



The Economic Impact of Arizona State Parks FY14



Lost Dutchman

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ARIZONA
UNIVERSITY



August 2015

The Economic Impact Report for Arizona State Parks has been a cooperative effort between the Arizona State Parks Board and the Arizona Hospitality Research and Resource Center at Northern Arizona University. The purpose of this report is to present how Arizona State Parks contributes to the State and local economies of Arizona.

We would like to show our gratitude to the Governor of Arizona, Legislature and the Arizona State Parks Board as this publication was prepared under their authority.

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Acknowledgements

The authors would like to acknowledge the special partnership that has existed since 1996 between the Arizona State Parks Board and the Arizona Hospitality Research and Resource Center (AHRRC) at Northern Arizona University. Arizona State Parks surveyed their visitors every five years – 1996, 2001, 2007 – and again in 2014. As part of these major efforts, the AHRRC has created survey instruments, entered and tabulated data, calculated results and prepared Final Reports for all studies. For the three most recent cycles, 2001, 2007, and 2014, the AHRRC has used visitor expenditure data to calculate the economic impact of state parks on the counties in which they are located.

The AHRRC looks forward to an ongoing partnership with the Arizona State Parks Board as it continues to document the impact of visitors on parks, their neighboring communities, and the state economy overall.

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ECONOMIC IMPACT OF ARIZONA STATE PARKS

Executive Summary

Arizona State Parks are economically important to the communities and counties in which they are located. A state park's value is, of course, not measured by economic impact alone. Parks enhance community quality-of-life, provide opportunities and environments for healthy behaviors, promote community connection and preserve priceless historic, cultural, and recreational sites for residents and visitors from around the world. Communities also increasingly recognize that State Parks improve the economic well-being of rural counties and serve as an important tourism resource.

This report analyzes the impact of 27 Arizona State Parks on the economies of the 13 counties in which they are located. The economic impact of a state park is a function of the number of visitors and how much they spend in the park and surrounding areas, combined with multipliers which are site-specific estimates of the amount of money that is recycled throughout the community.

Arizona State Parks (ASP) conducted a visitor survey in fiscal year 2014 (FY14), which included questions about visitor spending in the park and within 50 miles of the park. A total of 11,741 surveys were collected between July 1, 2013 and June 30, 2014. In FY14, 2,294,420 visitors came to Arizona State Parks, a decrease of 0.2 percent compared to 2,298,155 in fiscal year 2007 (FY07), when the previous Visitor Survey was conducted.

This study of the economic impact of Arizona State Parks produced the following findings:

- Calculated at the state level for FY14, the **total economic impact of Arizona State Parks was \$226,737,510.**
- ASP visitors reported they spent approximately \$209,722,879 or about \$90.58 per person per visit in FY14.

Comparison of Park Types

Arizona State Parks are divided into three park types – Recreation, Historic and Conservation.

As a group recreation parks generated the largest visitation and economic impact.

The *combined* total economic impact of each park type on Arizona counties was*:

- Recreation Parks (14)\$115.6 million
- Historic Parks (9)\$20.4 million
- Conservation Parks (4)\$22.4 million

Comparison of Recreation Park Impacts

The three recreation parks with the largest total economic impact were:

- Slide Rock State Park\$30.9 million (Coconino County)
- Lake Havasu State park\$23.8 million (Mohave County)
- Catalina State Park\$15.4 million (Pima County)

*Please note that the totals above cannot be combined to equal the estimated statewide impact total, due to the fact that estimates of leakage are calculated differently on the county and state level.

Methodology

Calculations of the economic impact of state parks are based on the number of visitors at the park. Total visitation for each park in the Arizona State Park system for fiscal years 2007 and 2014 are shown in Table 1a below, along with the percent change in visitation over this time.

Table 1a. Visitation by Park

County	State Park Name	Park Visitation FY07	Park Visitation FY14	Percent Change
Apache	Lyman Lake (Seasonal in FY14)	36,298	13,238	-63.5%
Cochise	Kartchner Caverns	155,909	152,996	-1.9%
Cochise	Tombstone Courthouse**	52,989	43,883	-17.2%
Coconino	Riordan Mansion**	26,013	21,955	-15.6%
Coconino	Slide Rock*	249,409	209,224	-16.1%
Gila	Tonto Natural Bridge	94,026	109,969	17.0%
Graham	Roper Lake	73,230	64,560	-11.8%
La Paz	Alamo Lake	72,066	33,068	-54.1%
La Paz	Buckskin Mountain	96,529	103,640	7.4%
Mohave	Cattail Cove	98,419	55,053	-44.1%
Mohave	Lake Havasu	314,519	379,645	20.7%
Navajo	Fool Hollow	95,495	94,309	-1.2%
Navajo	Homolovi Ruins	15,953	17,194	7.8%
Pima	Catalina	149,644	171,648	14.7%
Pinal	Boyce Thompson Arboretum	65,108	79,290	21.8%
Pinal	Lost Dutchman	77,683	124,169	59.8%
Pinal	McFarland**	3,968	8,910	124.5%
Pinal	Oracle (Seasonal, Weekends Only in FY14)	9,592	5,346	-44.3%
Pinal	Picacho Peak (Seasonal in FY14)	63,393	61,431	-3.1%
Santa Cruz	Patagonia Lake	178,497	188,432	5.6%
Santa Cruz	Tubac Presidio**	14,439	11,874	-17.8%
Yavapai	Dead Horse Ranch	120,686	154,319	27.9%
Yavapai	Fort Verde	16,950	11,360	-33.0%
Yavapai	Jerome	60,307	46,693	-22.6%
Yavapai	Red Rock	80,711	63,629	-21.2%
Yuma	Yuma Quartermaster Depot**	17,628	8,983	-49.0%
Yuma	Yuma Territorial Prison**	58,694	59,602	1.5%
Total Visitation		2,298,155	2,294,420	-0.2%

Data Source 2007 Attendance: Arizona State Parks: Park Summary

Data Source 2014 Attendance: Itinio Reservation System park specific attendance report July 1, 2013 through June 30, 2014.

* Slide Rock State Park - May 17-Jun 20 - Temporarily closed due to Slide Fire (Oak Creek Canyon), Jun 21 – reopened limited access, swim area closed until Sept 2014

** IGA – Park is operated through an intergovernmental agreement with a particular municipality.

From this data, it is clear that a majority of parks in the State Park system (16) experienced declining visitation from one period to the next, while 11 others grew. It is important to note that during the 2007 Visitor Survey, Arizona State Parks managed and operated 30 State Park and Natural Areas. All parks were open year round and operated seven days per week. The Agency was staffed by approximately 307 full-time, and 81 part-time or seasonal employees.

Due to severe budget cuts the Agency had to alter the system in an effort to keep all parks operational. During this time the agency received financial support from various partnerships and local organizations to help operate parks. During the 2014 Visitor Survey Year, 30 State Park and Natural Areas remained in the system. However, six parks were operated by partners without Arizona State Park Staff. Three parks were operated seasonally. Six parks operated on a shortened weekly schedule anywhere between two to six days per week. The Agency was staffed by 154 full-time, 122 part-time or seasonal employees. Additional staffing from partner organizations was eight full-time and seven part-time. In addition to these changes in system operations, in any given year, a wide range of additional influences, both internal and external, can cause park visitation to fluctuate – weather patterns and annual rainfall, gasoline prices, and so on. To provide a more complete picture of overall park visitation, visitor attendance totals for each park, in the intervening years between 2008 and 2014, are presented in the Appendix.

Expenditure data used to model the economic impact of parks in this report come from three sources: the Arizona State Park 2014 Visitor Survey, Arizona State Parks FY14 Park Summary report, and an online daily attendance system. The Arizona State Park FY14 Visitor Survey asked visitors to report what they spent, both in the park and within 50 miles of the park, by spending categories. Due to reporting inconsistencies for expenses in the park, the FY14 Park Summary was used as a proxy for in-park visitor expenditures. The Park Summary is a report that includes all park-related revenue - including that generated from concession operations, rental of facilities, entrance, camping, and others. The Arizona State Parks 2014 Visitor Survey data was used to identify visitor spending reported outside of but within a 50-mile radius of each park.

Total direct expenditures by visitors to each Arizona State Park were collected according to the categories shown below.

- In-Park Expenditures
- Admission Fees (including permits or licenses)
- Camping Fees
- Lodging Expenses (hotel, motel, condos, etc.)
- Groceries
- Food & Beverages (restaurants, etc.)
- Retail Shopping (clothing, souvenirs, gifts, etc.)
- Private Auto Expenses (gas, oil, repairs, parking fees, etc.)
- Any Other Expenses

To estimate the total economic impact of each park, the AHRRC used the IMPLAN™, an economic impact assessment modeling software system. This model is used to estimate the total impact in the county economy, including direct, indirect and induced impacts, and the

number of jobs in the county economy supported by visitor spending. The spending of visitors with ZIP codes in the county or within 50 miles of the park was excluded since these visitors do not add *new money* to the local economy. This is standard in economic impact studies.

The IMPLAN™ model was developed by the Minnesota IMPLAN™ Group, and is a widely used to estimate the impacts of visitor spending within a geographic area, typically at the county and state levels. Using this model, economic impact calculations are produced for each of 27 Arizona State Parks and for the state of Arizona overall. Maricopa and Greenlee Counties are not included in this study because they contain no Arizona State Parks. Visitor expenditure data are organized alphabetically by county in this report, combining the State Parks within each county.

There are three integral parts of impact modeling: *direct*, *indirect*, and *induced* effects. Direct expenditures are the dollars tourists spent in the community for goods and services. For example, a tourist visits a state park in county Y, and spends X dollars at a hotel. That X dollars is a *direct expenditure* and its initial influence on the county economy minus the amount of money that “leaks” out of the economy immediately is the *direct effect*. The hotel spends a portion of that initial expenditure on the inputs necessary to run the operation (electricity, maid service, and so forth). The in-county firms receiving those dollars will, in turn, spend more. This re-spending of the initial tourist expenditure is termed the *indirect effect*. This cycle continues to repeat itself multiple times.

As these dollars are spent and re-spent, some of the initial expenditures result in income to both workers and business proprietors. Households spend a portion of this income, in a cycle of re-spending similar to the one discussed above. This household spending is termed the *induced* effect of the initial expenditure.

The ratio of the three effects and the initial expenditure is labeled the output multiplier. Therefore an output multiplier is the sum of the direct (tourist spending minus leakage), indirect (hotel spending) and induced (consumption) effects divided by direct tourism spending. Similarly, direct jobs are jobs that are supported by direct impacts, while indirect jobs are those supported by indirect expenditure impacts. It is important to remember that direct jobs are jobs supported by visitor spending in the county and may include but are not limited to jobs in the parks.

The 2014 survey data were analyzed using the IMPLAN™ model. IMPLAN multipliers are based on calendar years, while the surveys were collected over the fiscal year ending on June 30. For continuity, the 2014 analysis uses multipliers for the second half of the fiscal year (calendar year 2014).

The table below summarizes total county impacts and jobs estimated by the IMPLAN™ analysis for FY14. The table includes abbreviations in parentheses indicating whether parks are primarily recreation (Rec), historic (His) or conservation parks (Con).

Table 2a. State Parks by Estimated County Impacts and Jobs*

County / Park	Total County Income (\$)	Total County Jobs
Apache County Total	\$403,162	5.5
Lyman Lake (Rec)	\$403,162	5.5
Cochise County Total	\$14,795,159	183.2
Tombstone Courthouse (His)	\$4,808,137	60.5
Kartchner Caverns (Con)	\$9,987,022	122.7
Coconino County Total	\$37,387,284	455.0
Riordan Mansion (His)	\$6,462,893	85.6
Slide Rock (Rec)	\$30,924,391	369.4
Gila County Total	\$3,469,230	44.0
Tonto Natural Bridge (Rec)	\$3,469,230	44.0
Graham County	\$1,800,611	24.5
Roper Lake (Rec)	\$1,800,611	24.5
La Paz County Total	\$6,630,635	95
Alamo Lake (Rec)	\$924,652	13
Buckskin Island (Rec)	\$5,705,983	82
Mohave County Total	\$28,412,574	335.3
Cattail Cove (Rec)	\$4,599,399	53
Lake Havasu (Rec)	\$23,813,175	282.3
Navajo County Total	\$5,568,231	71.4
Fool Hollow Lake Recreation Area (Rec)	\$4,258,489	56.9
Homolovi Ruins (His)	\$1,309,742	14.5
Pima County Total	\$15,394,905	189.7
Catalina (Rec)	\$15,394,905	189.7
Pinal County Total	\$15,706,581	201.4
Boyce Thompson (Con)	\$2,457,189	29.9
Lost Dutchman (Rec)	\$11,109,556	145.1
McFarland (His)	\$257,126	3.3
Oracle (Con)	\$84,976	1.3
Picacho Peak (Rec)	\$1,797,734	21.8
Santa Cruz County Total	\$7,110,482	88.1
Patagonia Lake (Rec)	\$5,925,641	74.5
Tubac Presidio (His)	\$1,184,841	13.6
Yavapai County Total	\$20,089,166	233.2
Dead Horse Ranch (Rec)	\$5,431,829	66.5
Fort Verde (His)	\$684,636	8.1
Jerome (His)	\$4,008,686	48.3
Red Rock (Con)	\$9,964,015	110.3
Yuma County Total	\$1,688,429	19.0
Yuma Territorial Prison (His)	\$1,184,841	13.6
Yuma Quartermaster Depot (His)	\$503,588	5.4

* The sum of individual county impacts will not equal the total impact on the state. The portion of in-county spending that leaks into neighboring Arizona counties is not captured by individual county models. However, this in-state leakage will be captured in the state model.

Economic Impact of Arizona State Parks at the State Level

The estimated total economic impact of all Arizona State Parks on the state has also been modeled in this study using IMPLAN. To perform this analysis, visitor spending in the parks was combined from all parks *by sector*, (as shown in Table 3a), and these totals were then entered into the IMPLAN model. As stated in the note above, the results of individual county models cannot be summed to produce a state economic impact number.

It was estimated that Arizona State Parks visitors spent a total of \$209,722,879 in FY14, (see Table 3a). These total direct expenditures of \$209.7 million resulted in \$130,063,972 in direct impact, \$40,451,170 of estimated indirect impact, and \$56,222,368 of estimated induced impact.

When the effects of direct, indirect and induced impacts are combined the total estimated impact of visitors to state parks in Arizona during FY14 is **\$226,737,510**. This total state impact resulted in 1,621 estimated direct jobs and 745 indirect jobs for a total of **2,367** total jobs.

Finally, visitors' expenditures combined with their direct, indirect and induced impacts resulted in an estimated \$17,550,855 in Federal Government taxes and an estimated \$15,895,473 in state and local government taxes. The total estimated tax impact of Arizona State Park visitors in FY14 was **\$33,446,328**.
See Table 3a.

Table 3a. Economic Impact of Arizona State Parks on the Arizona Economy, FY14

Direct Expenditures by Visitors (\$)	FY14
Admission etc.	\$11,876,091
Camping fees	\$15,064,324
Lodging	\$31,796,533
Groceries	\$38,505,549
Food & Beverage	\$40,654,435
Retail Shopping	\$20,632,905
Auto Expenses	\$46,567,517
Other expenses	\$4,625,523
Total Direct Expenditures	\$209,722,879

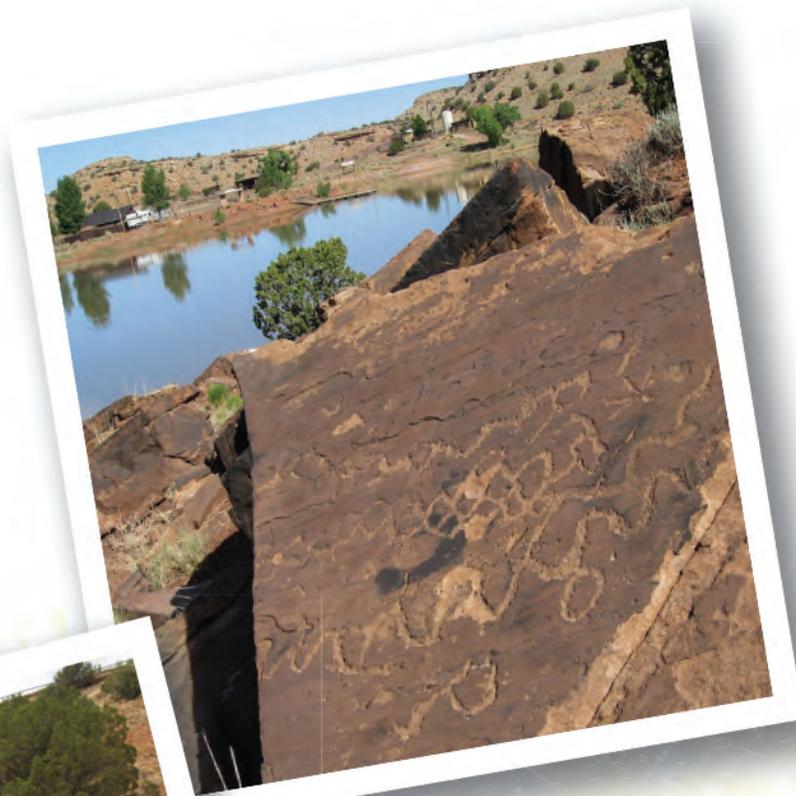
Direct, Indirect and Induced State Impacts* (\$)	FY14
Direct Impact	\$130,063,972
Indirect Impact*	\$40,451,170
Induced Impact	\$56,222,368
Total State Impact	\$226,737,510

**Impacts are a result of modeling and do not represent actual expenditures.*

Direct and Indirect State Employment	FY14
Direct Jobs	1,621.3
Indirect Jobs	745.2
Total State Jobs	2,366.5

Tax Impacts	FY14
Federal Government	\$17,550,855
State & Local Government	\$15,895,473
Total Taxes	\$33,446,328

Apache County State Parks



Lyman Lake

Apache County State Parks

Apache County contains one Arizona State Park – Lyman Lake State Park. Table 1 below shows total visitation to Lyman Lake State Park for FY07 and FY14. Visitation at Lyman Lake decreased significantly (-64%) during this time largely due to the fact that the park was open year round in 2007, but was closed from January through March in FY14.

During the 2007 Visitor Survey, Lyman Lake State Park was open year round for day use and overnight visitors and had approximately four full-time and two seasonal employees. On February 22, 2010 the park closed due to budget cuts. The park reopened through a partnership with Apache County from Memorial Day through Labor Day (5/24/10 through 9/6/10). The park reopened on seasonal basis for the summers in 2011, 2012 and 2013. The park at one time hosted an annual Fourth of July fireworks display, which was a main attraction for the area. Due to extreme fire danger the event has not taken place since the summer of 2010. During the 2014 Visitor Survey year, the park was open from July 1, 2013 through December 2, 2013 and from May 1, 2014 through June 30, 2014. Park staff included one full-time and two seasonal employees.

Table 1. Apache County State Park Visitation

Park	FY07	FY14	Percent change
Lyman Lake	36,298	13,238	-63.5%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors, who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 1 presents mean (average) direct expenditures for Lyman Lake in each category.

Figure 1. Lyman Lake State Park Mean Per-Person Expenditures FY14

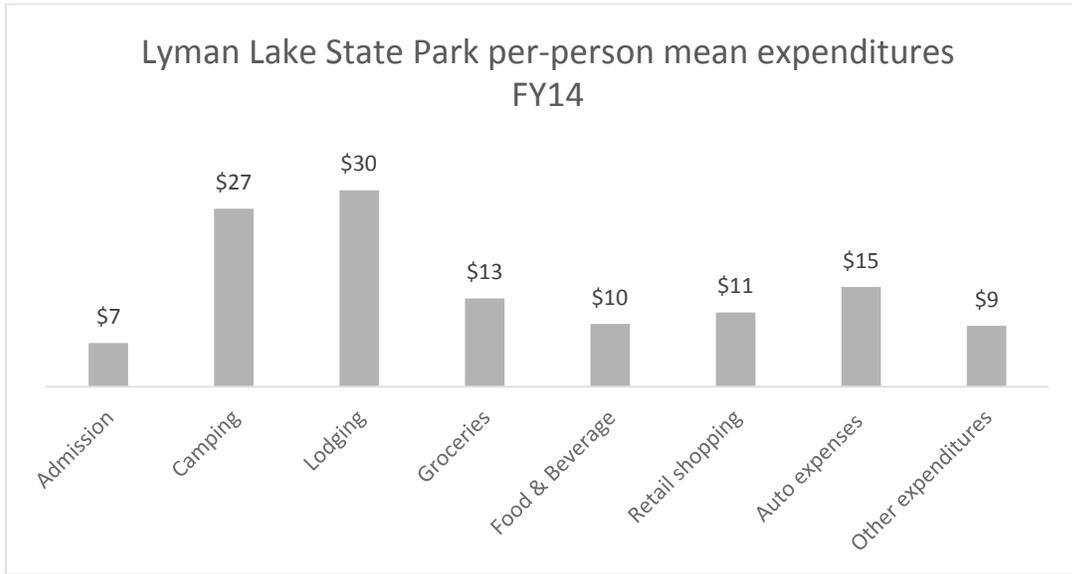


Table 2 is presented in four sections. In the first section, reported visitor expenditure totals in each category (Figure 1) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Lyman Lake had a total \$789,330 in direct state park expenditures for FY14.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the visitor spending. The model estimates direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services. This model represents the estimated flow of tourist dollars as they work their way through the county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 2. Apache County Economic Impact FY14

	FY14 Lyman Lake Expenditures
Apache County State Parks	
Admission etc.	\$18,197
Camping fees	\$84,052
Lodging	\$29,336
Groceries	\$192,836
Food & Beverage	\$77,134
Retail Shopping	\$50,568
Auto Expenses	\$314,860
Other expenses	\$22,346
Total Direct Expenditures	\$789,330

	FY14 Lyman Lake
Direct, Indirect and Induced County Impacts (\$)	
Direct Impact	\$324,212
Indirect Impact	\$38,426
Induced Impact	\$40,524
Total County Impact	\$403,162

	FY14 Lyman Lake
Direct and Indirect County Employment	
Direct Jobs	4.9
Indirect Jobs	0.6
Total County Jobs	5.5

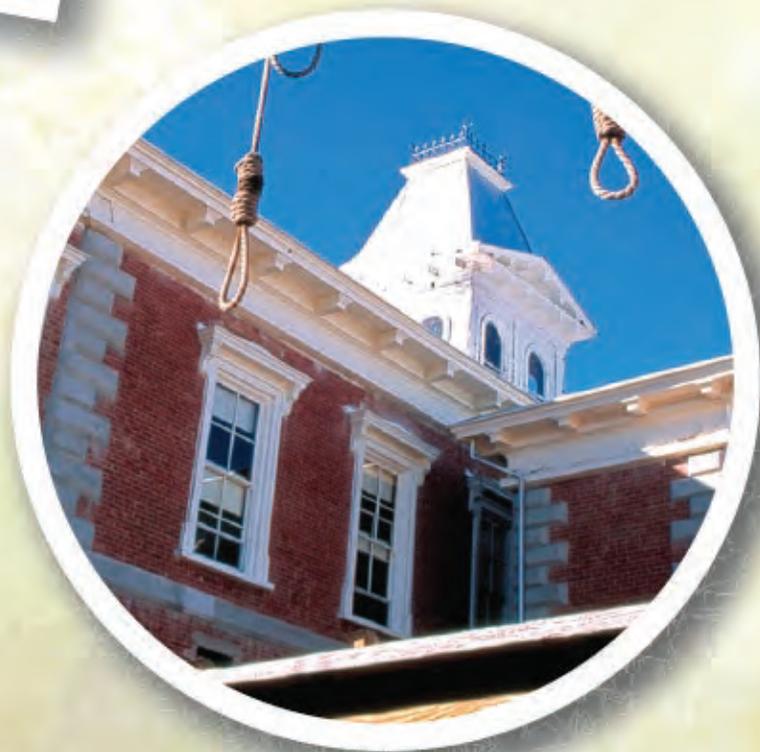
	FY14 Lyman Lake
Tax Impacts	
Federal Government Non-Defense	\$28,894
State & Local Government	\$36,030
Total Taxes	\$64,924

Cochise County State Parks

Kartchner Caverns



Tombstone Courthouse



Cochise County State Parks

Cochise County contains two Arizona State Parks – Tombstone Courthouse State Historic Park and Kartchner Caverns State Park. Table 3 below shows total visitation to Tombstone Courthouse and Kartchner Caverns State Parks for FY07 and FY14. Visitation at both Tombstone Courthouse and Kartchner Caverns declined from one period to the other.

During the 2007 Visitor Survey, Kartchner Caverns State Parks employed approximately 50 full-time staff to run park operations, including cave tours, campground, above ground activities, and maintenance. In 2014 staffing at the park was consisted of approximately 30 full-time and 12 seasonal employees to run the same park operations.

During the 2007 Visitor Survey Tombstone Courthouse State Historic Park was budgeted to operate with approximately four full-time and one seasonal employee. On April 21, 2009 park operations transitioned to a 5 day per week schedule (Thursdays through Mondays). In April, 2010 Arizona State Parks entered into a partnership with the City of Tombstone in collaboration with the Chamber of Commerce to operate the park. In 2014 the park operated seven days per week and the Tombstone Chamber of Commerce continued to operate the park. The park staff included three full-time and three part-time/seasonal employees.

Table 3. Cochise County State Park Visitation

Park	FY07	FY14	Percent Change
Tombstone	52,989	43,883	-17.2%
Kartchner Caverns	155,909	152,996	-1.9%
Total County Visitation	208,898	196,879	-5.8%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors, who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on

lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures.

Figure 2 presents mean (average) direct expenditures for Tombstone Courthouse in each category for the FY14 survey. Figure 3 presents mean (average) direct expenditures for Kartchner Caverns in each category for FY14.

Figure 2. Tombstone Courthouse State Historic Park Mean Per-Person Expenditures FY14

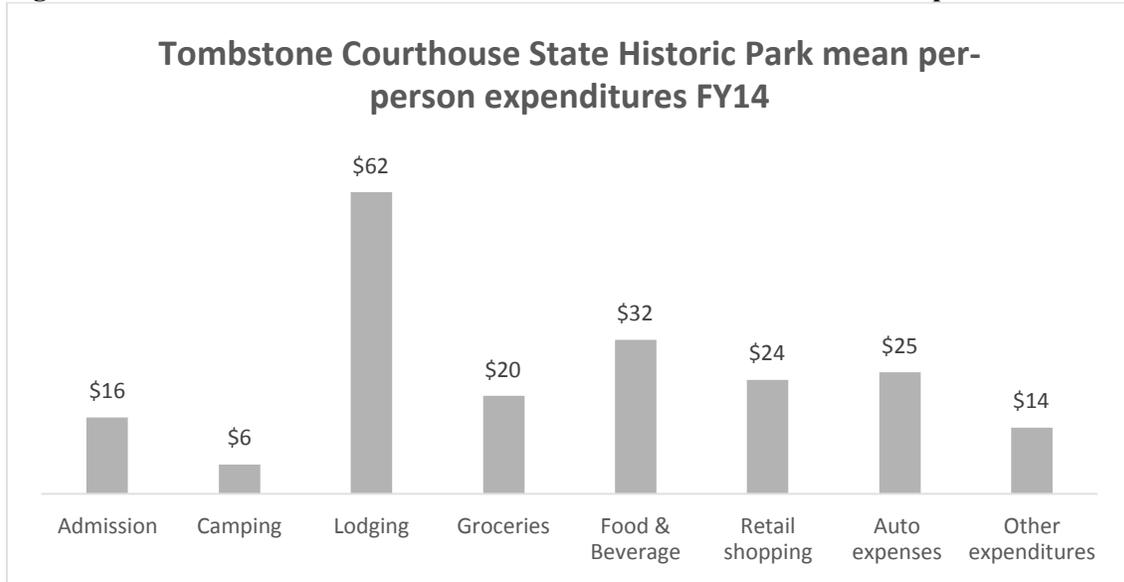


Figure 3. Kartchner Caverns State Park Mean Per-Person Expenditures FY14

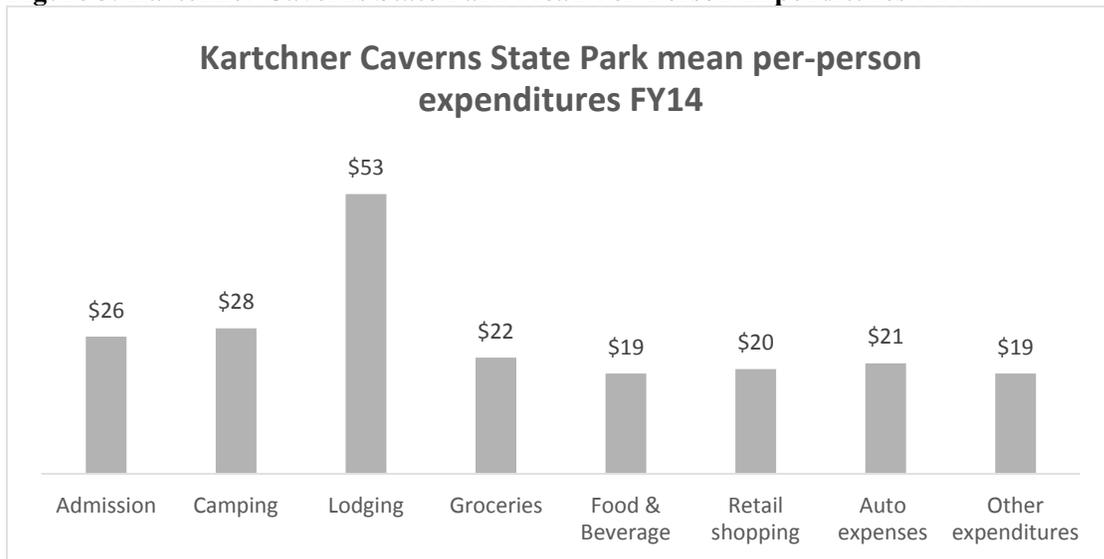


Table 4 is presented in four sections. In the first section, reported visitor expenditure totals in each category (Figures 2 & 3) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Tombstone Courthouse State Historic Park had direct expenditures of \$5,344,018 in FY14. Kartchner Caverns State Park had direct expenditures of \$13,456,917 in FY14.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the visitor spending. The model estimates direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services. This model represents the estimated flow of tourist dollars as they work their way through the county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 4. Cochise County Economic Impact FY14

Cochise County Parks	FY14 Tombstone Courthouse	FY14 Kartchner Caverns
Admission	\$531,406	\$1,747,325
Camping	\$22,876	\$225,959
Lodging	\$1,092,126	\$1,336,878
Groceries	\$116,141	\$1,204,949
Food & Beverage	\$1,664,255	\$2,884,713
Retail shopping	\$915,604	\$2,423,182
Auto expenses	\$943,210	\$3,508,857
Other expenditures	\$58,401	\$125,054
Total Direct Expenditures	\$5,344,018	\$13,456,917

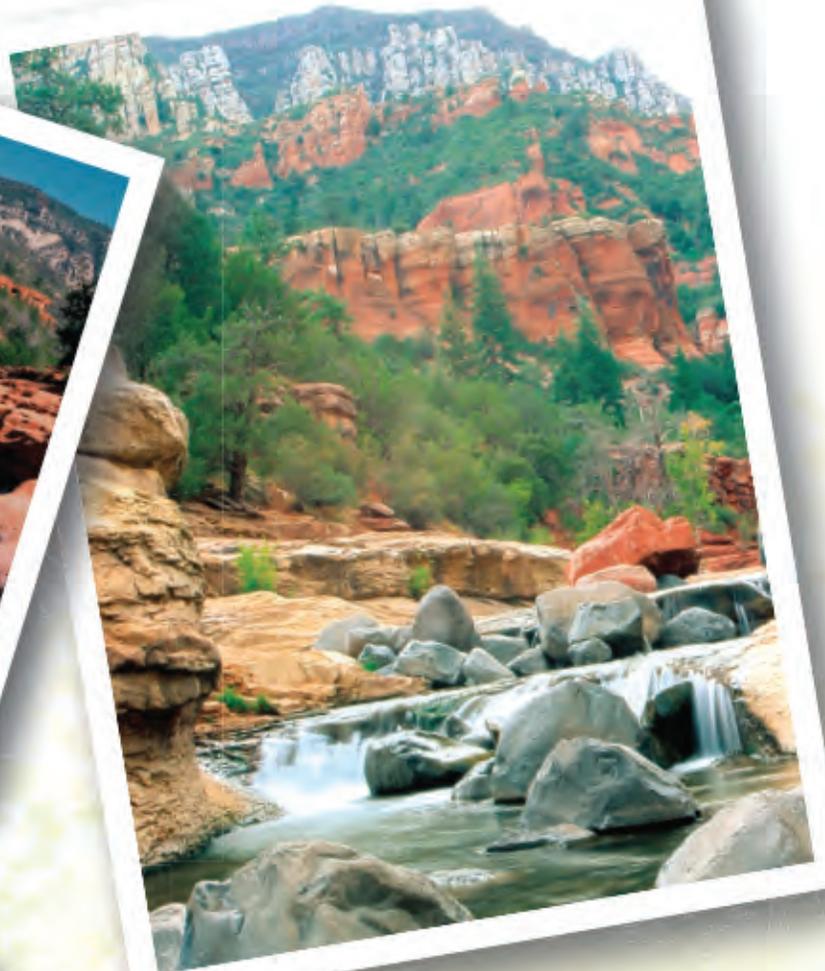
Direct, Indirect and Induced County Impact (\$)	FY14 Tombstone Courthouse	FY14 Kartchner Caverns
Direct Impact	\$3,733,847	\$7,663,931
Indirect Impact	\$570,293	\$1,206,394
Induced Impact	\$503,997	\$1,116,697
Total County Impact	\$4,808,137	\$9,987,022

Direct and Indirect County Employment	FY14 Tombstone Courthouse	FY14 Kartchner Caverns
Direct Jobs	51.2	102.4
Indirect Jobs	9.3	20.3
Total State Jobs	60.5	122.7

Tax Impacts	FY14 Tombstone Courthouse	FY14 Kartchner Caverns
Federal Government Non-Defense	\$313,808	\$672,663
State & Local Government	\$401,392	\$797,481
Total Taxes	\$715,200	\$1,470,144

Coconino County State Parks

Slide Rock



Riordan Mansion

Coconino County State Parks

Coconino County contains two Arizona State Parks – Riordan Mansion State Historic Park and Slide Rock State Park. Table 5 below shows total visitation to Riordan Mansion State Historic Park and Slide Rock State Park for FY07 and FY14. Riordan Mansion visitation decreased somewhat from one period to the next, due perhaps to seasonal operations in FY14 as compared to year round operations in FY07. Also, in FY14 the Slide Fire, which occurred in May, 2014 impacted park visitation at Slide Rock. The swimming area at the park was closed from before Memorial Day through the summer season.

During the 2007 Visitor Survey Riordan Mansion was open daily seven days per week and was operated by Arizona State Parks staff. The park employed approximately four full-time and one and one-half seasonal employees. October 6, 2009 the park transitioned to a 5 day per week schedule (Thursday through Monday). Due to budget cuts on May 21, 2010 the Arizona Historical Society and Riordan Action Network began operating the park without ASP staff. In 2014 the park operated with seasonal hours. The park is open seven days per week for approximately eight months (7/1/13-9/2/13 & 5/1/14-6/30/14), and 5 days per week for approximately four months (9/3/13-4/30/14). In 2014 the staff included one and one-half full-time and two and one-half part-time/seasonal employees.

During the 2007 Visitor Survey Slide Rock State Park was operated seven days per week and budgeted for approximately four full-time and two and one-half seasonal employees. November 3, 2009 the park transitioned to a five day per week schedule and resumed normal schedule starting January 28, 2010. In 2014 the park remained in operation seven days per week, 365 per year and was budgeted for approximately four full-time and four seasonal employees. Park closed May 17-June 20 and the water area remained closed until Oct. 2014 - due to the Slide Fire which burned throughout Oak Creek Canyon.

Table 5. Coconino County State Park Visitation

Park	FY07	FY14	Percent Change
Riordan Mansion	26,013	21,955	-15.6%
Slide Rock State Park	249,409	209,224	-16.1%
Total County Visitation	275,422	231,179	-16.1%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors, who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 4 presents mean (average) direct expenditures for Riordan Mansion State Historic Park in each category for the 2014 survey. Figure 5 presents mean (average) direct expenditures for Slide Rock State Park in each category for FY14.

Figure 4. Riordan Mansion State Historic Park Per-Person Mean Expenditures FY14

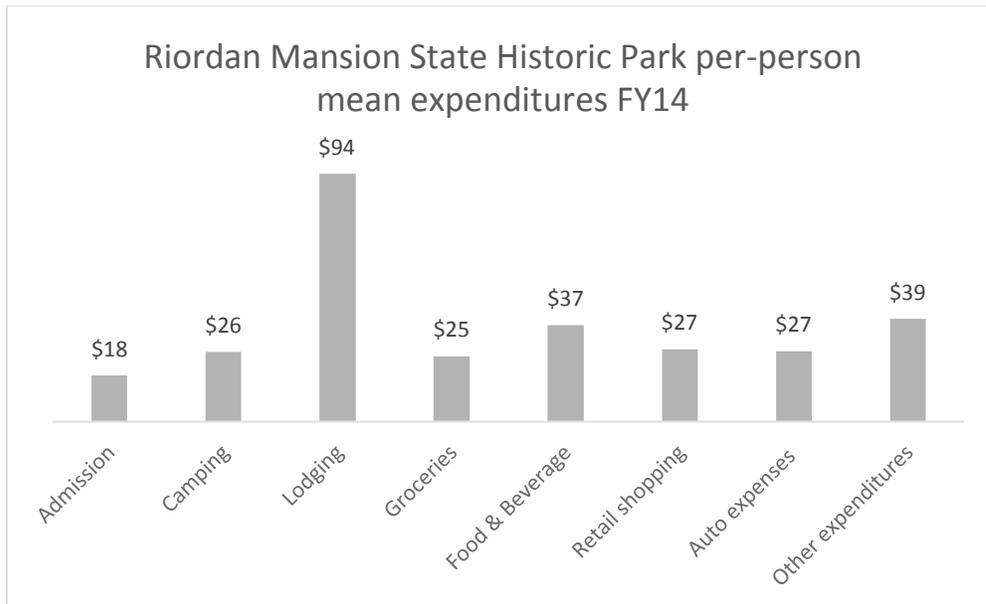


Figure 5. Slide Rock State Park Mean Per-Person Expenditures FY14

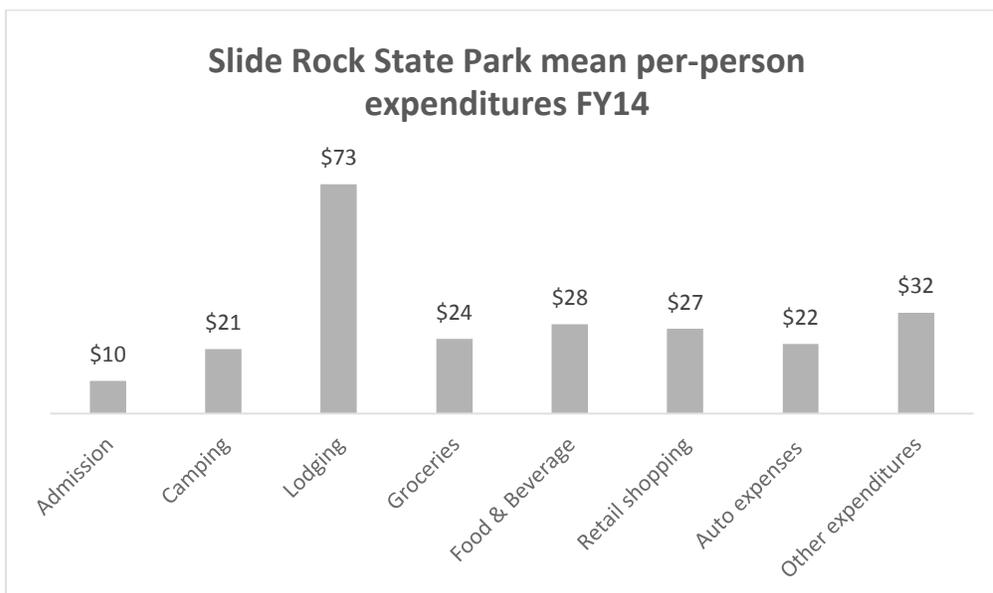


Table 6 is presented in two sections. In the first section, reported visitor expenditure totals in each category (Figures 4 & 5) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Riordan Mansion Historic State Park had direct expenditures of \$5,732,496 in FY14. Slide Rock State Park had direct expenditures of \$30,886,400 in FY14.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the visitor spending. The model estimates direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services. This model represents the estimated flow of tourist dollars as they work their way through the county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 6. Coconino County Economic Impact FY14

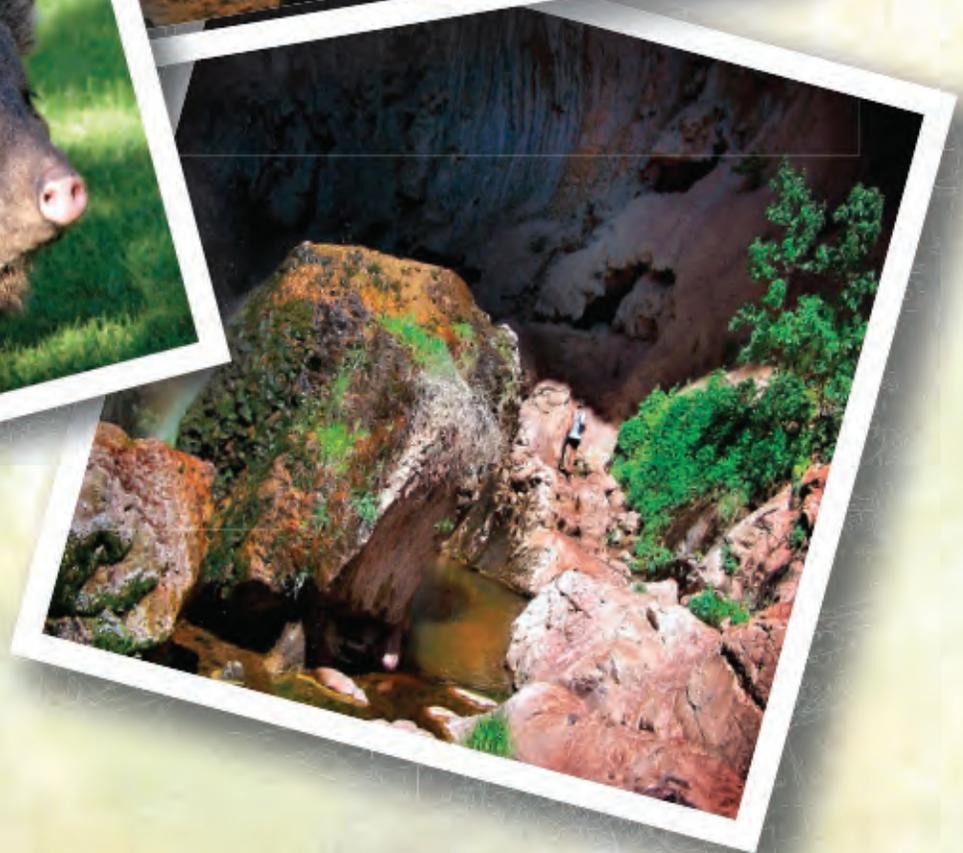
Coconino County Parks	FY14 Riordan Mansion Expenditures	FY14 Slide Rock Expenditures
Admission	\$286,809	\$1,316,382
Camping	\$25,304	\$230,275
Lodging	\$1,052,331	\$10,450,725
Groceries	\$202,805	\$2,747,899
Food & Beverage	\$3,246,859	\$9,282,155
Retail shopping	\$510,051	\$2,405,875
Auto expenses	\$383,034	\$4,252,803
Other expenditures	\$25,304	\$200,284
Total Direct Expenditures	\$5,732,496	\$30,886,400

Direct, Indirect and Induced County Impacts (\$)	FY14 Riordan Mansion	FY14 Slide Rock
Direct Impact	\$4,867,543	\$23,317,700
Indirect Impact	\$665,018	\$3,446,390
Induced Impact	\$930,332	\$4,160,301
Total County Impact	\$6,462,893	\$30,924,391

Direct and Indirect County Employment	FY14 Riordan Mansion	FY14 Slide Rock
Direct Jobs	69.5	291.8
Indirect Jobs	16.1	77.6
Total State Jobs	85.6	369.4

Tax Impacts	FY14 Riordan Mansion	FY14 Slide Rock
Federal Government Non-Defense	\$435,861	\$2,077,242
State & Local Government	\$469,759	\$2,478,871
Total Taxes	\$905,620	\$4,556,113

Gila County State Parks



Tonto Natural Bridge

Gila County State Parks

Gila County contains one Arizona State Park – Tonto Natural Bridge State Park. Table 7 below shows total visitation to Tonto Bridge State Park for FY07 and FY14. Visitation at Tonto Natural Bridge increased in 2014.

During the 2007 Visitor Survey Tonto Natural Bridge State Park was operated seven days per week 365 days per year and employed approximately four full-time and one seasonal employee. The park was closed for construction beginning February 26, 2009 and reopened for weekends only starting Memorial Day through November 19, 2009, at which time the park transitioned to a five-day per week schedule. In 2010 ASP entered into partnership agreements with the Towns of Payson and Star Valley and the Friends of Tonto Natural Bridge State Park to help operate Tonto Natural Bridge State Park. The park opened seasonally seven days per week during their busy months (May through September) until Summer 2012 at which time the park once again became open to the public seven days per week, 365 days per year. In 2014 the park was operated seven days per week and employs approximately three full-time and two and one-half seasonal employees.

Table 7. Gila County State Park Visitation

Park	FY07	FY14	Percent Change
Tonto Natural Bridge	94,026	109,969	17.0%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 6 presents mean (average) direct expenditures for Tonto Natural Bridge State Park in each category for the FY14 survey.

Figure 6. Tonto Natural Bridge State Park Mean Per-Person Expenditures FY14

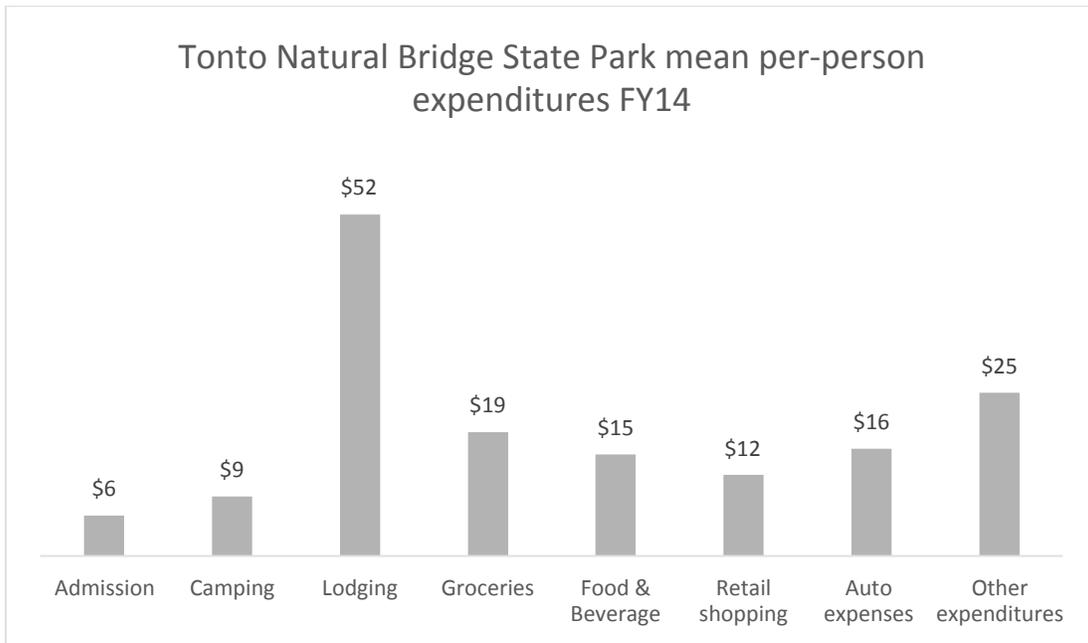


Table 8 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figure 6) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Tonto Natural Bridge State Park had a total of \$4,463,229 in direct state park expenditures for FY14.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 8. Gila County Economic Impact FY14

Gila County Parks	FY14 Tonto Natural Bridge Expenditures
Admission	\$281,753
Camping	\$66,344
Lodging	\$951,031
Groceries	\$707,870
Food & Beverage	\$1,059,366
Retail shopping	\$270,967
Auto expenses	\$1,106,385
Other expenditures	\$19,513
Total Direct Expenditures	\$4,463,229

Direct, Indirect and Induced County Impacts (\$)	FY14 Tonto Natural Bridge
Direct Impact	\$2,772,353
Indirect Impact	\$386,753
Induced Impact	\$310,124
Total County Impact	\$3,469,230

Direct and Indirect County Employment	FY14 Tonto Natural Bridge
Direct Jobs	38.1
Indirect Jobs	5.9
Total State Jobs	44

Tax Impacts	FY14 Tonto Natural Bridge
Federal Government Non-Defense	\$228,699
State & Local Government	\$284,409
Total Taxes	\$513,108

Graham County State Parks



Roper Lake

Graham County State Parks

Graham County contains one Arizona State Park – Roper Lake State Park. Table 9 below shows total visitation to Roper Lake State Park for FY07 and FY14. Visitation at the park decreased in FY 2014 as compared to FY 2007.

During the 2007 Visitor Survey Roper Lake State Park was operated 365 days per year and employed approximately five full-time and one-half seasonal employees. In 2014 the park remained open for 365 days per year and employed approximately three full-time and two seasonal employees.

Table 9. Graham County State Park Visitation

Park	FY07	FY14	Percent Change
Roper Lake	73,230	64,560	-11.8%

Visitor were asked to complete surveys were conducted at Arizona State Parks during the 12 months of FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 7 presents mean (average) direct expenditures for Roper Lake in each category.

Figure 7. Roper Lake State Park Mean Per-Person Expenditures FY14

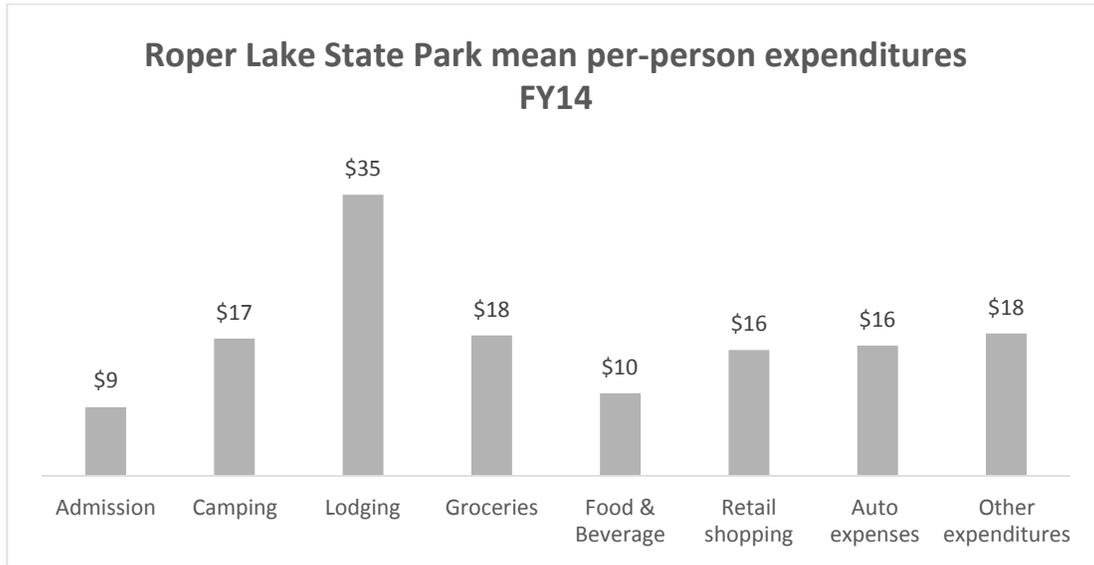


Table 10 is presented in four sections. In the first section multiplies mean direct expenditure totals in each category (Figure 7) are multiplied by the percentage of visitors to the park that live outside of a 50 miles radius to provide an estimate of total direct expenditures. Roper Lake State Park had a total of \$3,860,767 in direct state park expenditures for FY14.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs, representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 10. Graham County Economic Impact FY14

Graham County Parks	FY14 Roper Lake State Park Expenditures
Admission	\$72,347
Camping	\$132,685
Lodging	\$140,455
Groceries	\$1,225,500
Food & Beverage	\$365,277
Retail shopping	\$334,114
Auto expenses	\$1,433,244
Other expenditures	\$157,145
Total Direct Expenditures	\$3,860,767

Direct, Indirect and Induced County Impacts (\$)	FY14 Roper Lake
Direct Impact	\$1,391,152
Indirect Impact	\$176,556
Induced Impact	\$232,903
Total County Impact	\$1,800,611

Direct and Indirect County Employment	FY14 Roper Lake
Direct Jobs	21.1
Indirect Jobs	3.4
Total State Jobs	24.5

Tax Impacts	FY14 Roper Lake
Federal Government Non-Defense	\$128,746
State & Local Government	\$151,890
Total Taxes	\$280,636

La Paz County State Parks

Alamo Lake



Buckskin Mountain

La Paz County State Parks

La Paz County contains two Arizona State Parks – Alamo Lake State Park and Buckskin Mountain State Park. The numbers reported below for Buckskin Mountain State Park include visitor spending at River Island State Park – a subunit. Table 11 below shows total visitation to Alamo Lake State Park and Buckskin Mountain State Park for FY07 and FY14. Visitation from one period to the next decreased greatly at Alamo and increased at Buckskin Mountain.

During the 2007 Visitor Survey Alamo Lake State Park was operated 365 days per year and was operated by approximately five full-time employees. During Arizona State budget cuts in 2009/10, threats of the parks closing negatively impacted park visitation. Fluctuating lake levels has also impacted visitation by fisherman. In Arizona State Parks entered into a partnership agreement with the La Paz County and the City of Wickenburg to help operate Alamo Lake State Park. In 2014 the park remained open for 365 days per year and was operated by approximately four full-time and one-half seasonal employees.

During the 2007 Visitor Survey Buckskin Mountain State Park was operated 365 days per year and was budgeted for approximately ten full-time employees. In 2014 the park remained open for 365 days per year and was budgeted for approximately five full-time and four seasonal employees.

Table 11. La Paz County State Park Visitation

La Paz County	FY07	FY14	Percent Change
Alamo Lake	72,066	33,068	-54.1%
Buckskin Mountain	96,529	103,640	7.4%
Total County Visitation	168,595	136,708	-18.9%

Visitor were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate direct lodging expenditures. The same process is applied to all relevant expenditures.

Figure 8 presents mean (average) direct expenditures for Alamo Lake State Park in each category. Figure 9 presents mean (average) direct expenditures for Buckskin Mountain State Park in each category.

Figure 8. Alamo Lake State Park Mean Per-Person Expenditures FY14

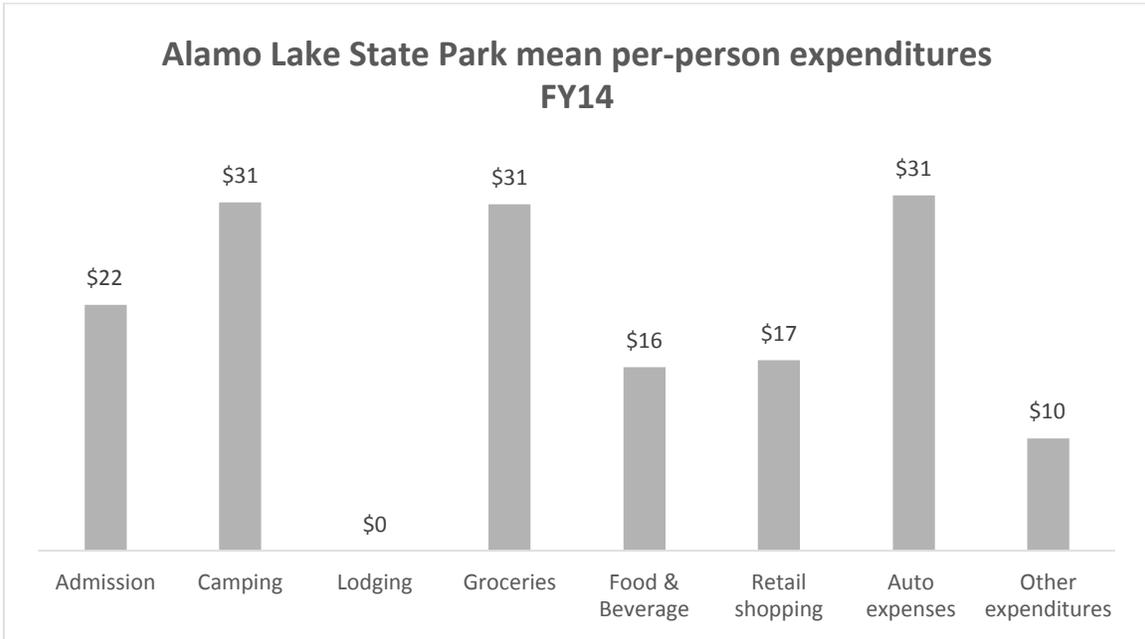


Figure 9. Buckskin Mountain State Park Mean Per-Person Expenditures FY14

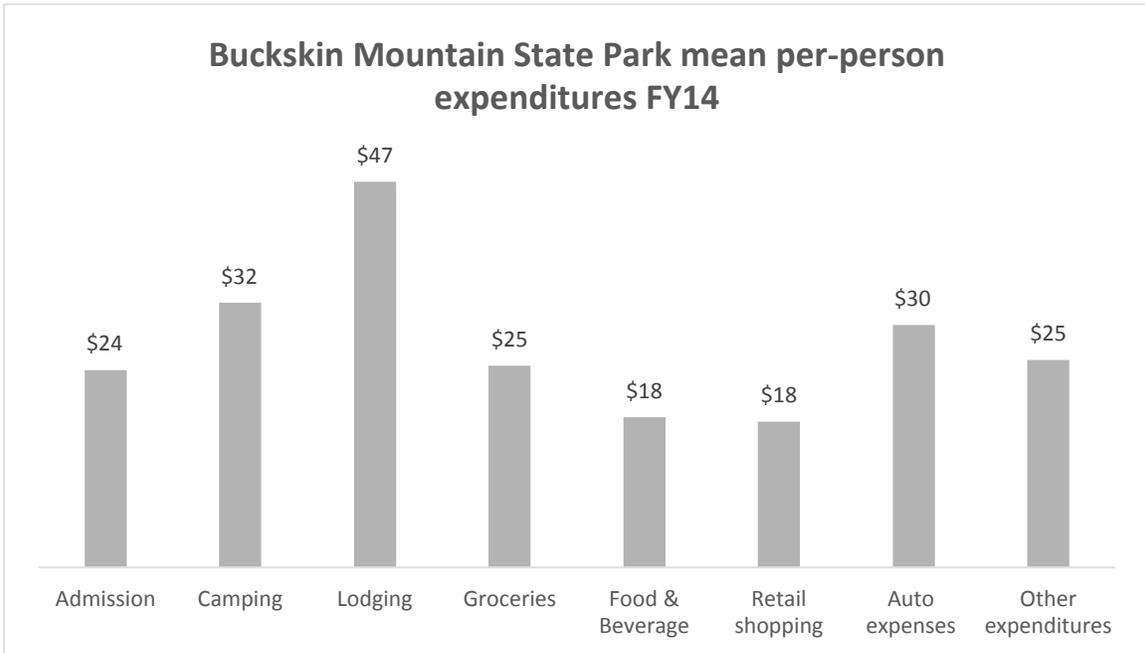


Table 12 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 8 & 9) are multiplied by the percentage of visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Alamo Lake State Park had an estimated total of \$2,004,010 in direct expenditures for FY14, while Buckskin Mountain State Park had an estimated \$11,217,179 in direct expenditures by visitors.

In the second section, the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 12. La Paz County Economic Impact FY14

La Paz County Parks	FY14 Alamo Lake Expenditures	FY14 Buckskin Mountain Expenditures
Admission	\$33,545	\$179,083
Camping	\$98,375	\$424,522
Lodging	\$0	\$150,563
Groceries	\$711,567	\$2,966,641
Food & Beverage	\$265,482	\$1,931,052
Retail shopping	\$272,065	\$1,097,692
Auto expenses	\$520,876	\$3,721,495
Other expenditures	\$102,099	\$746,131
Total Direct Expenditures	\$2,004,010	\$11,217,179

Direct, Indirect and Induced County Impacts (\$)	FY14 Alamo Lake	FY14 Buckskin Mountain
Direct Impact	\$765,087	\$4,755,844
Indirect Impact	\$66,582	\$398,975
Induced Impact	\$92,983	\$551,164
Total County Impacts	\$924,652	\$5,705,983

Direct and Indirect County Employment	FY14 Alamo Lake	FY14 Buckskin Mountain
Direct Jobs	11	74
Indirect Jobs	1.9	7.8
Total State Jobs	13	82

Tax Impacts	FY14 Alamo Lake	FY14 Buckskin Mountain
Federal Government Non-Defense	\$71,952	\$432,355
State & Local Government	\$75,005	\$498,539
Total Taxes	\$146,957	\$930,894

Mohave County State Parks

Cattail Cove



Lake Havasu



Mohave County State Parks

Mohave County contains two Arizona State Parks – Cattail Cove State Park and Lake Havasu State Park. Table 13 below shows total visitation to Cattail Cove State Park and Lake Havasu State Park for FY07 and FY14. During this time, visitation declined at Cattail Cove and increased at Lake Havasu. It is important to remember that visitation numbers at Lake Havasu are oftentimes limited by the carrying capacity of the park. On weekends and holidays, the park oftentimes reaches maximum capacity and so the gates are closed to additional visitors.

During the 2007 Visitor Survey Cattail Cove State Park was operated 365 days per year and had approximately seven full-time and one and one-half seasonal employees. In 2014 the park remained open for 365 days per year and had approximately five full-time and two seasonal employees.

During the 2007 Visitor Survey Lake Havasu State Park was operated 365 days per year and had approximately 12 full-time and two and one-quarter seasonal employees. In 2014 the park remained open for 365 days per year and had approximately seven full-time and six seasonal employees.

Table 13. Mohave County State Park Visitation

Mohave County	FY07	FY14	Percent Change
Cattail Cove	98,419	55,053	-44.1%
Lake Havasu	314,519	379,645	20.7%
Total County Visitation	412,938	434,698	5.3%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 10 presents mean (average) direct expenditures for Cattail Cove State Park in each

category for the FY14 survey. Figure 11 presents mean (average) direct expenditures for Lake Havasu State Park in each category for 2013-14.

Figure 10. Cattail Cove State Park Mean Per-Person Expenditures FY14

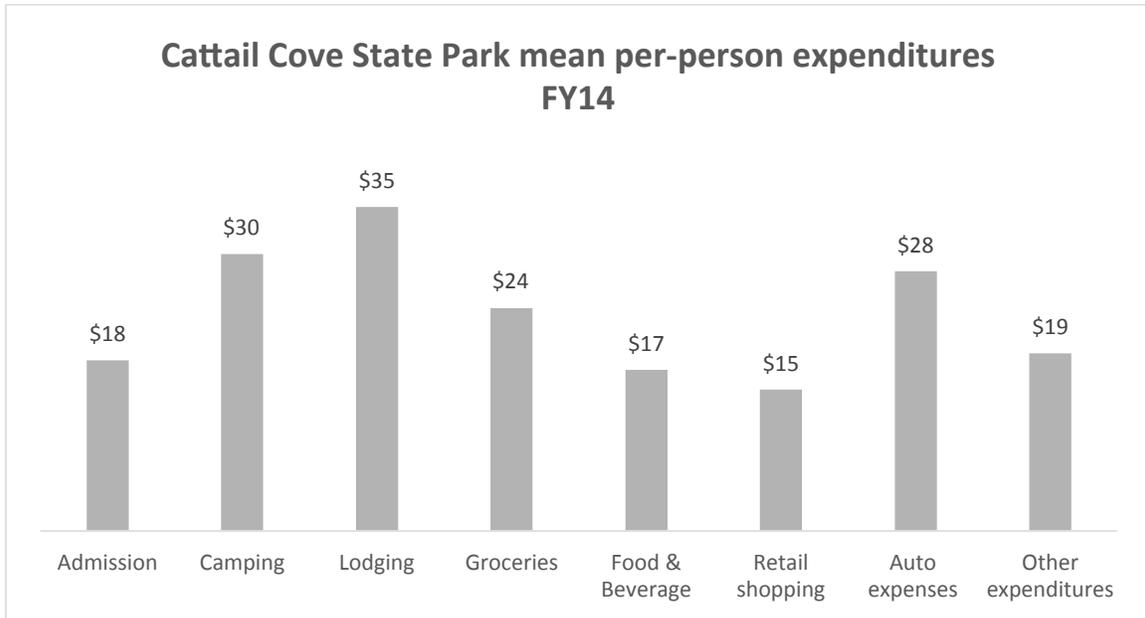


Figure 11. Lake Havasu State Park Mean Per-Person Expenditures FY14

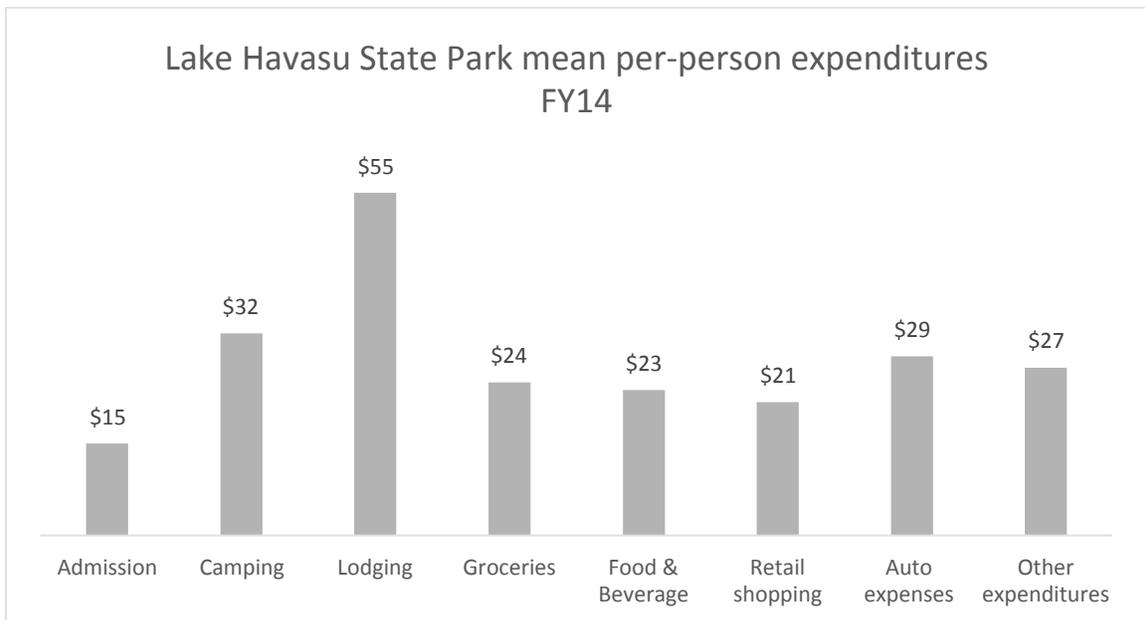


Table 14 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 10 & 11) are multiplied by the percentage of visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Visitors to Cattail Cove State Park reported an estimated \$5,926,168 in direct expenditures in FY14, while Lake Havasu State Park visitors reported an estimated \$33,185,585 in direct expenditures.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 14. Mohave County Economic Impact FY14

Mohave County Parks	FY14 Cattail Cove Expenditures	FY14 Lake Havasu Expenditures
Admission	\$961,118	\$1,470,684
Camping	\$1,028,228	\$2,328,971
Lodging	\$74,864	\$5,750,764
Groceries	\$1,301,903	\$6,954,070
Food & Beverage	\$625,133	\$3,608,094
Retail shopping	\$330,565	\$2,108,113
Auto expenses	\$1,509,250	\$9,369,390
Other expenditures	\$95,107	\$1,595,499
Total Direct Expenditures	\$5,926,168	\$33,185,585

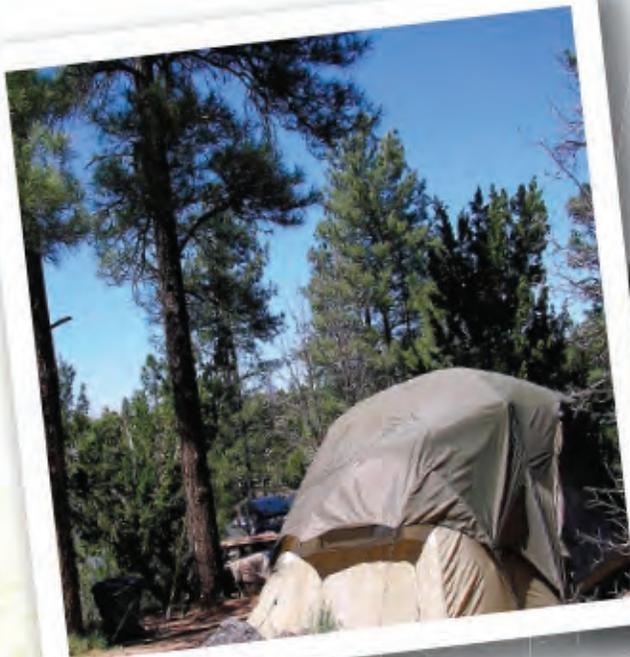
Direct, Indirect and Induced County Impacts (\$)	FY14 Cattail Cove	FY14 Lake Havasu
Direct Impact	\$3,371,142	\$17,538,758
Indirect Impact	\$637,410	\$3,113,220
Induced Impact	\$590,847	\$3,161,197
Total County Impact	\$4,599,399	\$23,813,175

Direct and Indirect County Employment	FY14 Cattail Cove	FY14 Lake Havasu
Direct Jobs	42.4	228.8
Indirect Jobs	10.6	53.5
Total State Jobs	53	282.3

Tax Impacts	FY14 Cattail Cove	FY14 Lake Havasu
Federal Government Non-Defense	\$310,982	\$1,670,407
State & Local Government	\$299,865	\$1,959,124
Total Taxes	\$610,847	\$3,629,531

Navajo County State Parks

Fool Hollow



Homolovi

Navajo County State Parks

Navajo County contains two Arizona State Parks – Fool Hollow Lake Recreation Area and Homolovi State Park. Table 15 below shows total visitation to Fool Hollow Lake Recreation Area and Homolovi State Park for FY07 and FY14. Fool Hollow Lake Recreation Area visitation decreased slightly when comparing these periods. Fool Hollow Lake only opened in 1994. In 2011, an online reservation system was implemented at this park, which changed camping patterns at the park. Visitation at Homolovi State Park increased.

During the 2007 Visitor Survey Fool Hollow Lake Recreation Area was operated 365 days per year and employed approximately five full-time and one and one-quarter seasonal employees. In 2014 the park remained open for 365 days per year had approximately five full-time and one and three-quarter seasonal employees.

During the 2007 Visitor Survey Homolovi State Park was operated 365 days per year and was employed approximately four full-time and one-half seasonal employees. The park campgrounds closed on October 1, 2009 and the park transitioned to a 5 day per week schedule for day use only. The park closed February 22, 2010 due to budget cuts. ASP entered into a partnership agreement with the Hopi Nation to help operate Homolovi Ruins State Park with ASP Staff. The park reopened to the public in March 18, 2011. In 2014 the park remained open for 365 days per year and employed approximately two full-time and two seasonal employees.

Table 15. Navajo County State Park Visitation

Navajo County	FY07	FY14	Percent Change
Fool Hollow Lake Recreation Area	95,495	94,309	-1.2%
Homolovi State Park	15,953	17,194	7.8%
Total County Visitation	111,448	111,503	0.05%

Visitor were asked to complete surveys were conducted at Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on

lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all other relevant expenditures. Figure 12 presents mean (average) direct expenditures for Fool Hollow Lake Recreation Area in each category. Figure 13 presents mean (average) direct expenditures for Homolovi State Park in each category.

Figure 12. Fool Hollow Lake Recreation Area Mean Per-Person Expenditures FY14

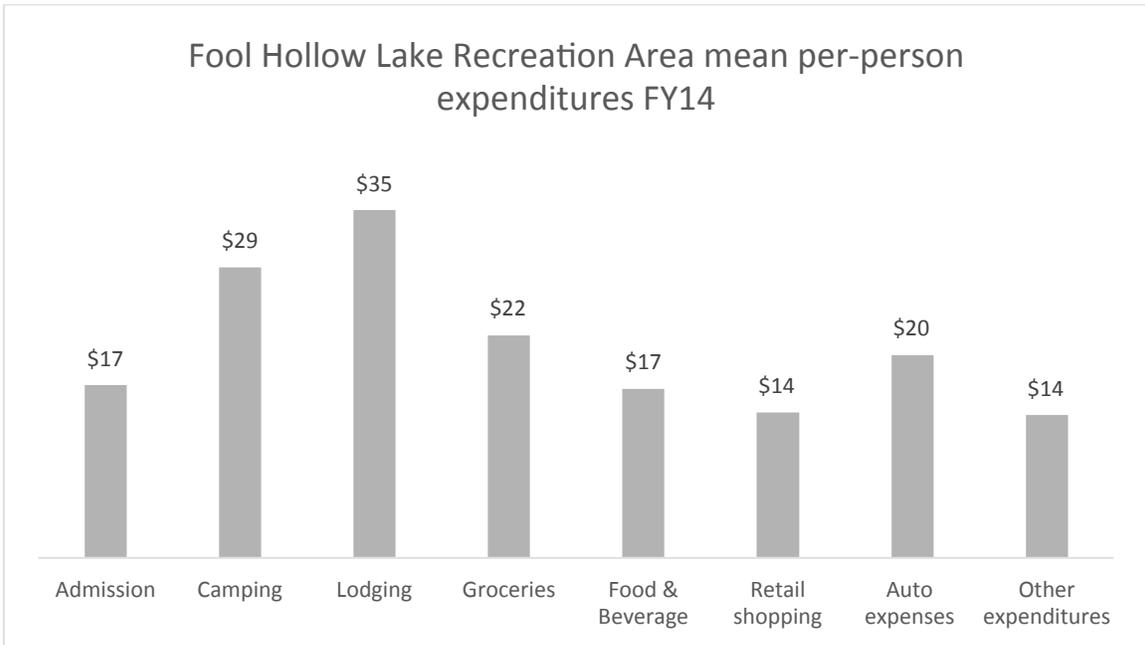


Figure 13. Homolovi State Park Mean Per-Person Expenditures FY14

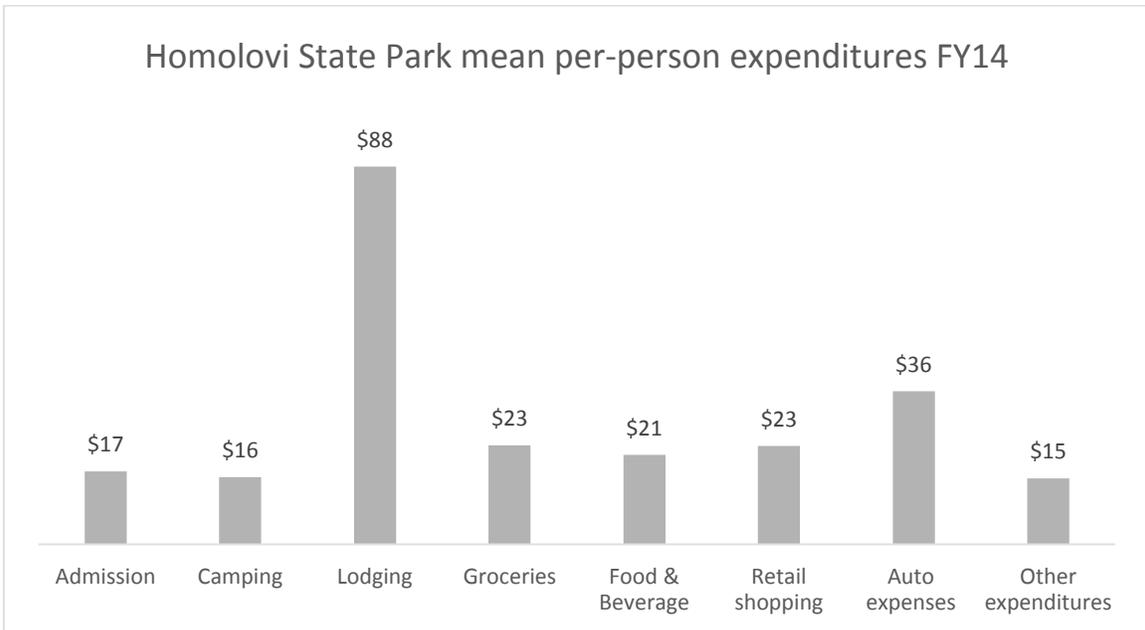


Table 16 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 12 & 13) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Fool Hollow Lake Recreation Area had \$8,021,076 in direct expenditures by state park visitors in FY14, while Homolovi State Park had \$1,721,110 in direct expenditures by state park visitors.

In the second section, the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impact, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs, representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 16. Navajo County Economic Impact FY14

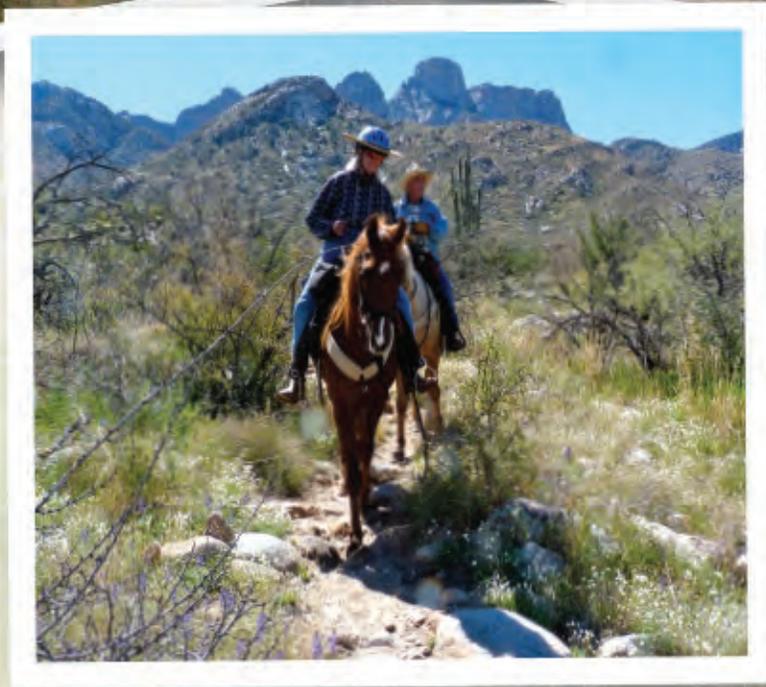
Navajo County Parks	FY14 Fool Hollow Lake expenditures	FY14 Homolovi expenditures
Admission	\$184,457	\$169,781
Camping	\$239,331	\$184,229
Lodging	\$318,946	\$227,070
Groceries	\$2,645,499	\$223,744
Food & Beverage	\$1,145,900	\$222,744
Retail shopping	\$758,334	\$133,886
Auto expenses	\$2,606,773	\$547,860
Other expenditures	\$121,835	\$11,796
Total Direct Expenditures	\$8,021,076	\$1,721,110

Direct, Indirect and Induced County Impacts (\$)	FY14 Fool Hollow Lake	FY14 Homolovi
Direct Impact	\$3,213,966	\$998,432
Indirect Impact	\$467,437	\$162,780
Induced Impact	\$577,086	\$148,530
Total County Impacts	\$4,258,489	\$1,309,742

Direct and Indirect County Employment	FY14 Fool Hollow Lake	FY14 Homolovi
Direct Jobs	48.6	12.1
Indirect Jobs	8.3	2.4
Total State Jobs	56.9	14.5

Tax Impacts	FY14 Fool Hollow Lake	FY14 Homolovi
Federal Government Non-Defense	\$327,717	\$89,725
State & Local Government	\$377,090	\$98,691
Total Taxes	\$704,807	\$188,416

Pima County State Parks



Catalina

Pima County State Parks

Pima County contains one Arizona State Park – Catalina State Park. Table 17 below shows total visitation to Catalina State Park for FY07 and FY14. Visitation at Catalina State Park increased substantially from one time period to the next. Catalina State Park is a draw for the growing population of the Tucson metro area, and is especially popular with day visitors who hike its many trails. In years with high rainfall, viewing of wildflowers can push visitation up.

During the 2007 Visitor Survey Catalina State Park was operated 365 days per year and had approximately five full-time and one-half seasonal employees. In 2014 the park remained open for 365 days per year and had approximately four and one-half full-time and one and one seasonal employees.

Table 17. Pima County State Park Visitation

Pima County	FY07	FY14	Percent Change
Catalina	149,644	171,648	14.7%

Visitor were asked to complete surveys were conducted at Arizona State Parks during FY14. These surveys asked visitors to estimate their total expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 14 presents mean (average) direct expenditures for Catalina State Park in each category.

Figure 14. Catalina State Park Mean Per-Person Expenditures FY14

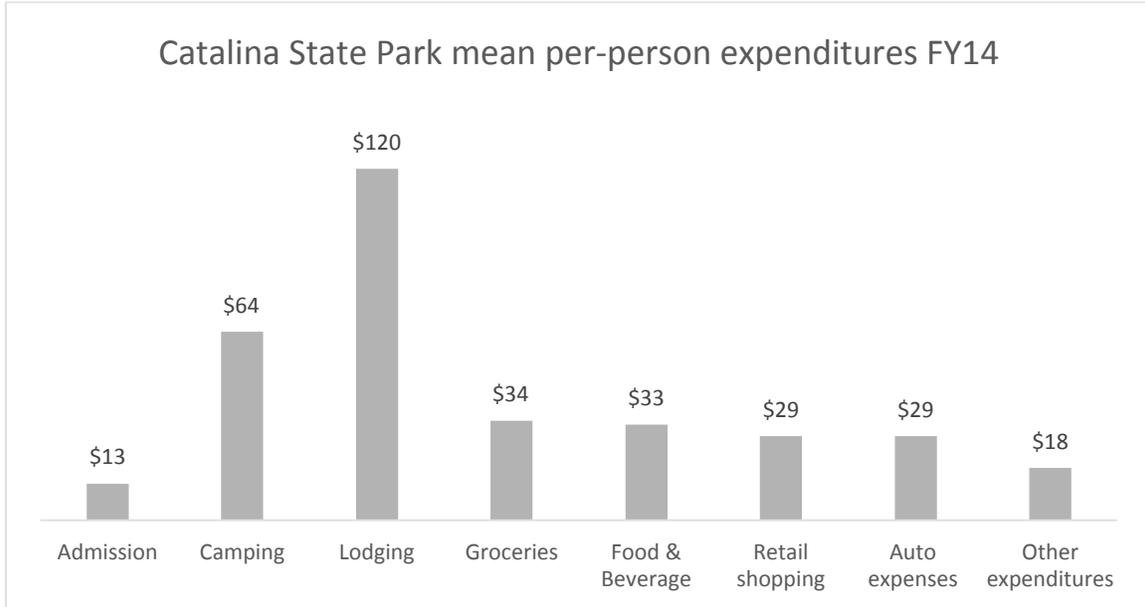


Table 18 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figure 14) are multiplied by the percentage of visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Catalina State Park had \$19,221,256 in direct expenditures by state park visitors in FY14.

In the second section, the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs, representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 18. Pima County Economic Impact FY14

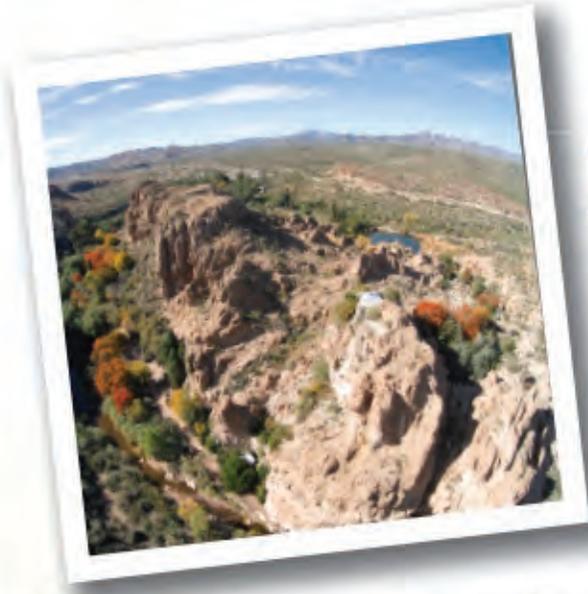
Pima County Parks	FY14 Catalina Expenditures
Admission	\$442,812
Camping	\$2,890,786
Lodging	\$858,088
Groceries	\$5,593,663
Food & Beverage	\$3,460,832
Retail shopping	\$1,968,003
Auto expenses	\$3,739,739
Other expenditures	\$267,333
Total Direct Expenditures	\$19,221,256

Direct, Indirect and Induced County Impacts (\$)	FY14 Catalina
Direct Impacts	\$10,361,631
Indirect Impacts	\$2,137,080
Induced Impacts	\$2,896,194
Total County Impacts	\$15,394,905

Direct and Indirect County Employment	FY14 Catalina
Direct Jobs	143.8
Indirect Jobs	45.9
Total State Jobs	189.7

Tax Impacts	FY14 Catalina
Federal Government Non-Defense	\$1,150,427
State & Local Government	\$1,135,191
Total Taxes	\$2,285,618

Pinal County State Parks



*Boyce
Thompson*



*Lost
Dutchman*



McFarland



*Picacho
Peak*



Oracle

Pinal County State Parks

Pinal County contains five Arizona State Parks – Boyce Thompson Arboretum State Park (BTA), Lost Dutchman State Park, McFarland State Historic Park, Picacho Peak State Park and Oracle State Park. Table 19 below shows total visitation to these parks for FY07 and FY14. Two of these five parks saw declining visitation from one period to the next.

Boyce Thompson Arboretum is managed collaboratively by the University of Arizona, Arizona State Parks and the Boyce Thompson Arboretum Board. During the 2007 Visitor Survey, Boyce Thompson Arboretum State Park was operated seven days per week. ASP provided one full-time park manager and one-half seasonal employee. These employees were in addition to the Arboretum staff. In February 2010, the agency ceased financial support to the Park due to budget sweeps and cuts. The Park is now staffed primarily via the Arboretum.

During the 2007 Visitor Survey, Lost Dutchman State Park was operated 365 days per year and was budgeted for approximately four full-time employees. ASP entered into a partnership agreement with the newly established Friends of Lost Dutchman and the City of Apache Junction to help operate Lost Dutchman State Park in 2010. In 2014 the park remained open for 365 days per year and was budgeted for approximately three full-time and two seasonal employees.

During the 2007 Visitor Survey McFarland State Historic Park was operated seven days per week and was budgeted for approximately three full-time and one-half seasonal employees. The park closed March 2009 due to a major stabilization project that was completed on the courthouse. Due to budget cuts the park remained closed until February 12, 2011. ASP entered into a partnership agreement with the Town of Florence to operate the park without ASP staff as the Town's visitor center. Fees were no longer collected for entrance into the park. Hours of operation changed to six days per week (Monday through Saturday). In 2014 the park continued to operate six days per week and was staffed by one full-time and one part-time employee.

During the 2007 Visitor Survey Picacho Peak State Park was operated 365 days per year and had approximately five full-time employees. After Memorial day in May of 2011 the park closed for the summer season and began operating on a seasonal basis and reopened Labor Day, September 2011. The park celebrates the Civil War in the Southwest on an annual basis in March, which attracts visitors from all over the county and in 2010 this event was cancelled. In 2014 the park continued to operate on a seasonal basis. The park was open for approximately eight months, September 14, 2013 through May 22, 2014. During that time it operated seven days per week for both day use and overnight visitors. Staffing consisted of four full-time and one-half seasonal employee.

Oracle State Park was officially dedicated and opened to the public October 1, 2001 as an environmental education center. During the 2007 Visitor Survey Oracle State Park was operated seven days per week and employed approximately four full-time and one seasonal employee. In May 2009, park operations transitioned to a 5 days per week schedule (Thursdays through Mondays) and in October 2009 the park closed to the

public. It remained open for school groups, by reservation only, from October 2009 through February 4, 2012. The park reopened February 4, 2012 on a limited basis. It was open by reservation only for school groups during the week and open to the public on Saturdays only through April 28, 2012. The park remained on the same seasonal schedule in 2013. In 2014, the park was open to the public on weekends only and scheduled school groups from October 5, 2013 through June 30, 2014. The park employed approximately one-half full-time and one seasonal employee.

Table 19. Pinal County State Park Visitation

Pinal County	FY07	FY14	Percent Change
Boyce Thompson Arboretum	65,108	79,290	21.8%
Lost Dutchman	77,683	124,169	59.8%
McFarland	3,968	8,910	124.5%
Picacho Peak	63,393	61,431	-3.1%
Oracle	9,592	5,346	-44.3%
Total County Visitation	219,744	279,146	27.0%

Visitor asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This Number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 15 presents mean (average) direct expenditures for Boyce Thompson Arboretum State Park in each category. Figure 16 presents mean (average) direct expenditures for Lost Dutchman State Park in each category. Figure 17 presents mean (average) direct expenditures for McFarland State Historic Park in each category. Figure 18 presents mean (average) direct expenditures for Picacho Peak State Park in each category. Figure 19 presents mean (average) direct expenditures for Oracle State Park in each category.

Figure 15. Boyce Thompson Arboretum State Park Mean Per-Person Expenditures FY14

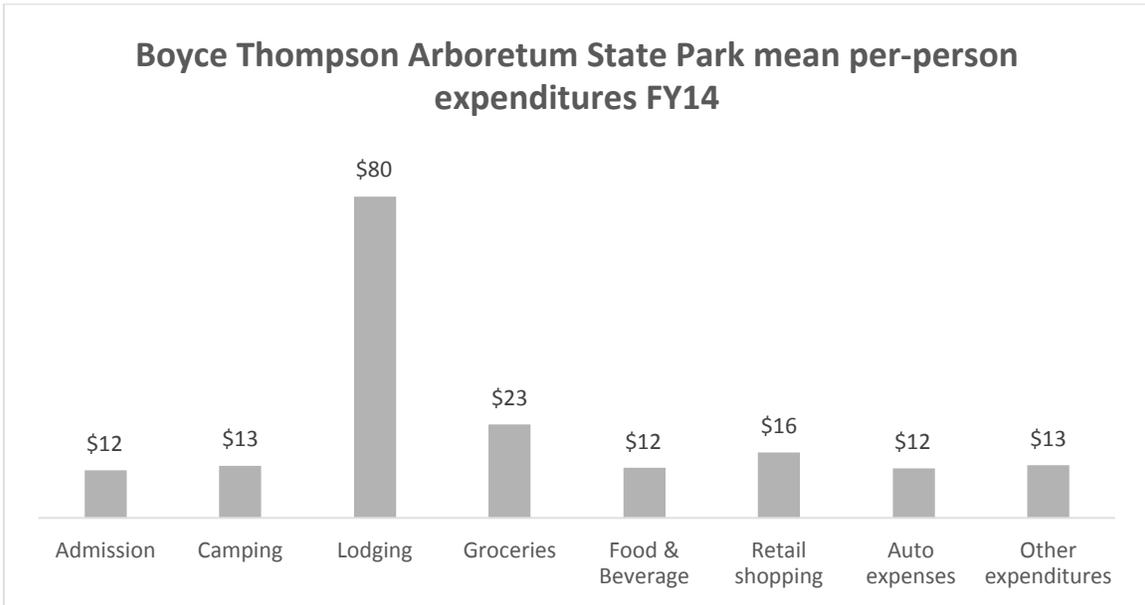


Figure 16. Lost Dutchman State Park Mean Per-Person Expenditures FY14

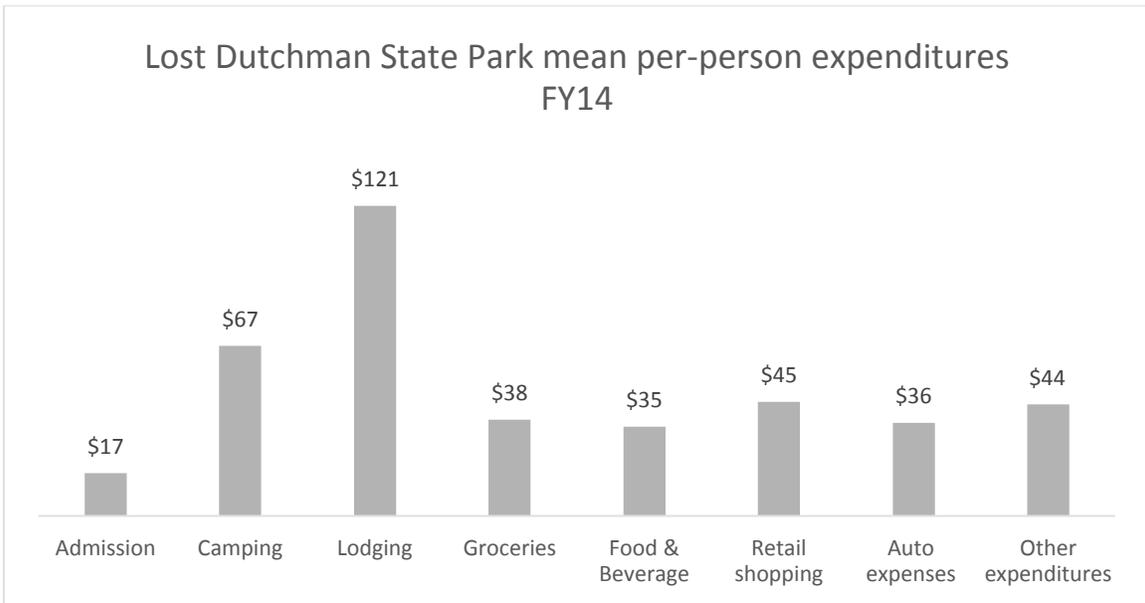


Figure 17. McFarland State Historic Park Mean Per-Person Expenditures FY14

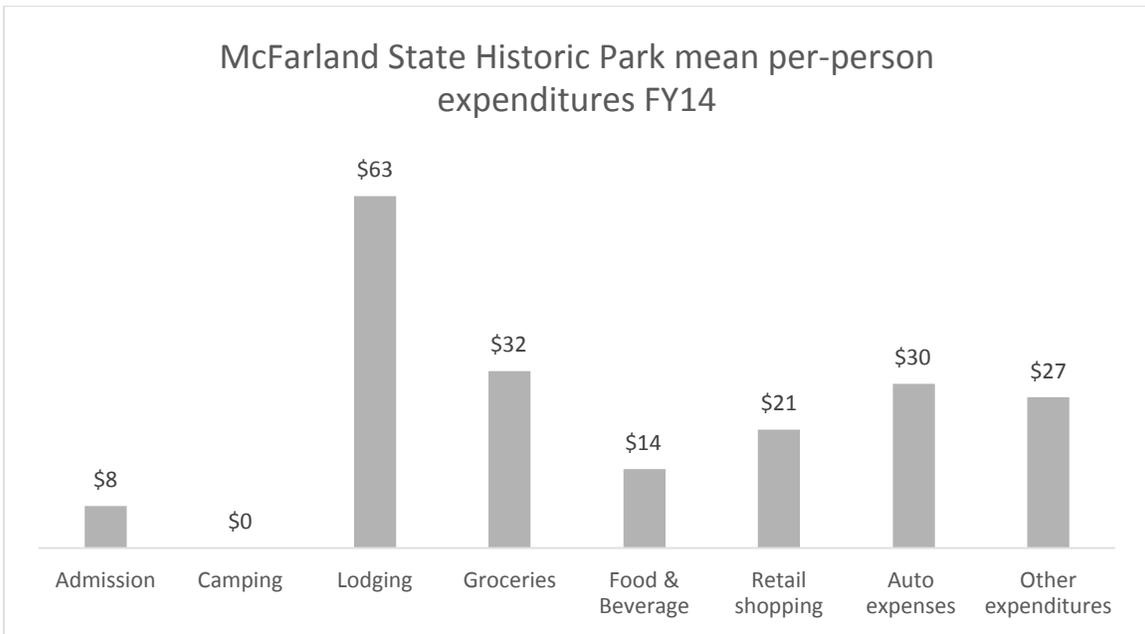


Figure 18. Picacho Peak State Park Mean Per-Person Expenditures FY14

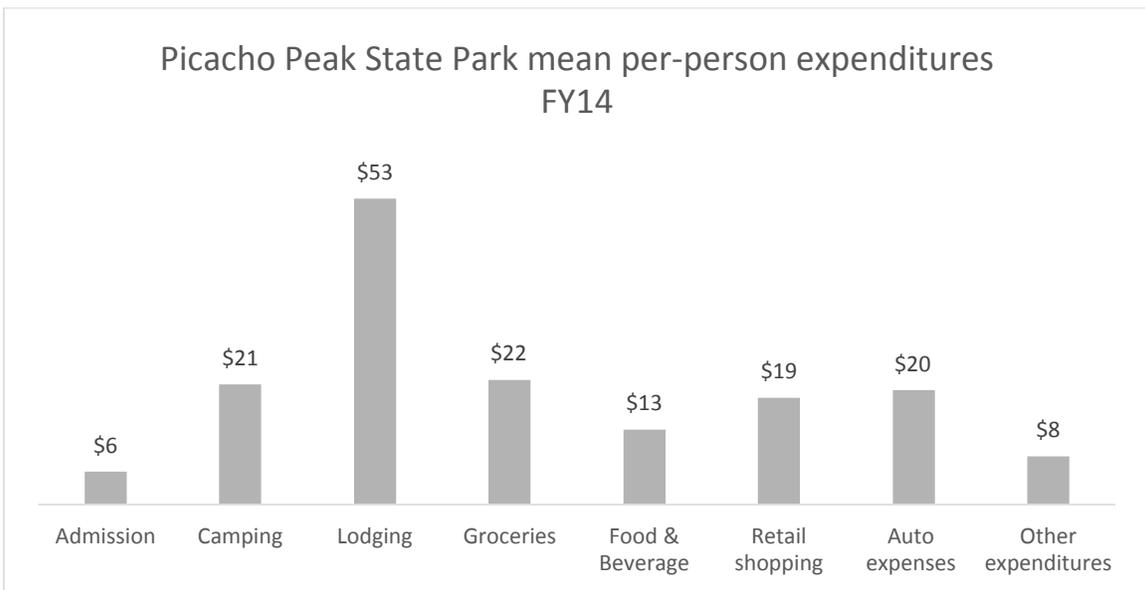


Figure 19. Oracle State Park Mean Per-Person Expenditures FY14

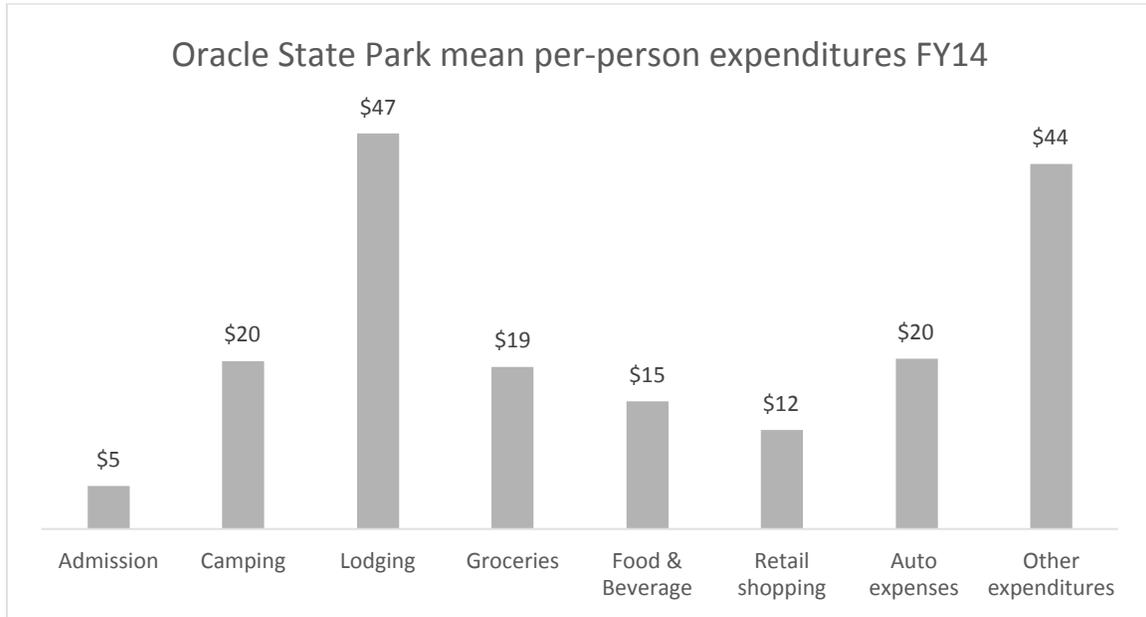


Table 20 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 15-19) are multiplied by the percentage of visitors to the park that live outside of a 50-mile radius to provide an estimate of total direct expenditures. Boyce Thompson Arboretum had an estimated \$3,356,013 in direct expenditures by state park visitors in FY14, while Lost Dutchman had \$15,411,951, McFarland had \$323,063, Picacho Peak had \$2,573,978 and Oracle had an estimated \$118,241 in direct expenditures in FY14.

In the second section runs these total direct expenditures are run through the IMPLAN model which uses multipliers to estimate *total* county income generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the estimated additional tax impacts of park visitor spending.

Table 20. Pinal County Economic Impact FY14

Pinal County Parks	FY14 BTA Expenditures	FY14 Lost Dutchman Expenditures	FY14 McFarland Expenditures	FY14 Picacho Peak Expenditures	FY14 Oracle Expenditures
Admission	\$864,077	\$650,391	\$14,318	\$76,368	\$1,751
Camping	\$43,771	\$3,809,096	\$31,038	\$911,486	\$15,875
Lodging	\$234,131	\$470,795	\$57,436	\$75,250	\$6,770
Groceries	\$168,443	\$2,708,251	\$33,185	\$495,963	\$15,563
Food & Beverage	\$555,997	\$2,767,138	\$88,069	\$193,528	\$36,807
Retail shopping	\$967,710	\$1,515,961	\$42,267	\$146,224	\$10,310
Auto expenses	\$434,205	\$3,077,119	\$52,331	\$664,932	\$29,835
Other expenditures	\$87,679	\$413,200	\$4,418	\$10,227	\$1,331
Total Direct Expenditures	\$3,356,013	\$15,411,951	\$323,063	\$2,573,978	\$118,241

Direct, Indirect and Induced County Impacts (\$)	FY14 BTA	FY14 Lost Dutchman	FY14 McFarland	FY14 Picacho Peak	FY14 Oracle
Direct Impact	\$2,106,787	\$9,438,942	\$220,187	\$1,520,367	\$72,554
Indirect Impact	\$202,320	\$829,028	\$18,464	\$143,927	\$5,692
Induced Impact	\$148,082	\$841,586	\$18,475	\$133,440	\$6,730
Total County Impact	\$2,457,189	\$11,109,556	\$257,126	\$1,797,734	\$84,976

Direct and Indirect County Employment	FY14 BTA	FY14 Lost Dutchman	FY14 McFarland	FY14 Picacho Peak	FY14 Oracle
Direct Jobs	26.5	129.1	3	19.1	1.1
Indirect Jobs	2.2	16	0.3	2.7	0.2
Total State Jobs	29.9	145.1	3.3	21.8	1.3

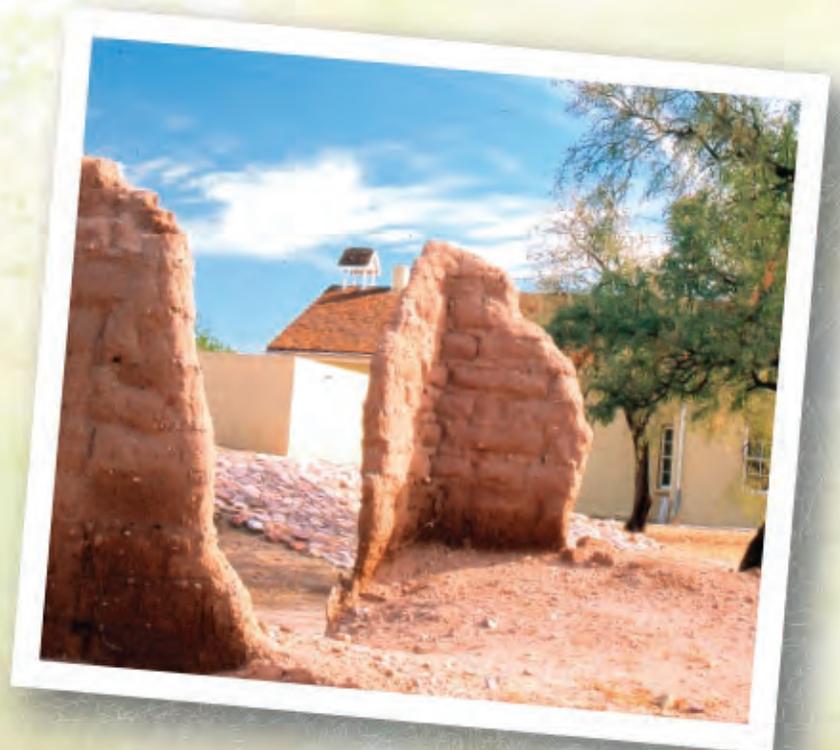
Tax Impacts	FY14 BTA	FY14 Lost Dutchman	FY14 McFarland	FY14 Picacho Peak	FY14 Oracle
Federal Government Non-Defense	\$145,980	\$725,931	\$16,577	\$116,179	\$5,641
State & Local Government	\$176,215	\$806,731	\$20,972	\$125,111	\$6,510
Total Taxes	\$322,195	\$1,532,662	\$37,549	\$241,290	\$12,151

Santa Cruz County State Parks

*Patagonia
Lake*



*Tubac
Presidio*



Santa Cruz County State Parks

Santa Cruz County contains two Arizona State Parks – Patagonia Lake State Park, and Tubac Presidio State Historic Park. Table 21 below shows total visitation to Patagonia Lake State Park, and Tubac Presidio State Historic Park for FY07 and FY14. Visitation to Patagonia Lake increased from one period to the next, whereas, visitation to Tubac Presidio declined when comparing the same two time periods. Visitors to Patagonia Lake State Park may also be visiting the Sonoita Creek State Natural Area that was opened in 2000. The Sonoita Creek Natural Area can be accessed from Patagonia Lake State Park.

During the 2007 Visitor Survey Patagonia Lake State Park was operated 365 days per year and employed approximately seven full-time and three seasonal employees. In 2014 the park remained open for 365 days per year and employed approximately eight and three seasonal employees.

During the 2007 Visitor Survey Tubac Presidio State Historic Park was operated seven days per week had approximately four full-time employees. In April 2009, due to budget cuts, park operations transitioned to a five day per week schedule (Thursdays through Mondays). In May 2010 ASP entered into a partnership agreement with Santa Cruz County to operate the park with the help of the Tubac Historical Society without ASP staff. In 2014 the park operated seven days per week and was staffed with one full-time employee.

Table 21. Santa Cruz County State Park Visitation

Santa Cruz County	FY07	FY14	Percent Change
Patagonia Lake	178,497	188,432	5.6%
Tubac Presidio	14,439	11,874	-17.8%
Total County Visitation	192,936	200,306	3.8%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total

direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 20 presents mean (average) direct expenditures for Patagonia State Park in each category. Figure 21 presents mean (average) direct expenditures for Tubac Presidio State Historic Park in each category.

Figure 20. Patagonia Lake State Park Mean Per-Person Expenditures FY14

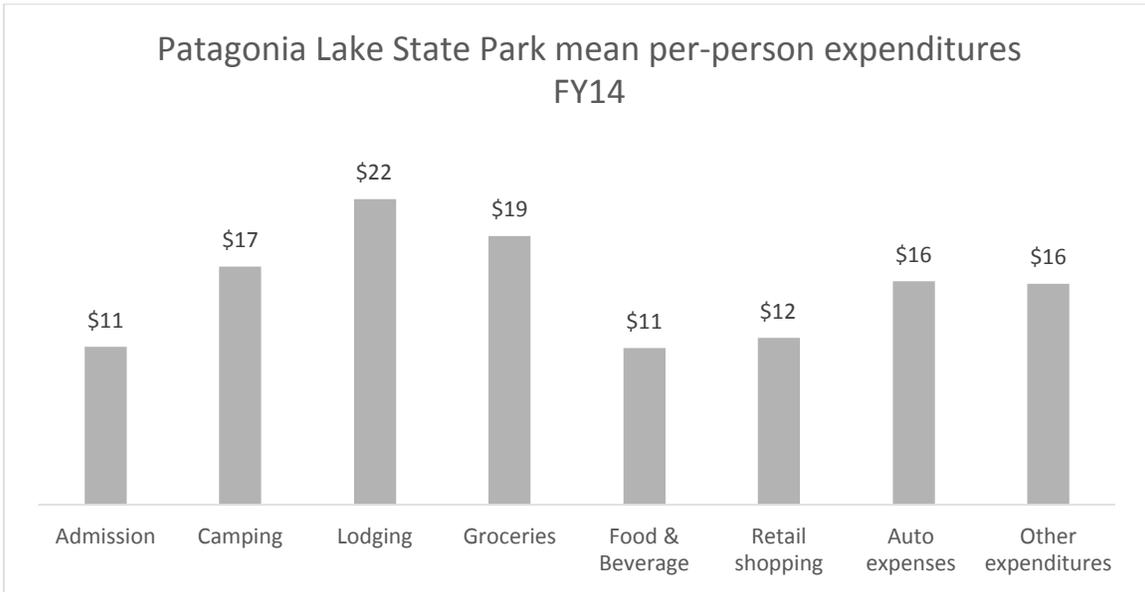


Figure 21. Tubac Presidio State Historic Park Mean Per-Person Expenditures FY14

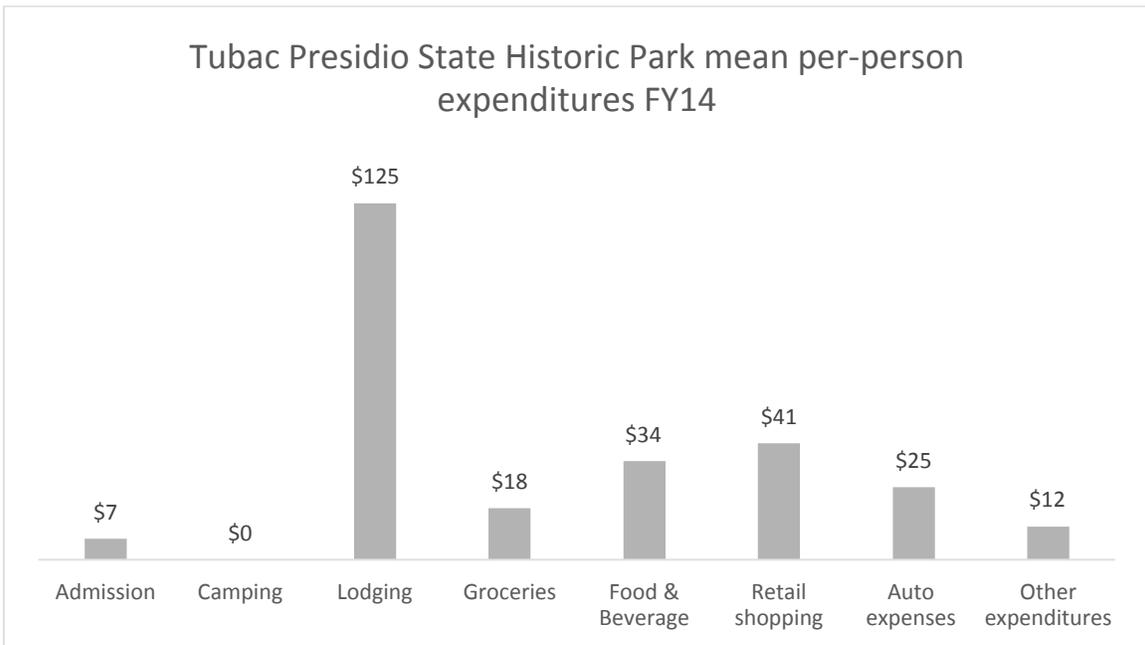


Table 22 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 20 & 21) are multiplied by the percentage of visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Patagonia Lake State Park had an estimated \$10,983,556 in direct expenditures in FY14, while Tubac Presidio State Historic Park had approximately \$1,396,472 in direct expenditures.

In the second section runs these total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impact generated as a result of the park spending. This is comprised of direct, indirect and induced county impacts, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 22. Santa Cruz County Economic Impact FY14

Santa Cruz County Parks	FY14 Patagonia Lake Expenditures	FY14 Tubac Presidio Expenditures
Admission	\$388,870	\$114,598
Camping	\$699,382	\$5,831
Lodging	\$271,456	\$397,567
Groceries	\$4,126,868	\$43,374
Food & Beverage	\$1,057,889	\$230,854
Retail shopping	\$1,058,623	\$460,913
Auto expenses	\$3,037,022	\$137,399
Other expenditures	\$343,446	\$5,937
Total Direct Expenditures	\$10,983,556	\$1,396,472

Direct, Indirect and Induced County Impacts (\$)	FY14 Patagonia Lake	FY14 Tubac Presidio
Direct Impact	\$4,403,923	\$908,799
Indirect Impact	\$778,062	\$158,377
Induced Impact	\$743,656	\$117,665
Total County Impact	\$5,925,641	\$1,184,841

Direct and Indirect County Employment	FY14 Patagonia Lake	FY14 Tubac Presidio
Direct Jobs	62	11.3
Indirect Jobs	12.5	2.3
Total County Jobs	74.5	13.6

Tax Impacts	FY14 Patagonia Lake	FY14 Tubac Presidio
Federal Government Non-Defense	\$462,241	\$85,865
State & Local Government	\$468,135	\$97,408
Total Taxes	\$930,376	\$183,273

Yavapai County State Parks

*Dead Horse
Ranch*



Jerome



Red Rock



*Fort
Verde*

Yavapai County State Parks

Yavapai County contains four Arizona State Parks – Dead Horse Ranch State Park, Fort Verde State Historic Park, Jerome State Historic Park and Red Rock State Park. Table 23 below shows total visitation to the parks for FY07 and FY14. Visitation at Dead Horse State Park showed positive growth, while attendance declined from one period to the next at all other parks.

During the 2007 Visitor Survey Dead Horse Ranch State Park was operated 365 days per year and had approximately eight full-time and two seasonal employees. In 2014 the park remained open for 365 days per year and had approximately seven full-time employees.

During the 2007 Visitor Survey Fort Verde State Historic Park was operated seven days per week and employed approximately four full-time and one-quarter seasonal employees. In 2010, ASP entered into a partnership agreement with the Town of Camp Verde and Yavapai County to help operate Fort Verde State Historic Park. In May 2009, park operations transitioned to a 5 day per week schedule (Thursdays through Mondays) due to budget cuts. In 2014 the park continued to operate on a 5 day a week schedule and employed approximately one full-time and one and one-half seasonal employees.

During the 2007 Visitor Survey Jerome State Historic Park was operated seven days per week and had approximately four full-time and one-half seasonal employees. Due to structural uncertainty, the park was closed in March of 2009 and remained closed until October 14, 2010 at which time it operated five days per week (Thursday through Monday). January 1, 2012 the park transitioned to a seven day per week schedule. In 2014 the park continued to operate seven days per week and has approximately two full-time and one and three-quarter seasonal employees.

During the 2007 Visitor Survey Red Rock State Park was operated seven days per week and was budgeted for approximately five full-time and two seasonal employees. The park transitioned to a five day per week schedule on November 3, 2009 and resumed normal schedule starting January 29, 2010. During FY10, ASP entered into a partnership agreement with Yavapai County and the Benefactors of Red Rock State Park to help operate Red Rock State Park. A generous donation made by the Benefactors, enabled the park to continue its Connections School Program providing a unique educational experience for children. In 2014 the park remained open seven days per week and had approximately three full-time and one and one-half seasonal employees.

Table 23. Yavapai County State Park Visitation

Yavapai County	FY07	FY14	Percent Change
Dead Horse Ranch	120,686	154,319	27.9%
Fort Verde	16,950	11,360	-33.0%
Jerome	60,307	46,693	-22.6%
Red Rock	80,711	63,629	-21.2%
Total County Visitation	278,654	276,001	-1.0%

Visitors were asked to complete surveys at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park's average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 22 presents mean (average) direct expenditures for Dead Horse Ranch State Park in each category for the FY14 survey. Figure 23 presents data for Fort Verde State Historic Park, Figure 24 presents data for Jerome State Historic Park and Figure 25 presents data for Red Rock State Park.

Figure 22. Dead Horse Ranch State Park Mean Per-Person Expenditures FY14

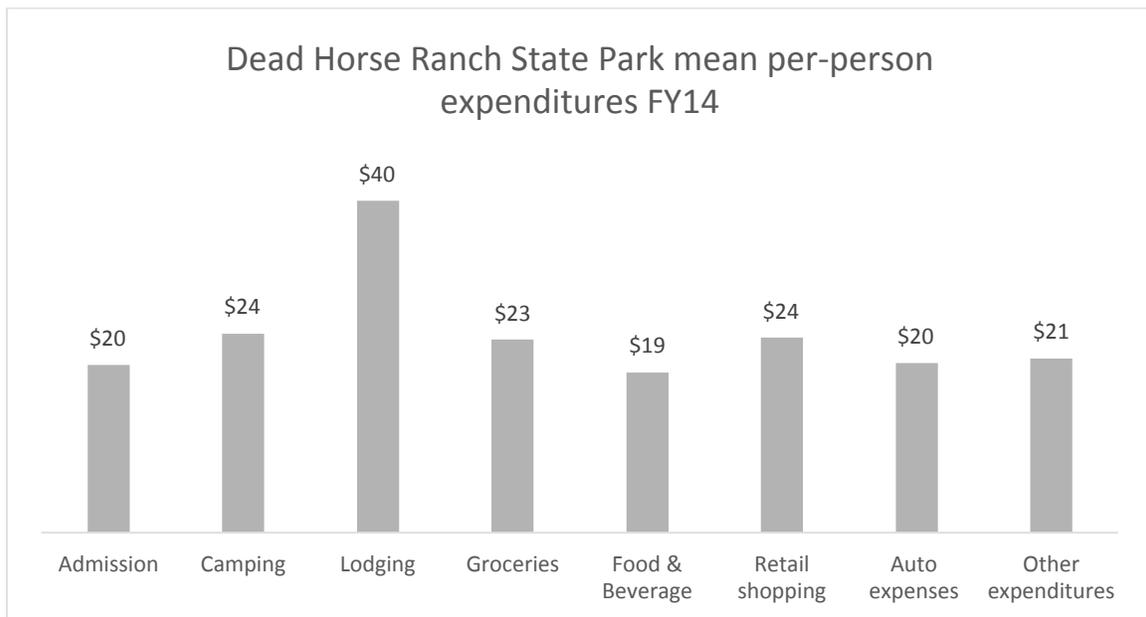


Figure 23. Fort Verde State Historic Park Mean Per-Person Expenditures FY14

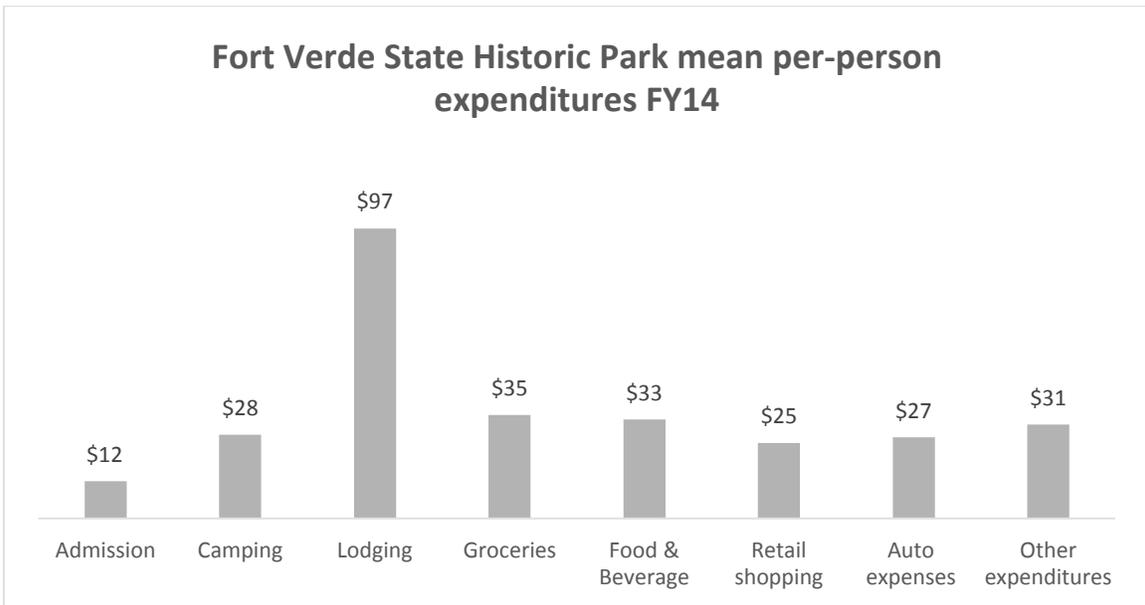


Figure 24. Jerome State Historic Park Mean Per-Person Expenditures FY14

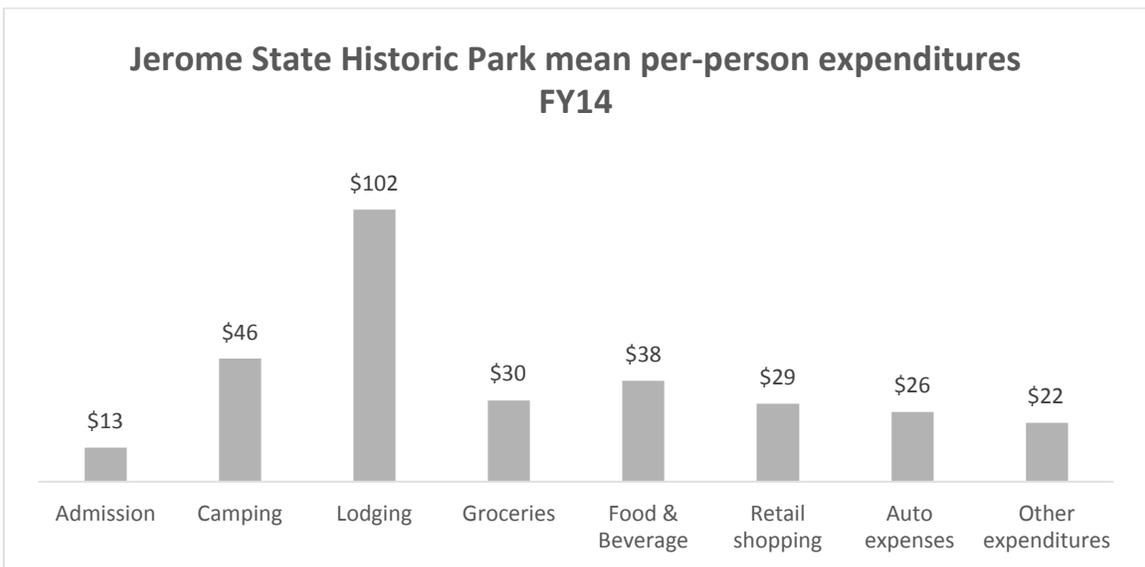


Figure 25. Red Rock State Park Mean Per-Person Expenditures FY14

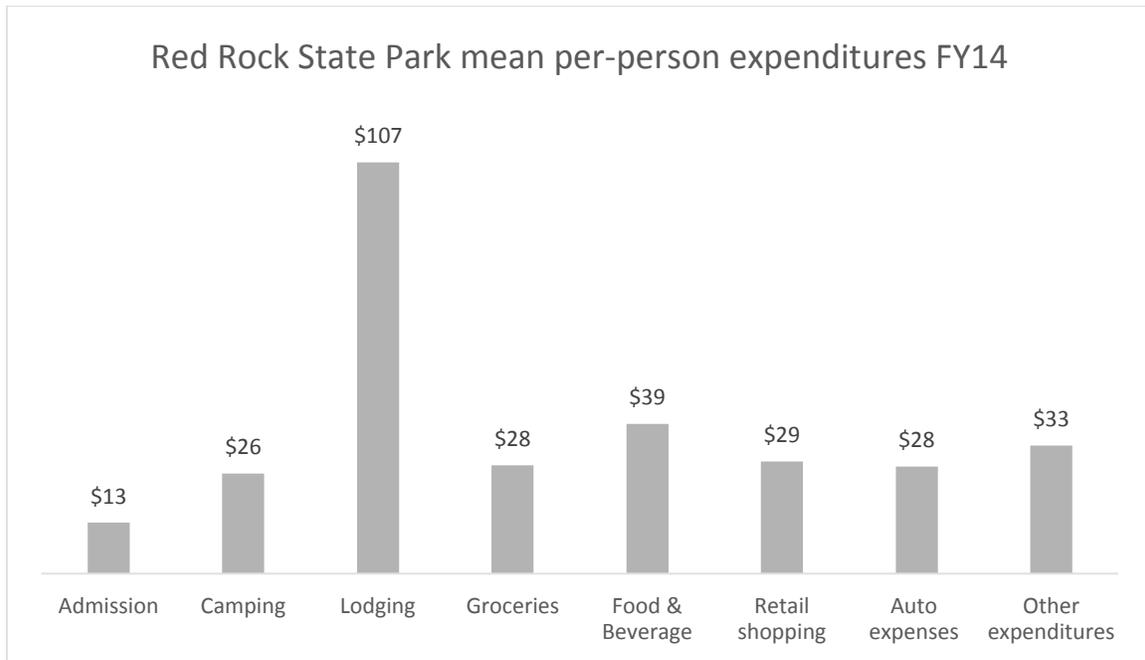


Table 24 is presented in four sections. In the first section mean direct expenditure totals in each category (Figures 22-25) are multiplied by the percentage of the visitors to the park that live outside of a 50-mile radius to provide an estimate of total direct expenditures in FY14. Dead Horse Ranch State Park had \$6,804,423 in direct expenditures by state park visitors in 2014, while Fort Verde had \$773,293, Jerome had \$5,018,686 and Red Rock had \$10,676,801 in direct expenditures.

In the second section the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county income, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 24. Yavapai County Economic Impact FY14

Yavapai County Parks	FY14 Dead Horse Ranch Expenditures	FY14 Fort Verde Expenditures	FY14 Jerome Expenditures	FY14 Red Rock Expenditures
Admission	\$813,904	\$74,958	\$201,262	\$263,580
Camping	\$1,040,636	\$60,422	\$160,927	\$79,766
Lodging	\$170,580	\$149,345	\$1,103,501	\$4,621,158
Groceries	\$1,403,503	\$88,163	\$427,960	\$1,350,254
Food & Beverage	\$1,383,370	\$180,886	\$1,142,937	\$1,928,006
Retail shopping	\$431,985	\$67,034	\$796,683	\$892,229
Auto expenses	\$1,457,209	\$149,725	\$1,161,222	\$1,486,842
Other expenditures	\$103,236	\$2,759	\$24,192	\$54,965
Total Direct Expenditures	\$6,804,423	\$773,293	\$5,018,686	\$10,676,801

Direct, Indirect and Induced County Impacts (\$)	FY14 Dead Horse Ranch	FY14 Fort Verde	FY14 Jerome	FY14 Red Rock
Direct Impact	\$4,145,872	\$527,984	\$3,097,449	\$7,724,950
Indirect Impact	\$590,195	\$73,073	\$408,205	\$1,066,538
Induced Impact	\$695,762	\$83,579	\$503,032	\$1,172,527
Total County Impact	\$5,431,829	\$684,636	\$4,008,686	\$9,964,015

Direct and Indirect County Employment	FY14 Dead Horse Ranch	FY14 Fort Verde	FY14 Jerome	FY14 Red Rock
Direct Jobs	54.2	6.6	39.7	89
Indirect Jobs	12.3	1.5	8.6	21.3
Total State Jobs	66.5	8.1	48.3	110.3

Tax Impacts	FY14 Dead Horse Ranch	FY14 Fort Verde	FY14 Jerome	FY14 Red Rock
Federal Government Non-Defense	\$391,559	\$48,693	\$291,197	\$712,335
State & Local Government	\$354,561	\$49,623	\$316,023	\$840,794
Total Taxes	\$746,120	\$98,316	\$607,220	\$1,553,129

Yuma County State Parks



*Yuma Territorial
Prison*

*Yuma
Quartermaster
Depot*



Yuma County State Parks

Yuma County contains two Arizona State Parks – Yuma Territorial Prison State Historic Park, and Yuma Quartermaster Depot State Historic Park (formerly named Yuma Crossing State Historic Park). Table 25 below shows total visitation to Yuma Territorial Prison State Historic Park, and Yuma Quartermaster Depot State Historic Park for FY07 and FY14. From one time period to the next visitation decreased at Yuma Quartermaster Depot, while it increased slightly at Yuma Territorial Prison.

During the 2007 Visitor Survey Yuma Quartermaster Depot State Historic Park was operated seven days per week and had approximately four full-time and one seasonal employee. In April 2009, park operations transitioned to a 5 day per week schedule (Thursdays through Mondays). ASP entered into a partnership agreement with the City of Yuma to operate the park and daily operations were transitioned to the City on November 1, 2009 without ASP staff. In 2014 the park continued to operate 5 days per week and is staffed with two full-time and one part-time employee.

During the 2007 Visitor Survey Yuma Territorial Prison State Historic Park was operated by approximately five full-time and one-half seasonal employees. In April 2009, park operations transitioned to a 5 days per week schedule (Thursdays through Mondays). ASP entered into a partnership agreement with the City of Yuma to operate the park and daily operations were transitioned to the City on March 30, 2010 without ASP staff. In 2014 the park continued to operate 5 days per week and is staffed with two full-time, two seasonal, and two part time employees.

Table 25. Yuma County State Park Visitation

Yuma County	FY07	FY14	Percent Change
Yuma Quartermaster Depot	17,628	8,983	-49.04%
Yuma Territorial Prison	58,694	59,602	1.55%
Total County Visitation	76,322	68,585	-10.14%

Visitor were asked to complete surveys were conducted at each of the Arizona State Parks during FY14. These surveys asked visitors to estimate their total park expenditures, both within the park and within 50 miles of the park in the categories below:

- Admission Fees
- Camping Fees
- Lodging Expenses
- Groceries
- Food & Beverages
- Retail Shopping
- Private Auto Expenses
- Any Other Expenses

Per-person direct expenditures are calculated, for use in the economic impact model, by dividing each park’s average per party expenditures by the average party size. This number is then multiplied by the percentage of visitors who reported expenditures in each specific category. For example if 15 percent of visitors reported spending money on

lodging, then only 15 percent of all visitors to the park in FY14 are used to calculate total direct lodging expenditures. The same process is applied to all relevant expenditures. Figure 26 presents mean (average) direct expenditures for Yuma Quartermaster Depot State Historic Park in each category. Figure 27 presents mean (average) direct expenditures for Yuma Territorial Prison State Historic Park in each category.

Figure 26. Yuma Quartermaster Depot State Historic Park Per-Person Mean Expenditures FY14

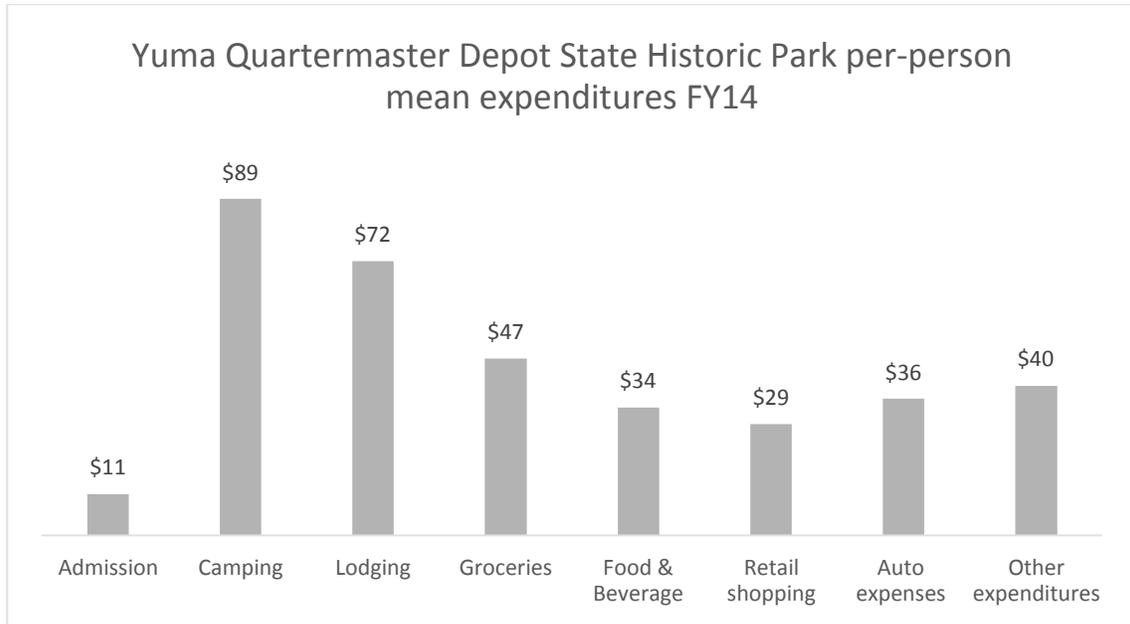


Figure 27. Yuma Territorial Prison State Historic Park Per-Person Mean Expenditures FY14

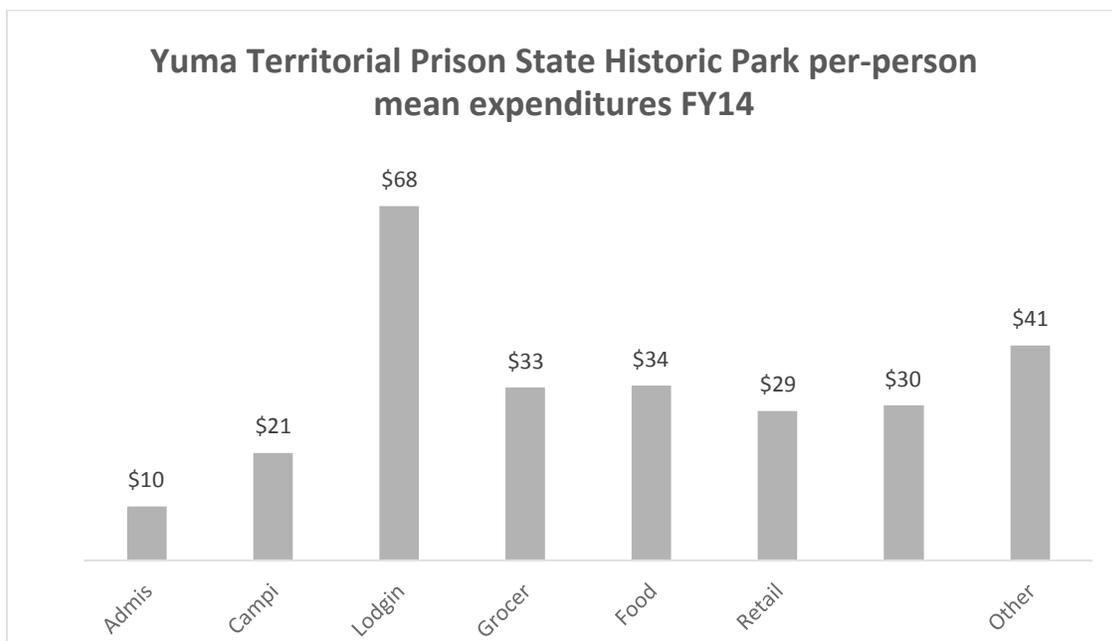


Table 26 is presented in four sections. In the first section, mean direct expenditure totals in each category (Figures 26 & 27) are multiplied by the percentage of the visitors to the park that live outside of a 50 mile radius to provide an estimate of total direct expenditures. Yuma Quartermaster Depot State Historic Park had \$586,735 in direct expenditures, while Yuma Territorial Prison State Park had \$4,751,234 in direct expenditures in FY14.

In the second section, the total direct expenditures are run through the IMPLAN model, which uses multipliers to estimate *total* county impacts generated as a result of the park spending. This is comprised of direct, indirect and induced county income, as businesses invest in new equipment, suppliers replenish stocks, pay their employees' wages, or improve local public services – that is, as tourist dollars work their way through the local and county economy.

The third section of the table estimates the number of direct and indirect jobs supported by this economic output. It provides an estimate of total county jobs representing the total employment impact of state parks on the county economy.

The final section of the table is a calculation of the additional estimated tax impacts of park visitor spending.

Table 26. Yuma County Economic Impact FY14

Yuma County Parks	FY14 Yuma Quartermaster Depot Expenditures	FY14 Yuma Territorial Prison Expenditures
Admission	\$97,095	\$619,220
Camping	\$52,390	\$171,766
Lodging	\$80,324	\$825,042
Groceries	\$106,373	\$523,668
Food & Beverage	\$95,463	\$1,154,495
Retail shopping	\$44,619	\$619,329
Auto expenses	\$108,433	\$813,466
Other expenditures	\$2,038	\$24,248
Total Direct Expenditures	\$586,735	\$4,751,234

Direct, Indirect and Induced County Impacts (\$)	FY14 Yuma Quartermaster Depot	FY14 Yuma Territorial Prison
Direct Impact	\$381,629	\$908,799
Indirect Impact	\$58,264	\$158,377
Induced Impact	\$63,695	\$117,665
Total County Impact	\$503,588	\$1,184,841

Direct and Indirect County Employment	FY14 Yuma Quartermaster Depot	FY14 Yuma Territorial Prison
Direct Jobs	4.2	11.3
Indirect Jobs	1.2	2.3
Total State Jobs	5.4	13.6

Tax Impacts	FY14 Yuma Quartermaster Depot	FY14 Yuma Territorial Prison
Federal Government Non-Defense	\$33,852	\$279,214
State & Local Government	\$24,287	\$239,574
Total Taxes	\$58,139	\$518,788

APPENDIX: Arizona State Park Visitation, Intervening Years

Arizona State Park Visitation FY 2007/08 to 2012/13

County	Park Name	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
Apache	Lyman Lake	42,018	37,130	28,951	14,258	11,316	13,427
Cochise	Kartchner	160,013	143,390	139,086	119,157	129,361	131,904
Cochise	Tombstone	52,588	48,344	47,160	47,061	44,933	46,120
Coconino	Riordan Man	26,209	25,406	24,747	19,419	22,539	22,156
Coconino	Slide Rock	249,759	254,249	237,676	217,494	241,225	237,246
Gila	Tonto Natura	87,930	65,831	58,640	66,487	74,785	80,700
Graham	Roper Lake	85,939	90,852	73,450	64,742	51,105	48,165
La Paz	Alamo Lake	64,885	68,563	66,447	55,571	46,411	41,714
La Paz	Buckskin Mt	93,709	95,379	95,496	83,554	80,172	94,416
Mohave	Cattail Cove	94,179	85,794	84,940	70,828	49,755	52,868
Mohave	Lake Havasu	248,851	337,692	340,269	328,699	351,135	370,881
Navajo	Fool Hollow	110,741	100,384	99,051	90,402	95,183	92,035
Navajo	Homolovi	15,200	17,145	6,570	6,140	13,739	14,822
Pima	Catalina	168,874	184,080	170,344	163,325	157,111	153,071
Pinal	Boyce Thom	73,174	73,767	77,875	72,125	79,012	74,373
Pinal	Lost Dutchm	100,424	98,802	103,727	88,366	97,290	113,607
Pinal	McFarland	4,945	642	-	4,857	5,383	5,882
Pinal	Oracle	9,898	11,547	3,457	121	3,757	4,529
Pinal	Picacho Peak	98,565	63,506	85,000	63,798	61,515	61,895
Santa Cruz	Patagonia La	178,505	203,724	190,303	141,526	160,671	179,320
Santa Cruz	Tubac Presid	12,835	10,984	9,054	9,252	11,556	11,966
Yavapai	Dead Horse I	133,822	165,728	157,432	121,850	151,063	135,186
Yavapai	Fort Verde	15,992	16,065	12,021	10,529	11,390	10,110
Yavapai	Jerome	60,114	35,393	-	24,374	41,538	47,617
Yavapai	Red Rock	79,617	68,394	59,097	54,817	58,970	60,220
Yuma	Yuma Quarte	11,676	10,730	29,295	54,269	47,256	13,794
Yuma	Yuma Prison	67,851	65,061	67,319	58,244	58,304	56,642
Total		2,348,313	2,378,582	2,267,407	2,051,265	2,156,475	2,174,666

Source: Arizona State Parks: Park Summaries, FY07 to FY13

*Oracle State Park was officially opened to the public on October 1, 2001, prior to that it was only available for environmental education programs on a reservation basis.