

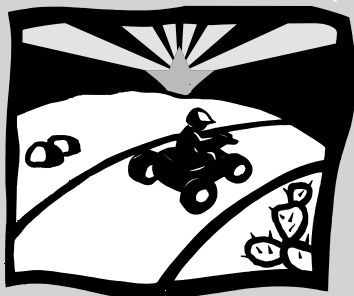
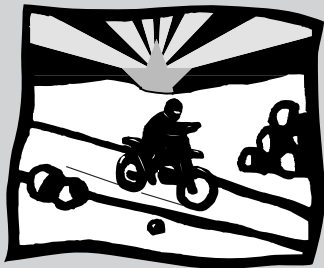
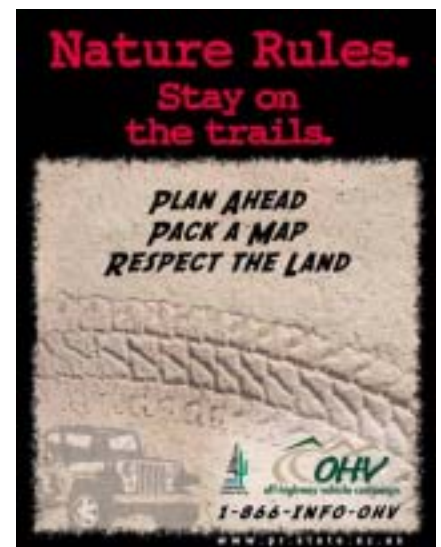
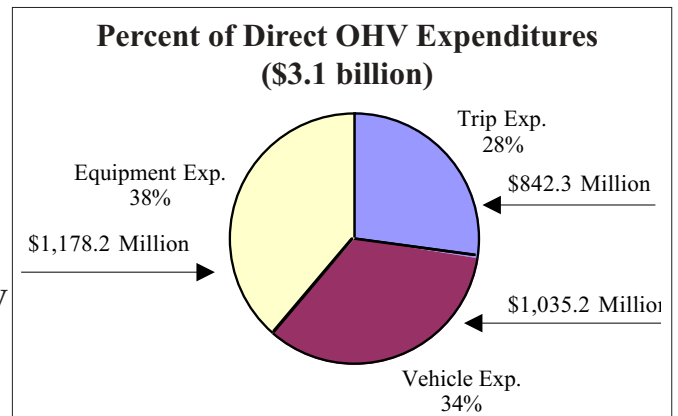
Economic Importance of Off-Highway Vehicle Recreation to Arizona

Whether you enjoy exploring Arizona's backcountry driving your truck, dirt bike or quad, or you prefer using your own muscle power to hike the trails, the following information may surprise you. In 2002, Arizona State University conducted a yearlong economic study of recreational off-highway vehicle (OHV) use in Arizona as part of the state's OHV Recreation Program. Completed surveys included 15,000 telephone surveys and 1,269 mail questionnaires from randomly selected Arizona households.

The study findings show that the **total economic impact to Arizona from recreational OHV use is more than \$4 billion a year.** OHV recreation activities provide an economic contribution to the state and its 15 counties mainly through direct expenditures for motorized vehicles, tow trailers, related equipment, accessories, insurance and maintenance costs.

Additionally, an economic benefit is generated when OHV recreationists spend money in local communities close to areas they recreate in for items such as gasoline, food, lodging and souvenirs. These direct purchases provide indirect benefits by helping to pay for many people's salaries and wages, and contributing to local and state tax revenues. Specific information regarding these elements is available for Arizona and its 15 counties.

Arizona State Parks offers grant funding to assist in developing OHV facilities and signage, mitigating environmental damage and educating people about safe use of OHVs and about responsible and respectful behaviors to others and the environment.





- 21% of Arizonans, or 1.1 million people, consider themselves OHV enthusiasts.
- The average OHV household in Arizona spends 25.4 days per year participating in OHV recreational activities, which equates to 13,983,356 OHV Recreation Days annually.
- 72% of OHV users are satisfied with their overall OHV recreation experience.

People who enjoy off-highway vehicle recreation spend a lot of money buying vehicles, tow trailers, equipment, insurance, repairs and other related purchases. They also spend money in local communities while on recreational trips for items such as gasoline, food, lodging and souvenirs, just like any other tourist. The methodology used for this economic analysis is conservative. Expenditures by non-resident OHV recreationists (visitors) to Arizona were not included. The number of Arizona OHV households was determined by positive phone survey responses to three specific questions: 1) do you own an OHV; 2) do you drive it off-highway; and 3) do you use it for recreation. Totals for vehicle and equipment purchases were factored (reduced) by the percentage of time that owners said vehicles were used for OHV recreation, not the total vehicle cost. The economic input/output model (IMPLAN) used to generate the direct/indirect estimates is more conservative than other frequently used models.

Economic Importance of OHV Recreation in Arizona

- **Creates a statewide economic impact of \$4.25 billion (multiplier effect*)**
- **Contributes \$3.1 billion to local economies through OHV-related retail sales**
- **Adds \$187 million to annual state tax revenues**
- **Provides \$1.1 billion in household income (salaries/wages) for AZ residents**
- **Supports 36,951 full-time and part-time jobs in Arizona**

(\$ in millions)	<u>Vehicles/Equipment Purchases for OHV Use</u>	<u>Trip Expenditures for OHV Recreation</u>	<u>Total Multiplier Effect*</u>	<u>Indirect Impacts (salaries, wages)</u>	<u>State Tax Revenues</u>	<u># Jobs Created</u>
Apache	\$46.5	\$47.6	\$101.9	\$12.8	\$2.9	842
Cochise	\$70.8	\$27.7	\$116.1	\$19.6	\$4.5	1,009
Coconino	\$108.9	\$106.4	\$258.3	\$51.7	\$10.5	2,580
Gila	\$53.4	\$67.1	\$137.6	\$22.3	\$4.2	1,322
Graham	\$19.9	\$12.4	\$37.5	\$6.2	\$1.4	348
Greenlee	\$6.4	\$5.3	\$12.0	\$0.8	\$0.1	50
La Paz	\$24.6	\$19.5	\$49.7	\$8.3	\$1.9	459
Maricopa	\$1,127.9	\$230.2	\$1,787.1	\$428.9	\$78.5	13,113
Mohave	\$132.1	\$49.9	\$219.5	\$40.7	\$9.2	1,929
Navajo	\$66.3	\$48.7	\$128.5	\$20.1	\$3.3	1,099
Pima	\$251.9	\$71.7	\$403.5	\$84.3	\$17.7	3,307
Pinal	\$95.1	\$40.2	\$152.7	\$24.2	\$5.9	1,099
Santa Cruz	\$6.5	\$20.8	\$32.8	\$6.9	\$1.3	399
Yavapai	\$112.4	\$70.6	\$222.7	\$43.9	\$9.2	2,067
<u>Yuma</u>	<u>\$90.4</u>	<u>\$24.1</u>	<u>\$136.5</u>	<u>\$25.1</u>	<u>\$5.5</u>	<u>1,094</u>
Arizona	\$2,213.4	\$842.3	\$4,252.0	\$1,080.0	\$187.0	36,951

Type of Vehicle(s) Used on last OHV Recreation Trip

Many households take more than one type of vehicle on their OHV recreation trips. Some vehicles are used primarily to tow smaller ATVs and dirt bikes; sometimes the larger vehicle is the primary recreation vehicle. Survey respondents said they used the following vehicles on their last trip:

- 4 Wheel Drive Pickup Truck 48%
- All Terrain Vehicle (ATV) 35%
- Sport Utility Vehicle (SUV)/Jeep 33%
- Trail Motorcycle/Dirt Bike 11%
- Dune Buggy/Sand Rail 7%
- 2 Wheel Drive Pickup Truck 6%
- Snowmobile 1%

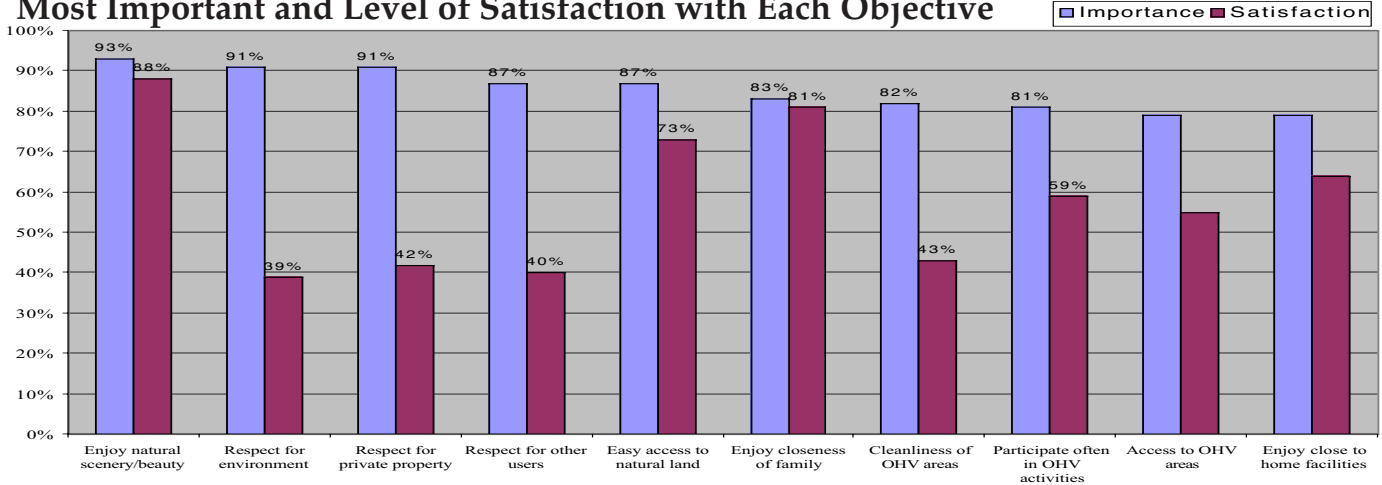


Participation in Outdoor Recreation Activities During OHV Recreation Trips

Interestingly, many OHV recreationists do not list an obvious OHV activity as the main reason for their last OHV trip. They participate in a wide variety of recreational activities while they are on an OHV trip. When asked what recreational activities people participated in during their last OHV recreation trip and what one activity was the main reason for going, survey respondents said:

<u>Recreation Activity</u>	<u>Participated in during last trip</u>	<u>Recreation Activity</u>	<u>Main Reason for taking trip</u>
• Driving backroads	75%	• Sightseeing	14%
• Sightseeing	52%	• Driving backroads	11%
• Hiking or walking	40%	• Camping	11%
• Picnicking	37%	• Trail riding-ATVs	10%
• Camping	31%	• Hunting	9%
• Trail riding-ATVs	27%	• Fishing	6%
• Hill climbing	24%	• Hiking or walking	4%
• Photography	23%	• Picnicking	3%
• Driving in open areas	21%	• Visiting historic/ archaeological sites	3%
• Wildlife/bird watching	20%	• Trail riding-motorized dirt bikes	3%
• Visiting historic/ archaeological sites	17%	• Driving in open areas	2%
• Fishing	17%	• Wildlife/bird watching	2%
• Hunting	13%	• Hill climbing	1%
• Trail riding-motorized dirt bikes	11%	• Photography	1%
• Target shooting	11%	• Target shooting	1%
• Rock crawling (with an OHV)	9%	• Rock crawling (with an OHV)	1%
• Swimming	8%	• Swimming	1%
• Boating	6%	• Boating	1%
• Rock climbing	5%	• Rock climbing	<1%
• Backpacking	4%	• Backpacking	<1%
• Mountain biking	3%	• Mountain biking	<1%
• Horseback riding	3%	• Horseback riding	<1%
• River running	3%	• River running	<1%
• Entered competitive events	1%	• Entered competitive events	<1%
• Snowmobiling	1%	• Snowmobiling	<1%

Evaluation of Last OHV Recreation Trip--"Top Ten" Objectives (out of 37) Rated as Most Important and Level of Satisfaction with Each Objective



OHV Recreationists and OHV Recreation Days

The following table includes: 1) the percentage of households in each county that are OHV users; 2) the percent of total AZ OHV recreation days that occur in that county; 3) the number of OHV recreation days spent yearly in that county by those OHV households living in that county; 4) the number of OHV recreation days spent in that county by those traveling there from other counties; and 5) the total number of OHV recreation days spent by Arizonans.

One OHV Recreation Day = One household spending at least part of a day participating in an OHV recreational activity.

	% County Households are OHV Recreationists ¹	% AZ OHV Days that occur in county ²	OHV Days spent by county residents ³	OHV Days spent by others traveling ⁴	Total OHV Days ⁵
Apache	34%	7.3%	153,125 (17%)	743,354 (83%)	896,479
Cochise	24%	3.5%	180,697 (42%)	254,437 (58%)	435,134
Coconino	35%	16.2%	390,421 (20%)	1,583,874 (80%)	1,974,295
Gila	36%	10.3%	228,071 (18%)	1,034,536 (82%)	1,262,608
Graham	34%	1.7%	66,020 (31%)	143,692 (69%)	209,711
Greenlee	48%	0.7%	32,787 (37%)	56,139 (63%)	88,926
La Paz	34%	2.8%	191,319 (55%)	153,231 (45%)	344,550
Maricopa	19%	17.1%	1,856,560 (89%)	230,334 (11%)	2,086,893
Mohave	26%	6.4%	604,266 (77%)	175,845 (23%)	780,111
Navajo	36%	6.1%	438,831 (59%)	305,799 (41%)	744,630
Pima	17%	6.8%	535,245 (64%)	301,549 (36%)	836,802
Pinal	22%	4.9%	197,918 (33%)	402,102 (67%)	600,020
Santa Cruz	19%	3.3%	35,152 (9%)	371,918 (91%)	406,935
Yavapai	27%	9.8%	416,824 (35%)	778,918 (65%)	1,195,742
Yuma	23%	3.0%	172,552 (48%)	189,319 (52%)	361,871
Arizona	21%	100%	5,499,797	6,724,910	12,224,707

+ 1,758,649*
13,983,356

AZ OHV households also take OHV recreation trips to adjacent states and countries.

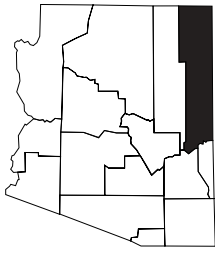
OHV Location	avg. OHV Days/yr.	Total OHV Days
California	11.3	520,895
Mexico	10.1	555,709
Nevada	5.1	103,372
New Mexico	7.5	356,840
Utah	8.2	221,833
Total		1,758,649*



For more information contact:
Arizona State Parks
1300 W. Washington St.
Phoenix, AZ 85007
Tel & TTY: (602) 542-4174
FAX (602) 542-4180
www.azstateparks.com

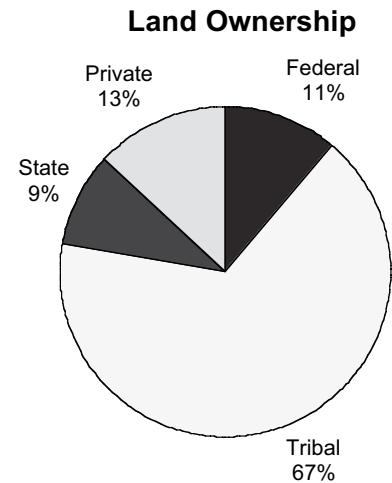
†Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.*

APACHE COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Apache County

Apache County is located in the northeast part of the state. It has 1.35% (69,423) of the state's population and 9.84% (7,178,082 acres or 11,216 square miles) of the state's land base. Population density is 6 people per square mile. The landscape ranges from high desert to high elevation spruce and fir forests offering a wide range of outdoor recreation opportunities. The region is a popular destination of OHV recreationists who want to explore mountainous terrain, lush green forests and cool temperatures.



- 34% of households in Apache County are OHV users; state percentage is 21%.
- 6% of all Arizona OHV trip destinations for past 12 months were to Apache County.
- 896,479 OHV Recreation Days occur annually in Apache County; 7.3% of Arizona's total.
 - 153,125 OHV Recreation Days (17%) are from Apache County residents.
 - 743,354 OHV days (83%) are from other Arizona residents traveling to Apache County.
- 70% of Apache County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Apache County from OHV Recreation is \$102 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Apache County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$11.8 M	\$4.0 M	\$7.8 M
Lodging/Campgrounds	\$8.6 M	\$0.5 M	\$8.1 M
Restaurants/Bars	\$8.1 M	\$2.0 M	\$6.1 M
Groceries/Liquor	\$9.4 M	\$3.0 M	\$6.4 M
Other (event fees, souvenirs, etc.)	\$9.7 M	\$1.9 M	\$7.8 M
• Total OHV Recreation Trips	\$47.6 M	\$11.4 M	\$36.2 M

- Off-Highway Vehicles + \$13.3 M
- Tow Vehicles/Trailers + \$10.6 M
- OHV Equipment + \$22.6 M

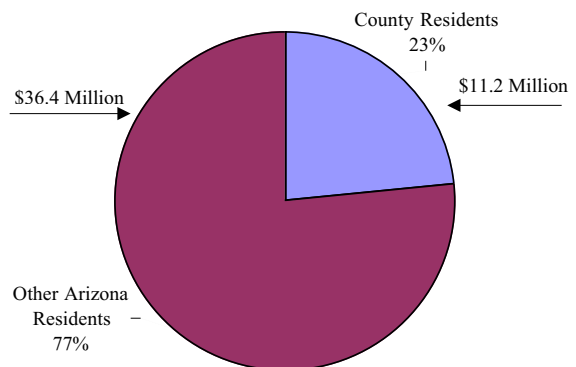
Total OHV Expenditures = \$94.1 Million

TOTAL IMPACT- Multiplier Effect* \$101.9 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 842
- Salaries/Wages \$12.8 Million
- State Tax Revenues \$2.9 Million

OHV Trip Expenditures—\$47.6 Million



Economic Importance of OHV Recreation to Apache County

- Creates a statewide economic impact of \$101.9 million (multiplier effect)*
- Contributes \$94.1 million to local economies through OHV-related expenditures
- Adds \$2.9 million to annual state tax revenues
- Provides \$12.8 million in income (salaries/wages) for Apache County residents
- Supports 842 jobs in Apache County

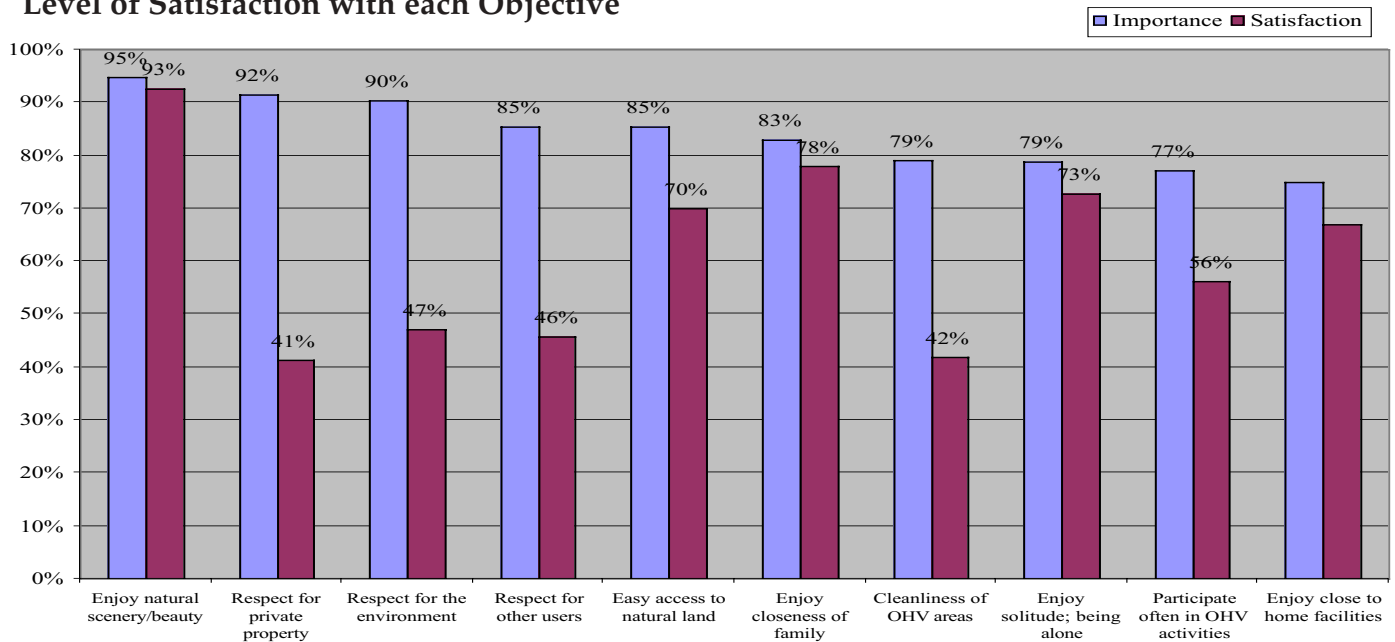
"Top Ten" Main Reason for taking last OHV Trip

- Camping 19%
- Fishing 15%
- Sightseeing 12%
- Hunting 11%
- Driving backroads 7%
- Trail riding-ATVs 5%
- Wildlife/bird watching 3%
- Hiking or walking 2%
- Picnicking 2%
- Trail riding-motorbikes 1%

"Top Ten" Outdoor Activities done on last OHV Trip

- Driving backroads 75%
- Sightseeing 46%
- Hiking or walking 38%
- Camping 37%
- Picnicking 30%
- Trail riding-ATVs 27%
- Trail riding-motorbikes 26%
- Fishing 25%
- Hill climbing 20%
- Hunting 20%

Evaluation of Last OHV Recreation Trip—"Top Ten" Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

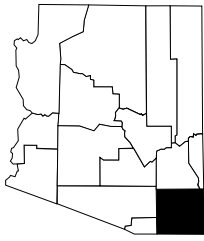
- 4WD Pickup Truck 52%
- All Terrain Vehicle (ATV) 34%
- Sport Utility Vehicle/Jeep 26%
- 2WD Pickup Truck 9%
- Trail Motorcycle 8%
- Dune Buggy/Sand Rail 2%
- Snowmobile 2%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



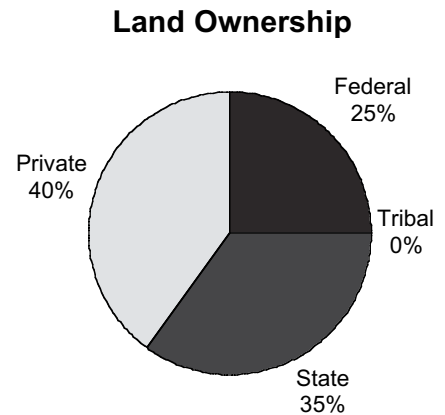
For more information contact:
 Arizona State Parks
 Recreational Trails
 1300 W. Washington St.
 Phoenix, AZ 85007
 Tel & TTY (602) 542-7174
www.azstateparks.com

COCHISE COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Cochise County

Cochise County is located in the southeast corner of the state. It has 2.3% (117,755) of the state's population and 5.54% (3,977,890 acres or 6,215 square miles) of the state's land base. Population density is 19 people per square mile. The topography includes Chihuahuan Desert dotted with isolated mountain ranges. The region provides OHV recreationists with desert OHV opportunities as well as forested roads and trails for year-round experiences.



- 24% of households in Cochise County are OHV users; state percentage is 21%.
- 4% of all Arizona OHV trip destinations for past 12 months were to Cochise County.
- 435,134 OHV Recreation Days occur annually in Cochise County; 3.6% of Arizona's total.
 - 180,697 OHV Recreation Days (42%) are from Cochise County residents.
 - 254,437 OHV days (58%) are from other Arizona residents traveling to Cochise County.
- 72% of Cochise County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Cochise County from OHV Recreation is **\$116 MILLION/year**

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Cochise County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$8.2 M	\$5.5 M	\$2.7 M
Lodging/Campgrounds	\$3.4 M	\$0.6 M	\$2.8 M
Restaurants/Bars	\$5.0 M	\$2.9M	\$2.1 M
Groceries/Liquor	\$6.2 M	\$4.0 M	\$2.2 M
Other (event fees, souvenirs, etc.)	<u>\$4.9 M</u>	<u>\$2.5 M</u>	<u>\$2.4 M</u>
• Total OHV Recreation Trips	\$27.7 M	\$15.5 M	\$12.2 M

- Off-Highway Vehicles + \$25.4 M
- Tow Vehicles/Trailers + \$12.7 M
- OHV Equipment + \$32.7 M

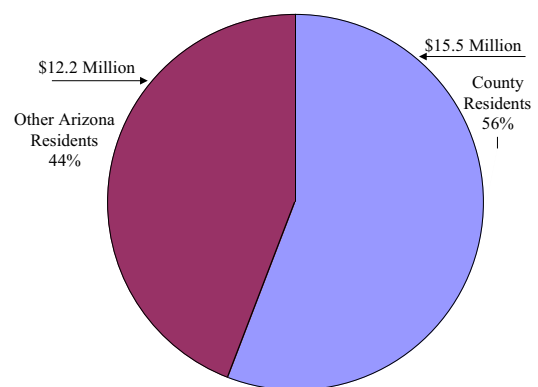
Total OHV Expenditures = \$98.5 Million

TOTAL IMPACT- Multiplier Effect* \$116.1 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,009
- Salaries/Wages \$19.6 Million
- State Tax Revenues \$4.5 Million

OHV Trip Expenditures—\$27.7 Million



Economic Importance of OHV Recreation to Cochise County

- Creates a statewide economic impact of \$116.1 million (multiplier effect)*
- Contributes \$98.5 million to local economies through OHV-related expenditures
- Adds \$4.5 million to annual state tax revenues
- Provides \$19.6 million in income (salaries/wages) for Cochise County residents
- Supports 1,009 jobs in Cochise County

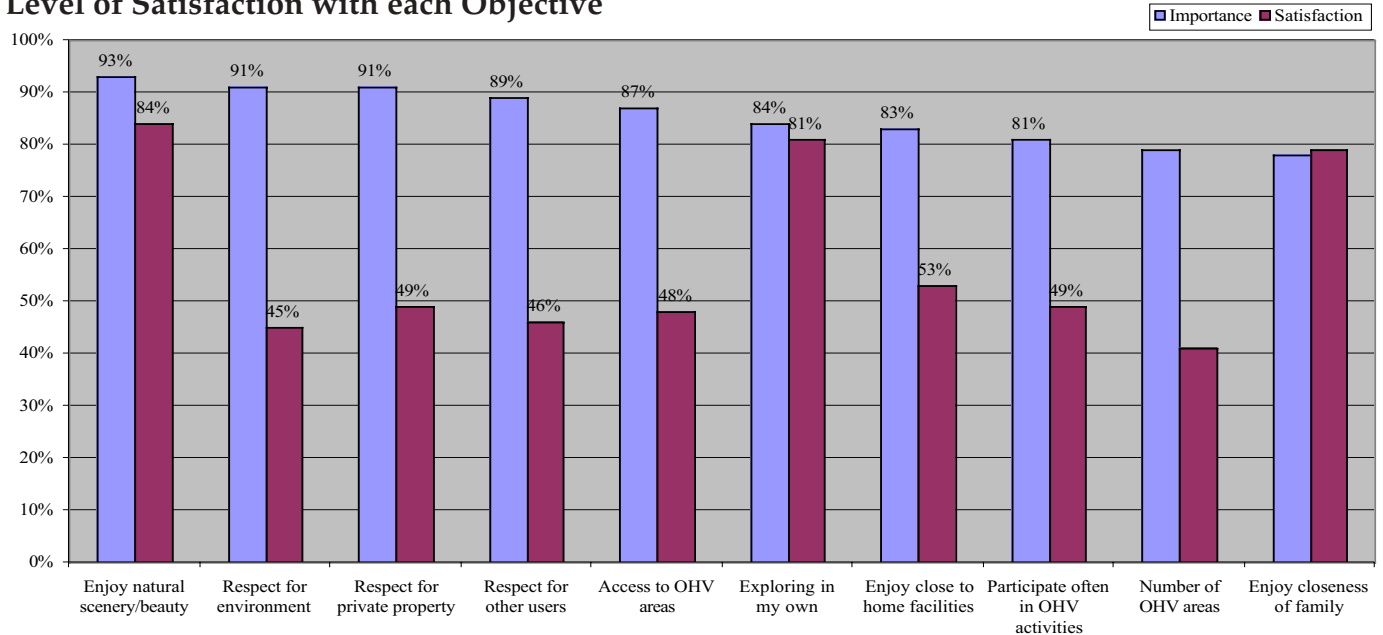
“Top Ten” Main Reason for taking last OHV Trip

- Driving backroads 15%
- Sightseeing 15%
- Trail riding-ATVs 11%
- Hunting 11%
- Camping 7%
- Visiting historic/arch. sites 7%
- Trail riding-motorbikes 6%
- Hiking or walking 6%
- Wildlife/bird watching 6%
- Picnicking 4%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 77%
- Sightseeing 48%
- Hiking or walking 37%
- Hill climbing 36%
- Picnicking 36%
- Camping 34%
- Trail riding-ATVs 32%
- Wildlife/bird watching 27%
- Photography 25%
- Trail riding-motorbikes 22%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

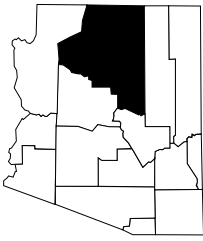
- Sport Utility Vehicle/Jeep 47%
- 4WD Pickup Truck 39%
- All Terrain Vehicle (ATV) 34%
- Trail Motorcycle 18%
- Dune Buggy/Sand Rail 9%
- 2WD Pickup Truck 7%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



For more information contact:
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 Recreational Trails
 1300 W. Washington St.
 Phoenix, AZ 85007
 Tel & TTY (602) 542-7174
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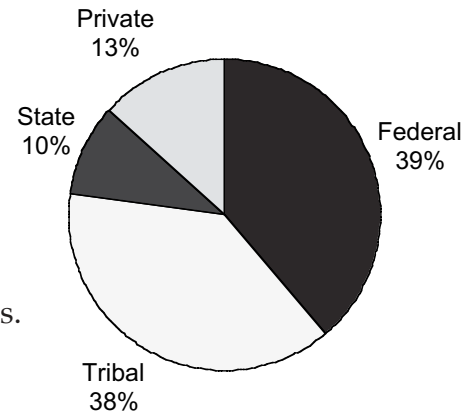
COCONINO COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Coconino County

Coconino County is located in the north central part of the state. It has 2.27% (116,320) of the state's population and 16.36% (11,929,622 acres or 18,640 square miles) of the state's land base. Population density is 6 people per square mile. The landscape ranges from Great Basin Desert to Ponderosa Pine forests offering a wide range of outdoor recreation opportunities. The region is popular with OHV recreationists who want to explore mountainous terrain, forests and cool temperatures.

Land Ownership



- 35% of households in Coconino County are OHV users; state percentage is 21%.
- 12% of all Arizona OHV trip destinations for past 12 months were to Coconino County.
- 1,974,295 OHV Recreation Days occur annually in Coconino County; 16.2% of AZ's total.
 - 390,421 OHV Recreation Days (20%) are from Coconino County residents.
 - 1,583,872 OHV days (80%) are from other AZ residents traveling to Coconino County.
- 69% of Coconino County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Coconino County from OHV Recreation is \$258 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Coconino County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$26.9 M	\$10.2 M	\$16.7 M
Lodging/Campgrounds	\$18.5 M	\$1.3 M	\$17.2 M
Restaurants/Bars	\$18.3 M	\$5.3 M	\$13.0 M
Groceries/Liquor	\$21.3 M	\$7.5 M	\$13.8 M
Other (event fees, souvenirs, etc.)	\$21.4 M	\$5.8 M	\$15.6 M
• Total OHV Recreation Trips	\$106.4 M	\$30.1 M	\$76.3 M

- Off-Highway Vehicles + \$46.3 M
- Tow Vehicles/Trailers + \$11.5 M
- OHV Equipment + \$51.1 M

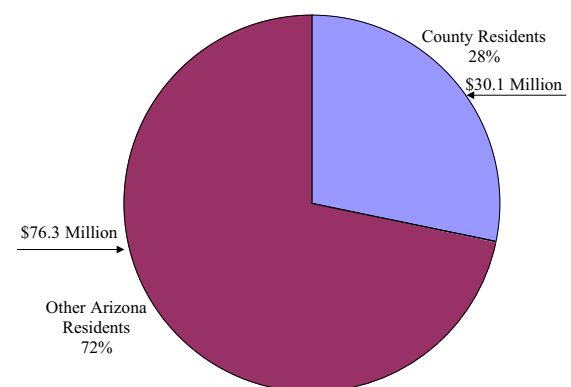
Total OHV Expenditures = \$215.3 Million

TOTAL IMPACT- Multiplier Effect* \$258.3 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 2,580
- Salaries/Wages \$51.7 Million
- State Tax Revenues \$10.5 Million

OHV Trip Expenditures—\$106.4 Million



Economic Importance of OHV Recreation to Coconino County

- Creates a statewide economic impact of \$258.3 million (multiplier effect)*
- Contributes \$215.3 million to local economies through OHV-related expenditures
- Adds \$10.5 million to annual state tax revenues
- Provides \$51.7 million in income (salaries/wages) for Coconino County residents
- Supports 2,580 jobs in Coconino County

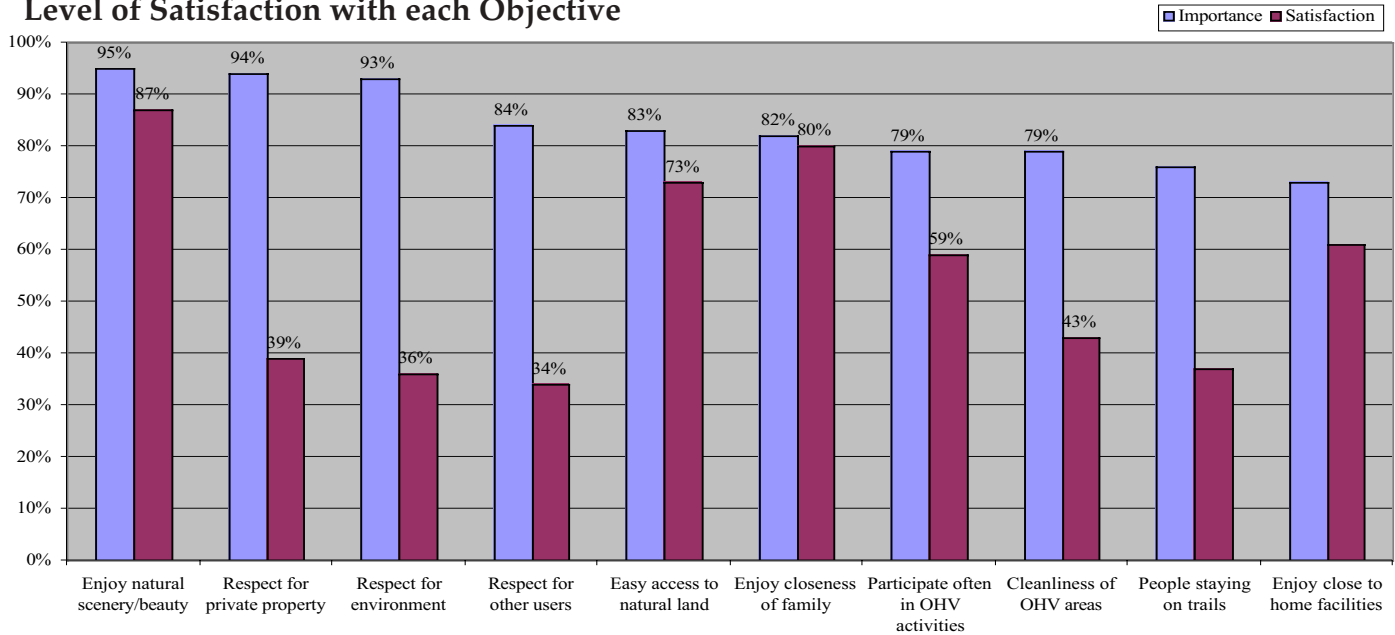
“Top Ten” Main Reason for taking last OHV Trip

- Hunting 19%
- Sightseeing 14%
- Camping 13%
- Driving backroads 10%
- Trail riding-ATVs 9%
- Hiking or walking 7%
- Wildlife/bird watching 4%
- Fishing 2%
- Picnicking 2%
- Trail riding-motorbikes 1%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 76%
- Sightseeing 49%
- Hiking or walking 47%
- Picnicking 36%
- Camping 30%
- Wildlife/bird watching 24%
- Trail riding-ATVs 23%
- Photography 22%
- Hunting 20%
- Hill climbing 20%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

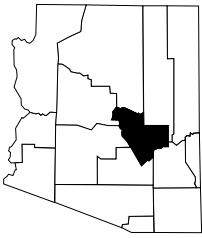
- 4WD Pickup Truck 45%
- Sport Utility Vehicle/Jeep 41%
- All Terrain Vehicle (ATV) 30%
- Trail Motorcycle 8%
- 2WD Pickup Truck 7%
- Dune Buggy/Sand Rail 4%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



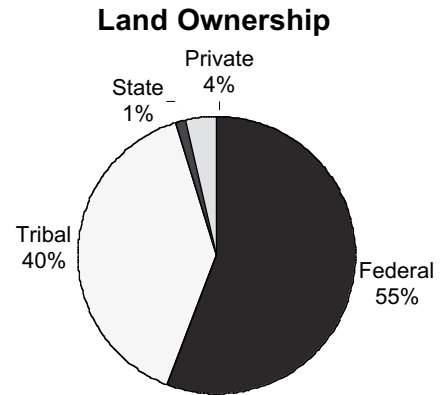
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GILA COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Gila County

Gila County is located in the east central part of the state. It has 1.0% (51,335) of the state's population and 4.2% (3,066,606 acres or 4,791 square miles) of the state's land base. Population density is 11 people per square mile. The landscape is forested with Pinyon-Juniper or Ponderosa Pine forests and offers a wide range of outdoor recreation opportunities. The region is a popular destination of OHV recreationists who want to explore rough backcountry terrain, dense green forests and somewhat cooler temperatures.



- 36% of households in Gila County are OHV users; state percentage is 21%.
- 8% of all Arizona OHV trip destinations for past 12 months were to Gila County.
- 1,262,607 OHV Recreation Days occur annually in Gila County; 10.3% of Arizona's total.
 - 228,071 OHV Recreation Days (18%) are from Gila County residents.
 - 1,034,536 OHV days (82%) are from other Arizona residents traveling to Gila County.
- 60% of Gila County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Gila County from OHV Recreation is \$138 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Gila County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$16.7 M	\$5.8 M	\$10.9 M
Lodging/Campgrounds	\$12.0 M	\$0.8 M	\$11.2 M
Restaurants/Bars	\$11.5 M	\$3.0M	\$8.5 M
Groceries/Liquor	\$13.3 M	\$4.3 M	\$9.0 M
Other (event fees, souvenirs, etc.)	<u>\$13.6 M</u>	<u>\$2.8 M</u>	<u>\$10.8 M</u>
• Total OHV Recreation Trips	\$67.1 M	\$16.7 M	\$50.4 M

- Off-Highway Vehicles + \$16.9 M
- Tow Vehicles/Trailers + \$9.4 M
- OHV Equipment + \$27.1 M

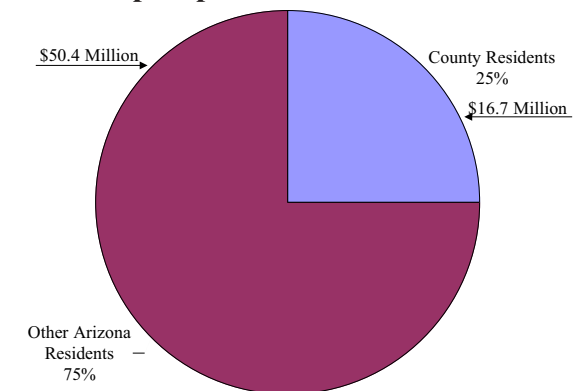
Total OHV Expenditures = \$120.5 Million

TOTAL IMPACT- Multiplier Effect* \$137.6 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,322
- Salaries/Wages \$22.3 Million
- State Tax Revenues \$4.2 Million

OHV Trip Expenditures—\$67.1 Million



Economic Importance of OHV Recreation to Gila County

- Creates a statewide economic impact of \$137.6 million (multiplier effect)*
- Contributes \$120.5 million to local economies through OHV-related expenditures
- Adds \$4.2 million to annual state tax revenues
- Provides \$22.3 million in income (salaries/wages) for Gila County residents
- Supports 1,322 jobs in Gila County

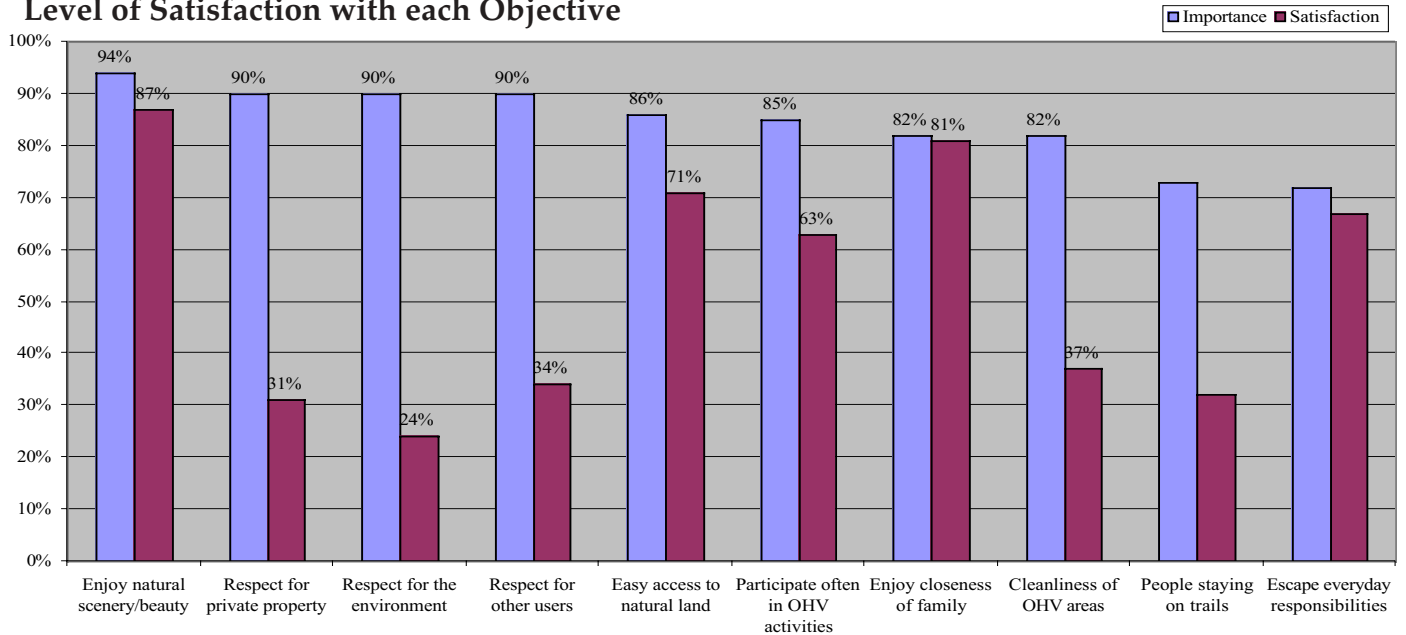
“Top Ten” Main Reason for taking last OHV Trip

- Sightseeing 15%
- Hunting 14%
- Driving backroads 13%
- Camping 12%
- Fishing 10%
- Trail riding-ATVs 8%
- Hiking or walking 5%
- Visiting historic/arch. sites 3%
- Trail riding-motorbikes 1%
- Driving in open areas 1%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 75%
- Sightseeing 55%
- Hiking or walking 37%
- Camping 33%
- Picnicking 27%
- Trail riding-ATVs 24%
- Hunting 22%
- Fishing 22%
- Wildlife/bird watching 20%
- Photography 18%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

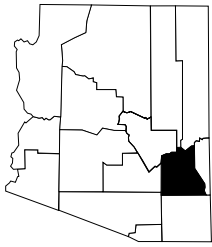
- 4WD Pickup Truck 50%
- All Terrain Vehicle (ATV) 39%
- Sport Utility Vehicle/Jeep 27%
- Trail Motorcycle 8%
- 2WD Pickup Truck 6%
- Dune Buggy/Sand Rail 6%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



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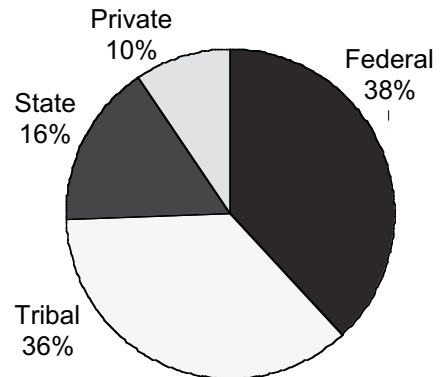
GRAHAM COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Graham County

Graham County is located in the eastern part of the state. It has 0.65% (33,489) of the state's population and 4.1% (2,975,155 acres or 4,648 square miles) of the state's land base. The population density is 7 people per square mile. The landscape ranges from low desert to high elevation mixed conifer forests offering a wide range of outdoor recreation opportunities. The region has several unique OHV opportunities, such as a small dune area and scenic byways.

Land Ownership



- 34% of households in Graham County are OHV users; state percentage is 21%.
- 5% of all Arizona OHV trip destinations for past 12 months were to Graham County.
- 209,712 OHV Recreation Days occur annually in Graham County; 1.7% of Arizona's total.
 - 66,020 OHV Recreation Days (31%) are from Graham County residents.
 - 143,694 OHV days (69%) are from other Arizona residents traveling to Graham County.
- 82% of Graham County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Graham County from OHV Recreation is \$37.5 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Graham County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$3.4 M	\$1.9 M	\$1.5 M
Lodging/Campgrounds	\$1.8 M	\$0.2 M	\$1.6 M
Restaurants/Bars	\$2.2 M	\$1.0 M	\$1.2 M
Groceries/Liquor	\$2.7 M	\$1.4 M	\$1.3 M
Other (event fees, souvenirs, etc.)	\$2.3 M	\$0.7 M	\$1.6 M
• Total OHV Recreation Trips	\$12.4 M	\$5.2 M	\$7.2 M

- Off-Highway Vehicles + \$6.7 M
- Tow Vehicles/Trailers + \$2.6 M
- OHV Equipment + \$10.6 M

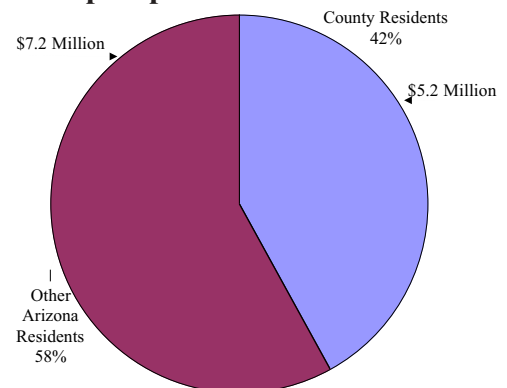
Total OHV Expenditures = \$32.3 Million

TOTAL IMPACT- Multiplier Effect* \$37.5 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 348
- Salaries/Wages \$6.2 Million
- State Tax Revenues \$1.4 Million

OHV Trip Expenditures—\$12.4 Million



Economic Importance of OHV Recreation to Graham County

- Creates a statewide economic impact of \$37.5 million (multiplier effect)*
- Contributes \$32.3 million to local economies through OHV-related expenditures
- Adds \$1.4 million to annual state tax revenues
- Provides \$6.2 million in income (salaries/wages) for Graham County residents
- Supports 348 jobs in Graham County

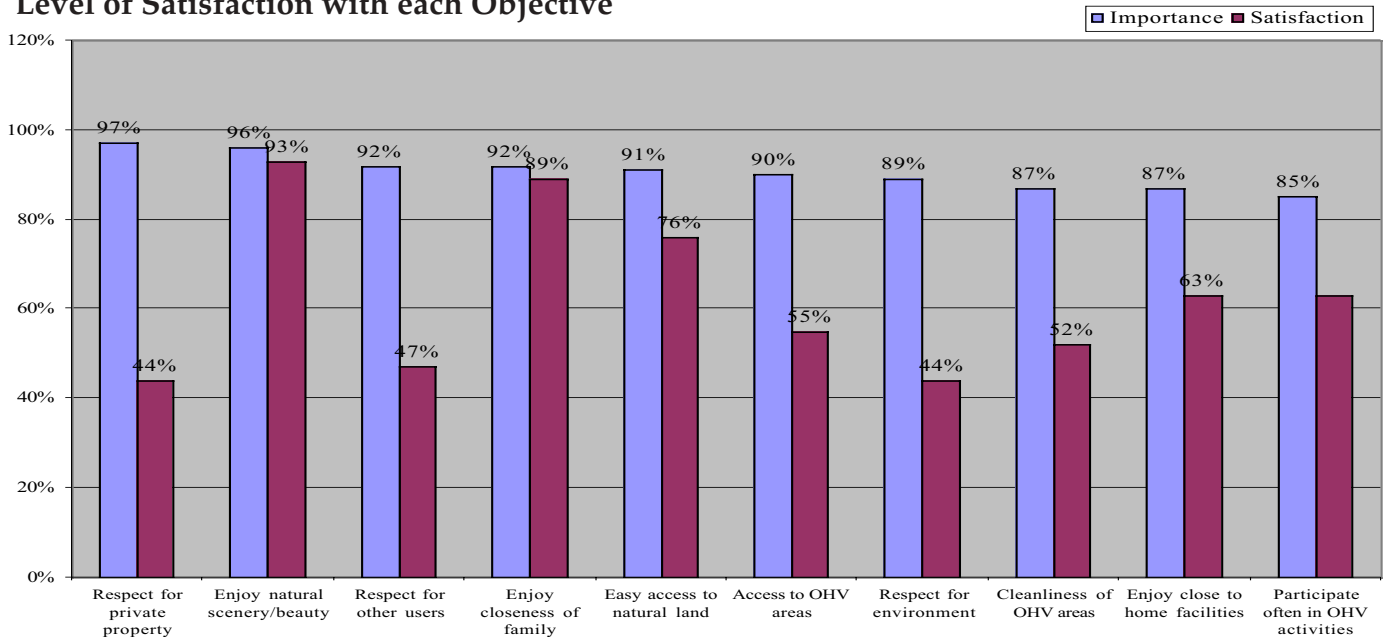
“Top Ten” Main Reason for taking last OHV Trip

- Camping 14%
- Sightseeing 11%
- Driving backroads 10%
- Fishing 10%
- Picnicking 10%
- Hunting 9%
- Trail riding-ATVs 7%
- Hiking or walking 5%
- Hill climbing 4%
- Trail riding-motorbikes 1%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 77%
- Picnicking 47%
- Sightseeing 42%
- Hiking or walking 30%
- Camping 30%
- Wildlife/bird watching 30%
- Hill climbing 28%
- Trail riding-ATVs 27%
- Fishing 26%
- Driving in open areas 24%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

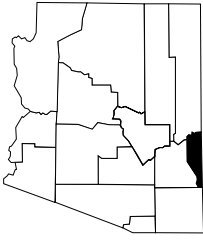
- 4WD Pickup Truck 50%
- All Terrain Vehicle (ATV) 46%
- Sport Utility Vehicle/Jeep 19%
- Dune Buggy/Sand Rail 16%
- Trail Motorcycle 15%
- 2WD Pickup Truck 5%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



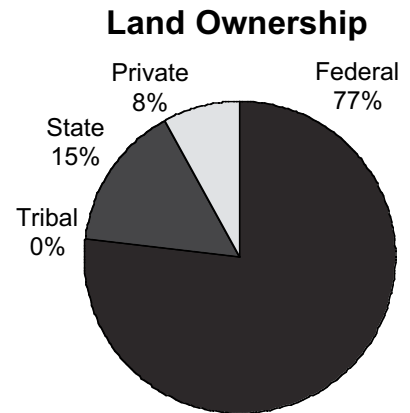
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GREENLEE COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Greenlee County

Greenlee County is located on the eastern border of the state. It has 0.17% (8,547) of the state's population and 1.61% (1,175,385 acres or 1,836 square miles) of the state's land base. Population density is 5 people per square mile. Much of the landscape is rough hilly and mountainous terrain ranging from high desert to spruce-fir forests. The region offers OHV recreationists an opportunity to explore remote backcountry roads and trails in mountainous forested terrain.



- 48% of households in Greenlee County are OHV users; state percentage is 21%.
- 5% of all Arizona OHV trip destinations for past 12 months were to Greenlee County.
- 88,926 OHV Recreation Days occur annually in Greenlee County; 0.7% of Arizona's total.
 - 32,787 OHV Recreation Days (37%) are from Greenlee County residents.
 - 56,139 OHV days (63%) are from other Arizona residents traveling to Greenlee County.
- 79% of Greenlee County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Greenlee County from OHV Recreation is \$12 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Greenlee County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$1.5 M	\$0.9 M	\$0.6 M
Lodging/Campgrounds	\$0.7 M	\$0.1 M	\$0.6 M
Restaurants/Bars	\$0.9 M	\$0.5 M	\$0.4 M
Groceries/Liquor	\$1.2 M	\$0.7 M	\$0.5 M
Other (event fees, souvenirs, etc.)	<u>\$0.97 M</u>	<u>\$0.37 M</u>	<u>\$0.6 M</u>
• Total OHV Recreation Trips	\$5.3 M	\$2.6 M	\$2.7 M

- Off-Highway Vehicles + \$2.2 M
- Tow Vehicles/Trailers + \$0.1 M
- OHV Equipment + \$4.1 M

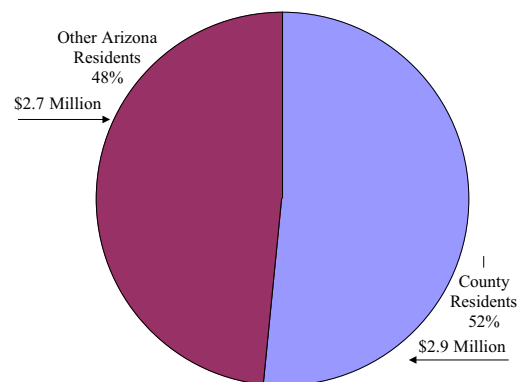
Total OHV Expenditures = \$11.7 Million

TOTAL IMPACT- Multiplier Effect* \$12 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 50
- Salaries/Wages \$0.8 Million
- State Tax Revenues \$0.1 Million

OHV Trip Expenditures—\$5.3 Million



Economic Importance of OHV Recreation to Greenlee County

- Creates a statewide economic impact of \$12 million (multiplier effect)*
- Contributes 11.7 million to local economies through OHV-related expenditures
- Adds \$0.1 million to annual state tax revenues
- Provides \$0.8 million in income (salaries/wages) for Greenlee County residents
- Supports 50 jobs in Greenlee County

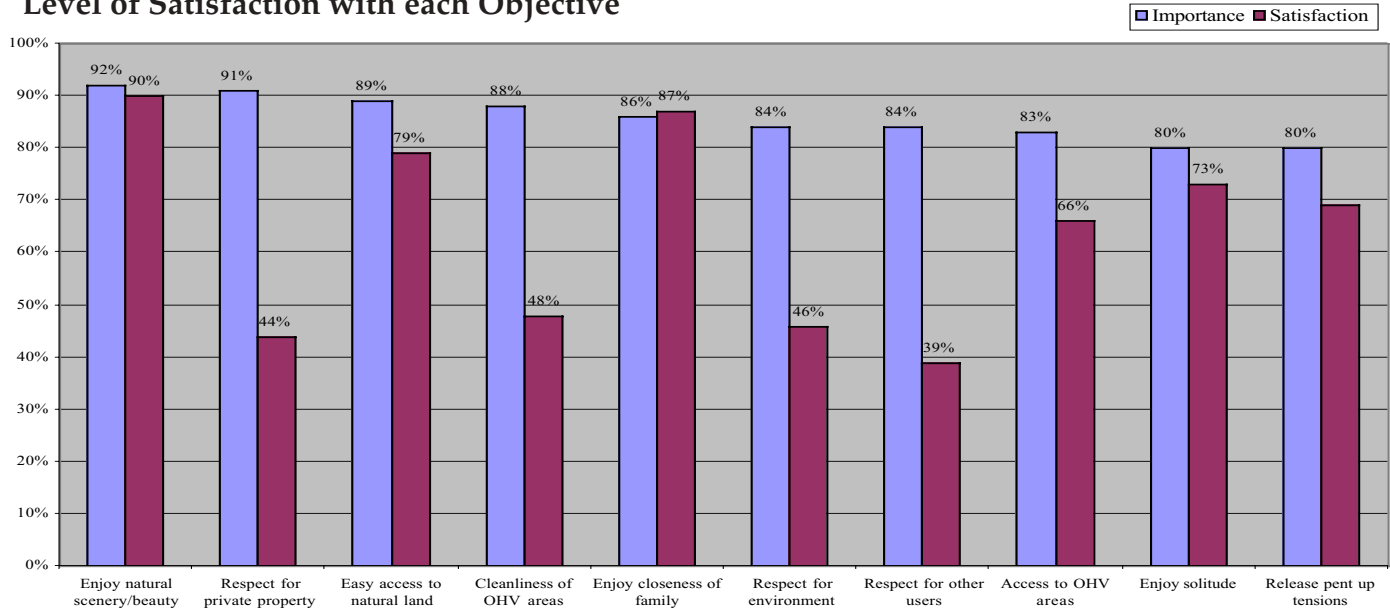
"Top Ten" Main Reason for taking last OHV Trip

- Camping 13%
- Fishing 14%
- Sightseeing 11%
- Hunting 11%
- Picnicking 10%
- Driving backroads 5%
- Hiking or walking 5%
- Swimming 3%
- Trail riding-ATVs 2%
- Trail riding-motorbikes 2%

"Top Ten" Outdoor Activities done on last OHV Trip

- Driving backroads 73%
- Sightseeing 49%
- Picnicking 43%
- Fishing 42%
- Hiking or walking 34%
- Camping 30%
- Wildlife/bird watching 25%
- River running 21%
- Driving in open areas 19%
- Swimming 19%

Evaluation of Last OHV Recreation Trip—"Top Ten" Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

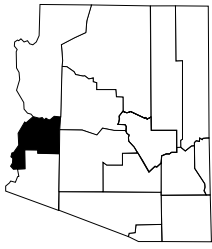
- 4WD Pickup Truck 72%
- All Terrain Vehicle (ATV) 25%
- Sport Utility Vehicle/Jeep 18%
- 2WD Pickup Truck 15%
- Dune Buggy/Sand Rail 9%
- Trail Motorcycle 6%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



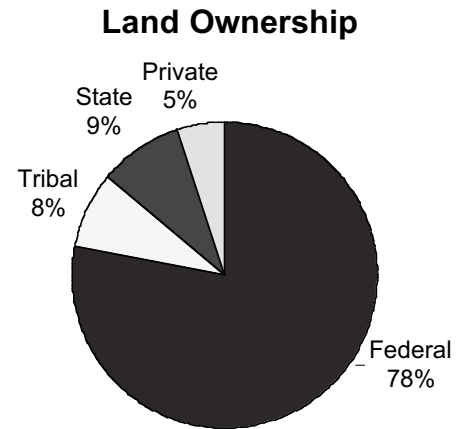
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LA PAZ COUNTY



Economic Importance of Off-Highway Vehicle Recreation to La Paz County

La Paz County is located on the western border of the state. It has 0.38% (19,715) of the state's population and 3.96% (2,891,502 acres or 4,517 square miles) of the state's land base. This averages out to four people per square mile. The landscape is primarily Sonoran Desert with several low elevation mountains. The region offers desert OHV opportunities including numerous remote backcountry roads and trails.



- 34% of households in La Paz County are OHV users; state percentage is 21%.
- 5% of all Arizona OHV trip destinations for past 12 months were to La Paz County.
- 344,550 OHV Recreation Days occur annually in La Paz County; 2.8% of Arizona's total.
 - 191,319 OHV Recreation Days (55%) are from La Paz County residents.
 - 153,230 OHV days (45%) are from other Arizona residents traveling to La Paz County.
- 94% of La Paz County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to La Paz County from OHV Recreation is \$50 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for La Paz County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$5.9 M	\$4.3 M	\$1.6 M
Lodging/Campgrounds	\$2.3 M	\$0.6 M	\$1.7 M
Restaurants/Bars	\$3.4 M	\$2.2 M	\$1.2 M
Groceries/Liquor	\$4.5 M	\$3.2 M	\$1.3 M
Other (event fees, souvenirs, etc.)	<u>\$3.4 M</u>	<u>\$1.8 M</u>	<u>\$1.6 M</u>
• Total OHV Recreation Trips	\$19.5 M	\$12.1 M	\$7.4 M

- Off-Highway Vehicles + \$13.7 M
- Tow Vehicles/Trailers + \$2.4 M
- OHV Equipment + \$8.5 M

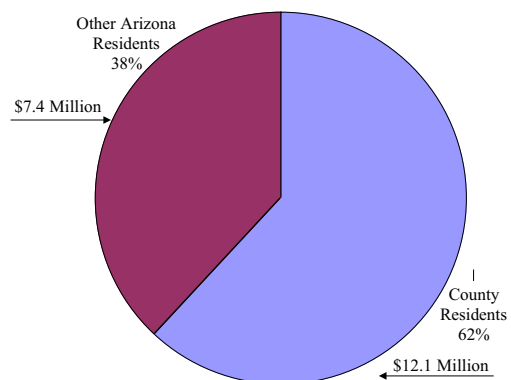
Total OHV Expenditures = \$44.1 Million

TOTAL IMPACT- Multiplier Effect* \$49.7 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 459
- Salaries/Wages \$8.3 Million
- State Tax Revenues \$1.9 Million

OHV Trip Expenditures—\$19.5 Million



Economic Importance of OHV Recreation to La Paz County

- Creates a statewide economic impact of \$49.7 million (multiplier effect)*
- Contributes \$44.1 million to local economies through OHV-related expenditures
- Adds \$1.9 million to annual state tax revenues
- Provides \$8.3 million in income (salaries/wages) for La Paz County residents
- Supports 459 jobs in La Paz County

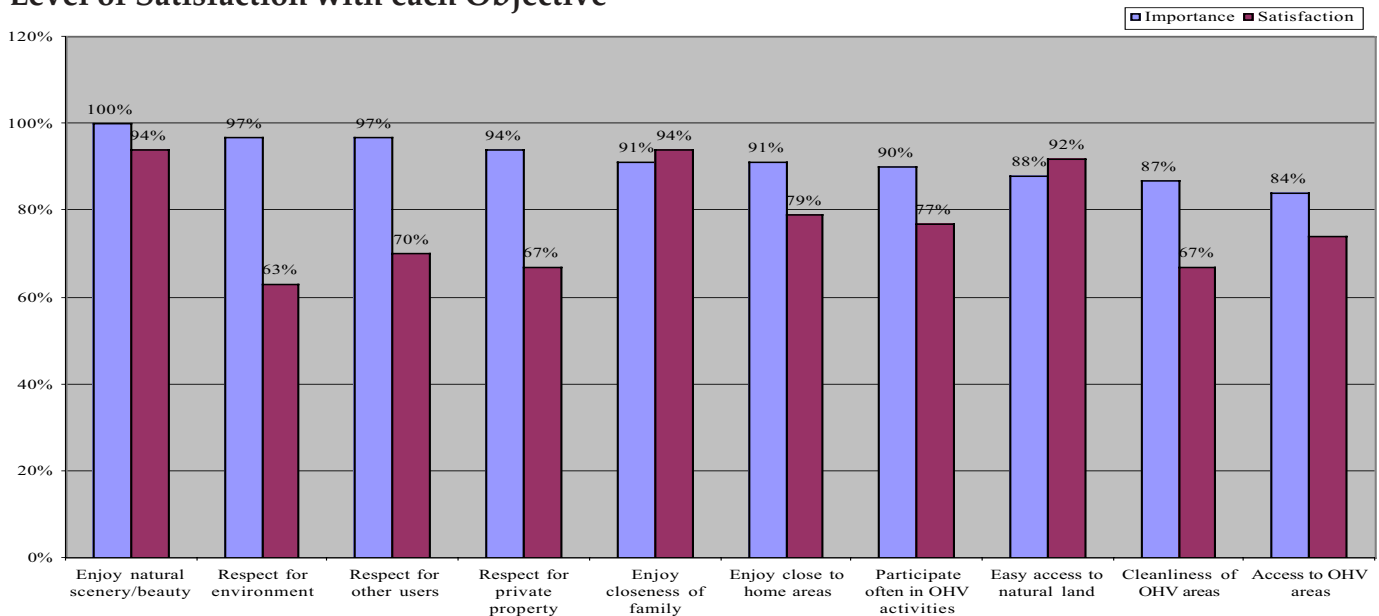
“Top Ten” Main Reason for taking last OHV Trip

- Sightseeing 21%
- Driving backroads 15%
- Trail riding-ATVs 12%
- Visiting historic/arch. sites 6%
- Fishing 6%
- Photography 3%
- Wildlife/bird watching 3%
- Hiking or walking 3%
- Picnicking 3%
- Trail riding-motorbikes 3%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 83%
- Sightseeing 71%
- Picnicking 71%
- Trail riding-ATVs 46%
- Hiking or walking 46%
- Photography 46%
- Visiting historic/arch. sites 37%
- Driving in open areas 37%
- Wildlife/bird watching 34%
- Hill climbing 31%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

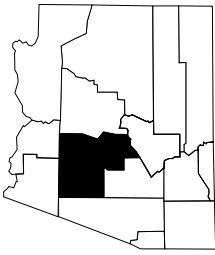
- All Terrain Vehicle (ATV) 46%
- 4WD Pickup Truck 37%
- Sport Utility Vehicle/Jeep 26%
- Dune Buggy/Sand Rail 9%
- Trail Motorcycle 6%
- 2WD Pickup Truck 3%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



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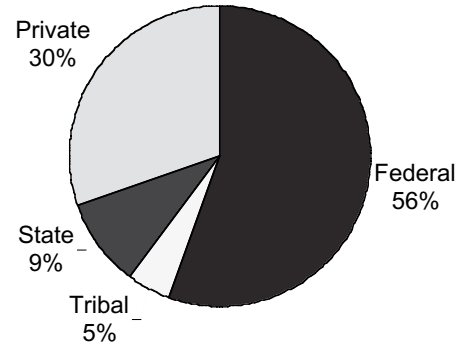
MARICOPA COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Maricopa County

Maricopa County is located in the center of the state. It has nearly 60% (3,072,149) of the state's population and 8% (5,902,107 acres or 9,222 square miles) of the state's land base. This averages out to 333 people per square mile. The topography is primarily Sonoran Desert with low desert mountains. The region provides OHV recreationists with desert OHV opportunities, especially in the winter and spring months.

Land Ownership



- 19% of households in Maricopa County are OHV users; state percentage is 21%.
- 9% of all Arizona OHV trip destinations for past 12 months were to Maricopa County.
- 2,086,893 OHV Recreation Days occur annually in Maricopa County; 17% of AZ's total.
 - 1,856,560 OHV Recreation Days (89%) are from Maricopa County residents.
 - 230,334 OHV days (11%) are from other AZ residents traveling to Maricopa County.
- 81% of Maricopa County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Maricopa County from OHV Recreation is \$1.8 BILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Maricopa County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$83.3 M	\$80.9 M	\$2.4 M
Lodging/Campgrounds	\$10.8 M	\$8.3 M	\$2.5 M
Restaurants/Bars	\$47.6 M	\$45.7 M	\$1.9 M
Groceries/Liquor	\$59.4 M	\$57.4 M	\$2.0 M
Other (event fees, souvenirs, etc.)	\$29.2 M	\$26.7 M	\$2.5 M
• Total OHV Recreation Trips	\$230.3 M	\$219 M	\$11.3 M

- Off-Highway Vehicles + \$294.4 M
- Tow Vehicles/Trailers + \$200.6 M
- OHV Equipment + \$632.9 M

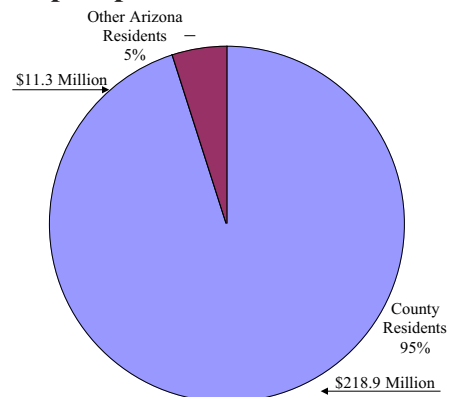
Total OHV Expenditures = \$1,358.2 Million

TOTAL IMPACT- Multiplier Effect* \$1,787.1 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 13,111
- Salaries/Wages \$428.9 Million
- State Tax Revenues \$78.5 Million

OHV Trip Expenditures—\$230.3 Million



Economic Importance of OHV Recreation to Maricopa County

- Creates a statewide economic impact of \$1.8 billion (multiplier effect)*
- Contributes \$1.4 billion to local economies through OHV-related expenditures
- Adds \$78.5 million to annual state tax revenues
- Provides \$428.9 million in income (salaries/wages) for Maricopa County residents
- Supports 13,111 jobs in Maricopa County

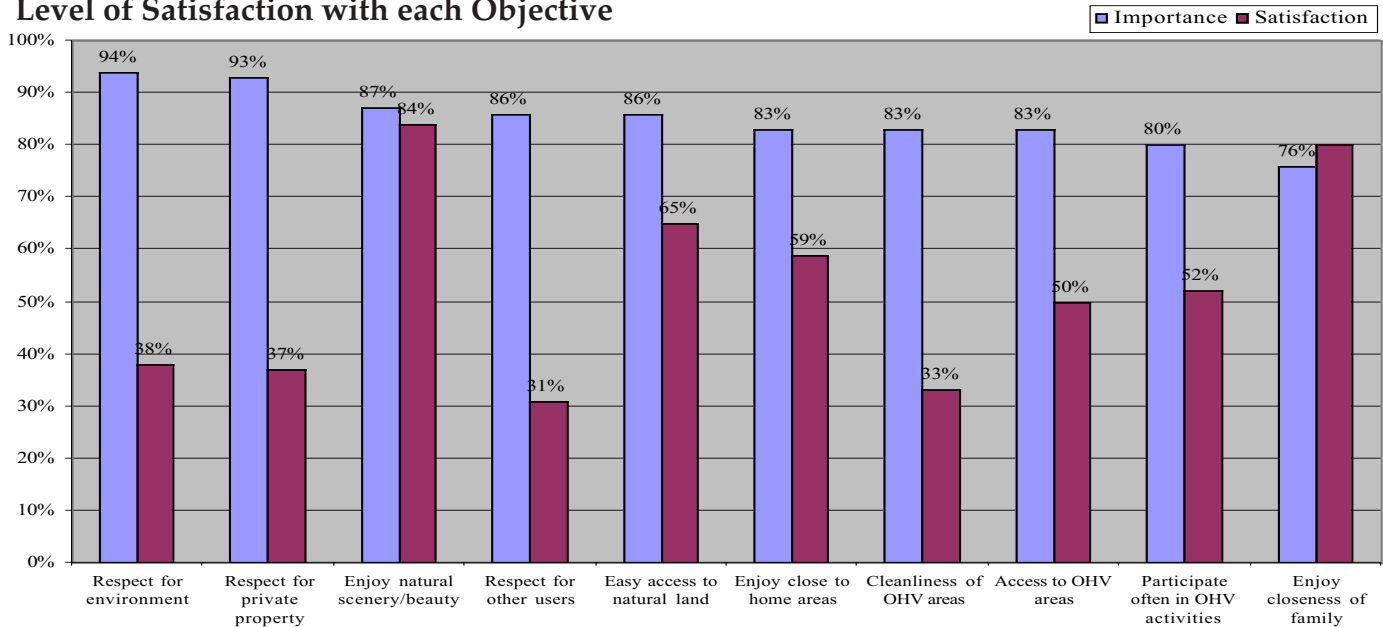
“Top Ten” Main Reason for taking last OHV Trip

- Trail riding-ATVs 16%
- Trail riding-motorbikes 14%
- Driving backroads 13%
- Camping 9%
- Sightseeing 6%
- Visiting historic/arch. sites 6%
- Picnicking 5%
- Fishing 3%
- Hunting 3%
- Boating 3%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 75%
- Sightseeing 45%
- Trail riding-ATVs 38%
- Hiking or walking 35%
- Picnicking 33%
- Hill climbing 32%
- Driving in open areas 24%
- Trail riding-motorbikes 23%
- Photography 20%
- Camping 17%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

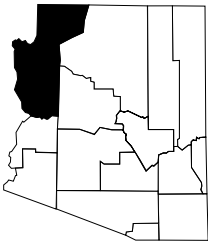
- 4WD Pickup Truck 53%
- All Terrain Vehicle (ATV) 44%
- Sport Utility Vehicle/Jeep 22%
- Trail Motorcycle 19%
- 2WD Pickup Truck 7%
- Dune Buggy/Sand Rail 1%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



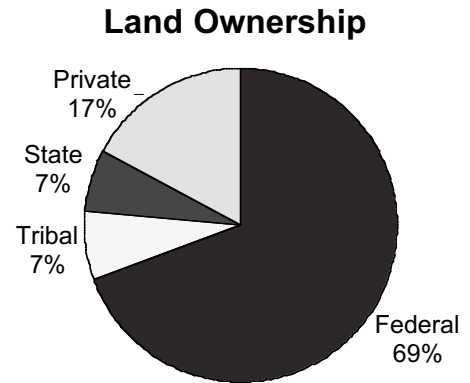
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MOHAVE COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Mohave County

Mohave County is located in the northwestern part of the state. It has 3% (155,032) of the state's population and 11.8% (8,627,206 acres or 13,480 square miles) of the state's land base. This averages out to 11 people per square mile. The landscape ranges from Mohave Desert to forested mountain ranges offering a wide range of outdoor recreation and OHV opportunities. There are many back roads and jeep trails to explore.



- 26% of households in Mohave County are OHV users; state percentage is 21%.
- 11% of all Arizona OHV trip destinations for past 12 months were to Mohave County.
- 780,111 OHV Recreation Days occur annually in Mohave County; 6.4% of Arizona's total.
 - 604,266 OHV Recreation Days (77%) are from Mohave County residents.
 - 175,846 OHV days (23%) are from other Arizona residents traveling to Mohave County.
- 77% of Mohave County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Mohave County from OHV Recreation is \$219 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Mohave County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$16.6 M	\$14.7 M	\$1.9 M
Lodging/Campgrounds	\$3.9 M	\$2.0 M	\$1.9 M
Restaurants/Bars	\$8.9 M	\$7.5 M	\$1.4 M
Groceries/Liquor	\$12.4 M	\$10.9 M	\$1.5 M
Other (event fees, souvenirs, etc.)	<u>\$8.1 M</u>	<u>\$5.8 M</u>	<u>\$2.3 M</u>
• Total OHV Recreation Trips	\$49.9 M	\$40.9 M	\$9.0 M

- Off-Highway Vehicles + \$45.8 M
- Tow Vehicles/Trailers + \$16.7 M
- OHV Equipment + \$69.7 M

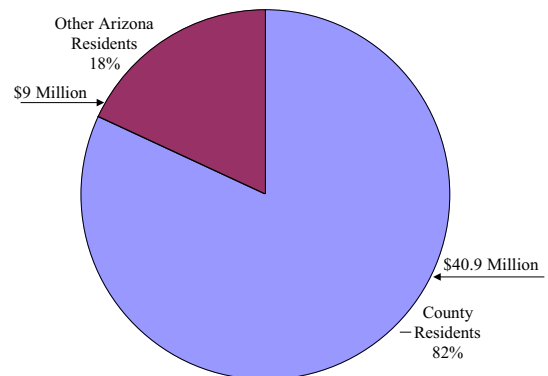
Total OHV Expenditures = \$182.1 Million

TOTAL IMPACT- Multiplier Effect* \$219.5 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,929
- Salaries/Wages \$40.7 Million
- State Tax Revenues \$9.2 Million

OHV Trip Expenditures—\$49.9 Million



Economic Importance of OHV Recreation to Mohave County

- Creates a statewide economic impact of \$219.5 million (multiplier effect)*
- Contributes \$182 million to local economies through OHV-related expenditures
- Adds \$9.2 million to annual state tax revenues
- Provides \$40.7 million in income (salaries/wages) for Mohave County residents
- Supports 1,929 jobs in Mohave County

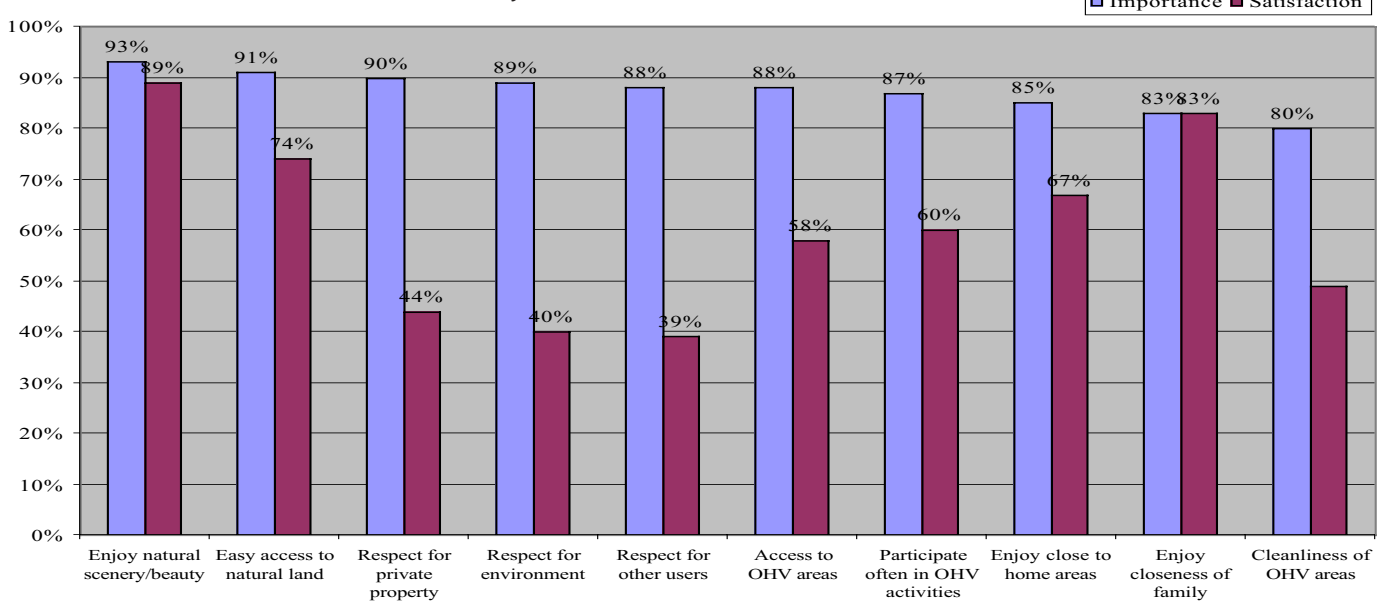
“Top Ten” Main Reason for taking last OHV Trip

- Sightseeing 21%
- Driving backroads 19%
- Trail riding-ATVs 15%
- Camping 8%
- Visiting historic/arch. sites 4%
- Hiking or walking 4%
- Fishing 3%
- Hunting 3%
- Rock crawling 2%
- Trail riding-motorbikes 2%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 81%
- Sightseeing 66%
- Hiking or walking 41%
- Picnicking 39%
- Trail riding-ATVs 33%
- Visiting historic/arch. sites 31%
- Hill climbing 27%
- Photography 26%
- Rock crawling 24%
- Camping 23%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

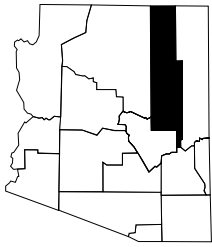
- 4WD Pickup Truck 43%
- Sport Utility Vehicle/Jeep 38%
- All Terrain Vehicle (ATV) 28%
- Trail Motorcycle 6%
- Dune Buggy/Sand Rail 5%
- 2WD Pickup Truck 2%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



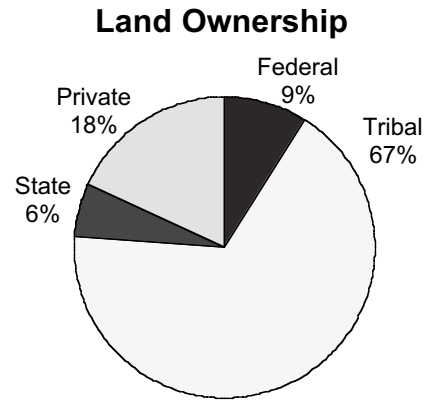
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 Phoenix, AZ 85007
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NAVAJO COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Navajo County

Navajo County is located in the northern part of the state. It has 1.9% (97,470) of the state's population and 8.7% (6,367,095 acres or 9.948 square miles) of the state's land base. This averages out to 9.8 people per square mile. The landscape ranges from high desert to ponderosa pine and mixed conifer forests offering a wide range of outdoor recreation opportunities. There are numerous back roads and trails to explore.



- 36% of households in Navajo County are OHV users; state percentage is 21%.
- 7% of all Arizona OHV trip destinations for past 12 months were to Navajo County.
- 744,630 OHV Recreation Days occur annually in Navajo County; 6.1% of Arizona's total.
 - 438,831 OHV Recreation Days (59%) are from Navajo County residents.
 - 305,798 OHV days (41%) are from other Arizona residents traveling to Navajo County.
- 73% of Navajo County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Navajo County from OHV Recreation is \$128.5 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Navajo County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$15.3 M	\$12.1 M	\$3.2 M
Lodging/Campgrounds	\$4.9 M	\$1.6 M	\$3.3 M
Restaurants/Bars	\$8.9 M	\$6.4 M	\$2.5 M
Groceries/Liquor	\$11.5 M	\$8.9 M	\$2.6 M
Other (event fees, souvenirs, etc.)	\$8.1 M	\$4.8 M	\$3.3 M
• Total OHV Recreation Trips	\$48.7 M	\$33.8 M	\$14.9 M

- Off-Highway Vehicles + \$25.9 M
- Tow Vehicles/Trailers + \$7.4 M
- OHV Equipment + \$32.9 M

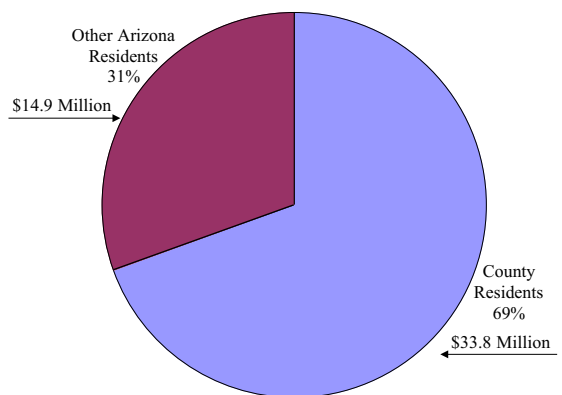
Total OHV Expenditures = \$114.9 Million

TOTAL IMPACT- Multiplier Effect* \$128.5 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,099
- Salaries/Wages \$20.1 Million
- State Tax Revenues \$3.3 Million

OHV Trip Expenditures—\$48.7 Million



Economic Importance of OHV Recreation to Navajo County

- Creates a statewide economic impact of \$128.5 million (multiplier effect)*
- Contributes \$115 million to local economies through OHV-related expenditures
- Adds \$3.3 million to annual state tax revenues
- Provides \$20.1 million in income (salaries/wages) for Navajo County residents
- Supports 1,099 jobs in Navajo County

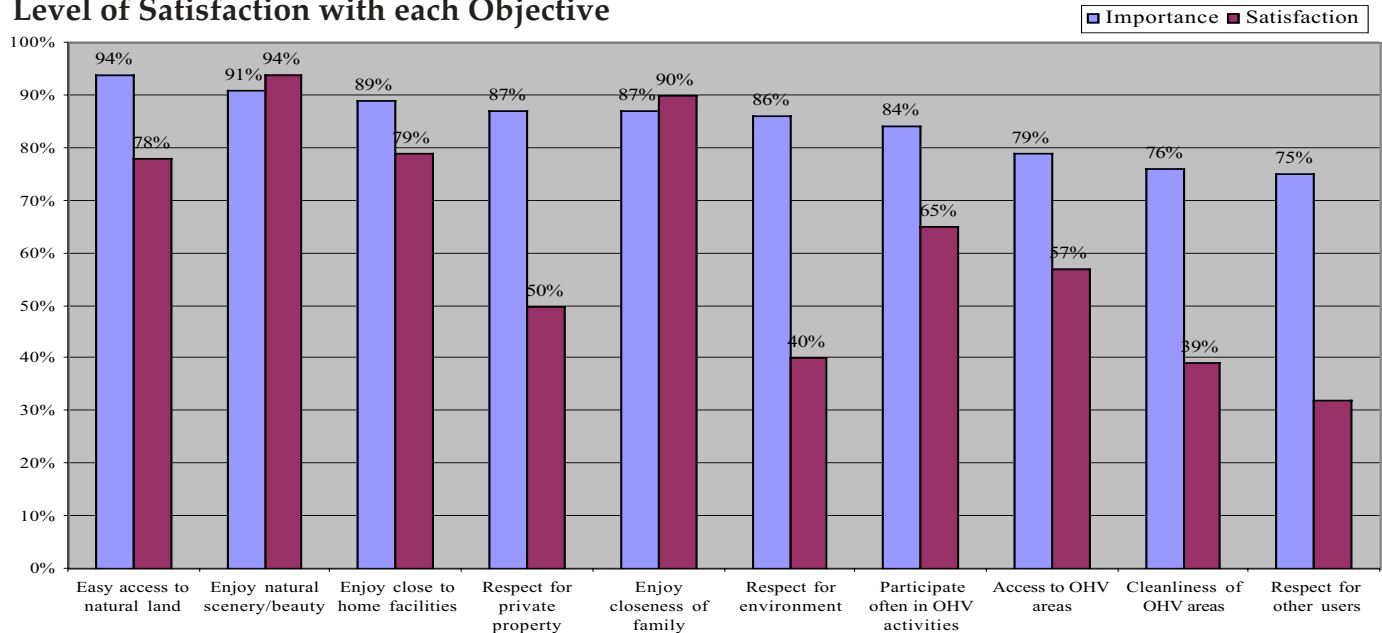
“Top Ten” Main Reason for taking last OHV Trip

- Camping 22%
- Trail riding-ATVs 12%
- Hunting 12%
- Driving backroads 11%
- Sightseeing 9%
- Fishing 8%
- Picnicking 5%
- Visiting historic/arch. sites 2%
- Mountain biking 2%
- Photography 2%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 79%
- Sightseeing 52%
- Hiking or walking 43%
- Camping 38%
- Picnicking 38%
- Trail riding-ATVs 31%
- Fishing 31%
- Wildlife/bird watching 23%
- Hill climbing 22%
- Driving in open areas 22%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

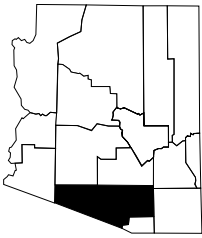
- 4WD Pickup Truck 49%
- All Terrain Vehicle (ATV) 44%
- Sport Utility Vehicle/Jeep 27%
- 2WD Pickup Truck 9%
- Trail Motorcycle 7%
- Snowmobile 2%
- Dune Buggy/Sand Rail 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



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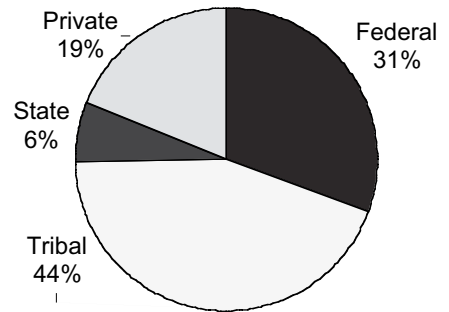
PIMA COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Pima County

Pima County is located in the southern part of the state. It has 16% (843,746) of the state's population and 8% (5,877,511 acres or 9,183 square miles) of the state's land base. This averages out to 92 people per square mile. Much of the landscape is Sonoran Desert with isolated mountain ranges offering a wide range of outdoor recreation opportunities. There are many backroads and trails to explore.

Land Ownership



- 17% of households in Pima County are OHV users; state percentage is 21%.
- 6% of all Arizona OHV trip destinations for past 12 months were to Pima County.
- 836,803 OHV Recreation Days occur annually in Pima County; 6.8% of Arizona's total.
 - 535,253 OHV Recreation Days (64%) are from Pima County residents.
 - 301,550 OHV days (36%) are from other Arizona residents traveling to Pima County.
- 71% of Pima County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Pima County from OHV Recreation is \$403 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Pima County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$24.2 M	\$21.0 M	\$3.2 M
Lodging/Campgrounds	\$5.5 M	\$2.2 M	\$3.3 M
Restaurants/Bars	\$14.1 M	\$11.6 M	\$2.5 M
Groceries/Liquor	\$17.5 M	\$14.9 M	\$2.6 M
Other (event fees, souvenirs, etc.)	<u>\$10.4 M</u>	<u>\$7.1 M</u>	<u>\$3.3 M</u>
• Total OHV Recreation Trips	\$71.7 M	\$56.8 M	\$14.9 M

- Off-Highway Vehicles + \$74.4 M
- Tow Vehicles/Trailers + \$38.1 M
- OHV Equipment + \$139.4 M

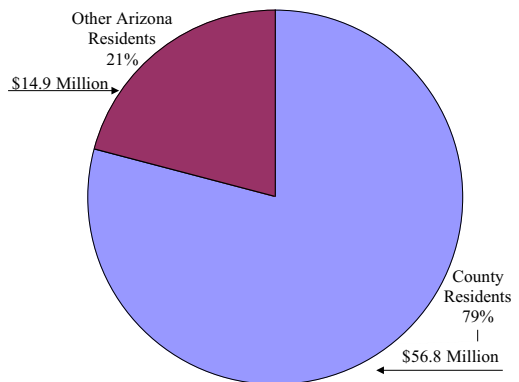
Total OHV Expenditures = \$323.6 Million

TOTAL IMPACT- Multiplier Effect* \$403.5 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 3,307
- Salaries/Wages \$84.3 Million
- State Tax Revenues \$17.7 Million

OHV Trip Expenditures—\$71.7 Million



Economic Importance of OHV Recreation to Pima County

- Creates a statewide economic impact of \$403.5 million (multiplier effect)*
- Contributes \$323.6 million to local economies through OHV-related expenditures
- Adds \$17.7 million to annual state tax revenues
- Provides \$84.3 million in income (salaries/wages) for Pima County residents
- Supports 3,307 jobs in Pima County

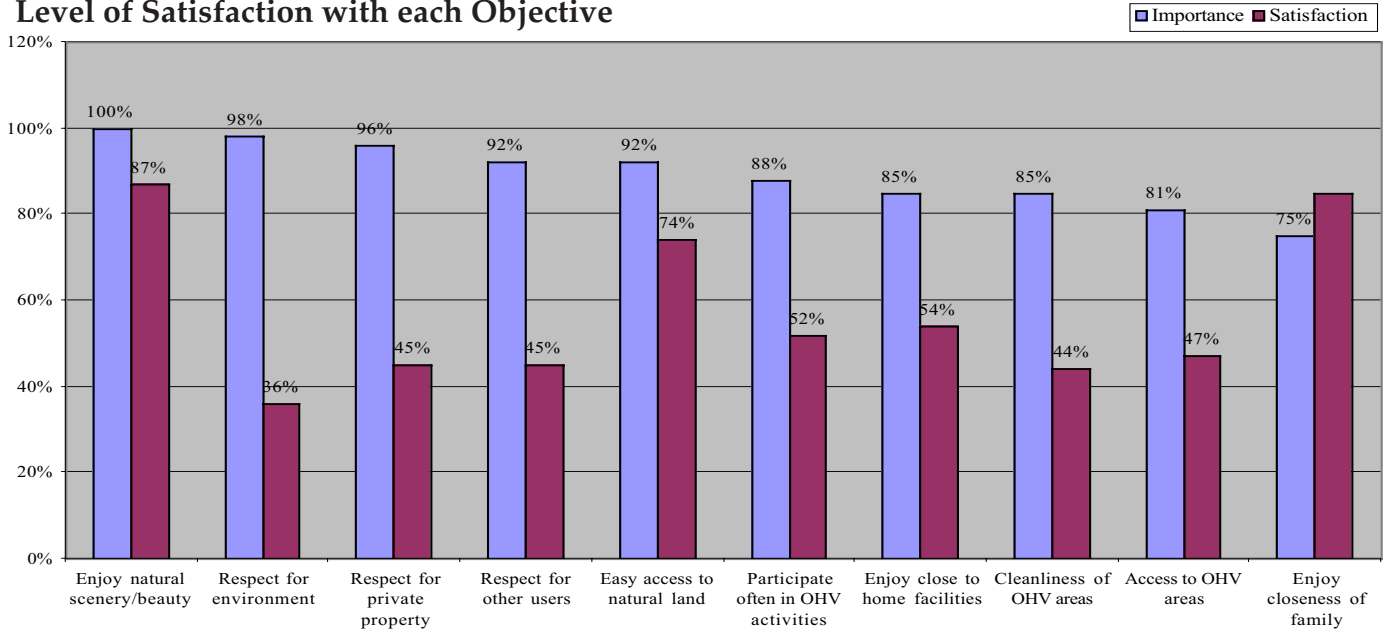
“Top Ten” Main Reason for taking last OHV Trip

- Camping 13%
- Hunting 12%
- Sightseeing 10%
- Driving backroads 8%
- Trail riding-motorbikes 8%
- Photography 6%
- Hiking or walking 6%
- Target shooting 6%
- Rock crawling 4%
- Driving in open areas 4%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 75%
- Hiking or walking 51%
- Sightseeing 45%
- Picnicking 39%
- Photography 31%
- Camping 24%
- Wildlife/bird watching 24%
- Driving in open areas 23%
- Hill climbing 20%
- Trail riding-ATVs 18%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

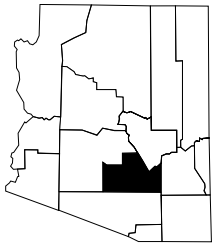
- 4WD Pickup Truck 43%
- Sport Utility Vehicle/Jeep 31%
- All Terrain Vehicle (ATV) 20%
- Trail Motorcycle 16%
- Dune Buggy/Sand Rail 8%
- 2WD Pickup Truck 2%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



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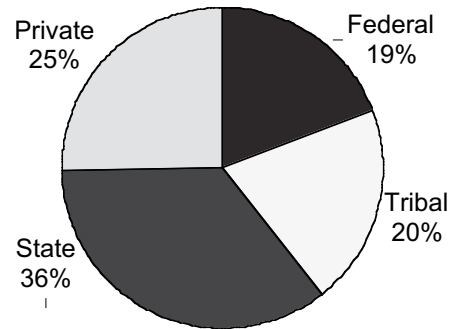
PINAL COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Pinal County

Pinal County is located in the central part of the state. It has 3.5% (179,727) of the state's population and 4.7% (3,437,462 acres or 5,371 square miles) of the state's land base. This averages out to 33 people per square mile. Much of the landscape is Sonoran Desert with the eastern edge rough mountainous terrain offering a wide range of outdoor recreation opportunities. The region is a popular destination for OHV recreationists who want to experience rock crawling.

Land Ownership



- 22% of households in Pinal County are OHV users; state percentage is 21%.
- 4% of all Arizona OHV trip destinations for past 12 months were to Pinal County.
- 600,020 OHV Recreation Days occur annually in Pinal County; 4.9% of Arizona's total.
 - 197,918 OHV Recreation Days (33%) are from Pinal County residents.
 - 402,101 OHV days (67%) are from other Arizona residents traveling to Pinal County.
- 77% of Pinal County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Pinal County from OHV Recreation is \$153 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Pinal County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$11.7 M	\$7.5 M	\$4.2 M
Lodging/Campgrounds	\$5.2 M	\$0.8 M	\$4.4 M
Restaurants/Bars	\$7.4 M	\$4.2 M	\$3.2 M
Groceries/Liquor	\$8.9 M	\$5.4 M	\$3.5 M
Other (event fees, souvenirs, etc.)	\$7.0 M	\$2.8 M	\$4.2 M
• Total OHV Recreation Trips	\$40.2 M	\$20.7 M	\$19.5 M

- Off-Highway Vehicles + \$31.8 M
- Tow Vehicles/Trailers + \$25.6 M
- OHV Equipment + \$37.7 M

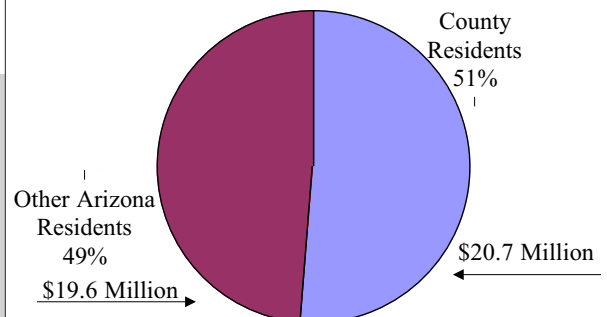
Total OHV Expenditures = \$135.3 Million

TOTAL IMPACT- Multiplier Effect* \$152.7 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,099
- Salaries/Wages \$24.2 Million
- State Tax Revenues \$5.9 Million

OHV Trip Expenditures—\$40.2 Million



Economic Importance of OHV Recreation to Pinal County

- Creates a statewide economic impact of \$152.7 million (multiplier effect)*
- Contributes \$135.3 million to local economies through OHV-related expenditures
- Adds \$5.9 million to annual state tax revenues
- Provides \$24.2 million in income (salaries/wages) for Pinal County residents
- Supports 1,099 jobs in Pinal County

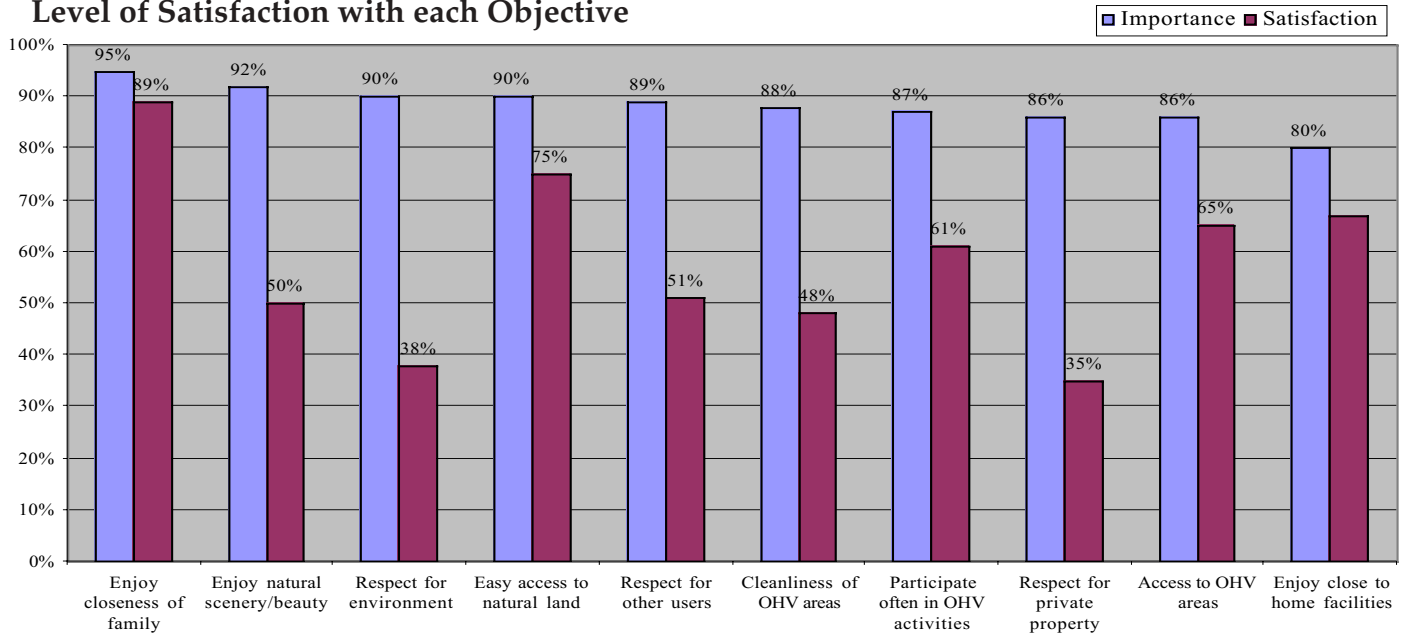
“Top Ten” Main Reason for taking last OHV Trip

- Sightseeing 18%
- Driving backroads 16%
- Hiking or walking 8%
- Camping 6%
- Hunting 6%
- Trail riding-ATVs 4%
- Visiting historic/arch. sites 4%
- Wildlife/bird watching 2%
- Fishing 2%
- Picnicking 2%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 80%
- Sightseeing 64%
- Hiking or walking 48%
- Picnicking 48%
- Photography 32%
- Hill climbing 30%
- Camping 28%
- Trail riding-ATVs 22%
- Driving in open areas 20%
- Visiting historic/arch. sites 20%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

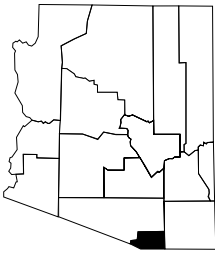
- 4WD Pickup Truck 62%
- Sport Utility Vehicle/Jeep 32%
- All Terrain Vehicle (ATV) 26%
- 2WD Pickup Truck 8%
- Trail Motorcycle 6%
- Dune Buggy/Sand Rail 4%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



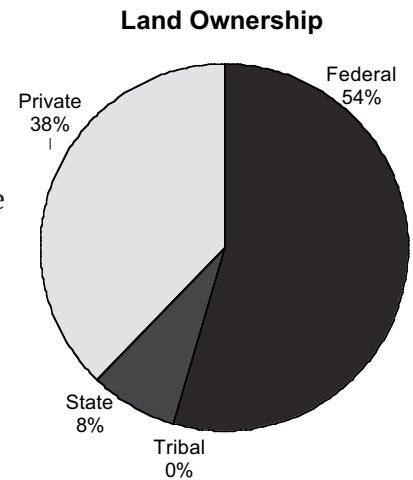
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SANTA CRUZ COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Santa Cruz County

Santa Cruz County is located in the extreme south part of the state along the Mexican border. It has 0.75% (38,381) of the state's population and 1% (790,819 acres or 1,235 square miles) of the state's land base. This averages out to 31 people per square mile. Much of the topography is rolling green grasslands, agricultural lands, wooded hills and rugged forested mountains offering a wide range of outdoor recreation opportunities.



- 19% of households in Santa Cruz County are OHV users; state percentage is 21%.
- 4% of all Arizona OHV trip destinations for past 12 months were to Santa Cruz County.
- 406,935 OHV Recreation Days occur annually in Santa Cruz County; 3.3% of AZ's total.
 - 35,152 OHV Recreation Days (9%) are from Santa Cruz County residents.
 - 371,918 OHV days (91%) are from other AZ residents traveling to Santa Cruz County.
- 62% of Santa Cruz County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Santa Cruz County from OHV Recreation is \$33 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Santa Cruz County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$4.9 M	\$0.9 M	\$4.0 M
Lodging/Campgrounds	\$4.1 M	\$0.1 M	\$4.0 M
Restaurants/Bars	\$3.5 M	\$0.5 M	\$3.0 M
Groceries/Liquor	\$3.9 M	\$0.7 M	\$3.2 M
Other (event fees, souvenirs, etc.)	<u>\$4.4 M</u>	<u>\$0.4 M</u>	<u>\$4.0 M</u>
• Total OHV Recreation Trips	\$20.8 M	\$2.6 M	\$18.2 M
• Off-Highway Vehicles	+ \$0.6 M		
• Tow Vehicles/Trailers	+ \$0.3 M		
• OHV Equipment	+ <u>\$5.6 M</u>		

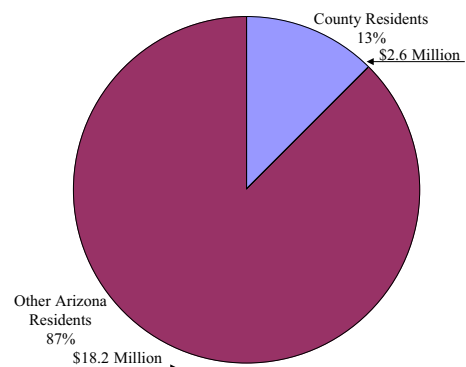
Total OHV Expenditures = \$27.3 Million

TOTAL IMPACT- Multiplier Effect* \$32.8 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) **399**
- Salaries/Wages **\$6.9 Million**
- State Tax Revenues **\$1.3 Million**

OHV Trip Expenditures—\$21 Million



Economic Importance of OHV Recreation to Santa Cruz County

- Creates a statewide economic impact of \$32.8 million (multiplier effect)*
- Contributes \$27.3 million to local economies through OHV-related expenditures
- Adds \$1.3 million to annual state tax revenues
- Provides \$6.9 million in income (salaries/wages) for Santa Cruz County residents
- Supports 399 jobs in Santa Cruz County

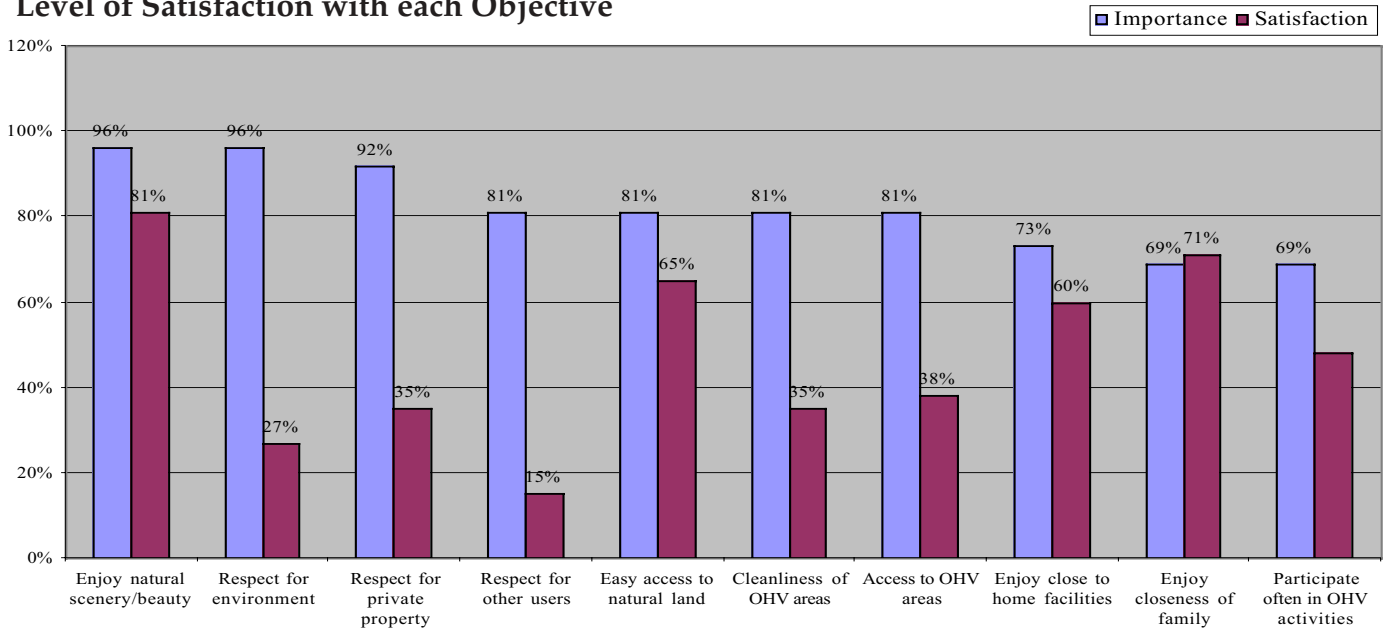
“Top Ten” Main Reason for taking last OHV Trip

- Camping 18%
- Sightseeing 18%
- Hiking or walking 14%
- Driving backroads 7%
- Hunting 7%
- Picnicking 7%
- Trail riding-ATVs 4%
- Wildlife/bird watching 4%
- Swimming 4%
- Jet skiing 4%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 79%
- Hiking or walking 68%
- Sightseeing 50%
- Picnicking 36%
- Camping 32%
- Trail riding-ATVs 29%
- Photography 25%
- Hill climbing 21%
- Wildlife/bird watching 14%
- Swimming 14%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

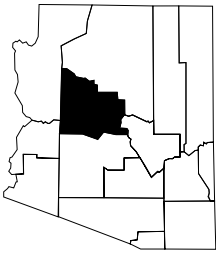
- 4WD Pickup Truck 54%
- Sport Utility Vehicle/Jeep 33%
- All Terrain Vehicle (ATV) 29%
- Trail Motorcycle 11%
- 2WD Pickup Truck 4%
- Dune Buggy/Sand Rail 0%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



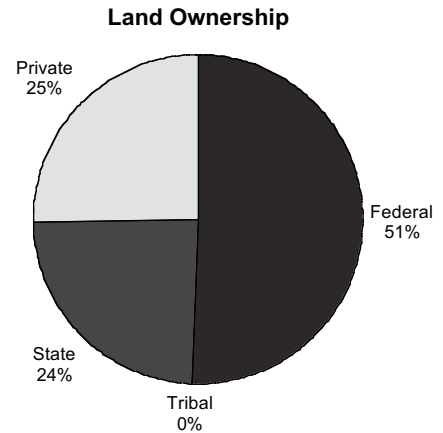
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YAVAPAI COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Yavapai County

Yavapai County is located in the west central part of the state. It has 3.3% (167,517) of the state's population and 7% (5,199,884 acres or 8,124 square miles) of the state's land base. This averages out to 21 people per square mile. Much of the topography is grassland, wooded hills and rugged forested mountains offering OHV recreationists a wide variety of backcountry activities.



- 27% of households in Yavapai County are OHV users; state percentage is 21%.
- 9% of all Arizona OHV trip destinations for past 12 months were to Yavapai County.
- 1,195,742 OHV Recreation Days occur annually in Yavapai County; 9.8% of Arizona's total.
 - 416,824 OHV Recreation Days (35%) are from Yavapai County residents.
 - 778,918 OHV days (65%) are from other Arizona residents traveling to Yavapai County.
- 74% of Yavapai County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Yavapai County from OHV Recreation is \$223 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Yavapai County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$19.8 M	\$11.6 M	\$8.2 M
Lodging/Campgrounds	\$9.9 M	\$1.5 M	\$8.4 M
Restaurants/Bars	\$12.5 M	\$6.1 M	\$6.4 M
Groceries/Liquor	\$15.3 M	\$8.6 M	\$6.7 M
Other (event fees, souvenirs, etc.)	<u>\$13.1 M</u>	<u>\$5.3 M</u>	<u>\$7.8 M</u>
• Total OHV Recreation Trips	\$70.6 M	\$33.1 M	\$37.5 M
• Off-Highway Vehicles	+ \$34.0 M		
• Tow Vehicles/Trailers	+ \$21.2 M		
• OHV Equipment	+ <u>\$57.2 M</u>		

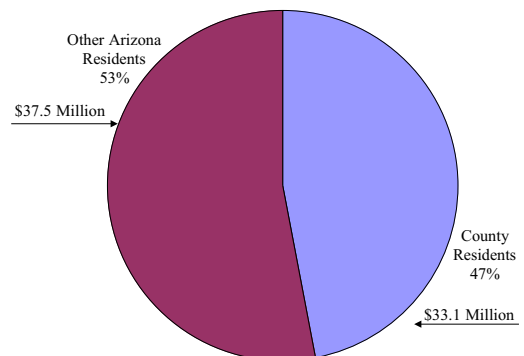
Total OHV Expenditures = \$183.0 Million

TOTAL IMPACT- Multiplier Effect* \$222.7 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 2,067
- Salaries/Wages \$43.9 Million
- State Tax Revenues \$9.2 Million

OHV Trip Expenditures—\$71 Million



Economic Importance of OHV Recreation to Yavapai County

- Creates a statewide economic impact of \$222.7 million (multiplier effect)*
- Contributes \$183 million to local economies through OHV-related expenditures
- Adds \$9.2 million to annual state tax revenues
- Provides \$43.9 million in income (salaries/wages) for Yavapai County residents
- Supports 2,067 jobs in Yavapai County

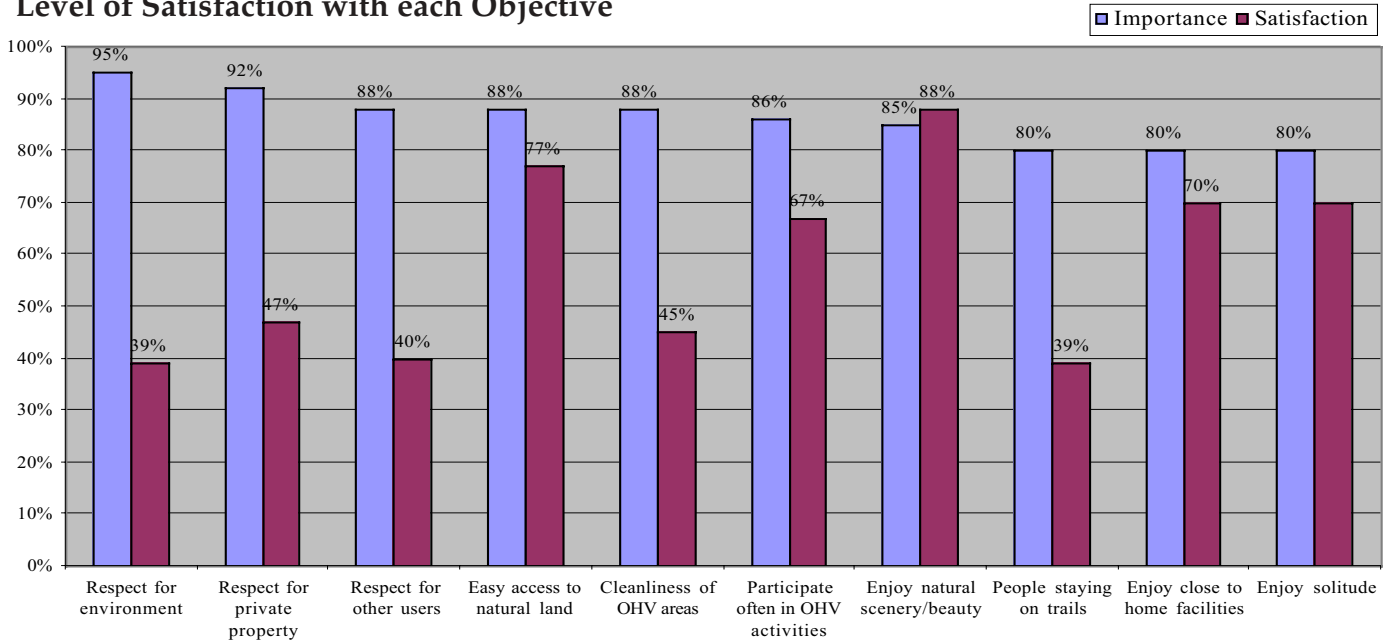
“Top Ten” Main Reason for taking last OHV Trip

- Sightseeing 18%
- Driving backroads 16%
- Hiking or walking 9%
- Trail riding-ATVs 8%
- Camping 7%
- Hunting 7%
- Fishing 7%
- Visiting historic/arch. sites 4%
- Rock crawling 4%
- Trail riding-motorbikes 3%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 78%
- Sightseeing 56%
- Hiking or walking 38%
- Picnicking 32%
- Camping 26%
- Photography 25%
- Trail riding-ATVs 21%
- Wildlife/bird watching 21%
- Visiting historic/arch. sites 18%
- Hill climbing 15%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective



Type of Vehicle(s) used on last OHV Trip

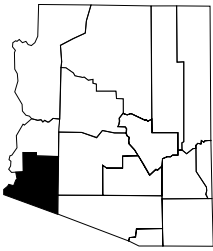
- Sport Utility Vehicle/Jeep 40%
- 4WD Pickup Truck 39%
- All Terrain Vehicle (ATV) 20%
- Trail Motorcycle 13%
- 2WD Pickup Truck 5%
- Dune Buggy/Sand Rail 0%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



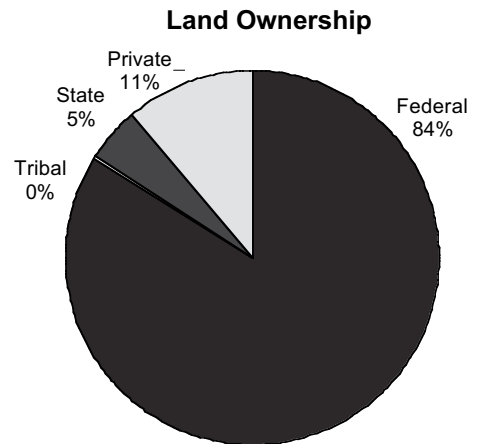
For more information contact:
 Arizona State Parks
 Recreational Trails
 1300 W. Washington St.
 Phoenix, AZ 85007
 Tel & TTY (602) 542-7174
www.azstateparks.com

YUMA COUNTY



Economic Importance of Off-Highway Vehicle Recreation to Yuma County

Yuma County is located in the southwest part of the state. It has 3% (160,026) of the state's population and 4.8% (3,534,832 acres or 5,523 square miles) of the state's land base. This averages out to 29 people per square mile. The landscape is primarily Sonoran Desert with low desert hills. Just across the state border into California is an extensive region of large, shifting sand dunes, a popular destination for many OHV enthusiasts.



- 23% of households in Yuma County are OHV users; state percentage is 21%.
- 3% of all Arizona OHV trip destinations for past 12 months were to Yuma County.
- 361,871 OHV Recreation Days occur annually in Yuma County; 2.9% of Arizona's total.
 - 172,552 OHV Recreation Days (48%) are from Yuma County residents.
 - 189,319 OHV days (52%) are from other Arizona residents traveling to Yuma County.
- 48% of Yuma County OHV households are satisfied with their overall OHV experience.

Total Economic Impact to Yuma County from OHV Recreation is \$136 MILLION/year

DIRECT ECONOMIC IMPACT—(\$ in millions)

<i>Off-Highway Vehicle Related Expenditures</i>	<i>Total for Yuma County</i>	<i>By County Residents</i>	<i>By Other Arizona Residents</i>
OHV Trips—Fuel/Gasoline	\$7.3 M	\$5.2 M	\$2.1 M
Lodging/Campgrounds	\$2.7 M	\$0.6 M	\$2.1 M
Restaurants/Bars	\$4.4 M	\$2.9 M	\$1.5 M
Groceries/Liquor	\$5.5 M	\$3.9 M	\$1.6 M
Other (event fees, souvenirs, etc.)	<u>\$4.1 M</u>	<u>\$1.7 M</u>	<u>\$2.4 M</u>
• Total OHV Recreation Trips	\$24.0 M	\$14.3 M	\$9.7 M

- Off-Highway Vehicles + \$28.8 M
- Tow Vehicles/Trailers + \$15.8 M
- OHV Equipment + \$45.9 M

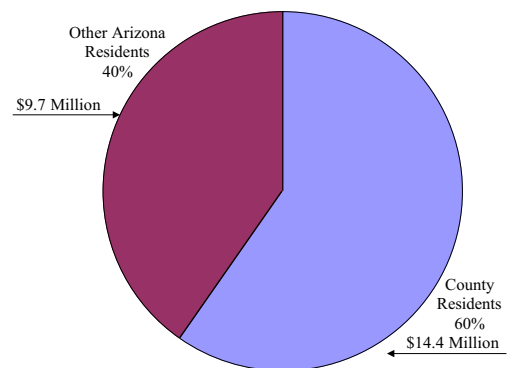
Total OHV Expenditures = \$114.5 Million

TOTAL IMPACT- Multiplier Effect* \$136.5 Million

INDIRECT ECONOMIC IMPACT

- Full-time/Part-time Jobs (#) 1,094
- Salaries/Wages \$25.1 Million
- State Tax Revenues \$5.5 Million

OHV Trip Expenditures—\$24 Million



Economic Importance of OHV Recreation to Yuma County

- Creates a statewide economic impact of \$136.5 million (multiplier effect)*
- Contributes \$114.5 million to local economies through OHV-related expenditures
- Adds \$5.5 million to annual state tax revenues
- Provides \$25.1 million in income (salaries/wages) for Yuma County residents
- Supports 1,094 jobs in Yuma County

“Top Ten” Main Reason for taking last OHV Trip

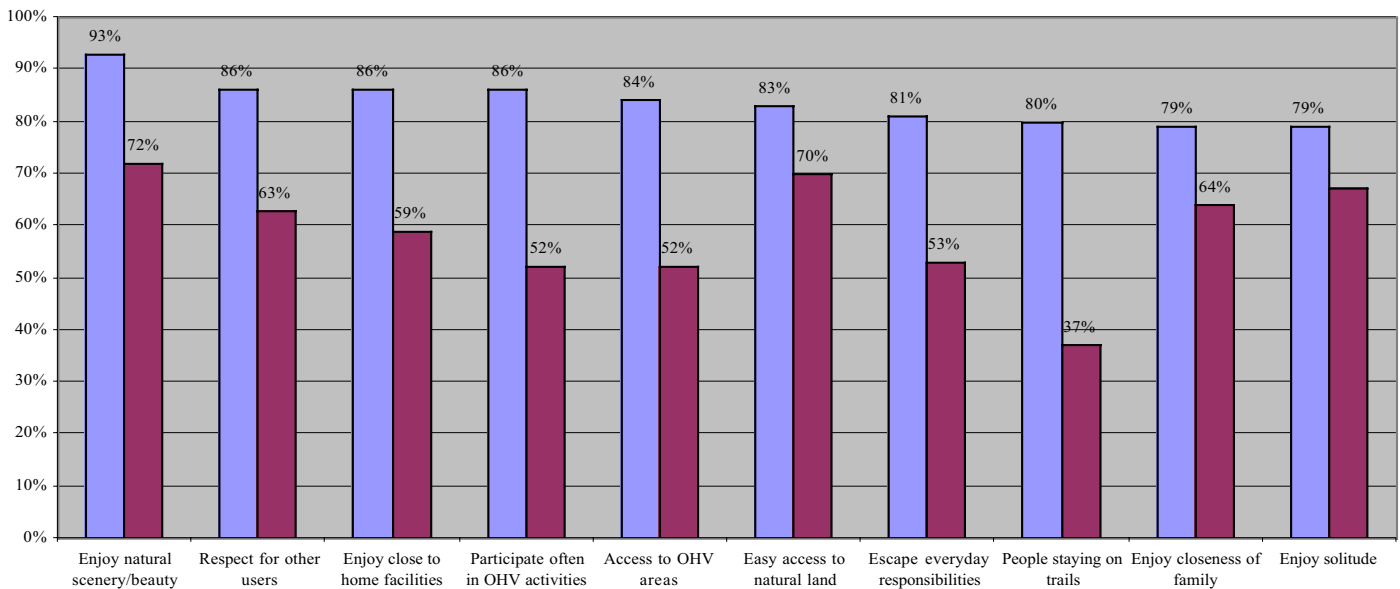
- Sightseeing 27%
- Camping 10%
- Hunting 10%
- Driving backroads 7%
- Trail riding-ATVs 7%
- Driving in open areas 7%
- Wildlife/bird watching 3%
- Hiking or walking 3%
- Visiting historic/arch. sites 3%
- Swimming 3%

“Top Ten” Outdoor Activities done on last OHV Trip

- Driving backroads 83%
- Sightseeing 57%
- Driving in open areas 43%
- Hill climbing 33%
- Hiking or walking 33%
- Picnicking 30%
- Trail riding-ATVs 30%
- Camping 17%
- Hunting 13%
- Rock crawling 10%

Evaluation of Last OHV Recreation Trip—“Top Ten” Objectives Rated as Most Important and Level of Satisfaction with each Objective

■ Importance ■ Satisfaction



Type of Vehicle(s) used on last OHV Trip

- 4WD Pickup Truck 50%
- Sport Utility Vehicle/Jeep 40%
- All Terrain Vehicle (ATV) 30%
- Dune Buggy/Sand Rail 20%
- 2WD Pickup Truck 7%
- Trail Motorcycle 7%
- Snowmobile 0%

*Multiplier Effect: sum of OHV expenditures, secondary effects generated by local re-expenditure of money, and induced impact from salaries paid by directly and indirectly impacted industries.



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