



DEPARTMENT OF PARKS AND RECREATION

Off-Highway Motor Vehicle Recreation Division
1725 23rd Street, Suite 200
Sacramento, California 95816
Telephone: (916) 324-5801 • Fax: (916) 324-0271

Lisa Ann L. Mangat, Director

**OHMVR COMMISSION MEETING
Sacramento, CA 95815**

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STAFF REPORT: Statewide Off-Highway Motor Vehicle and Over Snow Vehicle Recreation Study

STAFF: Katie Metraux, OHMVR Planning Section

SUBJECT: Information about a Statewide Off-Highway Motor Vehicle Recreation Study

Summary

Off-Highway Motor Vehicle Recreation (OHMVR) Division staff are researching the potential costs, scope of work, and timeline associated with conducting a Statewide Off-Highway Motor Vehicle (OHV) and Over Snow Vehicle (OSV) Recreation Study (Study). The statewide study would provide updated demographic information about OHV and OSV recreationists. It would also provide associated economic contributions to OHV recreation. This staff report describes processes for conducting the study, a proposed timeline, and potential costs.

Discussion

The proposed Study would provide information park managers are seeking to evolve the OHMVR Program to better serve California's changing demographics and future OHV and OSV recreation needs. Study components could include:

- Demographics to know who is currently participating in OHV and OSV recreation;
- trends in OHV and OSV types;
- visitor use patterns;
- a statewide evaluation of existing OHV and OSV recreation opportunities; and,
- the economic impacts associated with OHV recreation.

The Study would be useful for all aspects of the OHMVR Program. It would help the Department of Parks and Recreation (Department) find gaps in existing OHV and OSV recreation data; guide future acquisition and planning efforts; understand visitor needs and expectations; and help managers know what program components need further development. The information would also benefit federal agencies and local governments who may want to develop OHV and OSV opportunities on public lands within their jurisdiction.

The first comprehensive statewide study of OHV recreation was conducted by the Department in the late 1970s and utilized to develop the OHMVR Program. Other recreation studies include the Oceano Dunes SVRA Economic Impact Analysis Report (2010/2011); a SVRA attendance study in 2014; a winter recreation study (2013), and, the Statewide Comprehensive Outdoor Recreation Plan (known as SCORP) that is updated every few years. The 2015 SCORP is available for review on the California State Parks website: www.parks.ca.gov/?page_id=27894.

These studies are limited in scope and do not address OHV and OSV recreation on other public and private lands. A comprehensive study is needed to identify gaps in OHV and OSV recreation opportunities, determine existing user base and target audiences, and ascertain potential funding needs.

The proposed Study could include direct surveys (e.g., visitor intercept surveys and stakeholder interviews) and indirect surveys (e.g., mail surveys and/or online surveys) and review of other similar state and national OHV and OSV studies. In addition, it could include stakeholder interviews and coordination with federal and state agencies to collect data.

Potential Costs

The Department would explore hiring an academic institution or private research group to design and implement the study, analyze data, and produce reports. Depending on the project deliverables, a study of this size could cost \$350,000 and up.

Proposed Timeline

Phase 1: Study Design

This phase could take up to one-and-a-half years. It includes contracting and coordination with an academic institution or private research group.

Phase 2: Conduct Data Collection

This phase could take up to two years depending on study scope and data collection methods.

Phase 3: Analyze Data and Produce Reports

This phase could take up to six months depending on the amount of data and project deliverables.

Total estimated time is up to four years.

Proposed Scope of Work

The OHMVR Division staff developed a proposed Scope of Work for the Study. See attachment 1.

Attachment – Proposed Scope of Work

Statewide Off-Highway Vehicle and Over Snow Vehicle Recreation Demographics and Economic Contributions Study

Draft Scope of Work for an Interagency Agreement

1.0 Project Purpose, Background, Budget, and Issuing Office

1.1. Purpose

California State Parks, Off-Highway Motor Vehicle Recreation (OHMVR) Division is seeking a qualified Consultant to develop and administer a study, analyze data, and prepare a report that examines the demographics of off-highway vehicle (OHV) and over snow vehicle (OSV) recreationists and the economic contributions of OHV and OSV recreation throughout California. Data collected from this study will provide input into decisions regarding OHMVR Program management, OHV and OSV recreation opportunities, and associated programs.

Refer to Section 2.0, Scope of Services, for complete description of the Project

1.2 Background

The OHMVR Program supports motorized recreation and motorized access to nonmotorized recreation opportunities in California.¹ The OHMVR Program has two main components. The first is a grants program that provides financial assistance to local, state, and federal agencies as well as to Native American tribes, nonprofits, and educational institutions for OHV recreation-related activities. This assistance enables these agencies to implement sustainable, environmentally responsible OHV recreational opportunities. Funds are also available to counties and local communities affected by OHV uses and impacts that require management, regulatory action, education, and law enforcement.

The second component is a system of nine state vehicular recreation areas (SVRAs) that provide motorized recreational opportunities on 145,000 acres of State Parks' owned and managed lands. The OHMVR Division also administers the SNO-PARK program, in conjunction with the U.S. Forest Service, the California Department of Transportation, the California Highway Patrol, and various community organizations. Through this collaborative effort, winter recreation opportunities are provided at 19 SNO-PARK sites along the Sierra Nevada.

California Public Resources Code (PRC) Section 5090.32(h) directs the OHMVR Division to conduct and prepare surveys and studies that are necessary or desirable for implementing the OHMVR Program.

¹ Motorized recreation opportunities includes, but is not limited to, off-highway vehicle touring, trail riding, practice and play areas, competition and special event areas, and over-snow vehicle recreation. Providing motorized access to non-motorized recreation can refer to providing motorized access to camping, hiking, fishing, equestrian riding, boating, and other activities.

User Demographics

Demographic data provides specific information about the populations who use OHV and OSV areas. Understanding who recreate can help OHMVR managers develop well-defined strategies about how to reach current users, attract new users, develop desired programs and experiences, and identify the need for additional OHV and OSV opportunities statewide and where they live. Additionally, demographic data and population trend analysis will help the Division determine potential users and to develop strategies to reach them.

Recreation Opportunities within OHV Areas

This study will survey people about how they use motorized and nonmotorized recreation opportunities within OHV and OSV areas. People who visit these areas may participate in multiple forms of recreation, such as camping, mountain biking, hiking, swimming, snow play, skiing, as well as motorized recreation. The objectives of this survey are to determine what recreation opportunities are of interest to visitors, identify gaps in recreational opportunities, identify the need for multiple forms of recreation within an OHV and OSV area, and the need for connectivity between public lands that offer several forms of recreation opportunities.

Economic Contributions and Economic Value of OHV Recreation

This study aims to analyze economic contributions and economic value of OHV and OSV recreation to geographic regions and the recreation's value to its users. The data will help the Division understand the economic impact of OHV recreation to communities in various geographic areas of California, on the OHV industry, and to the overall California economy. The combined economic and demographic data will also be used to estimate OHV ownership trends (vehicle types) and number of OHV riders.

Previous Studies

The OHMVR Division and SVRAs have produced similar studies, which can be accessed on the California State Parks website: http://ohv.parks.ca.gov/?page_id=26656. These studies include:

- The OHMVR Division Statewide Attendance Study for SVRAs -- 2014
- Oceano Dunes SVRA Economic Impact Analysis Report – 2011
- Recreational Pursuits and Destinations Report - September 2007
- Assessing the State Fuel Tax Paid on Gasoline Used for Off-Highway Vehicle (OHV) Recreation report

Other reports include:

- Ocotillo Wells SVRA 2009 and 2017 Economic Impact Studies
- OHMVR Division Winter Recreation Survey 2009-2013
- 2015 California State Parks Statewide Comprehensive Outdoor Recreation Survey--
http://www.parks.ca.gov/?page_id=27894

1.3 Budget

The anticipated cost of all tasks and project deliverables is \$.

1.4 Contract Issuing Office

- California Department of Parks and Recreation (DPR), Off-Highway Motor Vehicle Recreation Division issues this contract.

2.0 Scope of Work and Project Deliverables

2.1 Scope of Work

- The Scope of Work is to develop and administer a study, analyze data, and prepare a report that examines the demographics of OHV and OSV recreationists and the economic contributions of off-highway motor vehicle recreation throughout California.
- The Consultant shall perform services for the term of the Agreement unless DPR authorizes a formal extension of the term in the form of an Agreement Amendment.

2.2 Study Objectives

- Demographic and recreation use information
 - Develop, administer, and analyze data from an OHV enthusiast demographic survey, using data collected from registered OHV owners.
 - Develop, administer, and analyze data from an OSV enthusiast demographic survey, using data collected from an online survey.
- Economic Contributions
 - Calculate local spending patterns when registered OHV owners visit an OHV area.
 - Estimate the contributions of this spending to the California economy by applying total trip and vehicle-related expenditures.
 - Estimate regional economic significance by identifying the economic sectors directly influenced by this spending for defined regions.
 - Estimate regional economic spending by non-local OHV area visitors.
- Assess economic value (recreational benefit) of OHV recreation in California.
- Economic impact of an OHV-specified event
 - Assess regional economic impact of a particular State Park OHV recreation event.
- OHV Area Visitor Study: Specific OHV and OSV Sites
 - Estimate number of visitors to a particular OHV and OSV area for those sites that do not record visitor data.

- Forecast OHV Ownership Projections and Trends
 - Forecast the number of OHV recreationists within California by vehicle types.

2.3 Project Deliverables

Task A: Design and Implement Study

This initial phase shall involve study scoping, study design, implementation and data collection, analysis, and reporting for an OHV registered owner survey and OSV user survey. These online surveys will be used to calculate spending patterns; generate unit day values for OHV and OSV recreational opportunities; and, analyze demographic data.

Task A-1 Project Kick-Off Meeting

The Consultant will meet with OHMVR Division staff in Sacramento at OHMVR Division Headquarters to kick-off the Statewide OHV Recreation and Economic Contributions study. This task includes staff time to prepare for the meeting and for after meeting follow-up. The purpose of this meeting is to discuss study methodologies and survey components; determine information and data needs; and review project tasks and schedule.

In preparation for this meeting, the Consultant will review materials that have been provided by the OHMVR Division. The Consultant shall submit a memorandum summarizing the materials provided to-date, and any outstanding resource and data needs to the OHMVR Division prior to the kick-off meeting. In addition, the Consultant shall develop and submit a draft project schedule and process diagram to the OHMVR Division prior to the kick off meeting to be discussed at the meeting.

Consultant Deliverables:

- A-1.1 Provide memo regarding acquired data and data needs.
- A-1.2 Provide project schedule and process diagram.
- A-1.3 Attend kick-off meeting with OHMVR Division Staff.

OHMVR Division Deliverables:

- A-1.4 Organize and attend kick-off meeting with Consultant.
- A-1.5 Provide Consultant with background data and materials.
- A-1.6 Review project schedule and process diagram and provide comments.

Task A-2 Develop Online Survey of Registered OHV Owners

The consultant will collaborate with OHMVR Division staff to establish survey parameters (e.g. objectives, target audience, sample size, categories of questions, online survey format and administration, and survey schedule); design and develop the survey; refine and finalize survey tools. This survey will include components (e.g. mailer, email blast, links to email from websites) that will direct people to the online survey. The survey may include incentives for completing the survey.

Consultant Deliverables:

- A-2.1 Set up initial meeting with OHMVR Division to develop survey parameters.
- A-2.2 Design and refine survey tools (e.g. format, questions, and visual aids).
- A-2.3 Set up and attend other meetings with OHMVR Division staff as needed.
- A-2.4 Finalize survey.

OHMVR Deliverables:

- A-2.5 Attend meetings to develop and finalize survey.
- A-2.6 Review and provide input on draft survey.
- A-2.7 Approve final survey tools.

Task A-3 Conduct Survey

The consultant will collaborate with OHMVR Division staff to conduct the survey of registered OHV owners.

Consultant Deliverables:

- A-3.1 Conduct survey
- A-3.2 Tabulate data

Task A-4 Analysis – Summary Report

The Consultant shall analyze the survey data and write a summary report. The summary report will include the problem statement, methodology, limitations, results and findings.

Consultant Deliverables:

- A-4.1 Data Analysis
- A-4.2 Prepare a draft summary report that includes the problem statement, methodology, limitations, results and findings. The summary report also includes pdf electronic copies of the survey tool and raw data.
- A-4.3 Prepare a final summary report of survey and findings.

OHMVR Deliverables:

- A-4.4 Review draft summary report and provide comments
- A-4.5 Approve final summary report

Task A-5: Over Snow Recreation User Survey

The consultant will collaborate with OHMVR Division staff to establish survey parameters (e.g. objectives, target audience, sample size, categories of questions, online survey format and administration, and survey schedule); design and develop the survey; refine and finalize survey

tools. This survey will include components (e.g. mailer, email blast, links to email from websites) that will direct people to the online survey. The survey may include incentives for completing the survey.

Consultant Deliverables:

- A-5.1 Set up initial meeting with OHMVR Division to develop survey parameters.
- A-5.2 Design and refine survey tools (e.g. format, questions, and visual aids).
- A-5.3 Set up and attend other meetings with OHMVR Division staff as needed.
- A-5.4 Finalize survey.

OHMVR Deliverables:

- A-5.5 Attend meetings to develop and finalize survey.
- A-5.6 Review and provide input on draft survey.
- A-5.7 Approve final survey tools.

Task A-6 Conduct Survey

The consultant will collaborate with OHMVR Division staff to conduct the survey of OSV users.

Consultant Deliverables:

- A-6.1 Conduct survey
- A-6.2 Tabulate data

Task A-7 Analysis – Summary Report

The Consultant shall analyze the survey data and write a summary report. The summary report will include the problem statement, methodology, limitations, results and findings.

Consultant Deliverables:

- A-7.1 Data Analysis
- A-7.2 Prepare a draft summary report that includes the problem statement, methodology, limitations, results and findings. The summary report also includes pdf electronic copies of the survey tool and raw data.
- A-7.3 Prepare a final summary report of survey and findings.

OHMVR Deliverables:

- A-7.4 Review draft summary report and provide comments
- A-7.5 Approve final summary report

Task B: Economic impact of an OHV-specified event

The Consultant shall develop and implement one intercept survey and one vendor survey to analyze the regional economic impact of one OHV-specified event and prepare a summary report on the findings. One survey will be given to event participants and one survey will be given to vendors at the event.

Task B-1: Develop surveys

The consultant shall collaborate with OHMVR Division staff to develop two surveys for the OHV event.

Consultant Deliverables:

- B-1.1 Facilitate a meeting with OHMVR Division staff to establish survey parameters, sample size, question categories, and schedule.
- B-1.2 Design draft survey tools for OHMVR Division review.
- B-1.3 Prepare final survey tool.

OHMVR Division Deliverables:

- B-1.4 Attend meeting and collaborate on survey development
- B-1.5 Review and provide input on draft survey tool.
- B-1.6 Approve final survey tool.

Task B-2: Conduct Surveys

The consultant shall conduct two surveys at the OHV-specified event. OHMVR Division staff and/or volunteers may be trained to give surveys.

Consultant Deliverables:

- B-2.1 Train OHMVR Division staff or volunteers to conduct intercept survey.
- B-2.2 Conduct survey – coordinate with OHMVR Division staff to conduct survey at the event.
- B-2.3 Conduct vendor survey for the event and vendors in the community.
- B-2.4 Tabulate data.

Task B-3 Analysis and Report

The Consultant shall analyze the survey data and write a summary report. The summary report will include the problem statement, methodology, limitations, results and findings.

Consultant Deliverables:

- B-3.1 Data Analysis.

- B-3.2 Prepare a draft summary report that includes the problem statement, methodology, limitations, results and findings. The summary report also includes electronic copies of the survey tool and raw data.
- B-3.3 Prepare a final summary report of survey and findings.

OHMVR Deliverables:

- B-3.4 Review draft summary report and provide comments
- B-3.5 Approve final summary report

Task C: Estimate the number of Annual Visitors to Each OHV Area

Prepare an estimate of annual visitors to OHV and OSV areas using data provided by each OHV area SVRAs, OSV Areas, and Federal Off-Highway Areas in California.

Task C-1: Collect Attendance Data

Collect attendance data from OHV and OSV areas.

Consultant Deliverables:

- C1-1: Collaborate with OHMVR Division staff to access attendance data from SVRAs and federal OHV and OSV areas.
- C-1-2: Determine other sources and methods for collecting or estimating attendance data for OHV areas that do not take attendance.

OHMVR Division Deliverables:

- C-1.3: Collaborate with consultant to give access to attendance data from SVRAs and federal OHV areas.

Task C-2 Analysis and Report

The consultant will prepare a summary report on the findings that show attendance to OHV and OSV areas, including heat maps that show concentrations of OHV use within California.

Consultant Deliverables:

- Task C-2.1: Prepare a draft summary report.
- Task C-2.2: Finalize summary report.

OHMVR Division Deliverables:

- Task C-2.3: Review draft summary report and provide input.
- Task C-2.4: Review and approve final summary report.

Task D: Final Report

Using the findings from surveys, data collection, and summary reports, prepare a final report that includes an analysis of the following:

- Demographic information of OHV and OSV users.
- Economic Contributions:
 - Calculate local and visitor spending patterns for registered OHV owners.
 - Estimate the contributions of this spending to the California economy by applying total trip and vehicle-related expenditures.
 - Estimate regional economic significance by identifying the economic sectors directly influenced by this spending for defined regions.
 - Estimate regional economic spending by non-local OHV area visitors.
- Assess economic value (recreational benefit) of OHV recreation in California.
- Economic impact of an OHV-specified event:
 - Assess regional economic impact of a particular OHV recreation event: Hangtown (Prairie City SVRA), Tierra del Sol (Ocotillo Wells SVRA), or another OHV event.
 - OHV Area Visitor Study: Specific OHV and OSV Sites by estimating the number of visitors to a particular OHV and OSV area for those sites that do not record visitor data.
- Forecast OHV Ownership Projections, vehicle trends, and demographic trends.

Consultant Deliverables:

- Task D-1: Prepare a draft report
- Task D-2: Prepare final report

OHMVR Deliverables:

- Task D-3: Review draft report and provide input
- Task D-4: Review and approve final report