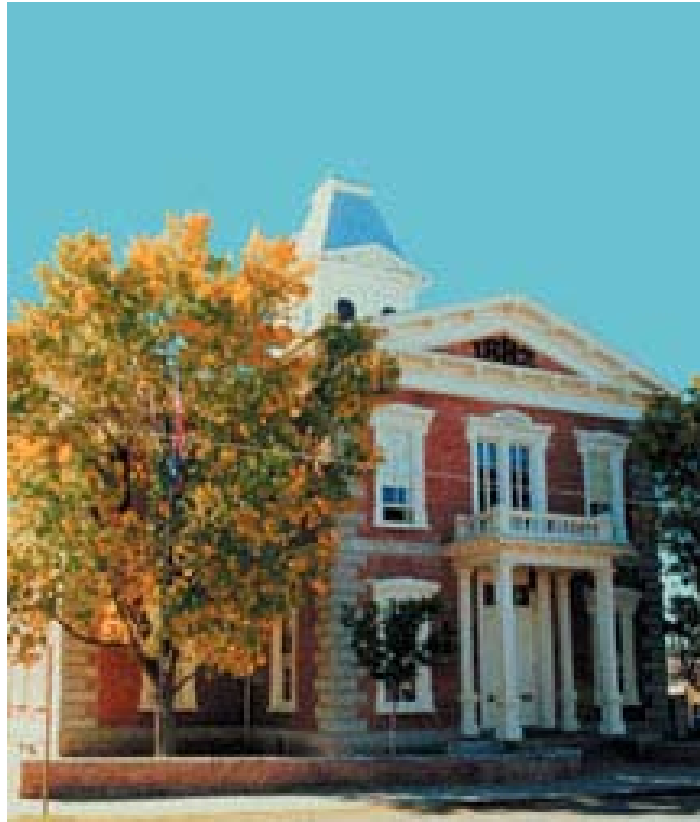


The Economic Impact Of Arizona State Parks



Prepared by

**The Arizona Hospitality Research & Resource Center
School of Hotel & Restaurant Management
Northern Arizona University**

May 2002



ARIZONA DEPARTMENT OF COMMERCE

JANE DEE HULL
GOVERNOR

MARGIE A. EMMERMANN
DIRECTOR

July 9, 2002

Dear Reader:

Arizona is blessed with incomparable natural and cultural diversity. Many of these unique assets are preserved and protected in 26 State Parks, spread throughout 13 Arizona counties.

This economic impact analysis is a collaborative effort of the Arizona Departments of Commerce, State Parks and Tourism to further the understanding of the impact and importance of State Parks to Arizona - and rural communities in particular. This is the first time the State Parks have been studied from an economic perspective and this report provides new information about these unique assets.

We see several practical applications for this information. First, quantifying the impact of the Parks will help communities recognize the development potential of tourism-related businesses and the need for extended services. Second, the report provides information - based in data - communities can use in recruiting companies to fill the retail gaps in the area. Third, policy makers have a new tool in understanding and making decisions related to bed, board and beverage taxes. Finally, local companies may benefit by using this information to tap into the market represented by Park visitors to increase their sales and plan for growth.

Prepared by Northern Arizona University's Hospitality Research and Resource Center, the analysis is based on expenditure data from comprehensive State Park visitor surveys conducted in 1996 and 2001. An economic impact model was used to estimate the contribution of State Parks to the economies of the counties in which they are located.

But the value of Arizona's State Parks cannot be measured solely in economic terms. They enhance quality of life and preserve priceless scenic and recreational resources. They help explain our culture and heritage, and are part of the very fabric of Arizona.

This report will help communities better understand the contributions and economic potential represented by the State Parks, as well as the need to protect and preserve these precious resources for the future.

Sincerely,

Margie A. Emmermann
Director, Arizona Department of
Commerce

Mark McDermott
Director, Arizona Office of
Tourism

Ken Travous
Director, Arizona State
Parks

Acknowledgements

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ECONOMIC IMPACT OF ARIZONA STATE PARKS

Executive Summary

Arizona State Parks have a significant economic impact on 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 and preserve priceless historic, cultural, and recreational resources for residents and visitors from around the world. However, communities are increasingly recognizing the economic impact of State Parks as a tourism resource.

This report analyzes the impact of 26 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 visitor population and direct visitor spending, combined with multipliers (that vary across counties) reflecting the extent of re-circulation of visitors' money in the local economy.

Table One shows total visitation for each park in fiscal years 1995-96 and 2000-01, and the percent change in visitation over that time.

Table One: Visitation by Park

County	State Park Name	Park Visitation 1995-1996	Park Visitation 2000-2001	Percent Change
Apache	Lyman Lake	50,495	28,304	-43.9%
Cochise	Kartchner Caverns		199,115	
Cochise	Tombstone	100,759	74,105	-26.5%
Coconino	Riordan	20,972	19,194	-8.5%
Coconino	Slide Rock	316,301	275,554	-12.9%
Gila	Tonto Natural Bridge	97,127	100,178	3.1%
Graham	Roper lake	63,468	60,242	-5.1%
La Paz	Alamo Lake	62,102	70,969	14.3%
La Paz	Buckskin Mountain	94,474	93,999	-0.5%
Mohave	Cattail Cove	96,459	106,939	10.9%
Mohave	Lake Havasu	371,700	345,590	-7.0%
Navajo	Fool Hollow	54,148	84,527	56.1%
Navajo	Homolovi	20,733	20,644	-0.4%
Pima	Catalina	132,213	154,806	17.1%
Pinal	Boyce Thompson Arboretum	84,876	87,238	2.8%
Pinal	Lost Dutchman	84,795	114,253	34.7%
Pinal	McFarland	4,514	4,273	-5.3%
Pinal	Picacho Peak	68,289	117,652	72.3%
Santa Cruz	Patagonia Lake	208,959	196,332	-6.0%
Santa Cruz	Tubac Presidio	24,090	18,770	-22.1%
Yavapai	Dead Horse	74,503	103,089	38.4%
Yavapai	Fort Verde	31,181	21,450	-31.2%
Yavapai	Jerome	87,749	53,128	-39.5%
Yavapai	Red Rock	66,442	76,393	15.0%
Yuma	Yuma Crossing		16,959	
Yuma	Yuma Prison	84,606	69,698	-17.6%
	Total Visitation	2,300,955	2,513,401	9.2%

It is clear that a number of individual parks in the State Park system experienced declining visitation over this period, while others grew. In any given year, park visitation can fluctuate greatly due to a wide range of influences, both internal and external to the park. Therefore, information is provided in each chapter of this report to explain some of the more dramatic visitor fluctuations in Table 1. For the same reason, visitor attendance totals for Arizona State Parks in the intervening years – 1996-97 through 1999-00 – are also included in the Appendix; these provide a more complete picture of visitation over time.

Expenditure data represents visitor spending inside and within a 50-mile radius of each park, and is derived from two State Park Visitor Surveys, the first conducted in 1995-96 and the second in 2000-01.¹ These surveys estimate direct visitor expenditures for each park and are the basis of the economic impact analyses contained in this report. The survey instruments differed in one respect. The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey did not separate in-park from other expenditures. This distinction is reflected in the expenditure data shown in Table Two below, perhaps accounting for some of the larger totals in 1995-96 categories (e.g., shopping, lodging/camping).

Total direct expenditures of visitors to each Arizona State Park were categorized as shown in Table Two below.

Table Two: Total Visitor Expenditures in Arizona State Parks

Expenditure Categories	1995-96	2000-01*
Expenditures in park		\$16,669,802
Entrance fees or permits	5,097,889	\$6,816,727
Shopping & gifts	25,403,534	\$21,283,405
Food & drink	19,139,544	\$30,667,049
Tourist services (museums, tours)	3,968,144	\$3,856,638
Gas and transportation services	17,414,585	\$21,075,702
Lodging (hotels, camping)	27,165,509	\$21,512,901
Other	5,049,731	\$4,480,810
Total	\$103,238,936	\$126,363,033

*Adjusted for inflation.

¹ Arizona Hospitality Research & Resource Center, NAU, *1995-96 Survey of Arizona State Park Visitors, Final Report*; Arizona Hospitality Research & Resource Center, NAU, *2000-01 Arizona State Parks Visitor Survey, Final Report*.

To estimate the total economic impact of each park, the AHRRC at NAU used the Silvers-Pavlovich economic impact model² to estimate the total income generated in the county economy, including direct, indirect and induced income, and the number of jobs in the county supported by visitor spending. The spending of visitors with ZIP codes in the county or within 60 miles of the park was excluded since such visitors do not add to the local economy by spending their money within it. Only expenditures by those from farther away were considered in the analysis.

Using this model, the full set of economic impact calculations are produced for each of 26 Arizona State Parks. These data are organized in the report that follows by county, including the State Parks within each county; each county report stands as a discrete document. The Silvers-Pavlovich model is designed to estimate economic impacts for each park *at the county level*; it is not designed for summing county economic impacts to estimate an overall statewide impact.

Table Three summarizes the Total County Income and Total County Jobs for each park for both the 1995-96 and 2000-01 periods. Maricopa and Greenlee Counties are not included in this study because they contain no Arizona State Parks. Expenditures in 2000-01 were adjusted by the average increase in the Consumer Price Index (CPI) from 1996 to 2001 of 12.87 percent.³ Adjusting for inflation allows for comparisons between survey years in constant dollars. See economic impact calculations for each park in Table Three.

² Silvers, Art and Vera Pavlovich, 1990. *TIMM – Tourism Impact Multiplier Model*. College of Business & Public Administration, University of Arizona.

³ The CPI is a measure of the average change in prices over time in a market basket of goods and services, including food, clothing, shelter, fuels, transportation, and retail shopping – many of which are typical travel expenditures. Taxes associated with the purchase of these items are also included in the index. The figure used here represents a U.S. average. CPI calculation derived from U.S. Bureau of Labor Statistics website at: www.bls.gov/cpi

Table Three: Summary of Economic Impacts for Each State Park

County / Park	1995-96		2000-01	
	Total County Income (\$)	Total County Jobs	Total County Income (\$)	Total County Jobs
Apache County				
Lyman Lake (Rec)	2,010,450	71	2,124,106	78
Cochise County				
Tombstone (His)	8,395,836	291	8,961,295	314
Kartchner Caverns (Con)	0	0	11,201,585	399
Coconino County				
Riordan Mansion (His)	2,245,211	79	2,009,254	71
Slide Rock (Rec)	24,269,913	840	23,801,930	830
Gila County				
Tonto Nat. Bridge (Rec)	3,266,827	114	3,443,189	123
Graham County				
Roper Lake (Rec)	2,252,743	73	4,192,879	141
La Paz County				
Alamo Lake (Rec)	3,165,097	108	2,592,788	91
Buckskin Island (Rec)	2,989,961	101	2,838,786	100
Mohave County				
Cattail Cove (Rec)	9,644,078	328	23,806,391	831
Lake Havasu (Rec)	29,198,847	994	32,725,420	1,143
Navajo County				
Fool Hollow Lake (Rec)	5,325,419	182	6,459,828	230
Homolovi Ruins (His)	1,329,937	46	1,887,694	65
Pima County				
Catalina (Rec)	14,458,887	465	16,649,651	544
Pinal County				
Boyce Thompson (Con)	3,624,111	126	3,747,240	131
Lost Dutchman (Rec)	6,480,361	221	7,967,529	280
McFarland (His)	195,379	7	88,730	4
Picacho Peak (Rec)	1,541,321	53	1,417,237	51
Santa Cruz County				
Patagonia Lake (Rec)	3,177,358	111	3,396,464	118
Tubac Presidio (His)	1,420,571	48	1,602,891	54
Yavapai County				
Dead Horse (Rec)	4,764,448	155	9,812,791	330
Fort Verde (His)	1,489,789	49	1,653,652	55
Jerome (His)	8,247,510	271	7,949,592	262
Red Rock (Con)	7,867,713	262	9,919,216	331
Yuma County				
Yuma Prison (His)	7,449,721	252	6,267,295	216
Yuma Crossing (His)	0	0	2,392,956	80

NOTE: Abbreviations in Parentheses refer to Park Type.

Rec = Recreation Park; His = Historic Park; Con = Conservation Park.

In conclusion, this study of the economic impact of Arizona State Parks produced the following findings:

- Total visitation to the Arizona State Park system grew from 2,300,955 in 1995-96 to 2,513,401 in 2000-01, an increase of 9.2 percent.
- Direct spending by Arizona State Park visitors totaled \$103,238,936 in 1995-96 and \$126,363,033 million in 2000-01, an increase of 22.4 percent (adjusted for inflation; the Consumer Price Index grew by 12.87 percent during this 5-year period).
- Per person spending at Arizona State Parks totaled \$44.86 in 1995-96 and \$50.28 in 2000-01, an increase of 12 percent (adjusted for inflation).
- Arizona State Parks are divided into three types – Conservation Parks (3 parks), Historic Parks (9 parks), and Recreation Parks (14 parks). As a group, recreation parks generate the largest visitation and economic impact. The three recreation parks with the largest total economic impact are:
 - Lake Havasu State Park (Mohave County) - \$32.72 million in 2001
 - Cattail Cove State Park (Mohave County) - \$23.80 million in 2001
 - Slide Rock State Park (Coconino County) - \$23.80 million in 2001.
- In 2001, the *average* total economic impact of each park type on counties was:
 - Conservation parks – \$8.29 million
 - Historic parks – \$3.65 million
 - Recreation parks – \$10.09 million.

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 FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Park	1995-1996	2000-2001	% change
Lyman Lake	50,495	28,304	-43.9%

Source: Arizona State Parks Board.

Lyman Lake visitation declined sharply over this period. The level of the water in Lyman Lake fluctuates because water is taken out for agricultural and other area uses; the remainder is available for recreation. When the water level is low, visitation declines.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey did not separate in-park expenditures from those within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures for Lyman Lake in each category for both the 1996 and 2001 surveys.

Figure 1. Mean expenditures by Visitors to Lyman Lake State Park, 1996 & 2001

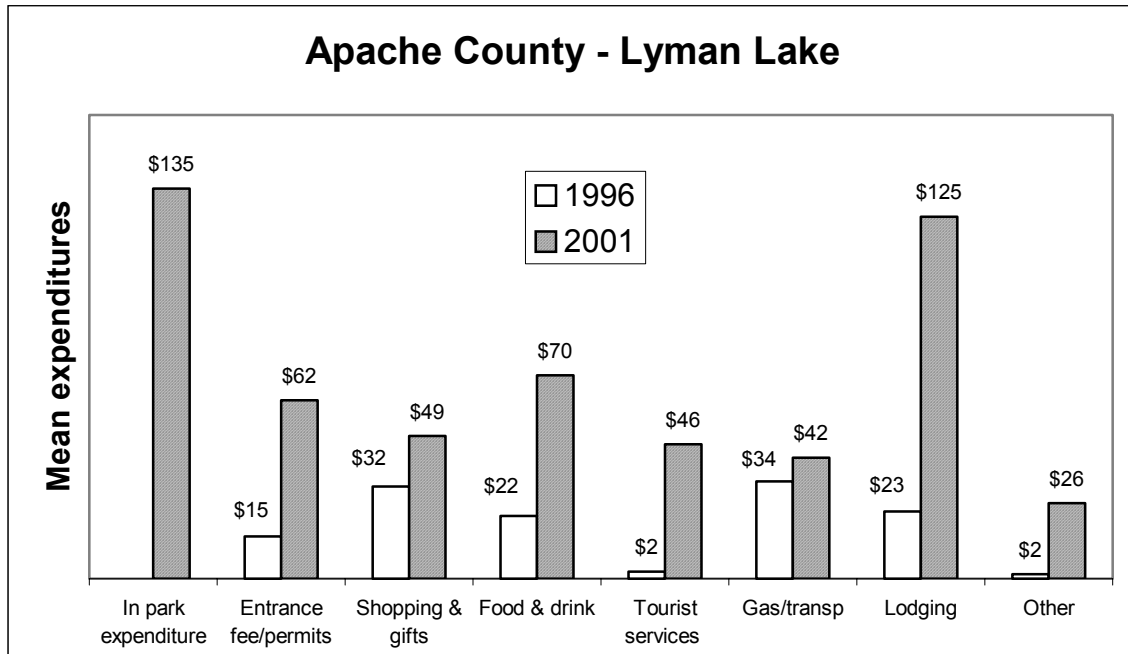


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure One) by visitor population totals (Table One) to produce Total Direct Expenditures in 1996 and 2001. Lyman Lake had an increase of \$113,656 or 5.4 percent in direct state park expenditures for 2001 when compared to the same period in 1996.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

**Table 2. Economic Impact of Lyman Lake State Park on Apache County
1996 & 2001**

Direct Expenditures by Visitors (\$)	1996	2001
In-park expenditures		383,775
Entrance fees or permits	177,010	177,734
Shopping & gifts	387,346	110,683
Food & drink	264,912	427,974
Tourist services (museums, tours)	29,763	44,594
Gas and transportation services	410,287	253,608
Lodging (hotels, camping)	281,755	240,615
Other	19,983	16,683
Total direct expenditures	1,571,056	1,655,665

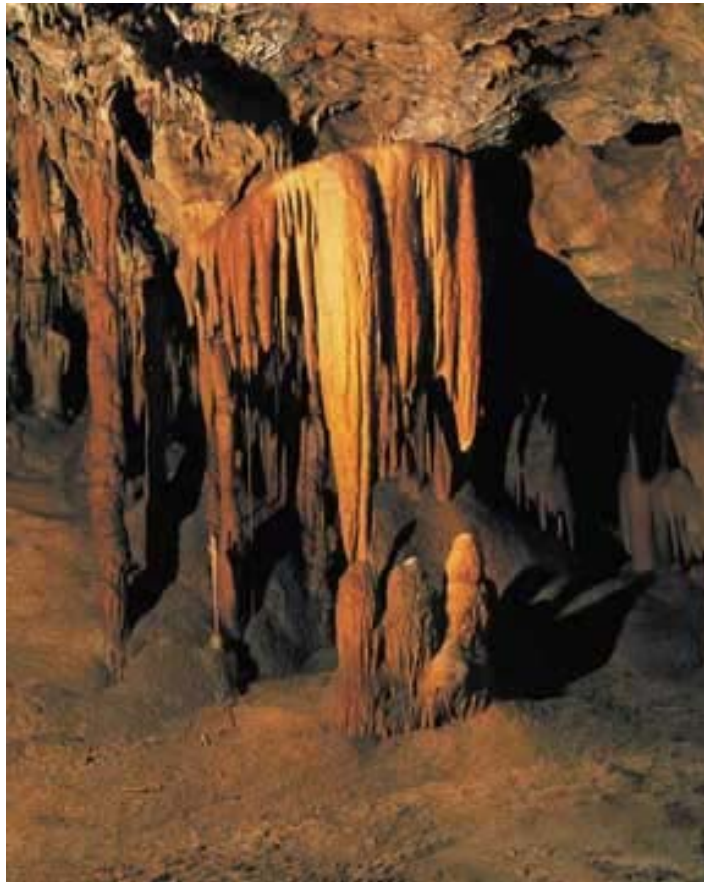
Indirect and Induced County Income (\$)	1996	2001
Direct Income	295,350	321,527
Indirect & Induced Income	144,044	146,913
Total County Income	439,394	468,441

Indirect and Direct County Employment	1996	2001
Direct Jobs	58	64
Indirect Jobs	13	14
Total County Jobs	71	78

Total County Income	\$2,010,450	\$2,124,106
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Cochise County State Parks

Kartchner Caverns



Cochise County State Parks

Cochise County contains two Arizona State Parks – Tombstone Courthouse State Park and Kartchner Caverns State Park. Table 1 below shows total visitation to Tombstone Courthouse and Kartchner Caverns State Parks for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Park	1996	2001	Percent Change
Tombstone	100,759	74,105	-26.5
Kartchner Caverns		199,115	
Total County Visitation	100,759	275,221	173.1

Tombstone visitation declined over this period. Several major motion pictures about Tombstone and the OK Corral appeared in the mid-90s and gave a big boost to visitation; since then, visitation has settled at more historical levels. Kartchner was not open in 1996.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey did not separate in-park expenditures from those within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures for Tombstone Courthouse in each category for both the 1996 and 2001 surveys. Figure 2 presents similar data for Kartchner Caverns.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

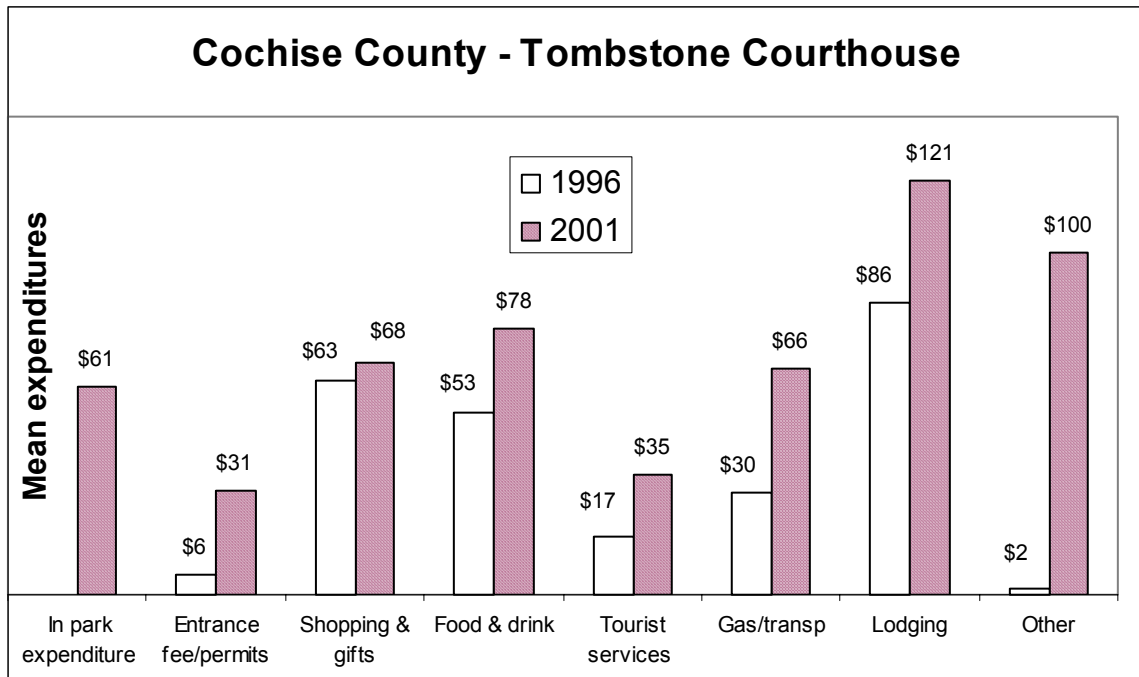


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure One) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Tombstone Courthouse State Park saw an increase of \$565,459 or 6.7 percent in direct expenditures compared to the same period in 1996.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Kartchner Caverns State Park, which was not open in 1996, saw direct expenditures of \$7,364,864 in 2001.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

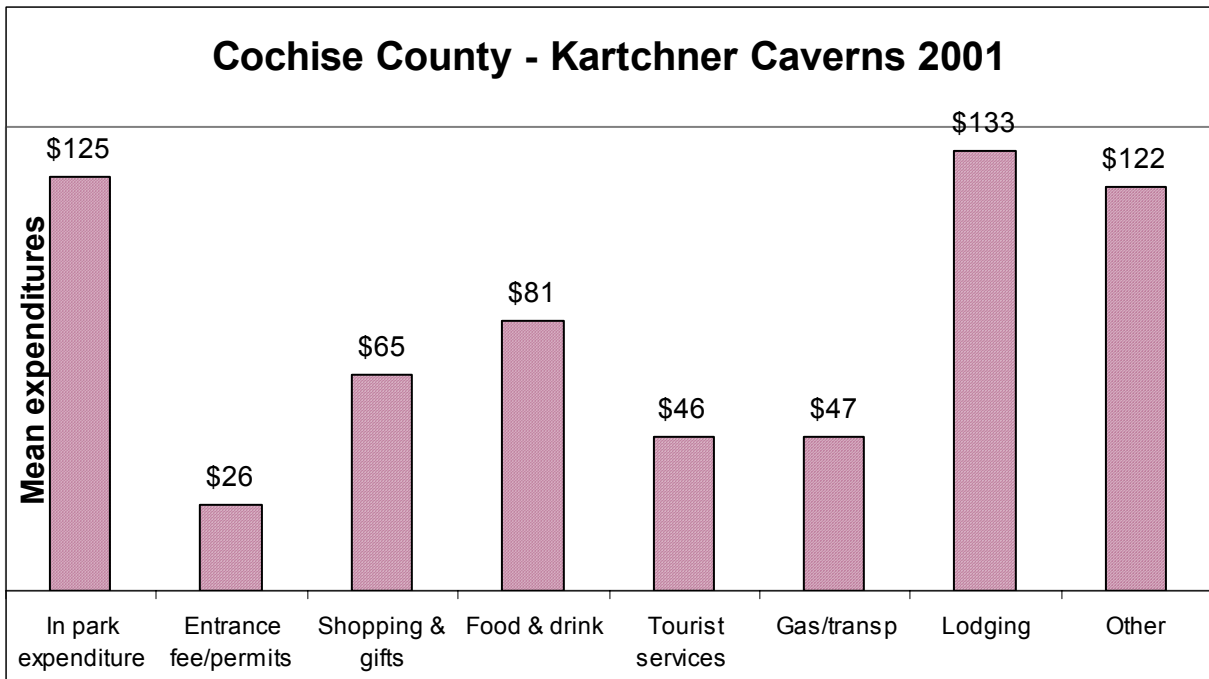


Table 2. County Economic Impact 1996 - 2001

Cochise County Parks	1996 Tombstone Courthouse	2001 Tombstone Courthouse	2001 Kartchner Caverns
In park expenditures		\$194,033	\$1,176,517
Entrance fees or permits	\$128,751	\$347,686	\$306,688
Shopping & gifts	\$1,355,231	\$1,085,062	\$944,092
Food & drink	\$1,149,125	\$1,332,752	\$1,789,248
Tourist services (museums, tours)	\$365,014	\$457,317	\$454,136
Gas and transportation services	\$647,362	\$863,551	\$838,583
Lodging (hotels, camping)	\$1,856,011	\$1,517,383	\$1,712,841
Other	\$39,727	\$113,619	\$142,759
Total direct expenditures	\$5,541,221	\$5,911,403	\$7,364,864

	Income	Income	Income
Indirect and Induced County Income			
Direct Income	\$1,691,310	\$1,834,076	\$2,364,864
Indirect & Induced Income	\$1,163,306	\$1,215,816	\$1,517,398
Total County Income	\$2,854,615	\$3,049,892	\$3,882,262

Indirect and Direct County Employment	Jobs	Jobs	Jobs
Direct Jobs	202	220	280
Indirect Jobs	89	94	119
Total County Jobs	291	314	399
Total County Income	\$8,395,836	\$8,961,295	\$11,201,585

Coconino County State Parks

Slide Rock



Coconino County State Parks

State Park Visitation

Coconino County contains two Arizona State Parks – Riordan Mansion State Park and Slide Rock State Park. Table 1 below shows total visitation to Riordan Mansion State Park and Slide Rock State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Park	1996	2001	Percent Change
Riordan Mansion State Park	20,972	19,194	-8.5%
Slide Rock State Park	316,301	275,554	-12.9%
Total County Visitation	438,032	296,749	

Riordan Mansion visitation declined somewhat over this period; Slide Rock declined more. Slide Rock is dependent on rainfall and snowmelt. The water in Oak Creek is also tested three times/day for micro-organisms and microbes; when found to be present, attendance is restricted or the park is closed.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean expenditures 1996, 2001 state park surveys

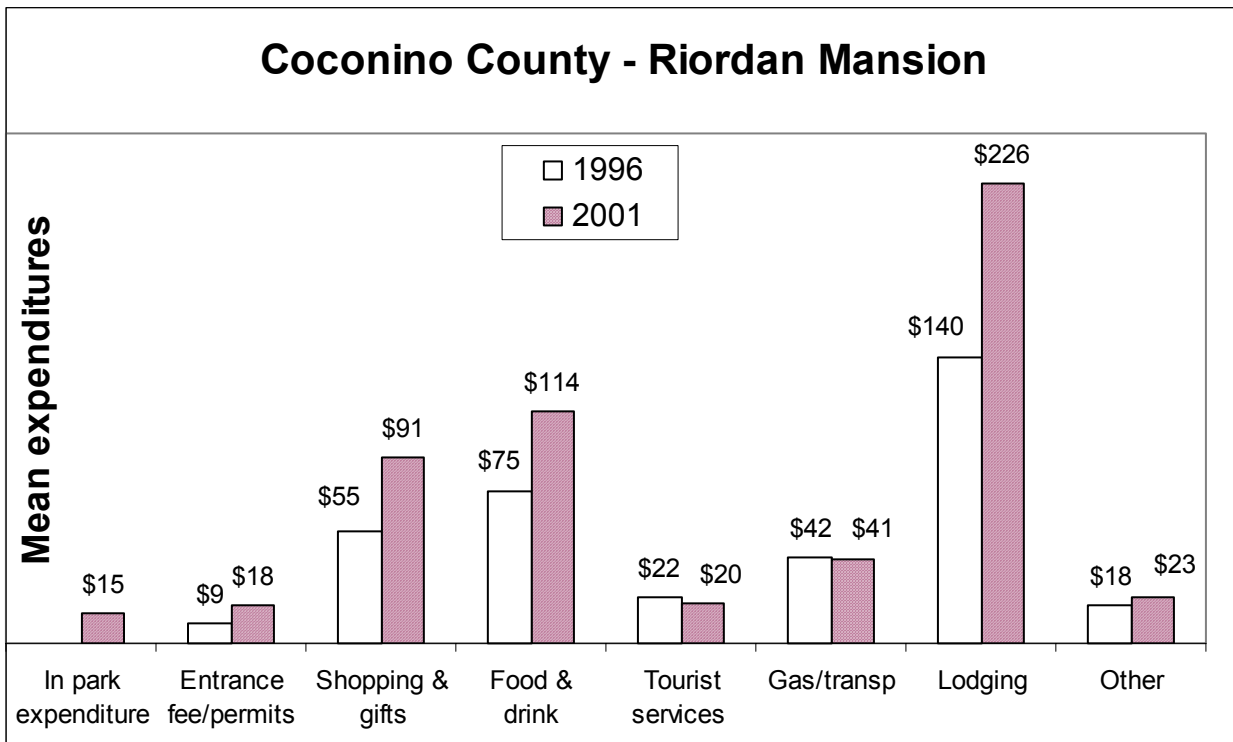


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Riordan Mansion State Park saw a decrease of \$235,957 or -10.5 percent in direct expenditures by state park visitors. On the other hand, Slide Rock State Park with larger visitation numbers also saw a decrease of \$467,983 or -1.9 percent between 1996 and 2001.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Riordan Mansion	1996	2001
In park expenditures		\$16,528
Entrance fees or permits	\$38,973	\$36,462
Shopping & gifts	\$225,874	\$206,236
Food & drink	\$309,453	\$340,186
Tourist services (museums, tours)	\$92,316	\$35,308
Gas and transportation services	\$174,561	\$113,615
Lodging (hotels, camping)	\$578,460	\$593,557
Other	\$76,154	\$1,634
Total direct expenditures	\$1,495,791	\$1,343,525

Indirect and Induced County Income	Income	Income
Direct Income	\$456,890	\$403,138
Indirect & Induced Income	\$292,530	\$262,591
Total County Income	\$749,420	\$665,729

Indirect and Induced County Employment	Jobs	Jobs
Direct Jobs	56	51
Indirect Jobs	23	20
Total County Jobs	79	71
Total County Income	\$2,245,211	\$2,009,254

Figure 1. Mean Expenditures 1996, 2001 state park surveys

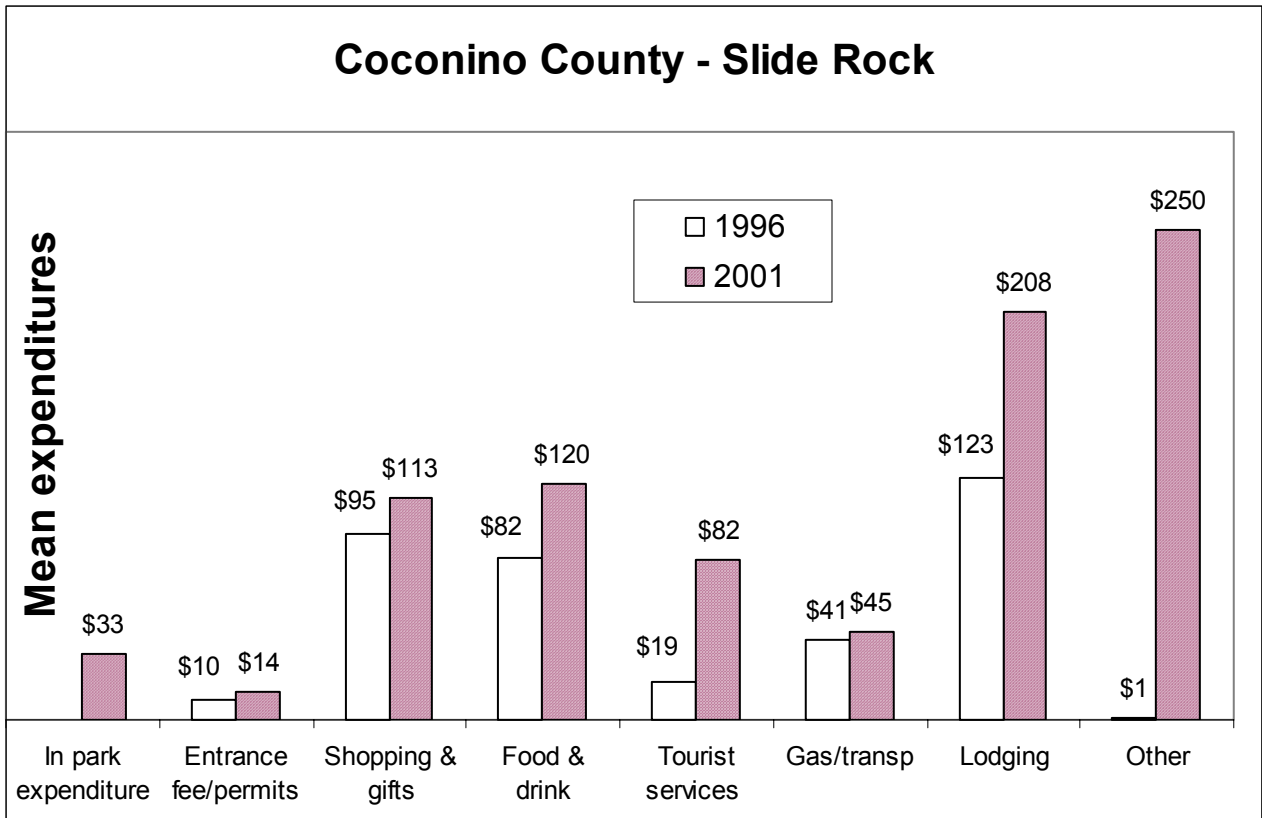


Table 2. County Economic Impact 1996 - 2001

Slide Rock State Park	1996	2001
In park expenditures		\$347,775
Entrance fees or permits	\$429,893	\$355,684
Shopping & gifts	\$4,182,416	\$3,238,494
Food & drink	\$3,629,881	\$4,104,728
Tourist services (museums, tours)	\$834,554	\$1,124,314
Gas and transportation services	\$1,785,626	\$1,447,513
Lodging (hotels, camping)	\$5,448,718	\$5,278,035
Other	\$33,583	\$137,649
Total direct expenditures	\$16,344,671	\$16,034,192

Indirect and Induced County Income	Income	Income
Direct Income	\$4,732,316	\$4,668,928
Indirect & Induced Income	\$3,192,925	\$3,098,810
Total County Income	\$7,925,242	\$7,767,738

Indirect and Induced County Employment	Jobs	Jobs
Direct Jobs	590	587
Indirect Jobs	250	243
Total County Jobs	840	830
Total County Income	\$24,269,913	\$23,801,930

Gila County State Parks

Tonto Natural Bridge



Gila County State Parks

State Park Visitation

Gila County contains one Arizona State Park – Tonto Natural Bridge State Park. Table 1 below shows total visitation to Tonto Bridge State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Park	1996	2001	Percent Change
Tonto Natural Bridge	97,127	100,178	3.1%

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

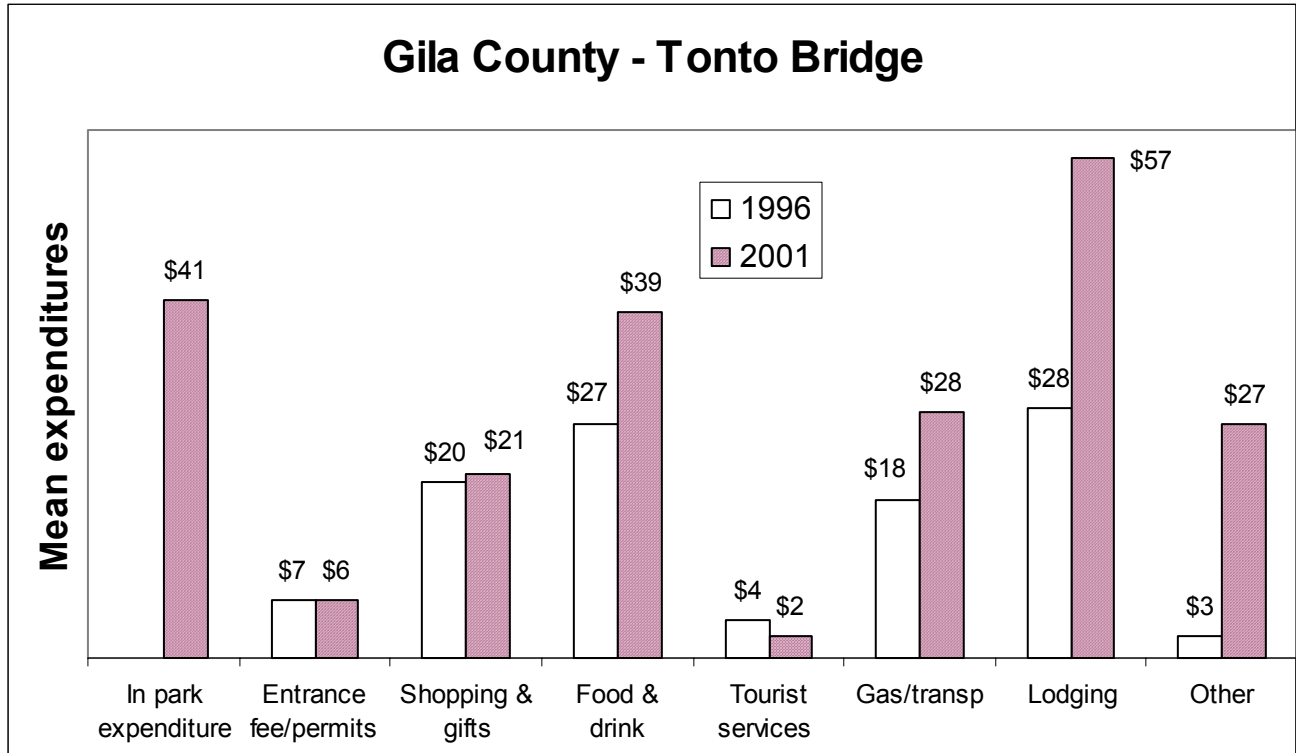


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Tonto Bridge State Park saw an increase of \$176,362 or 5.4 percent in direct expenditures by state park visitors.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Tonto Natural Bridge	1996	2001
In park expenditures		\$292,889
Entrance fees or permits	\$139,007	\$89,428
Shopping & gifts	\$418,167	\$239,482
Food & drink	\$560,165	\$669,554
Tourist services (museums, tours)	\$89,957	\$18,320
Gas and transportation services	\$376,719	\$438,767
Lodging (hotels, camping)	\$597,763	\$543,906
Other	\$54,840	\$63,720
Total direct expenditures	\$2,236,618	\$2,356,066

Indirect & Induced County Income	Income	Income
Direct Income	\$619,789	\$664,505
Indirect & Induced Income	\$410,420	\$422,618
Total County Income	\$1,030,209	\$1,087,123

Indirect & Induced County Employment	Jobs	Jobs
Direct Jobs	83	91
Indirect Jobs	31	32
Total County Jobs	114	123
Total County Income	\$3,266,827	\$3,443,189

Graham County State Parks

Roper Lake



Graham County State Parks

State Park Visitation

Gila County contains one Arizona State Park – Roper Lake State Park. Table 1 below shows total visitation to Roper Lake State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Park	1996	2001	Percent Change
Roper lake	63,468	60,242	-5.1%

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

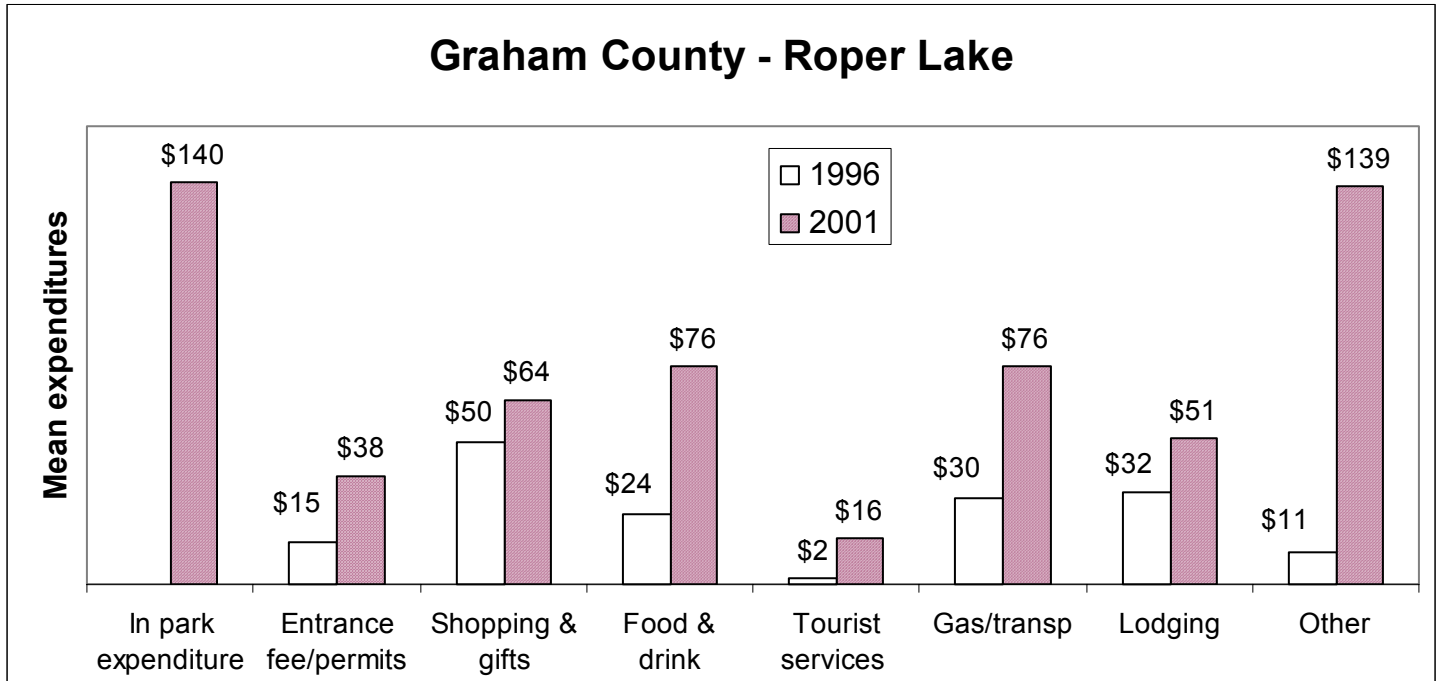


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Roper Lake State Park saw an increase of \$1,940,136 more than 86 percent in direct expenditures by state park visitors.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Roper Lake	1996	2001
In park expenditures		\$565,321
Entrance fees or permits	\$143,629	\$206,093
Shopping & gifts	\$480,362	\$349,873
Food & drink	\$236,391	\$708,604
Tourist services (museums, tours)	\$17,000	\$39,900
Gas and transportation services	\$291,205	\$677,029
Lodging (hotels, camping)	\$313,857	\$161,556
Other	\$106,712	\$252,901
Total direct expenditures	\$1,589,156	\$2,961,278

	Income	Income
County Income		
Direct Income	\$432,773	\$833,702
Indirect & Induced Income	\$230,814	\$397,899
Total County Income	\$663,587	\$1,231,601

	Jobs	Jobs
County Employment		
Direct Jobs	57	112
Indirect Jobs	17	29
Total County Jobs	73	141

Total County Income	\$2,252,743	\$4,192,879
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La Paz County State Parks

Alamo Lake



La Paz County State Parks

State Park Visitation

La Paz County contains two Arizona State Parks – Alamo Lake State Park and Buckskin Mountain State Park. Table 1 below shows total visitation to Alamo Lake State Park and Buckskin Mountain State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

La Paz County	1996	2001	Percent Change
Alamo Lake	62,102	70,969	14.3%
Buckskin	94,474	93,999	-0.5%
Total	156,576	164,968	

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

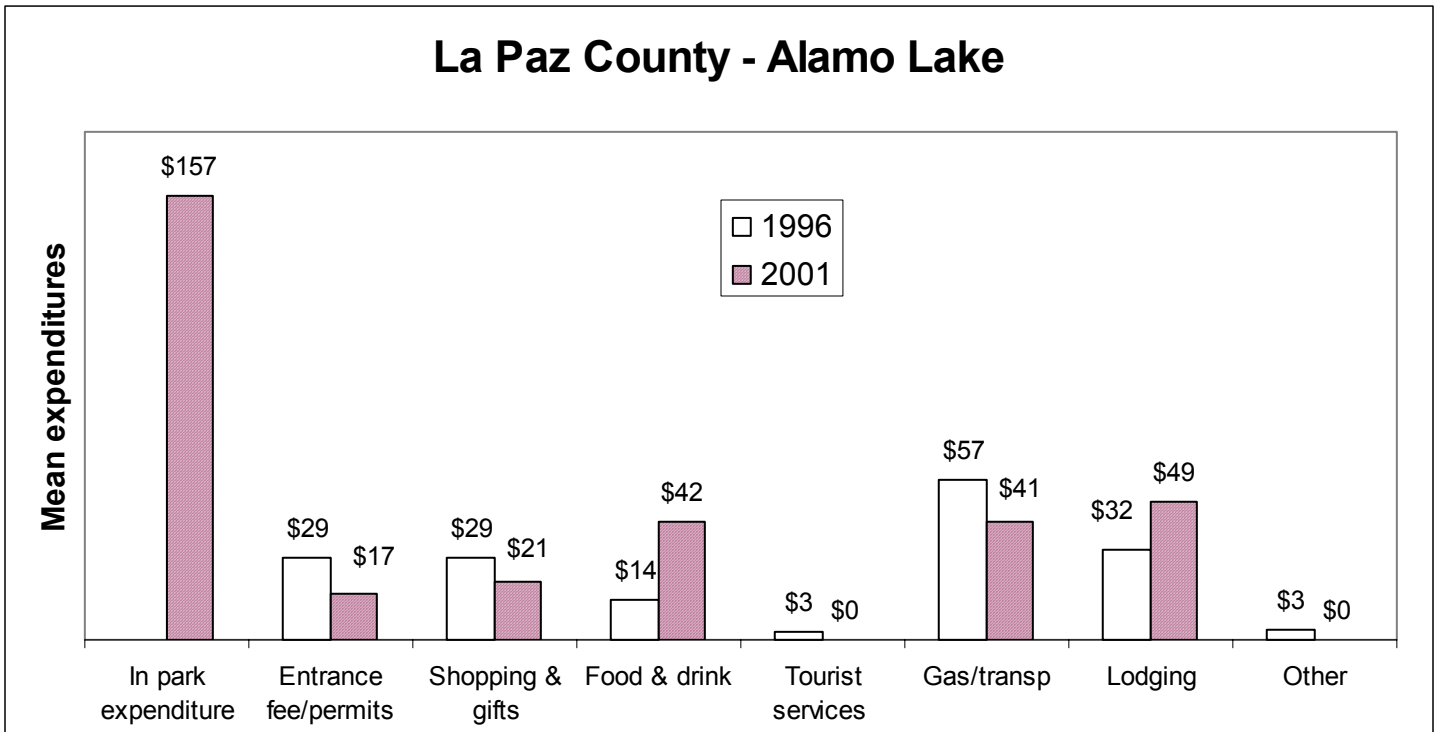


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Alamo Lake State Park saw a decrease of \$573,209 or -22 percent in direct visitor expenditures. Buckskin Island State Park also saw a decrease of \$151,175 or -5.1 percent in direct expenditures by state park visitors.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Alamo Lake	1996	2001
In park expenditures		\$667,604
Entrance fees or permits	\$393,560	\$114,673
Shopping & gifts	\$389,811	\$81,345
Food & drink	\$195,539	\$348,815
Tourist services (museums, tours)	\$39,974	\$0
Gas and transportation services	\$768,110	\$347,568
Lodging (hotels, camping)	\$429,521	\$290,872
Other	\$44,779	\$0
Total direct expenditures	\$2,261,293	\$1,850,877

County Income	Income	Income
Direct Income	\$619,359	\$513,712
Indirect & Induced Income	\$284,444	\$228,198
Total County Income	\$903,803	\$741,910

County Employment	Jobs	Jobs
Direct Jobs	88	75
Indirect Jobs	20	17
Total County Jobs	108	91
Total County Income	\$3,165,097	\$2,592,788

Figure 1. Mean Expenditures 1996, 2001 state park surveys

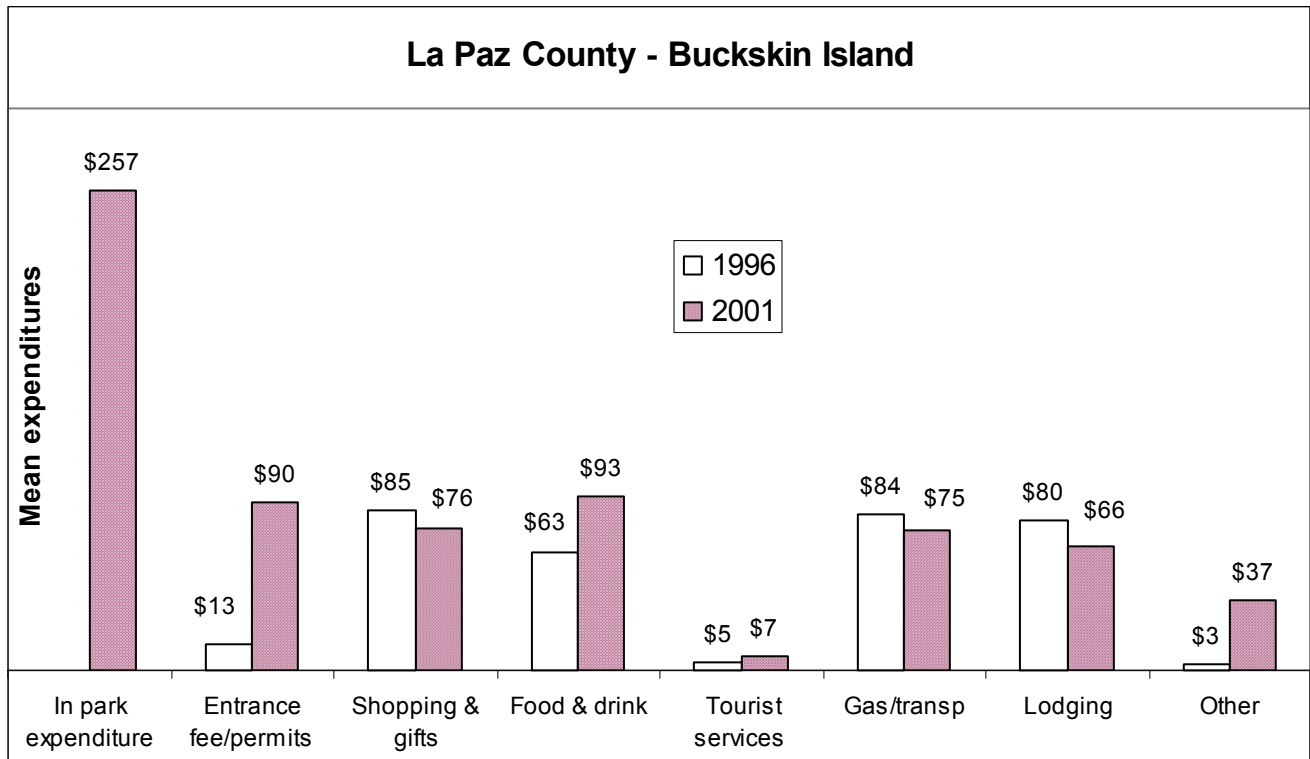


Table 2. County Economic Impact 1996 - 2001

Buckskin Mountain	1996	2001
In park expenditures		\$719,537
Entrance fees or permits	\$94,347	\$293,416
Shopping & gifts	\$340,764	\$142,412
Food & drink	\$532,229	\$367,300
Tourist services (museums, tours)	\$16,182	\$11,663
Gas and transportation services	\$712,351	\$296,253
Lodging (hotels, camping)	\$478,486	\$183,908
Other	\$3,186	\$17,262
Total direct expenditures	\$2,177,545	\$2,031,751

County Income	Income	Income
Direct Income	\$558,012	\$554,828
Indirect & Induced Income	\$254,403	\$252,206
Total County Income	\$812,416	\$807,035

County Employment	Jobs	Jobs
Direct Jobs	83	81
Indirect Jobs	18	19
Total County Jobs	101	100
Total County Income	\$2,989,961	\$2,838,786

Mohave County State Parks

Cattail Cove



Mohave County State Parks

State Park Visitation

La Paz County contains two Arizona State Parks – Cattail Cove State Park and Lake Havasu State Park. Table 1 below shows total visitation to Cattail Cove State Park and Lake Havasu State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Mohave County	1996	2001	Percent Change
Cattail Cove	96,459	106,939	10.9%
Lake Havasu	371,700	345,590	-7.0%
Total	468,159	452,529	

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

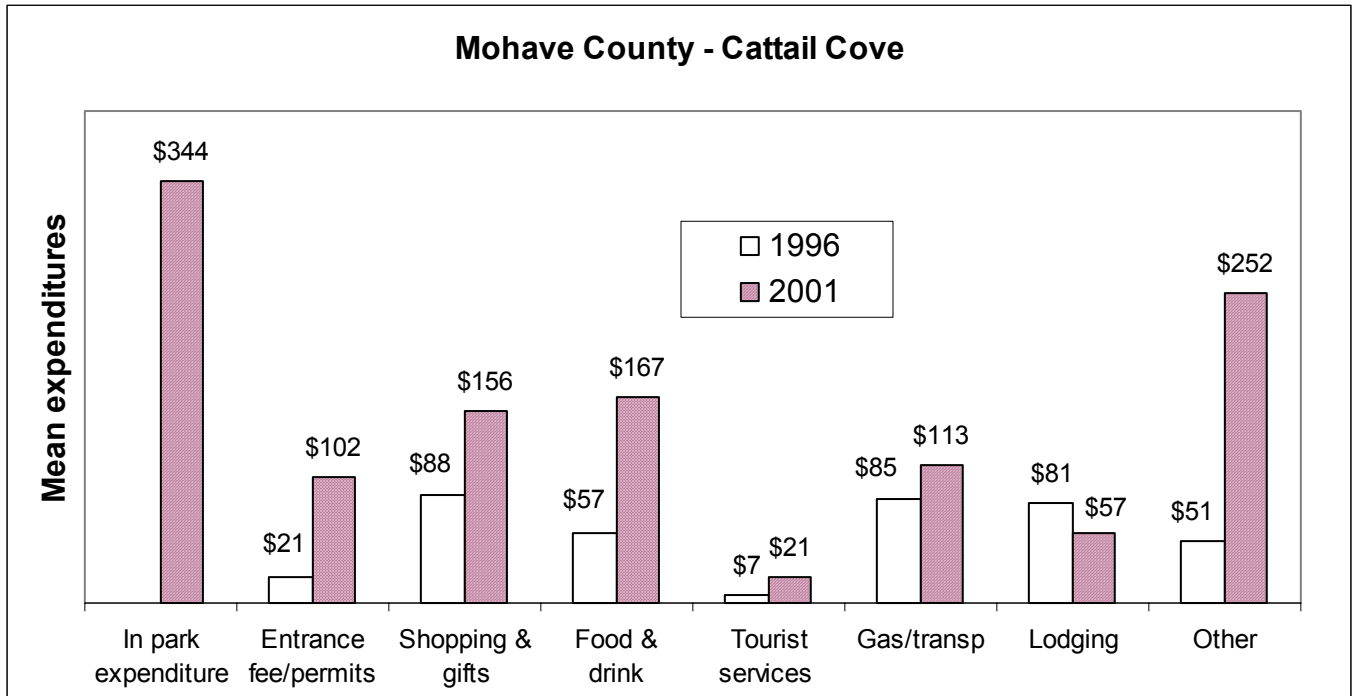


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Cattail Cove State Park saw an increase of \$4,408,067 or more than 100 percent in direct visitor expenditures. Lake Havasu State Park also saw an increase of \$3,526,573 or 12.1 percent increase in direct expenditures by state park visitors.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 – 2001

Cattail Cove	1996	2001
In park expenditures		\$3,876,102
Entrance fees or permits	\$355,609	\$1,496,588
Shopping & gifts	\$1,479,493	\$2,942,100
Food & drink	\$959,688	\$3,969,308
Tourist services (museums, tours)	\$114,614	\$114,477
Gas and transportation services	\$1,435,655	\$2,602,974
Lodging (hotels, camping)	\$1,366,720	\$436,272
Other	\$851,320	\$879,524
Total direct expenditures	\$6,563,098	\$16,317,346

	Income	Income
County Income		
Direct Income	\$1,972,147	\$4,768,532
Indirect & Induced Income	\$1,108,833	\$2,720,514
Total County Income	\$3,080,979	\$7,489,046

	Jobs	Jobs
County Employment		
Direct Jobs	237	603
Indirect Jobs	91	228
Total County Jobs	328	831
Total County Income	\$9,644,078	\$23,806,391

Figure 1. Mean Expenditures 1996, 2001 state park surveys

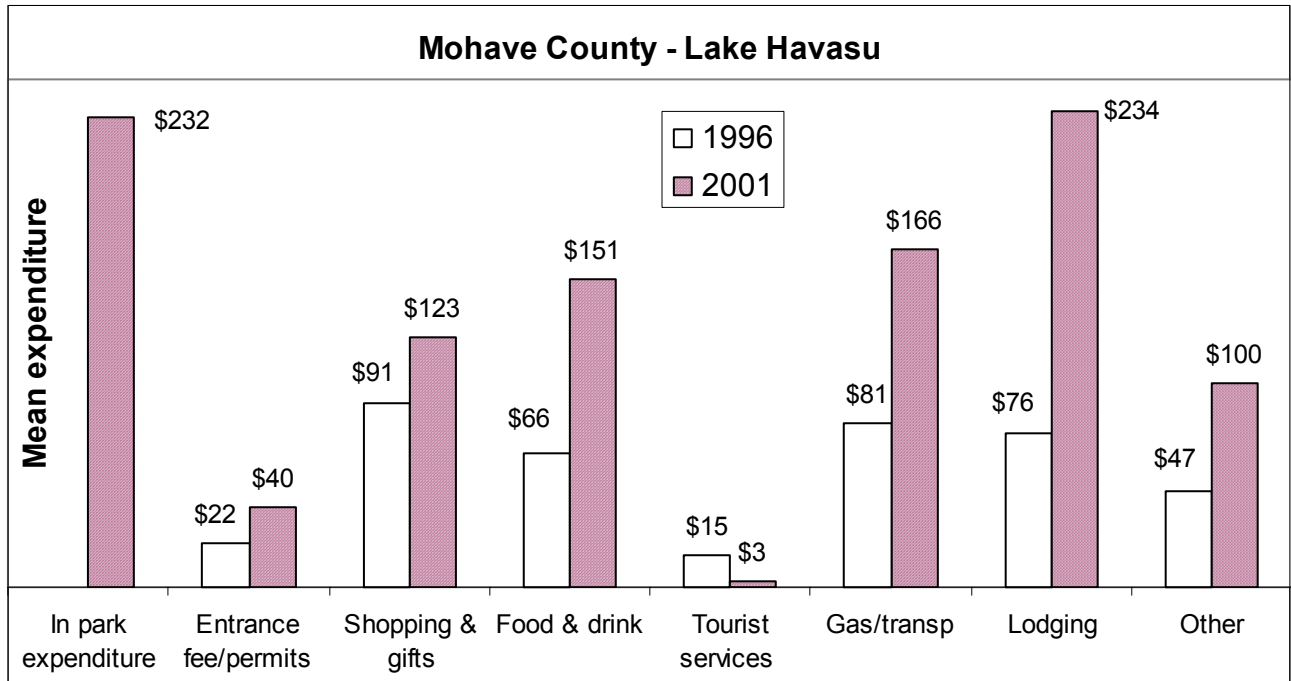


Table 2. County Economic Impact 1996 - 2001

Lake Havasu	1996	2001
In park expenditures		\$2,293,664
Entrance fees or permits	\$1,095,876	\$943,052
Shopping & gifts	\$4,526,771	\$3,751,456
Food & drink	\$3,294,819	\$5,789,937
Tourist services (museums, tours)	\$775,578	\$22,531
Gas and transportation services	\$4,062,795	\$6,169,535
Lodging (hotels, camping)	\$3,816,899	\$2,903,009
Other	\$2,352,620	\$563,282
Total direct expenditures	\$19,925,356	\$22,436,467

County Income	Income	Income
Direct Income	\$5,924,181	\$6,628,279
Indirect & Induced Income	\$3,349,308	\$3,660,674
Total County Income	\$9,273,489	\$10,288,953

County Employment	Jobs	Jobs
Direct Jobs	718	845
Indirect Jobs	277	298
Total County Jobs	994	1,143
Total County Income	\$29,198,847	\$32,725,420

Navajo County State Parks

Fool Hollow



Navajo County State Parks

State Park Visitation

Navajo County contains two Arizona State Parks – Fool Hollow State Park and Homolovi Ruins State Park. Table 1 below shows total visitation to Fool Hollow and Homolovi Ruins State Parks for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Navajo County	1996	2001	Percent Change
Fool Hollow	54,148	84,527	56.1%
Homolovi Ruins	20,733	20,644	-0.4%
Total	74,881	105,171	

Fool Hollow visitation increased substantially over this period. Fool Hollow only opened in 1994. Word-of-mouth is bringing much larger numbers of visitors to this park than when it first opened.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

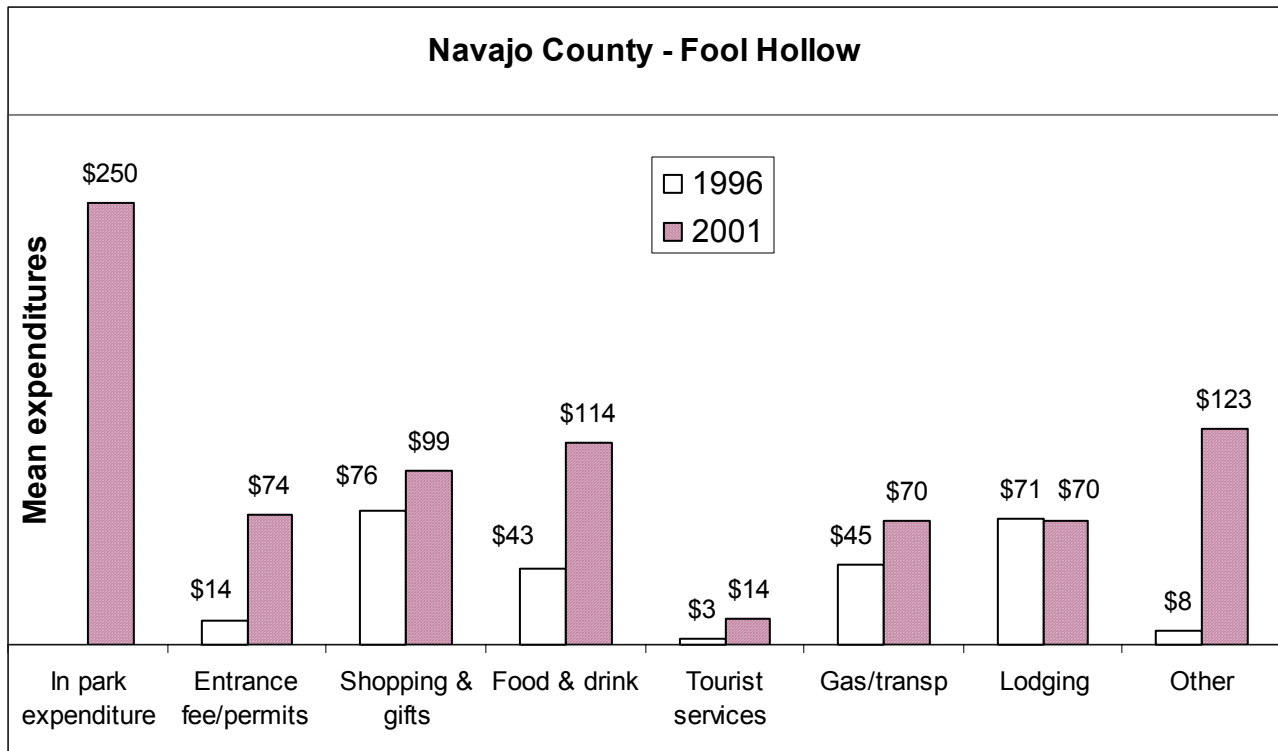


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Fool Hollow State Park saw an increase of \$170,409 or 22 percent in direct visitor expenditures. Homolovi Ruins State Park also saw an increase of \$557,575 or 41.9 percent increase in direct expenditures by state park visitors.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 1. County Economic Impact 1996 - 2001

Fool Hollow	1996	2001
In park expenditures		\$1,235,185
Entrance fees or permits	\$196,109	\$440,943
Shopping & gifts	\$1,067,302	\$650,626
Food & drink	\$596,885	\$1,131,142
Tourist services (museums, tours)	\$41,884	\$20,615
Gas and transportation services	\$634,920	\$668,342
Lodging (hotels, camping)	\$995,714	\$186,726
Other	\$110,982	\$126,371
Total direct expenditures	\$3,643,797	\$4,459,949

County Income	Income	Income
Direct Income	\$1,010,729	\$1,253,748
Indirect & Induced Income	\$670,894	\$782,131
Total County Income	\$1,681,623	\$2,035,879

County Employment	Jobs	Jobs
Direct Jobs	130	168
Indirect Jobs	51	62
Total County Jobs	182	230
Total County Income	\$5,325,419	\$6,495,828

Figure 1. Mean Expenditures 1996, 2001 state park surveys

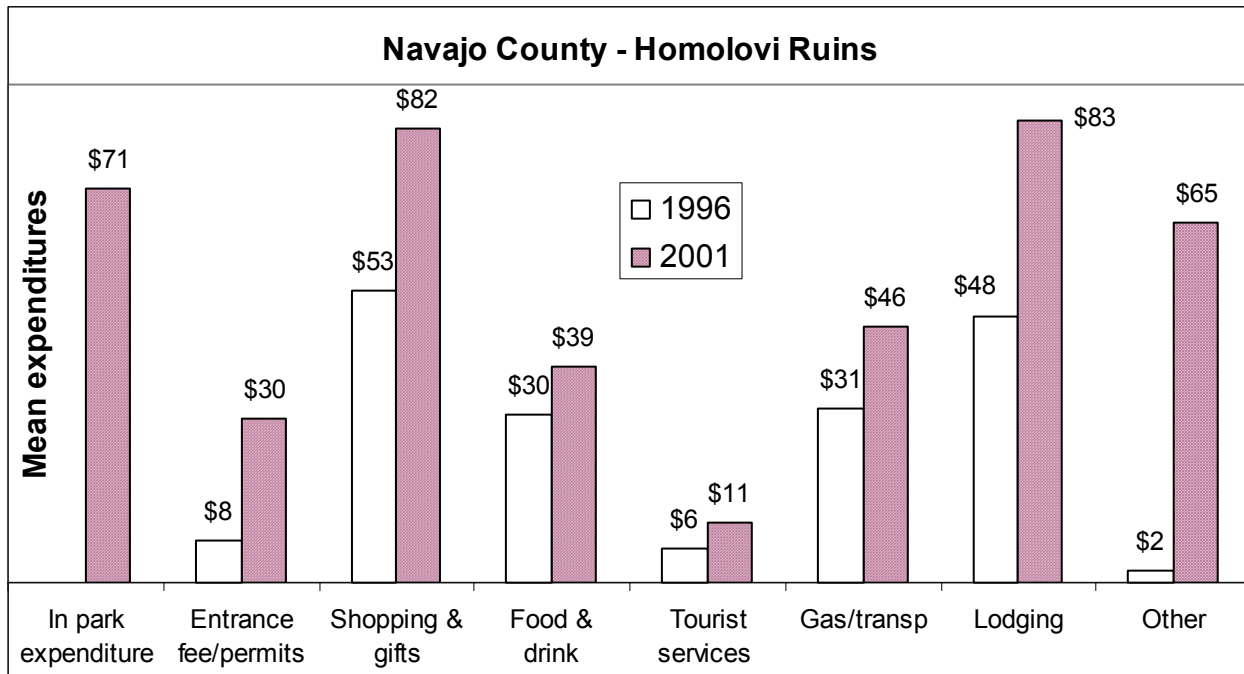


Table 2. County Economic Impact 1996 - 2001

Homolovi Ruins	1996	2001
In park expenditures		\$164,423
Entrance fees or permits	\$39,385	\$72,794
Shopping & gifts	\$268,760	\$286,877
Food & drink	\$154,926	\$217,649
Tourist services (museums, tours)	\$30,443	\$18,892
Gas and transportation services	\$160,553	\$307,795
Lodging (hotels, camping)	\$244,546	\$174,925
Other	\$11,675	\$45,480
Total direct expenditures	\$910,288	\$1,288,834

County Income	Income	Income
Direct Income	\$252,021	\$367,795
Indirect & Induced Income	\$167,628	\$231,065
Total County Income	\$419,649	\$598,860

County Employment	Jobs	Jobs
Direct Jobs	33	48
Indirect Jobs	13	17
Total County Jobs	46	65
Total County Income	\$1,329,937	\$1,887,694

Pima County State Parks

Catalina



Pima County State Parks

State Park Visitation

Pima County contains one Arizona State Park – Catalina State Park. Table 1 below shows total visitation to Catalina State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Pima County	1996	2001	Percent Change
Catalina	132,213	154,806	17.1%

Visitation at Catalina increased substantially over this period. Catalina has become a much bigger draw for the growing population of the Tucson metro area. It is especially popular with day visitors who hike its many trails. Viewing wildflowers, in good years, can also push visitation up sharply.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

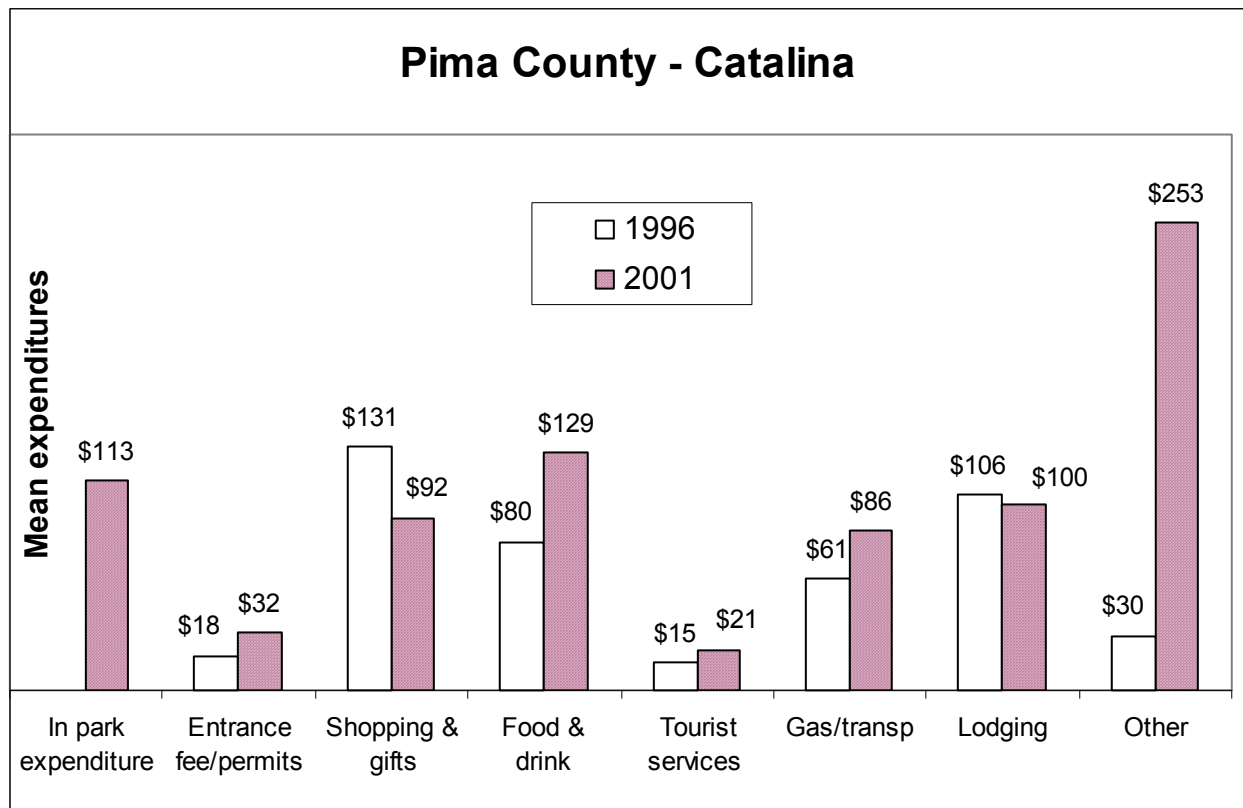


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 2) to produce Total Direct Expenditures in 1996 and 2001. Catalina State Park saw an increase of \$2,190,764 or 15.2 percent in direct visitor expenditures.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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.

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Table 2. County Economic Impact 1996 - 2001

Catalina	1996	2001
In park expenditures		\$1,116,120
Entrance fees or permits	\$361,983	\$482,576
Shopping & gifts	\$2,593,305	\$1,636,381
Food & drink	\$1,586,998	\$2,752,537
Tourist services (museums, tours)	\$290,098	\$232,024
Gas and transportation services	\$1,205,950	\$1,799,590
Lodging (hotels, camping)	\$2,090,276	\$1,252,442
Other	\$582,590	\$916,613
Total direct expenditures	\$8,711,201	\$10,188,283

County Income	Income	Income
Direct Income	\$3,040,336	\$3,598,552
Indirect & Induced Income	\$2,707,351	\$2,862,816
Total County Income	\$5,747,687	\$6,461,367

County Employment	Jobs	Jobs
Direct Jobs	305	373
Indirect Jobs	160	171
Total County Jobs	465	544
Total County Income	\$14,458,887	\$16,649,651

Pinal County State Parks

Lost Dutchman



Pinal County State Parks

State Park Visitation

Pinal County contains four Arizona State Parks – Picacho Peak State Park, Boyce Thompson State Park, Lost Dutchman State Park and McFarland State Park. Table 1 below shows total visitation to Picacho Peak State Park, Boyce Thompson State Park, Lost Dutchman State Park and McFarland State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Pinal County	1996	2001	Percent Change
Boyce Thompson Arboretum	84,876	87,238	2.8%
Lost Dutchman	84,795	114,253	34.7%
McFarland	4,514	4,273	-5.3%
Picacho Peak	68,289	117,652	72.3%
Total	306,398	360,570	

Visitation at Lost Dutchman and Picacho Peak increased substantially. Located near the rapidly growing East Valley of the Phoenix metropolitan area, Lost Dutchman has seen visitation rise. This park also draws large numbers of visitors in years when spring wildflowers are prolific. Located halfway between the metro areas of Phoenix and Tucson and near Apache Junction, Picacho Peak also benefited from population growth. This park also has had years when the wildflowers are an exceptional draw for visitors.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

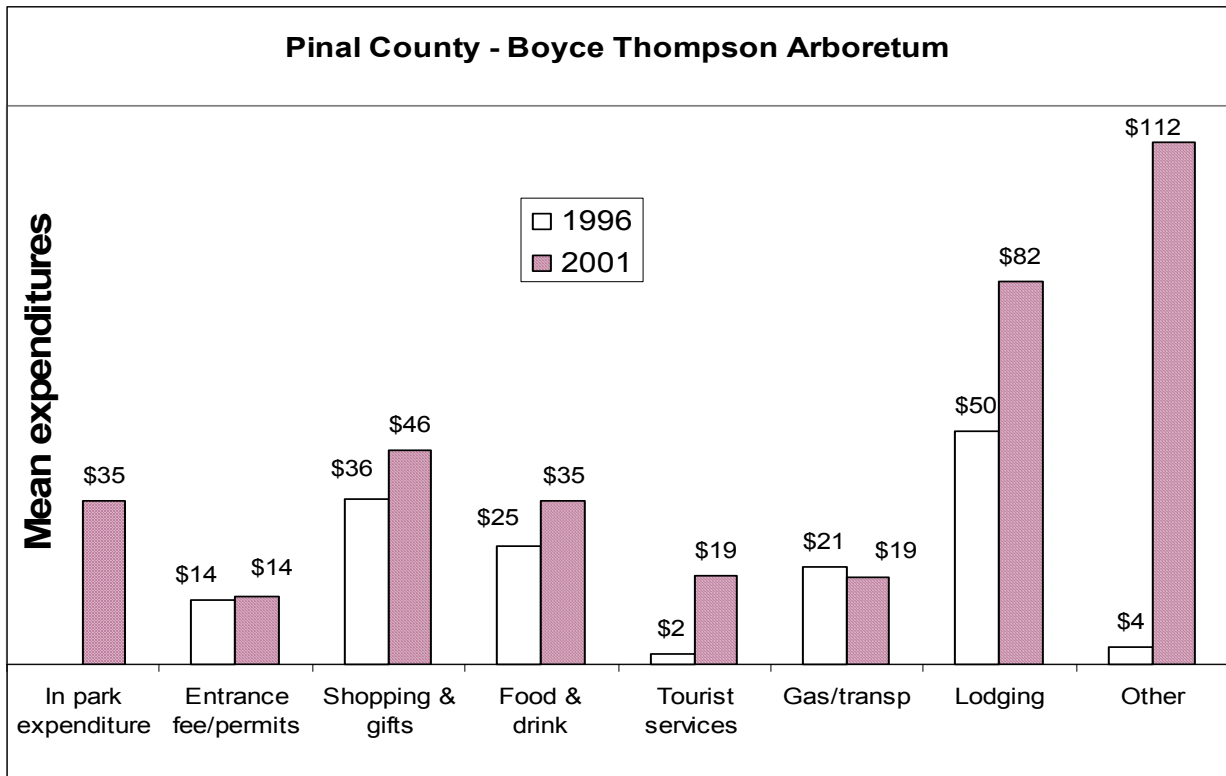


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Boyce Thompson Arboretum State Park saw an increase of \$123,129 or 3.4 percent in 2001 as compared to 1996. Lost Dutchman State park also saw an increase in visitor expenditure, with an increase of \$1,487,168 or 22.9 percent over 1996. McFarland State Park, however, saw a decline of 54.6 percent in visitor expenditures losing an estimated \$106,649 in visitor revenue. Finally, Picacho Peak State Park saw a decrease of - 8.1 percent or \$124,084 during the same period. (Despite the large increase in visitation at Picacho Peak, large party sizes reduced per person spending to account for this decline.)

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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.

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Table 2. County Economic Impact 1996 - 2001

Boyce Thompson	1996	2001
In park expenditures		\$338,593
Entrance fees or permits	\$221,016	\$123,561
Shopping & gifts	\$567,598	\$494,986
Food & drink	\$405,770	\$536,418
Tourist services (museums, tours)	\$35,812	\$120,778
Gas and transportation services	\$330,475	\$254,766
Lodging (hotels, camping)	\$801,800	\$487,937
Other	\$58,513	\$166,603
Total direct expenditures	\$2,420,983	\$2,523,642

County Income	Income	Income
Direct Income	\$690,411	\$706,068
Indirect & Induced Income	\$512,716	\$517,530
Total County Income	\$1,203,127	\$1,223,598

County Employment	Jobs	Jobs
Direct Jobs	89	92
Indirect Jobs	37	38
Total County Jobs	126	131
Total County Income	\$3,624,111	\$3,747,240

Figure 1. Mean Expenditures 1996, 2001 state park surveys

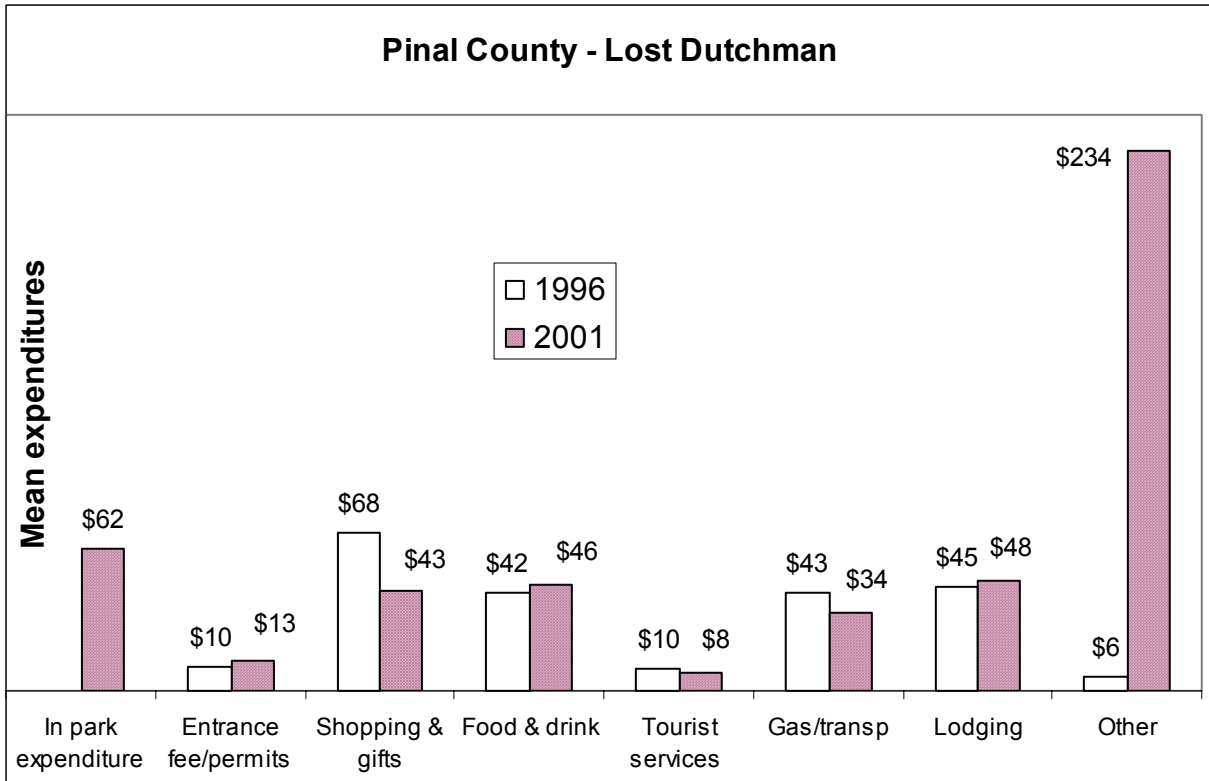


Table 2. County Economic Impact 1996 - 2001

Lost Dutchman	1996	2001
In park expenditures		\$1,003,772
Entrance fees or permits	\$200,713	\$328,342
Shopping & gifts	\$1,333,540	\$638,808
Food & drink	\$825,418	\$1,220,929
Tourist services (museums, tours)	\$192,804	\$87,209
Gas and transportation services	\$832,303	\$854,650
Lodging (hotels, camping)	\$882,686	\$625,116
Other	\$124,627	\$612,641
Total direct expenditures	\$4,392,091	\$5,371,467

County Income	Income	Income
Direct Income	\$1,193,481	\$1,534,751
Indirect & Induced Income	\$894,790	\$1,061,311
Total County Income	\$2,088,270	\$2,596,062

County Employment	Jobs	Jobs
Direct Jobs	156	201
Indirect Jobs	65	78
Total County Jobs	221	280
Total County Income	\$6,480,361	\$7,967,529

Figure 1. Mean Expenditures 1996, 2001 state park surveys

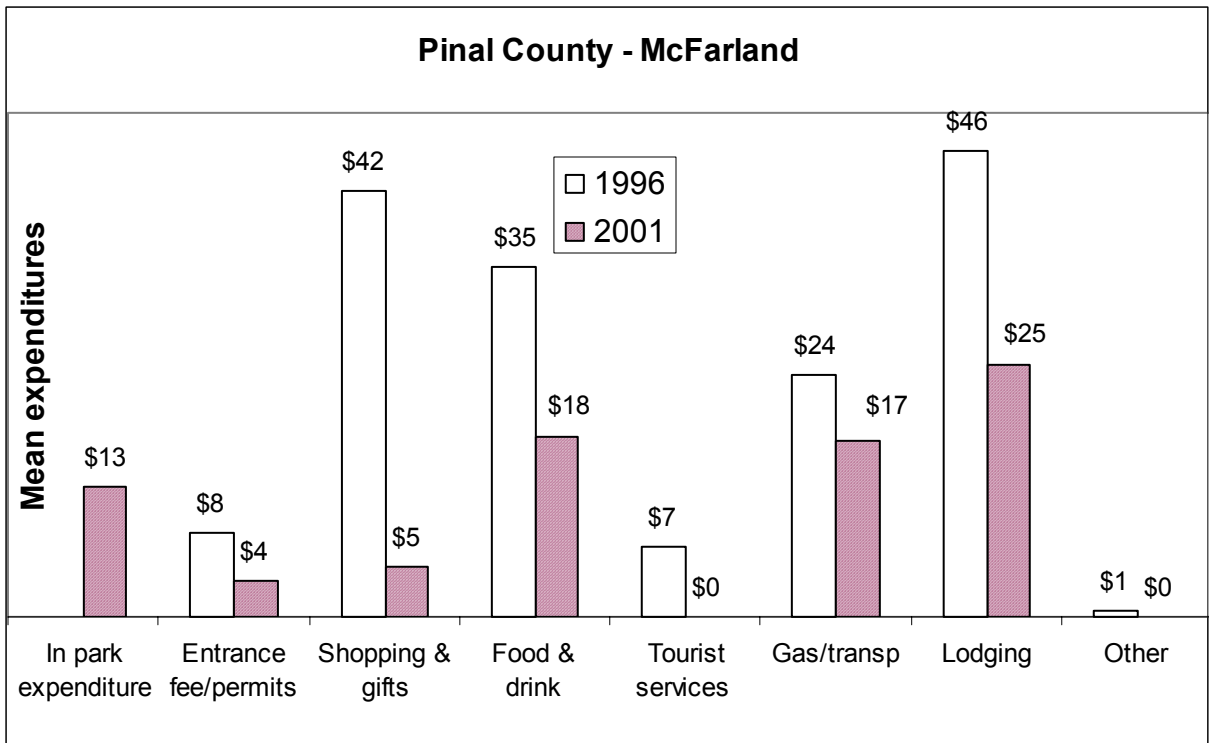


Table 2. County Economic Impact 1996 - 2001

McFarland	1996	2001
In park expenditures		\$3,259
Entrance fees or permits	\$6,724	\$2,414
Shopping & gifts	\$34,121	\$3,447
Food & drink	\$28,129	\$18,443
Tourist services (museums, tours)	\$5,658	\$0
Gas and transportation services	\$19,450	\$14,996
Lodging (hotels, camping)	\$37,303	\$17,236
Other	\$445	\$0
Total direct expenditures	\$131,830	\$59,794

	Income	Income
County Income		
Direct Income	\$36,299	\$17,301
Indirect & Induced Income	\$27,250	\$11,635
Total County Income	\$63,549	\$28,936

	Jobs	Jobs
County Employment		
Direct Jobs	5	3
Indirect Jobs	2	1
Total County Jobs	7	4
Total County Income	\$195,379	\$88,730

Figure 1. Mean Expenditures 1996, 2001 state park surveys

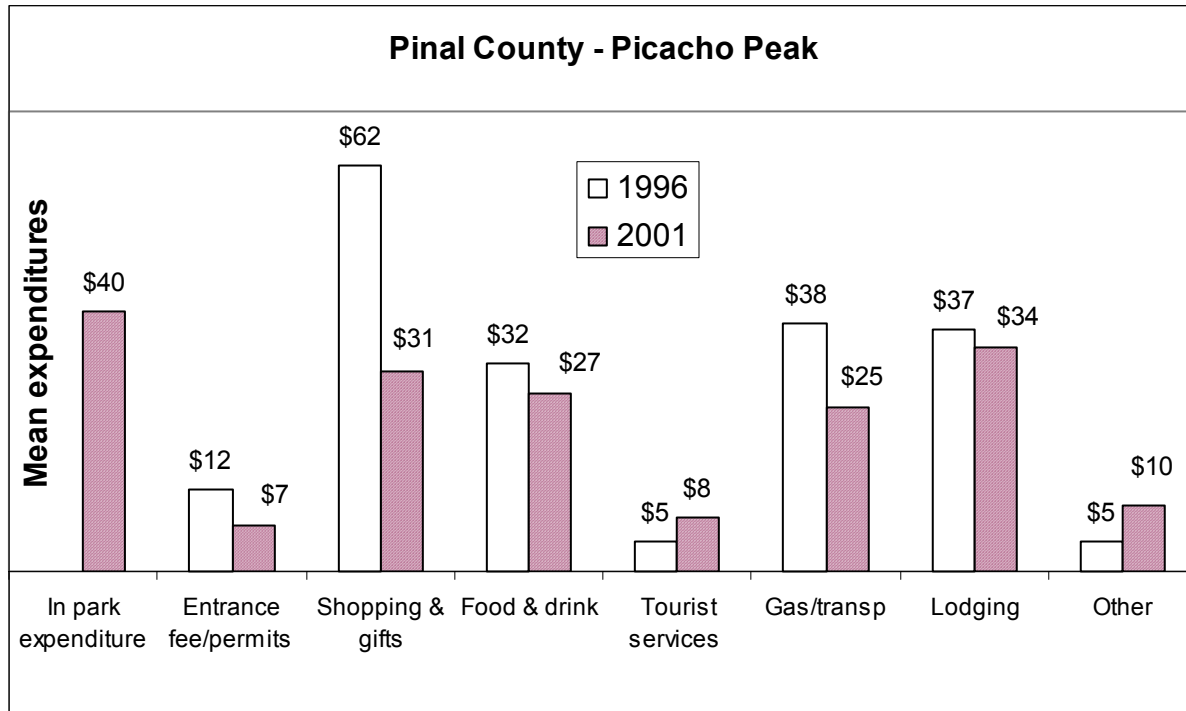


Figure 1. County Economic Impact 1996 - 2001

Picacho Peak	1996	2001
In park expenditures		\$150,459
Entrance fees or permits	\$77,507	\$43,079
Shopping & gifts	\$248,238	\$122,609
Food & drink	\$255,494	\$218,678
Tourist services (museums, tours)	\$14,939	\$27,381
Gas and transportation services	\$303,971	\$200,059
Lodging (hotels, camping)	\$147,935	\$136,902
Other	\$1,664	\$54,761
Total direct expenditures	\$1,049,748	\$953,928

County Income	Income	Income
Direct Income	\$287,647	\$274,271
Indirect & Induced Income	\$203,926	\$189,038
Total County Income	\$491,573	\$463,309

County Employment	Jobs	Jobs
Direct Jobs	39	37
Indirect Jobs	15	14
Total County Jobs	53	51
Total County Income	\$1,541,321	\$1,417,237

Santa Cruz County State Parks

Tubac Presidio



Santa Cruz County State Parks

State Park Visitation

Santa Cruz County contains two Arizona State Parks – Patagonia Lake State Parks, and Tubac Presidio State Park. Table 1 below shows total visitation to Patagonia Lake State Parks, and Tubac Presidio State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Santa Cruz County	1996	2001	Percent Change
Patagonia Lake	208,959	196,332	-6.0%
Tubac Presidio	24,090	18,770	-22.1%
Total	233,049	215,102	

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

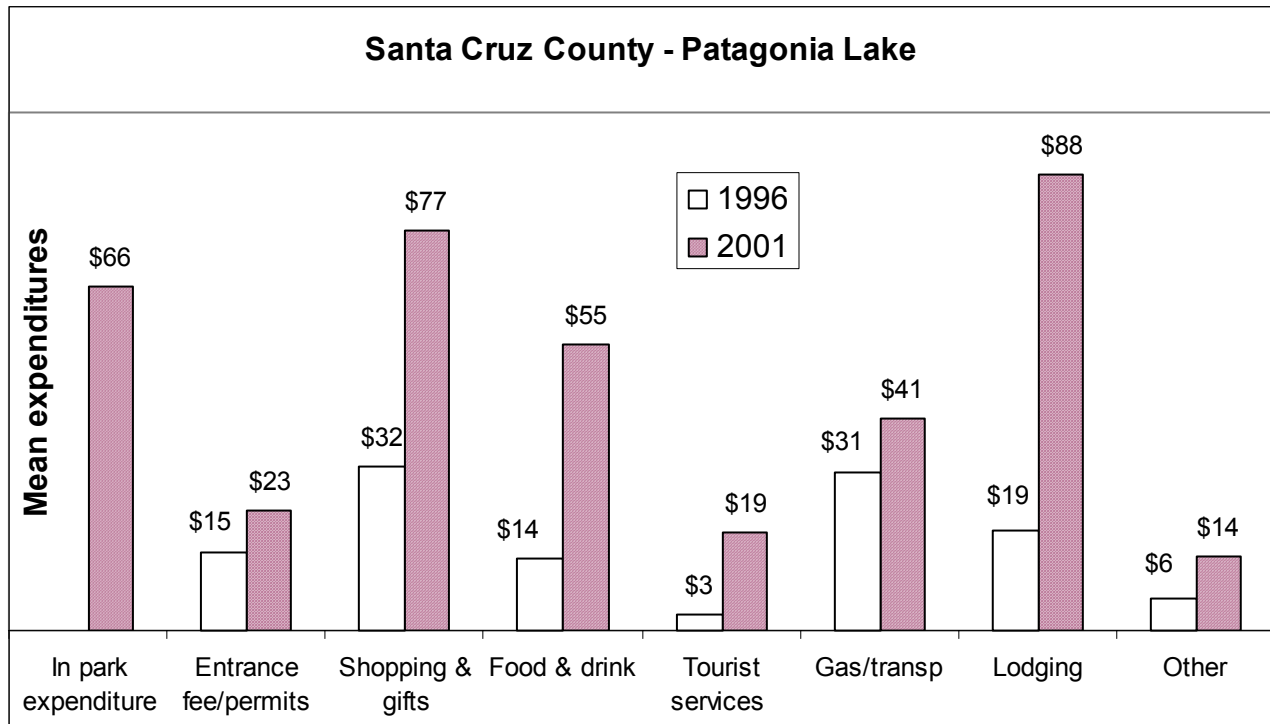


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Patagonia Lake saw an estimated increase of \$210.106 or 6.9 percent, while Tubac Presidio saw an estimated \$182,320 increase or 11.4 percent when compared to the same period.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Patagonia Lake	1996	2001
In park expenditures		\$345,826
Entrance fees or permits	\$304,748	\$178,053
Shopping & gifts	\$484,539	\$449,180
Food & drink	\$347,275	\$517,123
Tourist services (museums, tours)	\$27,301	\$62,408
Gas and transportation services	\$769,388	\$390,561
Lodging (hotels, camping)	\$200,211	\$347,774
Other	\$40,446	\$35,141
Total direct expenditures	\$2,173,907	\$2,326,066

County Income	Income	Income
Direct Income	\$661,692	\$690,765
Indirect & Induced Income	\$341,759	\$379,633
Total County Income	\$1,003,450	\$1,070,398

County Employment	Jobs	Jobs
Direct Jobs	82	87
Indirect Jobs	28	31
Total County Jobs	111	118
Total County Income	\$3,177,358	\$3,396,464

Figure 1. Mean Expenditures 1996, 2001 state park surveys

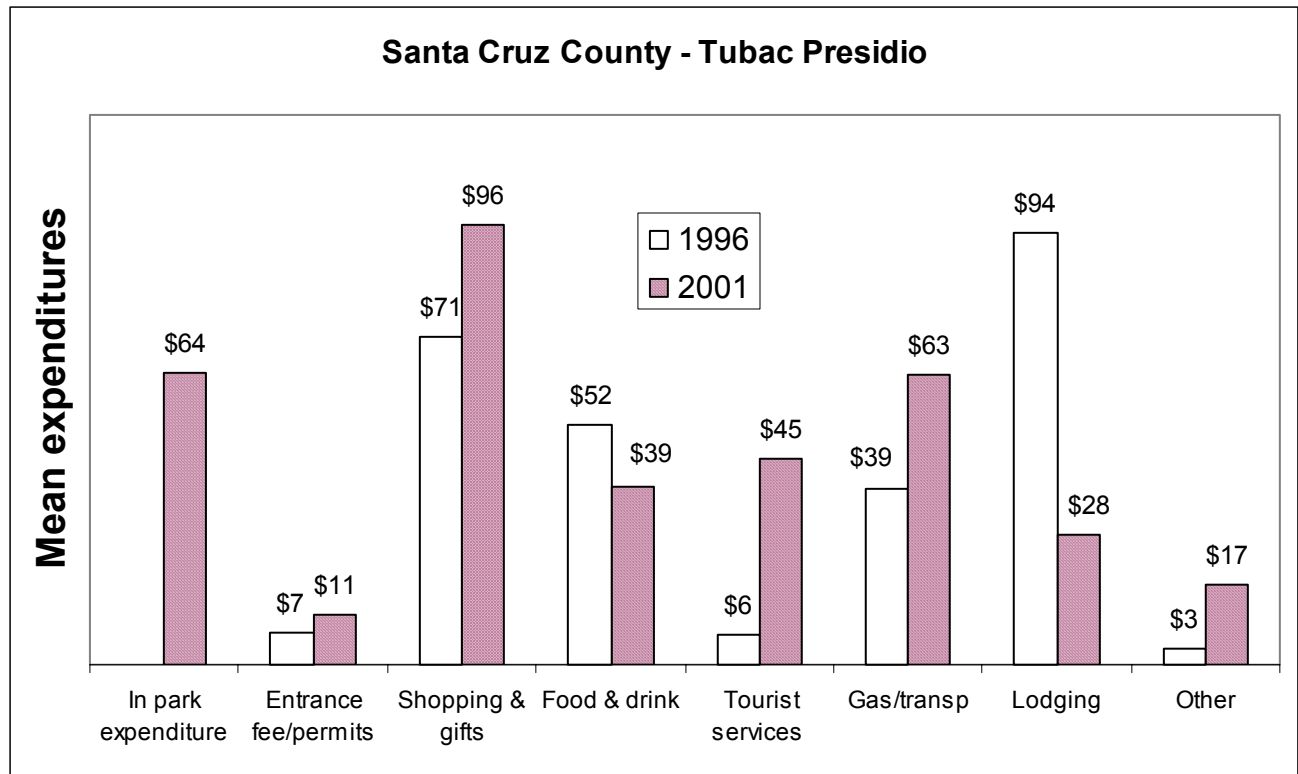


Table 2. County Economic Impact 1996 - 2001

Tubac Presidio	1996	2001
In park experience		\$129,868
Entrance fees or permits	\$25,008	\$36,461
Shopping & gifts	\$254,290	\$404,447
Food & drink	\$186,073	\$171,185
Tourist services (museums, tours)	\$22,613	\$66,573
Gas and transportation services	\$137,254	\$240,392
Lodging (hotels, camping)	\$334,960	\$47,838
Other	\$12,248	\$10,959
Total direct expenditures	\$972,447	\$1,107,723

County Income	Income	Income
Direct Income	\$285,925	\$313,585
Indirect & Induced Income	\$162,200	\$181,583
Total County Income	\$448,125	\$495,169

County Employment	Jobs	Jobs
Direct Jobs	35	39
Indirect Jobs	13	15
Total County Jobs	48	54
Total County Income	\$1,420,571	\$1,602,891

Yavapai County State Parks

Red Rock



Yavapai County State Parks

Yavapai County contains four Arizona State Parks – Dead Horse State Park, Fort Verde State Park, Jerome State Park and Red Rock State Park. Table 1 below shows total visitation to Dead Horse State Park, Fort Verde State Park, Jerome State Park and Red Rock State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Yavapai County	1996	2001	Percent Change
Dead Horse	74,503	103,089	38.4%
Fort Verde	31,181	21,450	-31.2%
Jerome	87,749	53,128	-39.5%
Red Rock	66,442	76,393	15.0%
County Total	259,875	254,060	

Visitation at Dead Horse increased greatly. Located in the rapidly growing Verde Valley, Dead Horse, a recreation park, has benefited from this population growth. On the other hand, both Fort Verde and Jerome saw visitation decline sharply during the same period. Fort Verde has had signage problems, making the entrance to the park hard to find. State Parks are in discussions with ADOT to resolve this problem. Jerome has had maintenance work performed in the park, requiring occasional closures.

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

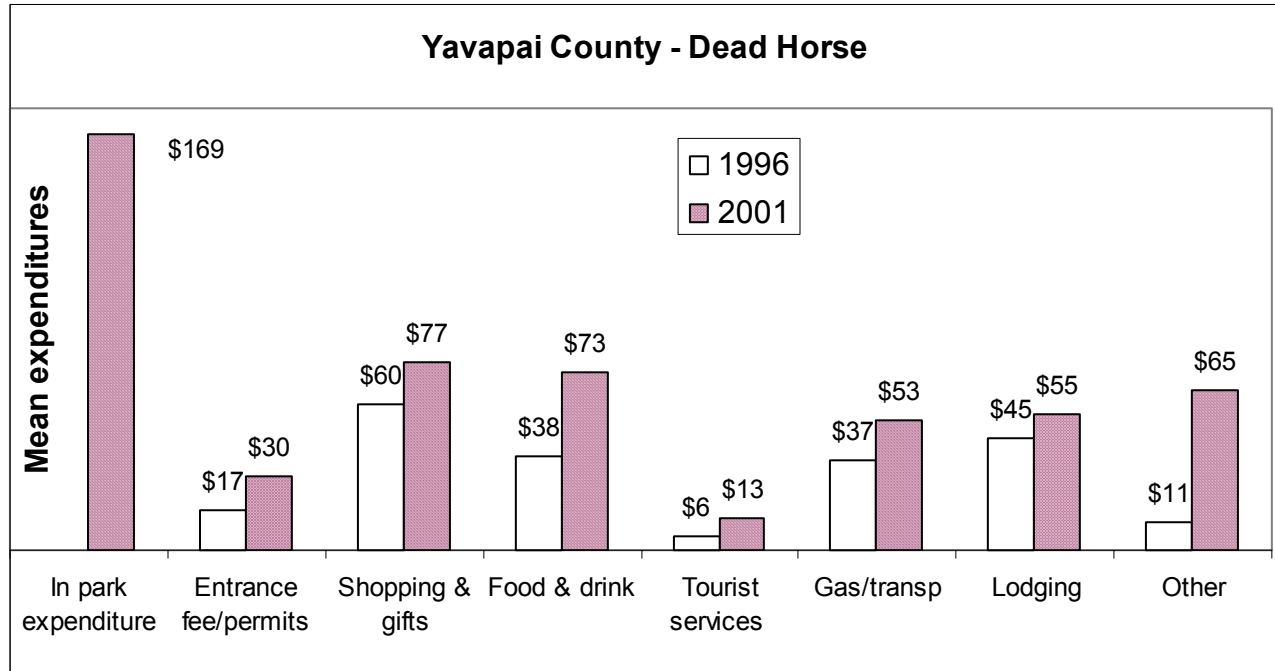


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Dead Horse State Park saw an estimated increase of \$5,048,343 or more than 100 percent in 2001 as compared to 1996. Fort Verde State Park also saw an increase in visitor expenditure, with an increase of \$163,863 or 9.9 percent over 1996. Jerome State Park, saw a decrease of -3.6 percent in visitor expenditures losing an estimated \$297,918. Finally, Red Rock State Park saw an increase of 26.1 percent or \$2,051,503 during the same period.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Dead Horse	1996	2001
In park expenditures		\$1,578,859
Entrance fees or permits	\$240,519	\$438,747
Shopping & gifts	\$864,387	\$1,203,504
Food & drink	\$558,552	\$1,356,238
Tourist services (museums, tours)	\$85,439	\$113,988
Gas and transportation services	\$530,207	\$948,105
Lodging (hotels, camping)	\$658,043	\$531,381
Other	\$165,586	\$197,504
Total direct expenditures	\$3,102,733	\$6,368,326

County Income	Income	Income
Direct Income	\$1,031,495	\$2,168,377
Indirect & Induced Income	\$630,220	\$1,276,088
Total County Income	\$1,661,715	\$3,444,465

County Employment	Jobs	Jobs
Direct Jobs	111	238
Indirect Jobs	44	92
Total County Jobs	155	330
Total County Income	\$4,764,448	\$9,812,791

Figure 1. Mean Expenditures 1996, 2001 state park surveys

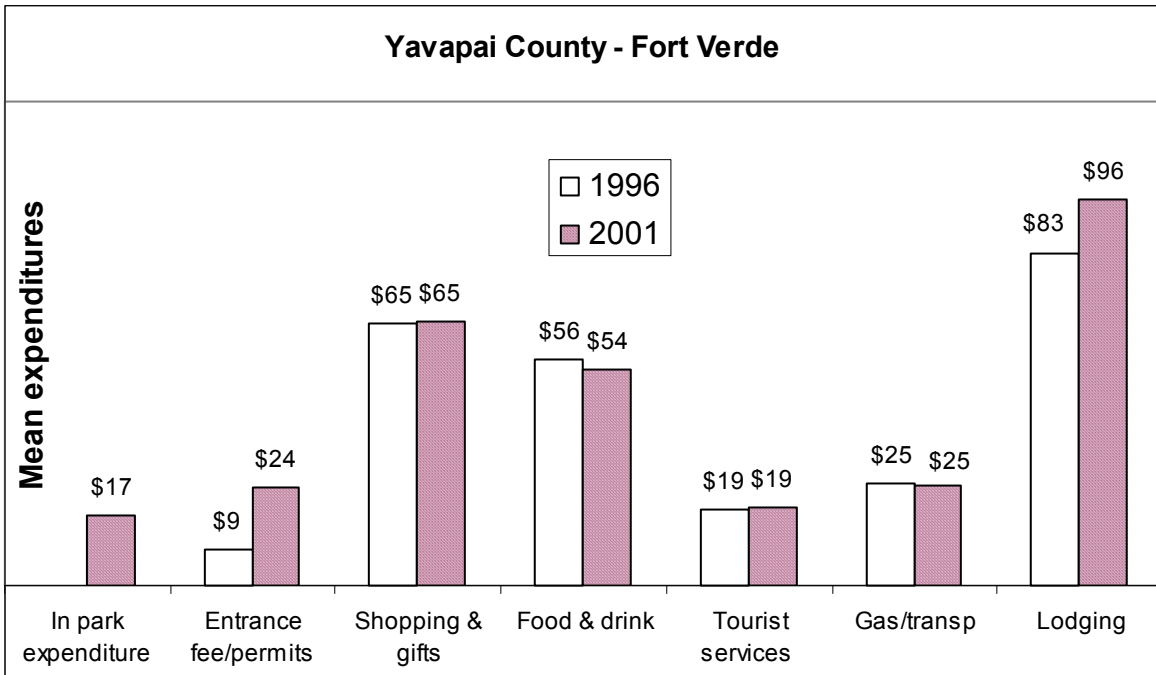


Table 2. County Economic Impact 1996 - 2001

Fort Verde	1996	2001
In park expenditures		\$33,404
Entrance fees or permits	\$25,008	\$94,299
Shopping & gifts	\$254,290	\$237,228
Food & drink	\$186,073	\$259,004
Tourist services (museums, tours)	\$22,613	\$41,588
Gas and transportation services	\$137,254	\$84,144
Lodging (hotels, camping)	\$334,960	\$323,760
Other	\$0	\$0
Total direct expenditures	\$960,198	\$1,073,427

County Income	Income	Income
Direct Income	\$327,239	\$357,652
Indirect & Induced Income	\$202,352	\$222,573
Total County Income	\$529,591	\$580,225

County Employment	Jobs	Jobs
Direct Jobs	35	39
Indirect Jobs	14	16
Total County Jobs	49	55
Total County Income	\$1,489,789	\$1,653,652

Figure 1. Mean Expenditures 1996, 2001 state park surveys

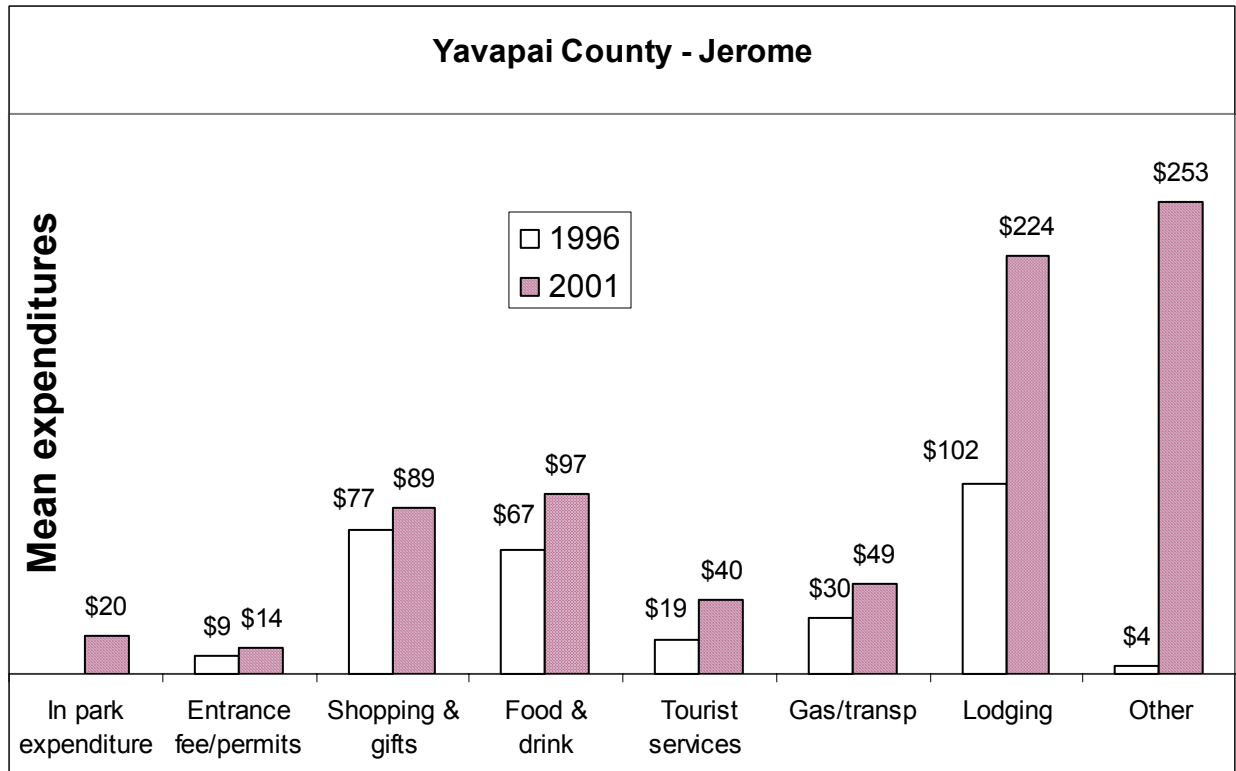


Table 2. County Economic Impact 1996 - 2001

Jerome	1996	2001
In park expenditures		\$85,454
Entrance fees or permits	\$160,460	\$99,917
Shopping & gifts	\$1,351,424	\$1,019,084
Food & drink	\$1,167,339	\$1,251,368
Tourist services (museums, tours)	\$324,438	\$187,257
Gas and transportation services	\$523,099	\$543,026
Lodging (hotels, camping)	\$1,784,212	\$1,797,567
Other	\$75,957	\$176,251
Total direct expenditures	\$5,386,930	\$5,159,923

County Income	Income	Income
Direct Income	\$1,783,303	\$1,732,790
Indirect & Induced Income	\$1,113,278	\$1,056,879
Total County Income	\$2,896,581	\$2,789,669

County Employment	Jobs	Jobs
Direct Jobs	193	188
Indirect Jobs	78	74
Total County Jobs	271	262
Total County Income	\$8,247,510	\$7,949,592

Figure 1. Mean Expenditures 1996, 2001 state park surveys

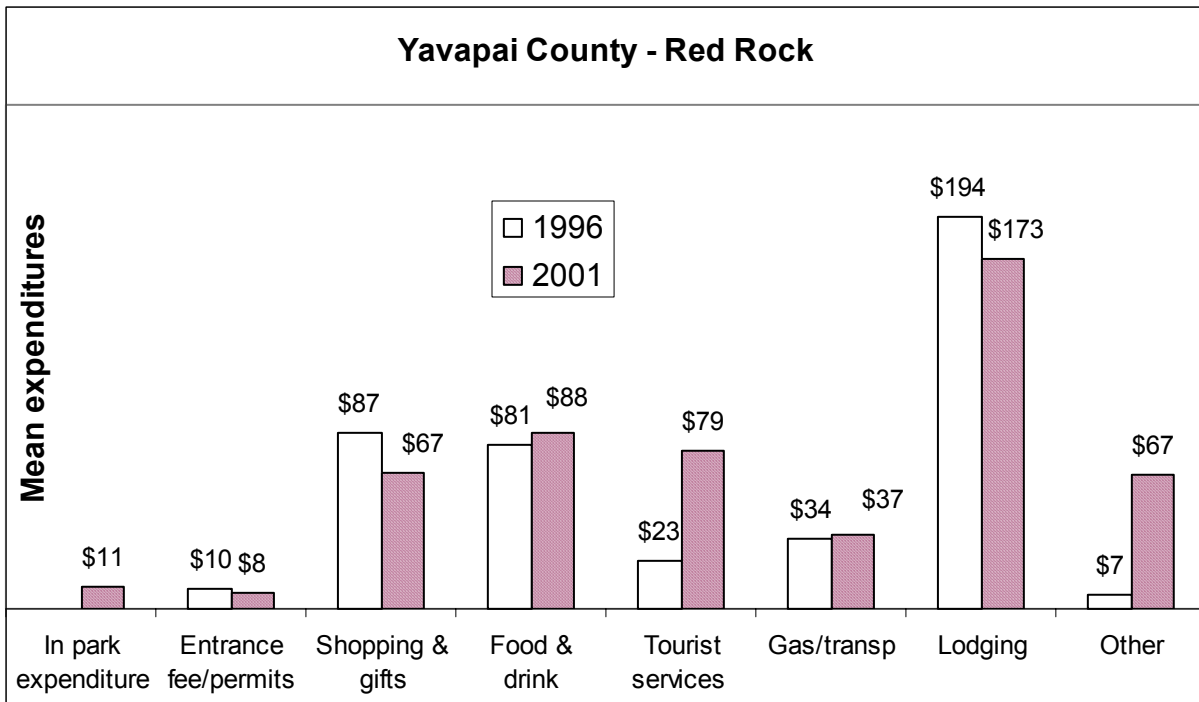


Table 2. County Economic Impact 1996 - 2001

Red Rock	1996	2001
In park expenditures		\$75,626
Entrance fees or permits	\$118,265	\$87,640
Shopping & gifts	\$1,001,664	\$1,045,386
Food & drink	\$936,635	\$1,633,347
Tourist services (museums, tours)	\$269,062	\$634,252
Gas and transportation services	\$395,685	\$576,383
Lodging (hotels, camping)	\$2,234,288	\$2,263,797
Other	\$82,923	\$100,591
Total direct expenditures	\$5,038,523	\$6,417,022

County Income	Income	Income
Direct Income	\$1,753,266	\$2,182,667
Indirect & Induced Income	\$1,075,925	\$1,319,528
Total County Income	\$2,829,191	\$3,502,195

County Employment	Jobs	Jobs
Direct Jobs	187	239
Indirect Jobs	79	92
Total County Jobs	266	331
Total County Income	\$7,867,713	\$9,919,216

Yuma County State Parks

Yuma Territorial Prison



Yuma County State Parks

State Park Visitation

Yuma County contains two Arizona State Parks – Yuma Prison State Park, and Yuma Crossing State Park. Table 1 below shows total visitation to Yuma Prison State Park, and Yuma Crossing State Park for FY 1995-96 and FY 2000-01.

Table 1. State Park Visitation

Yuma County	1996	2001	Percent Change
Yuma Prison	84,606	69,698	-17.6%
Yuma Crossing		16,959	
County Total	84,606	86,657	

Visitor surveys were conducted at Arizona State Parks during the 12 months of FY 1995-96 and FY 2000-01. These surveys asked visitors to estimate total park expenditures in relevant categories:

- Entrance fees & permits
- Shopping & gifts
- Food & drink
- Tourist services
- Gas & transportation
- Lodging
- Other

The 2001 survey, unlike the 1996 survey, asked respondents to separate their “in-park” expenditures from those within 50 miles of the park; the 1996 survey totaled all expenditures within a 50-mile radius surrounding the park. Figure 1 presents mean (average) direct expenditures in each category for both the 1996 and 2001 surveys.

Figure 1. Mean Expenditures 1996, 2001 state park surveys

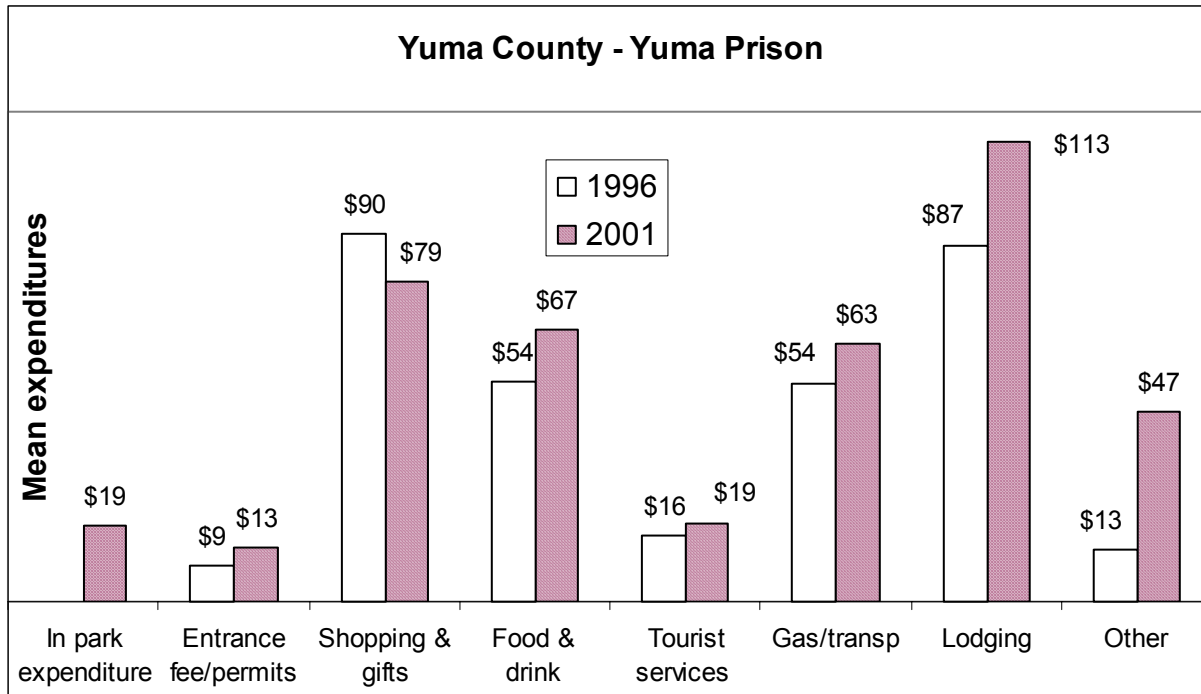


Table 2 is presented in four sections. The first section multiplies mean direct expenditure totals in each category (Figure 1) by visitor population totals (Table 1) to produce Total Direct Expenditures in 1996 and 2001. Yuma Prison State Park saw an estimated decrease of \$1,60,418 or -20.3 percent in 2001 as compared to 1996. Yuma Crossing State Park had estimated direct visitor expenditures of \$1,499,895 for 2001.

The second section runs these total direct expenditures through an economic impact model that uses multipliers to estimate *total* county income generated as a result of the park. This is comprised of: (1) Direct Income, reflecting the spending of local businesses on salaries, wages, taxes, and goods and services required to serve visitors; (2) Indirect & Induced 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. Table 2 ends with an estimate of Total County Jobs and Total County Income, representing the total impact of state parks on the county economy.

Table 2. County Economic Impact 1996 - 2001

Yuma Prison	1996	2001
In park expenditures		\$84,858
Entrance fees or permits	\$123,788	\$123,269
Shopping & gifts	\$1,293,842	\$760,090
Food & drink	\$771,776	\$803,311
Tourist services (museums, tours)	\$230,086	\$102,989
Gas and transportation services	\$769,404	\$724,297
Lodging (hotels, camping)	\$1,250,385	\$1,228,519
Other	\$186,926	\$47,273
Total direct expenditures	\$4,626,207	\$3,874,605

County Income	Income	Income
Direct Income	\$1,626,323	\$1,396,679
Indirect & Induced Income	\$1,197,191	\$996,011
Total County Income	\$2,823,514	\$2,392,690

County Employment	Jobs	Jobs
Direct Jobs	166	145
Indirect Jobs	86	71
Total County Jobs	252	216
Total County Income	\$7,449,721	\$6,267,295

Figure 1. Mean Expenditures 1996, 2001 state park surveys

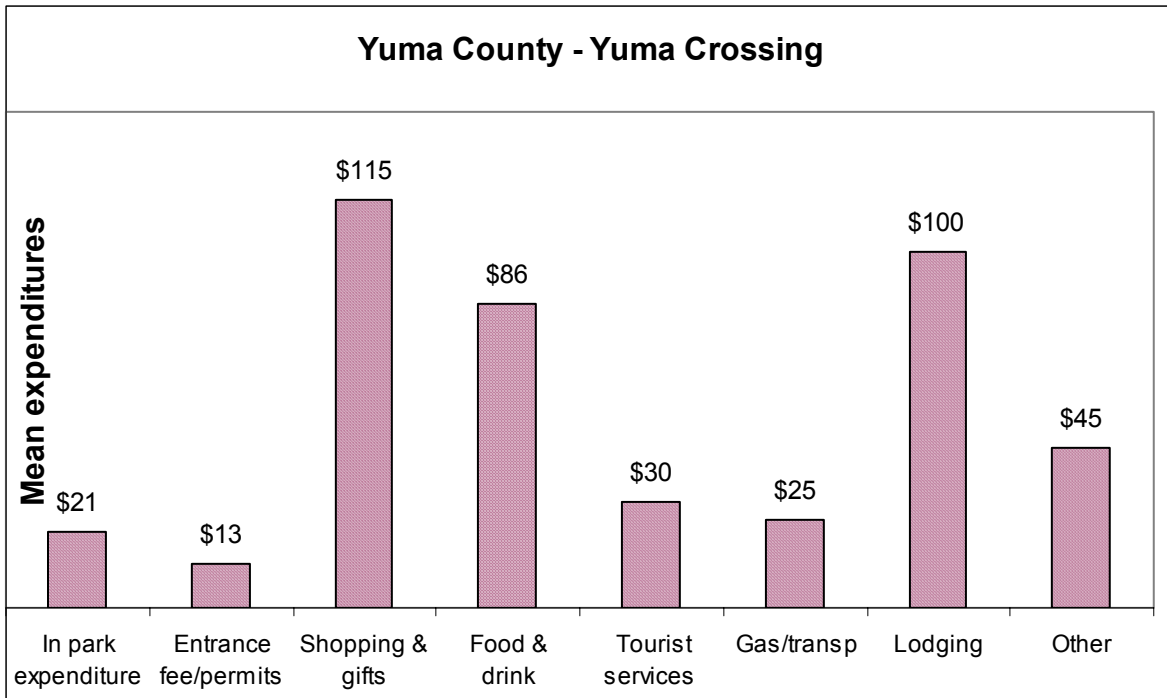


Table 1. County Economic Impact 1996 - 2001

Yuma Crossing	2001
In park expenditures	\$35,610
Entrance fees or permits	\$45,785
Shopping & gifts	\$456,402
Food & drink	\$341,252
Tourist services (museums, tours)	\$73,256
Gas and transportation services	\$105,001
Lodging (hotels, camping)	\$428,854
Other	\$13,736
3Total direct expenditures	\$1,499,895

County Income	Income
Direct Income	\$504,030
Indirect & Induced Income	\$389,030
Total County Income	\$893,060

County Employment	Jobs
Direct Jobs	53
Indirect Jobs	27
Total County Jobs	80
Total County Income	\$2,392,956

|

APPENDIX

Arizona State Park Visitation, Intervening Years

Arizona State Park Visitation FY 1995/96 to 2000/01

County	Park Name	Park Visitation					
		1995/96	1996/97	1997/98	1998/99	1999/00	2000/01
Apache	Lyman Lake	50,495	44,303	32,936	26,599	27,623	28,304
Cochise	Kartchner Cavern					120,337	199,115
Cochise	Tombstone	100,759	84,408	70,333	72,988	69,656	74,105
Coconino	Riordan	20,972	21,000	19,348	16,525	16,791	19,194
Coconino	Slide Rock	316,301	294,213	267,789	279,812	296,602	275,554
Gila	Tonto Natural Bridge	97,127	112,576	100,892	103,972	113,807	100,178
Graham	Roper Lake	63,468	70,869	60,138	61,717	64,984	60,242
La Paz	Alamo Lake	62,102	59,834	55,779	75,246	66,279	70,969
La Paz	Buckskin	94,474	93,809	97,291	102,593	105,942	93,999
Mohave	Cattail Cove	96,459	94,876	87,702	72,281	98,406	106,939
Mohave	Lake Havasu	371,700	319,329	292,360	302,014	325,723	345,590
Navajo	Fool Hollow	54,148	59,801	64,781	74,590	81,388	84,527
Navajo	Homolovi	20,733	21,734	22,426	26,195	24,380	20,644
Pima	Catalina	132,213	143,085	155,791	148,545	146,428	154,806
Pinal	Boyce Thompson	84,876	90,823	100,188	76,549	76,422	87,238
Pinal	Lost Dutchman	84,795	83,740	104,218	87,472	82,054	114,253
Pinal	McFarland	4,514	4,733	3,688	4,015	3,518	4,273
Pinal	Picacho Peak	68,289	67,734	168,772	66,327	60,252	117,652
Santa Cruz	Patagonia Lake	208,959	203,209	191,951	200,489	203,998	196,332
Santa Cruz	Tubac Presidio	24,090	25,969	21,688	23,744	21,350	18,770
Yavapai	Dead Horse	74,503	83,683	89,225	100,176	104,935	103,089
Yavapai	Fort Verde	31,181	29,200	29,024	27,941	22,315	21,450
Yavapai	Jerome	87,749	75,417	70,093	70,563	70,370	53,128
Yavapai	Red Rock	66,442	76,061	73,699	67,711	75,964	76,393
Yuma	Yuma Crossing		3,137	20,892	16,321	14,830	16,959
Yuma	Yuma Prison	84,606	79,675	74,391	72,497	75,053	69,698

Source: Arizona State Parks Board: Revenue and Attendance Reports