|---|---|
| <input type="checkbox"/> Currently a full-time Arizona resident | What is your zip code? | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| <input type="checkbox"/> Currently a part-time Arizona resident | What is your AZ zip code? | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| | What is the zip code of your permanent residence? | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| <input type="checkbox"/> Out of state visitor (US) | What is your zip code? | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| <input type="checkbox"/> International visitor | What country are you from? | <input type="text"/> |

5. How did you and your group obtain information about this Arizona State Park? (select all that apply)

- Arizona State Parks website
- Other website/internet
- Word of mouth including friend or family member
- Mobile apps (Alltrails, Allstays, Fishbrain, etc.)
- Local businesses (hotels, motels, restaurants, etc.)
- Local Visitor's Center/Chamber of Commerce
- Magazine/Newspaper
- Arizona State Parks Monthly email newsletter
- Radio/TV
- Road sign(s)/Drive by
- Social media (Facebook, Twitter, Instagram, etc.)
- Other tourist materials (guide book, brochure, map)
- Visited before
- Other (please specify)

6. How did the visit to this park fit into your personal group's travel plans? (Please check only one).

- This park was our primary destination
- This park was one of several planned destinations
- This park was not a planned destination

7. On this trip did any of you and your group: (check all that apply)

- Visit the park for the day? If so, how many hours will you spend in the park?

--	--

hours
- Stay overnight inside the park? If so, how many nights will you spend inside the park?

--	--

nights
- Stay overnight outside the park (in the surrounding area or communities/within 50 miles) If so, how many nights will you spend outside the park?

--	--

nights

8. Please select the activities you and your group participated in today at this park. Please note that some activities may not be available at this park. (select all that apply)

Formal and Ranger Led Activities

- Attending a ranger-led activity, such as a hike or tour (including cave tour)
- Attending a cultural demonstration or performance
- Participating in the Junior Ranger program
- Special event

Informal and Self-Led Activities

- Learning about history
- Learning about nature
- Listening to an audio tour or podcast
- Visiting the visitor center/gift shop
- Watching movies or videos about the park

Overnight Activities

- RV camping
- Stargazing/Night sky events
- Stay in a cabin
- Tent camping

Outdoor Recreation Activities

- Bicycling
- Bird watching
- Boating/watersports
- Fishing
- Horseback riding
- Mountain biking
- Photography
- Picnicking
- Swimming
- Trail hiking
- Other (please specify)

9. Who are you visiting the park with on this visit? (check all that apply)

- Alone
- Family
- Friends
- Organized group/club
- Dog
- Horse
- Other (please specify)

--	--

10. How many people are in your group today?

11. What are the ages and genders of the people in your group?

	Age		Gender			Age		Gender	
	M	F	M	F		M	F	M	F
Yourself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person #6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person #2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person #7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person #3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person #8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person #4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person #9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Person #5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Person #10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. On this trip to this Arizona State Park, which one of the following entrance fees applied to you and your personal group? (please check only one)

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Day-use entrance fee <input type="checkbox"/> Overnight camping fee <input type="checkbox"/> Kartchner Cavern Cave Tour fee <input type="checkbox"/> Standard Annual Pass (\$75) <input type="checkbox"/> Premium Annual Pass (\$200) <input type="checkbox"/> Commercial Annual Pass | <ul style="list-style-type: none"> <input type="checkbox"/> Military discount <input type="checkbox"/> Complimentary day-use pass <input type="checkbox"/> Other <input style="width: 300px; height: 25px;" type="text"/> |
|---|--|

13. Did you have any safety concerns during your recent visit to this Arizona State Park?

- Yes
- No

If yes, why

14. How crowded did you feel this Arizona State Park was during your recent visit?

Not at all crowded	Slightly crowded	Moderately crowded	Very crowded	Extremely crowded
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. For you and your group, please report how much you spent within 50 miles of the park **(including expenses inside the park)**. Please write "0" if no money was spent in a particular category.

Admission, recreation, and entertainment fees (park admission, museums, tours, etc.)	<input type="text"/>	Retail shopping (Clothing, souvenirs, gifts, outdoor recreation gear)	<input type="text"/>
Camping fees and charges	<input type="text"/>	Auto expenses (gas, oil, repairs)	<input type="text"/>
Lodging (Hotels, motels, cabins, B&Bs, timeshares)	<input type="text"/>	Any other expenses	<input type="text"/>
Groceries	<input type="text"/>		
Food & beverage (Restaurants, bars)	<input type="text"/>		
Please identify other expenses in the surrounding area	<input type="text"/>		

16. How important to you was it during your visit to this Arizona State Park to use personal electronic devices to do each of the following, and how would you rate the quality of service in this park required to do each? For each item please mark one rating for importance and one for quality of service needed.

"Please rate questions on a 1 to 5 scale. Importance scale 1 = Not at all important and 5 = Very important. Quality scale: 1 = Very Poor and 5 = Excellent"

	Not Applicable	Importance					Quality				
		1	2	3	4	5	1	2	3	4	5
Make/receive cell phone calls/text messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search the internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share pictures/videos/audio via social media (FB, Twitter, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Watch streaming video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use mobile device apps to link with features (QR codes, ADA information Podcasts, event listings, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Please rate the following statements as they relate to your current visit to this Arizona State Park.

	Very Poor	Poor	Average	Good	Excellent
Your overall experience at this park	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall <u>quality</u> of informational displays and exhibits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall <u>relevance</u> of informational displays and exhibits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. This question addresses park facilities and has 2 parts. First, rate how Important the facility is to your park experience (please check one box under "Importance" for each facility). Then rate the Quality of the facility in the park you visited (please check one box under "Quality" for each facility). If the facility does not exist at this park or if you did not use the facility please check "not applicable."

*"Please rate questions on a 1 to 5 scale. Importance scale: 1 = Not at all important and 5 = Very important.
Quality scale: 1 = Very Poor and 5 = Excellent"*

	Not Applicable	Importance					Quality				
		1	2	3	4	5	1	2	3	4	5
Beach area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Boating facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cabins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campsites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equestrian area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group use area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Park signs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Picnic sites/tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restrooms/showers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visitor Center/gift shop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. This question addresses park services and has 2 parts. First, rate how Important the service is to your park experience (check one box under "Importance" for each service). Then rate the Quality of the service in the park you visited (check one box under "Quality" for each service). If the service does not exist at this park or if you did not use the service please check "not applicable."

*Please rate questions on a 1 to 5 scale. Importance scale: 1 = Not at all important and 5 = Very important.
Quality scale: 1 = Very Poor and 5 = Excellent.*

	Not Applicable	Importance					Quality				
		1	2	3	4	5	1	2	3	4	5
Ranger led park programs (e.g. history)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Park map or brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Park cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On-site law enforcement ranger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parking availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reservation system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rental of outdoor recreation equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff and volunteer availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Below is a list of services and activities, which may or may not be available currently at Arizona State Parks. Which ones would you like to participate in/use? (check one box for each service)

	I would definitely not use	I may use	I would definitely use
Events and Programs			
Dark sky/stargazing area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Junior Ranger/other children's activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor recreation classes (MountainBiking 101, Archery, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Park programs (campfire, interpretive, history, culture)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Special park events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor Activities			
Bicycle rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dog park/dog run	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equestrian facilities / rentals (stables)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group use areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiking trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mountain bike trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Off-highway vehicles staging areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Playgrounds/courts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overnight Opportunities			
Rental cabins	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upgraded RV/trailer camping hook-ups (water, 100 amp electricity, sewer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tent only camping area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Related Activities			
Boat/Canoe/Kayak rentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fish cleaning stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing piers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water trails (for kayaking, canoeing, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. How likely are you to return to this Arizona State Park?

Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. How important would the following improvements be in your decision to return to this Arizona State Park? Please rate questions on a 1 to 5 scale. 1 = Very unlikely and 5 = Very likely.

	Very unlikely (1)	2	3	4	Very likely (5)
Rotating museum exhibits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-led activities (self-guided exploration with podcasts, pamphlets or signs to tell you what is there)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leader directed programs (classes, guided tour, lectures)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interactive exhibits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living history presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Video or computer program in a visitor center/museum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Archaeological and cultural programs and information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. Does anyone in your group have physical conditions that made it difficult to access or participate in park activities and services (please check one)

- Yes
 No
 Prefer not to answer

If yes, please identify the type of disability

- Hearing
 Speech
 Mental
 Visual
 Mobility
 Chemical Sensitivity
 Other

If Adaptive Equipment were available at this Arizona State Park would you or members of your travel party use the equipment? (i.e. kayak, beach wheelchair, adapted scooter/power wheelchair.)

- Yes
 No

If yes, what type of improvements or accommodations could Arizona State Parks provide to help make visits by the individual(s) with a disability more enjoyable?

Demographics

24. Which one or more of the following racial or ethnic groups do you identify with? (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Hispanic/Latino | <input type="checkbox"/> Asian |
| <input type="checkbox"/> Black/African American | <input type="checkbox"/> Hawaiian/Pacific Islander |
| <input type="checkbox"/> White/Caucasian | <input type="checkbox"/> Don't Know |
| <input type="checkbox"/> American Indian/Alaskan Native | |

25. What is the highest level of education you have completed? (check one)

- Some high school
 High school graduate/GED
 Vocational/Trade school certificate
 Some college, no degree
 Completed Associates degree
 Completed Bachelor's degree
 Completed Master's degree
 Completed Ph.D. or equivalent degree

26. Are you:

- Currently employed
- Currently unemployed
- Retired
- Student
- Full time homemaker/stay at home parent

27. Which category best describes your total annual household income before taxes? (check one)

- | | |
|--|--|
| <input type="checkbox"/> Less than \$30,000 | <input type="checkbox"/> \$130,000 - \$149,999 |
| <input type="checkbox"/> \$30,000 - \$49,999 | <input type="checkbox"/> \$150,000 - \$169,999 |
| <input type="checkbox"/> \$50,000 - \$69,999 | <input type="checkbox"/> \$170,000 - \$189,999 |
| <input type="checkbox"/> \$70,000 - \$89,999 | <input type="checkbox"/> \$190,000 - \$209,999 |
| <input type="checkbox"/> \$90,000 - \$109,999 | <input type="checkbox"/> \$210,000+ |
| <input type="checkbox"/> \$110,000 - \$129,999 | |

Please share any additional comments you might have about your visitor experience in the space below:

THANK YOU FOR COMPLETING THIS SURVEY

Appendix B - Visitor Spending Patterns for All Visitors (Local & Non-Local)

Alamo Lake State Park

Category	Percent with Reported Expense	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	10.8%	\$15.51
Camping fees & charges	65.8%	\$26.90
Lodging	6.0%	\$43.08
Groceries	32.5%	\$19.23
Food & beverage	17.7%	\$11.80
Retail shopping	11.4%	\$9.93
Auto expenses	39.0%	\$20.20
Any other expenses	21.9%	\$34.81

Buckskin Mountain State Park

Category	Percent with Reported Expense	Average per Visitor Expenditure
Admission, recreation, & entertainment fees	21.4%	\$63.04
Camping fees & charges	67.5%	\$59.84
Lodging	3.9%	\$63.43
Groceries	62.1%	\$44.10
Food & beverage	44.3%	\$25.86
Retail shopping	27.6%	\$20.01
Auto expenses	60.6%	\$33.00
Any other expenses	15.5%	\$53.08

Catalina State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	27.1%	\$20.51
Camping fees & charges	54.3%	\$32.99
Lodging	3.9%	\$69.96
Groceries	47.9%	\$36.53
Food & beverage	41.0%	\$24.22
Retail shopping	21.1%	\$25.13
Auto expenses	50.1%	\$18.00
Any other expenses	13.0%	\$60.28

Cattail Cove State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	34.7%	\$22.13
Camping fees & charges	55.2%	\$73.57
Lodging	9.6%	\$204.25
Groceries	65.0%	\$63.24
Food & beverage	51.9%	\$52.44
Retail shopping	22.4%	\$51.75
Auto expenses	69.4%	\$61.69
Any other expenses	14.8%	\$77.39

Deadhorse Ranch State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	31.0%	\$17.22
Camping fees & charges	58.0%	\$49.58
Lodging	5.5%	\$214.86
Groceries	51.2%	\$38.01
Food & beverage	52.8%	\$42.47
Retail shopping	24.7%	\$35.93
Auto expenses	53.8%	\$28.96
Any other expenses	12.9%	\$55.66

Fool Hollow Lake Recreation Area

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	25.6%	\$16.39
Camping fees & charges	54.1%	\$45.14
Lodging	6.9%	\$193.11
Groceries	54.6%	\$28.59
Food & beverage	39.1%	\$26.71
Retail shopping	22.8%	\$23.82
Auto expenses	56.1%	\$26.04
Any other expenses	12.7%	\$48.33

Fort Verde State Historic Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	74.9%	\$13.74
Camping fees & charges	16.7%	\$46.86
Lodging	26.9%	\$163.31
Groceries	32.1%	\$33.87
Food & beverage	57.7%	\$38.43
Retail shopping	27.4%	\$29.22
Auto expenses	45.9%	\$27.07
Any other expenses	5.9%	\$66.30

Granite Mountain Hotshots Memorial State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	8.1%	\$10.41
Camping fees & charges	5.4%	\$36.52
Lodging	13.0%	\$68.59
Groceries	15.7%	\$30.83
Food & beverage	45.9%	\$24.53
Retail shopping	8.9%	\$25.38
Auto expenses	34.1%	\$18.28
Any other expenses	1.6%	\$13.40

Homolovi State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	13.1%	\$18.57
Camping fees & charges	66.8%	\$29.99
Lodging	1.8%	\$96.25
Groceries	33.8%	\$35.91
Food & beverage	32.5%	\$24.69
Retail shopping	18.3%	\$30.20
Auto expenses	57.6%	\$33.27
Any other expenses	19.9%	\$60.67

Jerome State Historic Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	84.0%	\$12.39
Camping fees & charges	5.3%	\$53.67
Lodging	33.7%	\$213.39
Groceries	31.7%	\$42.69
Food & beverage	73.4%	\$51.85
Retail shopping	43.8%	\$50.18
Auto expenses	46.7%	\$29.21
Any other expenses	4.4%	\$86.50

Kartchner Caverns State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	72.0%	\$24.61
Camping fees & charges	29.2%	\$49.50
Lodging	18.2%	\$70.97
Groceries	29.0%	\$32.17
Food & beverage	52.6%	\$29.79
Retail shopping	31.0%	\$27.37
Auto expenses	45.2%	\$29.87
Any other expenses	7.1%	\$38.76

Lake Havasu State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	37.7%	\$22.53
Camping fees & charges	48.4%	\$49.24
Lodging	13.1%	\$209.38
Groceries	65.0%	\$46.73
Food & beverage	66.9%	\$36.31
Retail shopping	36.6%	\$35.21
Auto expenses	65.8%	\$43.76
Any other expenses	10.9%	\$70.61

Lost Dutchman State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	44.7%	\$13.57
Camping fees & charges	49.9%	\$62.10
Lodging	7.8%	\$187.55
Groceries	50.9%	\$46.42
Food & beverage	48.8%	\$34.60
Retail shopping	24.8%	\$38.27
Auto expenses	51.2%	\$33.24
Any other expenses	8.9%	\$51.86

Lyman Lake State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	16.4%	\$20.48
Camping fees & charges	70.4%	\$31.43
Lodging	6.3%	\$56.32
Groceries	56.3%	\$24.65
Food & beverage	24.6%	\$16.79
Retail shopping	23.5%	\$12.20
Auto expenses	55.8%	\$20.98
Any other expenses	14.6%	\$54.43

McFarland State Historic Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	18.6%	\$17.05
Camping fees & charges	6.2%	\$54.71
Lodging	12.4%	\$77.35
Groceries	23.9%	\$24.92
Food & beverage	67.3%	\$21.08
Retail shopping	40.7%	\$29.40
Auto expenses	52.2%	\$15.83
Any other expenses	4.4%	\$22.59

Oracle State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	38.6%	\$10.20
Camping fees & charges	4.3%	\$65.88
Lodging	5.0%	\$186.99
Groceries	21.4%	\$20.37
Food & beverage	37.9%	\$21.12
Retail shopping	9.3%	\$27.19
Auto expenses	32.1%	\$24.29
Any other expenses	3.6%	\$3.73

Patagonia Lake State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	30.7%	\$11.05
Camping fees & charges	58.2%	\$25.27
Lodging	3.4%	\$34.90
Groceries	55.4%	\$21.00
Food & beverage	30.4%	\$13.37
Retail shopping	25.8%	\$19.32
Auto expenses	47.7%	\$14.95
Any other expenses	8.5%	\$23.84

Picacho Peak State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	51.4%	\$9.58
Camping fees & charges	42.0%	\$35.08
Lodging	4.5%	\$217.15
Groceries	37.8%	\$29.73
Food & beverage	38.1%	\$19.74
Retail shopping	21.0%	\$17.84
Auto expenses	49.5%	\$25.95
Any other expenses	8.7%	\$35.20

Red Rock State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	79.6%	\$15.83
Camping fees & charges	5.2%	\$57.13
Lodging	41.5%	\$267.38
Groceries	41.2%	\$37.69
Food & beverage	67.4%	\$50.64
Retail shopping	33.8%	\$42.90
Auto expenses	51.5%	\$31.70
Any other expenses	6.7%	\$83.74

Riordan Mansion State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	85.2%	\$10.65
Camping fees & charges	6.3%	\$61.25
Lodging	48.4%	\$139.30
Groceries	32.4%	\$22.55
Food & beverage	73.4%	\$32.90
Retail shopping	40.2%	\$18.88
Auto expenses	48.4%	\$14.58
Any other expenses	6.6%	\$81.04

River Island State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	14.5%	\$35.38
Camping fees & charges	73.8%	\$57.19
Lodging	2.5%	\$150.84
Groceries	61.8%	\$40.31
Food & beverage	47.1%	\$31.67
Retail shopping	25.8%	\$26.90
Auto expenses	64.0%	\$36.22
Any other expenses	20.0%	\$90.87

Roper Lake State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	20.6%	\$13.84
Camping fees & charges	61.2%	\$24.15
Lodging	5.4%	\$33.07
Groceries	55.0%	\$20.07
Food & beverage	34.9%	\$15.93
Retail shopping	18.4%	\$21.21
Auto expenses	51.8%	\$16.97
Any other expenses	15.5%	\$24.60

Slide Rock State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	75.7%	\$14.36
Camping fees & charges	8.3%	\$21.23
Lodging	39.3%	\$99.63
Groceries	37.6%	\$20.63
Food & beverage	58.6%	\$33.63
Retail shopping	29.0%	\$25.67
Auto expenses	49.7%	\$18.20
Any other expenses	8.3%	\$92.97

Tombstone Courthouse State Historic Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	79.9%	\$54.36
Camping fees & charges	10.6%	\$49.25
Lodging	26.6%	\$109.72
Groceries	17.1%	\$29.13
Food & beverage	62.8%	\$40.31
Retail shopping	39.6%	\$28.06
Auto expenses	37.9%	\$23.99
Any other expenses	9.2%	\$99.18

Tonto Natural Bridge State Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	78.9%	\$7.04
Camping fees & charges	3.4%	\$32.77
Lodging	25.6%	\$118.82
Groceries	28.7%	\$23.65
Food & beverage	56.1%	\$25.53
Retail shopping	22.0%	\$19.13
Auto expenses	44.5%	\$14.04
Any other expenses	3.4%	\$37.47

Tubac Presidio State Historic Park

Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	68.1%	\$14.21
Camping fees & charges	6.9%	\$59.76
Lodging	16.0%	\$335.65
Groceries	19.7%	\$48.96
Food & beverage	59.0%	\$44.97
Retail shopping	38.8%	\$36.15
Auto expenses	35.1%	\$19.60
Any other expenses	5.9%	\$174.87

Yuma Territorial Prison & Colorado River State Historic Parks

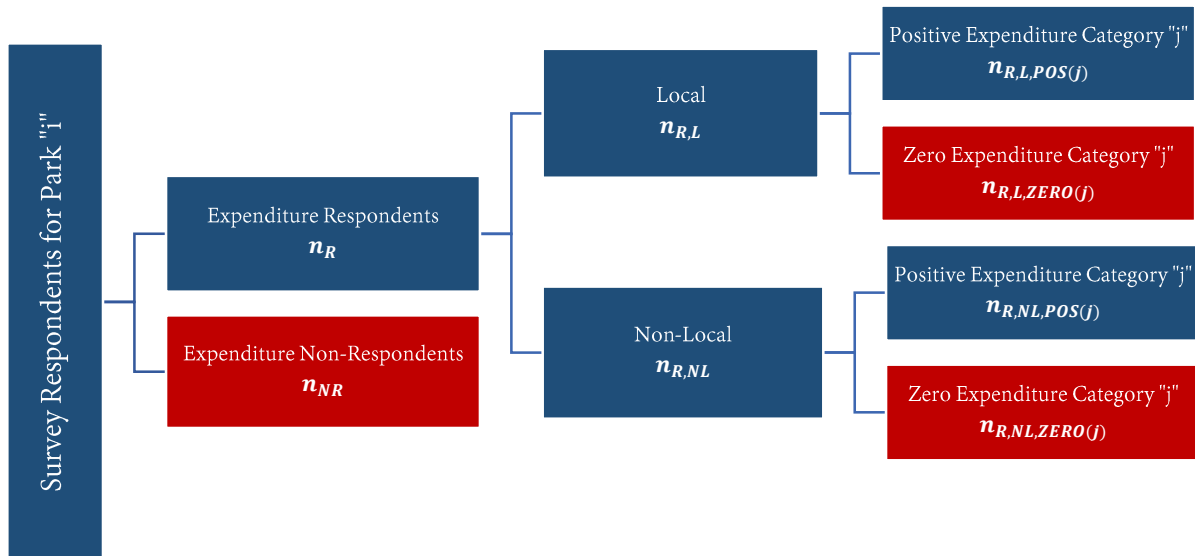
Category	Percent with Reported Expense	Avg. Per Visitor Expenditure
Admission, recreation, & entertainment fees	85.5%	\$8.72
Camping fees & charges	10.5%	\$62.26
Lodging	30.8%	\$130.76
Groceries	22.8%	\$64.75
Food & beverage	52.5%	\$32.27
Retail shopping	32.2%	\$34.15
Auto expenses	41.3%	\$25.94
Any other expenses	3.6%	\$124.88

Appendix C - Spending Pattern Derivation Process

For each park “i”, we develop two (2) average visitor spending patterns, one that corresponds with the spending from non-local visitors and one that corresponds with spending by all visitors (non-local and local). Each visitor spending pattern consists of spending in various expenditure categories “j”. Average per-visitor expenditures for each park “i” and each spending category “j” were calculated for all positive (non-zero) expenditure responses reported.

$$\begin{array}{ll}
 AE_{i,j}^{Non-Local} & \text{Average non-zero non-local expenditures} \\
 AE_{i,j}^{Total} & \text{Average non-zero local \& non-local expenditures}
 \end{array}$$

To account for the fact that not all visitors have expenditures in each spending category, we calculate the share of total visitors making expenditures in each category for each park. The following diagram illustrates the different categories of survey respondents for each park used in calculating the relevant shares of total visitors with expenditures in a particular category.



For county-level economic impact analyses, it was necessary to estimate the share of total annual visitors to each park “i” that were non-local visitors and that had expenditures in each particular spending category “j”. This can be expressed as the ratio of survey respondents that were non-local and had positive expenditures in category “j” to the total number of expenditure respondents for that park:

$$\text{Non – Local Visitors with Expenditure in "j" as \% of Total Visitors}_{i,j} = P_{i,j}^{NL} = \frac{n_{R,NL,POS(j)}}{n_R}$$

For the state-level economic contribution analysis, it was not necessary to differentiate by local or non-local visitors because the contribution analysis considers spending by all visitors. Therefore, the share of total visitors to park “i” with positive expenditures in category “j” can simply be expressed at:

All Visitors with Expenditure in "j" as % of Total Visitors $P_{i,j}^{Total} = \frac{n_{R,NL,POS(j)} + n_{R,L,POS(j)}}{n_R}$

Non-local and total visitor spending for each park "i" and spending category "j" were calculated, then, as follows:

$$Spending_{i,j}^{NL} = AE_{i,j}^{Non-Local} * P_{i,j}^{NL} * TotalAnnualVisits_i$$

$$Spending_{i,j}^{Total} = AE_{i,j}^{Total} * P_{i,j}^{Total} * TotalAnnualVisits_i.$$

[This page intentionally left blank]

