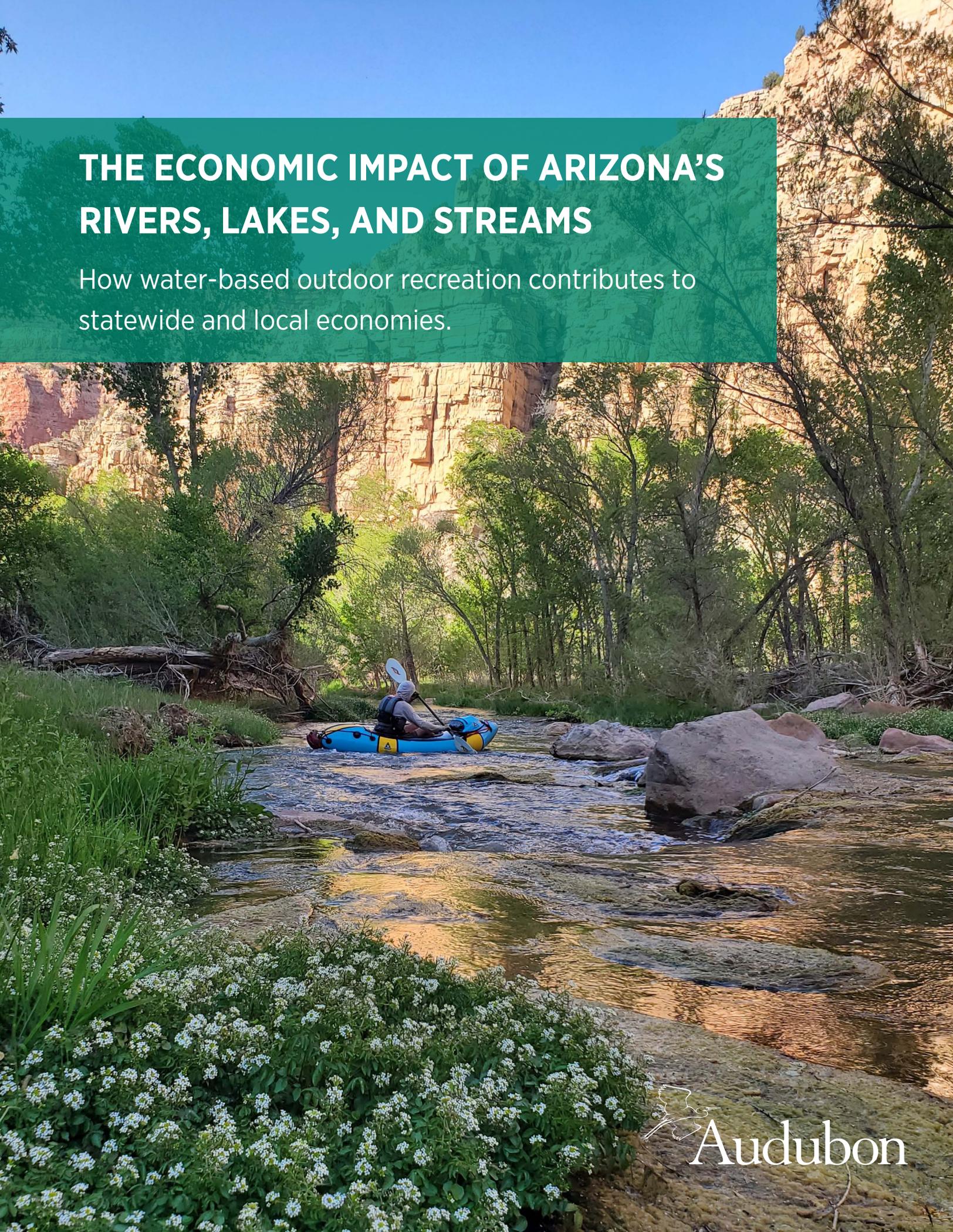


# THE ECONOMIC IMPACT OF ARIZONA'S RIVERS, LAKES, AND STREAMS

How water-based outdoor recreation contributes to statewide and local economies.





Fishing on Lake Powell. Photo: George Andrejko/Arizona Game and Fish Department

## ECONOMICS OF WATER-BASED OUTDOOR RECREATION

This executive summary highlights the economic contributions of water-based outdoor recreation in Arizona.

Rivers, lakes, streams, and the habitat they support are critical for people, birds, fish, and other wildlife. Maintaining the integrity (the water quality and quantity) of these special places is crucial to our way of life in the arid West. The water of the Colorado River and its tributaries support more than 400 species of birds, hundreds of species of wildlife, provide water to roughly 40 million people, and irrigate nearly six million acres of farms and ranches.

We know that water is life in Arizona, and we would not be here without it. The economic impact provided by our rivers and reservoirs is clear—just look at the large metropolitan areas, acres of agricultural production, and myriad industries supported by water in the West.

### **But what is the economic value of water flowing in our rivers, lakes, and streams?**

To get at this question, the National Audubon Society worked with Southwick Associates, a research firm, to analyze the economic contributions associated with water-based recreation in Arizona, defined as doing the following activities on or along rivers, lakes, and streams in Arizona:

- Bicycling
- Camping
- Fishing
- Hunting/target shooting
- Picnicking/relaxing outdoors
- Trail sports (hiking, backpacking, trail running, horseback riding, climbing, and mountaineering)
- Water sports (swimming, canoeing, kayaking, rafting, paddle-boarding, boating)
- Wildlife watching

Water-based outdoor recreation is a helpful way to measure the economic value of water *in* rivers, lakes, and streams because without water, much of this recreation and the related economic activity would cease. People don't fish in dry lakes or kayak in dry riverbeds.

We assessed water-based recreation through participation by Arizona residents and the time they spent recreating. The analysis also included calculating the associated spending of the various water-based recreational activities of both residents and non-residents to measure the economic impact generated annually from rivers, lakes, and streams throughout the state.

Between September 2024 and August 2025, Arizona residents and non-resident visitors spent more than \$9.7 billion in the state to support their water-related outdoor recreation. That spending and the related multiplier effects created **\$11.7 billion in economic output** within Arizona, adding more than \$6.9 billion to the state's Gross Domestic Product (GDP). That spending also **supported more than 72,000 jobs** in the state, with those jobs paying annual wages of nearly \$4 billion.

Comparatively, water-based outdoor recreation as an industry **creates more economic output** (\$11.7 billion) than **Arizona's golf** (\$6 billion) **or wine** (\$5.7 billion) **industries**. While mining creates more economic output (\$21.2 billion), water-related outdoor recreation **supports more employment** throughout the state.

Comparatively, water-based outdoor recreation in Arizona creates more economic output than Arizona's golf or wine industries, and supports more jobs than mining in the state.

Hiking at the Grand Canyon, overlooking the Colorado River. Photo: Joel Grimes





Canoeing in the Colorado River. Photo: Yuma Crossing National Heritage Area

## BY THE NUMBERS

*Annually*

2.2  
MILLION



AZ RESIDENTS  
PARTICIPATE

\$11.7  
BILLION



ECONOMIC  
OUTPUT

\$6.9  
BILLION



CONTRIBUTION  
TO AZ'S GDP

72,000



JOBS

\$4  
BILLION



WAGES

\$1.9  
BILLION



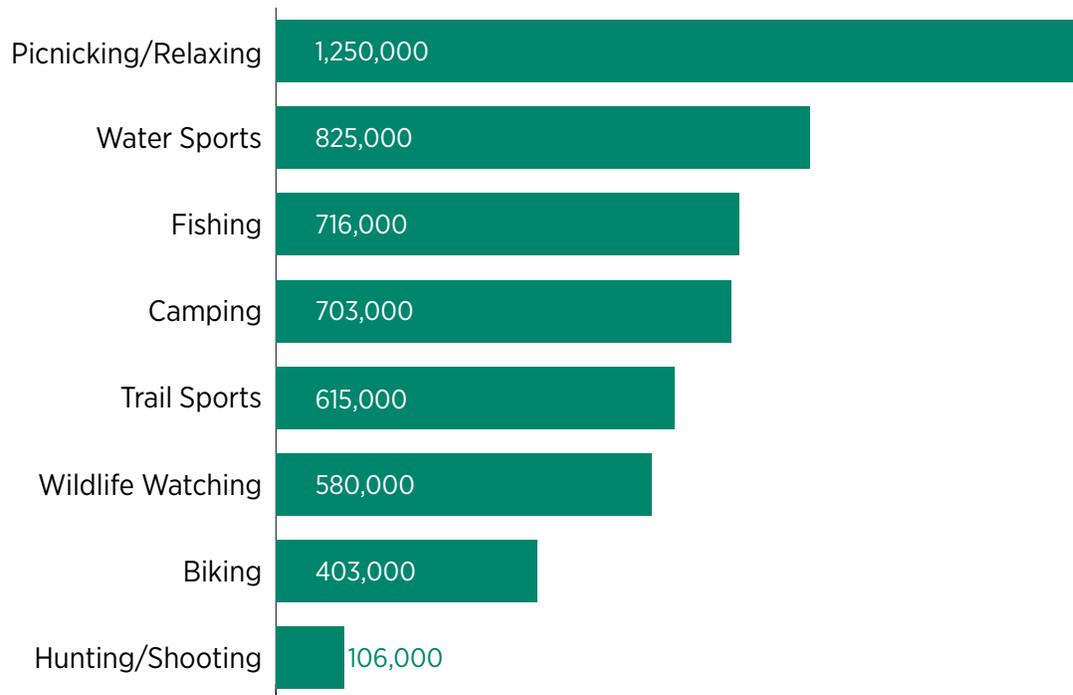
TAX REVENUES

## ACTIVITIES WE CHERISH IN THE PLACES WE LOVE

**We're making an economic case for why we must continue to protect the rivers, lakes, and streams we care about**—through investments to restore watersheds and wildlife habitat, as well as with smart policies that improve Arizona's water outlook.

Some **2.2 million Arizona residents participate** in water-based outdoor recreational activities annually (nearly 39% of the state's adult population).

### Arizona Resident Participation by Activity



While we looked at the economics of outdoor recreation on Arizona's rivers, lakes, and streams, we also know the intrinsic value and importance of these places culturally, historically, and spiritually. Those who have hiked the Grand Canyon and reached the Colorado River, watched thousands of Sandhill Cranes at Whitewater Draw in southern Arizona, or fished along the Black River in the White Mountains know that these are invaluable places. Water is rooted in the experiences that so many enjoy in Arizona—it defines much of the region's history and culture.

Hiking along Sabino Creek. Photo: Watershed Management Group



## LOCAL IMPACT

The activities Arizona residents participated in varied by county, reflecting the diversity of the state's landscapes and what they have to offer in terms of water-based outdoor recreation. For example, in Coconino County, where the Grand Canyon is located, the top three activities were camping, picnicking/relaxing, and trail sports. By contrast, in Cochise County, where the San Pedro Riparian National Conservation Area and Willcox Playa are located, the top activities were wildlife watching, picnicking/relaxing, and fishing.

In addition to being able to tell the statewide story of the economic impact of rivers, lakes, and streams in Arizona, we wanted to better understand the significance of water-based recreation locally. The table below displays the statewide impact from water-based outdoor recreation across Arizona's 15 counties.

### Economic Contribution from Water-Based Outdoor Recreation by County

|            | AZ Resident Days Spent Recreating | Output          | Jobs Supported | Contribution to AZ's GDP | State/Local Tax | Federal Tax   |
|------------|-----------------------------------|-----------------|----------------|--------------------------|-----------------|---------------|
| Apache     | 2,670,900                         | \$524,500,000   | 3,245          | \$310,500,000            | \$42,400,000    | \$42,100,000  |
| Cochise    | 1,565,000                         | \$292,000,000   | 1,813          | \$172,700,000            | \$23,600,000    | \$23,400,000  |
| Coconino   | 5,538,900                         | \$1,054,000,000 | 6,519          | \$625,700,000            | \$85,500,000    | \$84,800,000  |
| Gila       | 2,235,200                         | \$436,900,000   | 2,684          | \$259,900,000            | \$35,500,000    | \$35,400,000  |
| Graham     | 838,100                           | \$172,600,000   | 1,062          | \$103,000,000            | \$14,000,000    | \$14,200,000  |
| Greenlee   | 200,200                           | \$36,400,000    | 229            | \$21,400,000             | \$2,900,000     | \$2,900,000   |
| La Paz     | 1,117,200                         | \$221,100,000   | 1,357          | \$131,800,000            | \$18,000,000    | \$18,000,000  |
| Maricopa   | 27,694,700                        | \$5,014,400,000 | 31,139         | \$2,960,800,000          | \$405,900,000   | \$396,200,000 |
| Mohave     | 3,352,600                         | \$622,400,000   | 3,823          | \$369,200,000            | \$50,700,000    | \$49,600,000  |
| Navajo     | 2,243,900                         | \$426,000,000   | 2,646          | \$252,600,000            | \$34,600,000    | \$34,100,000  |
| Pima       | 6,919,700                         | \$1,358,300,000 | 8,450          | \$801,400,000            | \$109,700,000   | \$107,400,000 |
| Pinal      | 2,474,200                         | \$484,400,000   | 2,989          | \$286,900,000            | \$39,300,000    | \$38,700,000  |
| Santa Cruz | 957,800                           | \$176,000,000   | 1,085          | \$104,400,000            | \$14,300,000    | \$14,200,000  |
| Yavapai    | 3,903,600                         | \$720,400,000   | 4,456          | \$426,600,000            | \$58,200,000    | \$58,000,000  |
| Yuma       | 1,182,100                         | \$222,500,000   | 1,364          | \$131,900,000            | \$18,100,000    | \$17,800,000  |

**Note:** Numbers rounded. For precise numbers, please read the full report available at [audubon.org/AZRivers](http://audubon.org/AZRivers).

# THANK YOU TO THE FOLLOWING ORGANIZATIONS FOR THEIR GUIDANCE AND SUPPORT



## ABOUT AUDUBON

The National Audubon Society protects birds and the places they need, today and tomorrow. Incorporated in 1905, the National Audubon Society is one of the oldest and most effective bird conservation organizations in the Western Hemisphere. Audubon works throughout the Americas using science, advocacy, education and on-the-ground conservation. Learn more at [audubon.org/AZRivers](http://audubon.org/AZRivers).



Cover Photo. Kayaking on the Upper Verde River.  
 Photo: Landon Sawaya/American Whitewater Member

