

The Economic Value of Arizona's Trails

Trails provide Arizonans with opportunities to enjoy nature, exercise, and spend time with friends and family. While access to trails is typically free or low-cost, that doesn't mean it has little or no value to people. Arizonans dedicate significant time and resources to trail-based recreation, evidence of the enjoyment trails bring them. The value people get from using trails is separate and different from their spending on trail-related equipment and supplies. Economists can estimate this additional value of trails using information on how often and how far people travel to use them.

Value of Trail Use to Arizonans

- ◆ The value of non-motorized trail use to Arizonans is estimated at **\$8.3 billion** per year¹
- ◆ The value of motorized trail use to Arizonans is estimated at **\$5.2 billion** per year¹
- ◆ 59% of Arizona adults (3.1 million people) use non-motorized trails each year and 24% (1.3 million people) use motorized trails¹



The value Arizonans place on trails also motivates their decisions of where to live and travel.

Value of Trails for Community Development & Tourism

4 out of 5 trail users in Arizona consider trail access as somewhat or very important in deciding where to **live** and where to **travel** for leisure¹.



Even among infrequent trail users or non-users, more than **2 out of 3** report trail access as important in deciding where to live and visit¹.

Besides the value people get from outdoor recreation, consumer spending on goods and services for outdoor recreation contributes to the state economy. Trail use is one of the most popular outdoor activities. It is a major driver of outdoor recreation-related spending. Past studies capture the importance of all outdoor recreation-related consumer spending to the state economy.

Arizonans' Spending on All Outdoor Recreation

- ◆ Outdoor recreation supports \$21.2 billion in consumer spending annually & 201,000 jobs in Arizona, as of 2017²
- ◆ Consumer spending on off-highway vehicles in Arizona supports an estimated \$2.6 billion in state sales annually and over 21,000 jobs, including multiplier effects³
- ◆ Outdoor recreation directly accounts for an estimated 2.7% of Arizona's gross state product, and 3.8% of state employment⁴



Pima County

- ◆ Most non-motorized trail use is by in-county residents & residents of Maricopa County. Top destinations include Tucson, Mount Lemmon, Ajo, Catalina, & Oro Valley. Non-motorized trail users from Pima County use trails most frequently in Pima, Coconino, & Pinal counties.
- ◆ Most motorized trail use is by residents of Pima, Maricopa, & Santa Cruz counties. Top destinations include Tucson, Ajo, Mount Lemmon, Catalina, & Sahuarita. Motorized trail users from Pima County use trails most frequently within Pima, Yuma, Navajo, Cochise, & Pinal counties.
- ◆ In Pima County, 62% of adults report participating in non-motorized trail use and 20% report participating in motorized trail use in the past 12 months.

Sources:

1. University of Arizona Cooperative Extension. The Economic Value of Trails in Arizona. 2020. <https://economics.arizona.edu/economic-value-trails-arizona-travel-cost-method-study>
2. Outdoor Industry Association. The Outdoor Recreation Economy. 2017 State Reports. <https://outdoorindustry.org/state/arizona/>
3. Arizona State Parks. Economic Impact of Off-Highway Recreation in the State of Arizona. 2017. <https://azstateparks.com/publications/>
4. Bureau of Economic Analysis. Outdoor Recreation Satellite Account. 2017. <https://www.bea.gov/data/special-topics/outdoor-recreation>