

**IOWA OFF-HIGHWAY VEHICLE OPERATIONS, OPERATORS,
EXPENDITURES AND ECONOMIC IMPACTS**

Prepared by Mark Imerman, Senior Consultant
Regional Strategic, Ltd.
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EXECUTIVE SUMMARY

This study was commissioned by the Iowa Off-Highway Vehicle Association. It is based on a survey of 1500 registered off-highway vehicle owners.

There are 43,410 registered off-highway vehicles and 159,097 titled off-highway vehicles in Iowa.

An estimated 220,829 Iowans operate off-highway vehicles. This is slightly over 7% of the Iowa population. Riders and decision makers are overwhelmingly male.

Decision makers in off-highway vehicle owning households are older and have higher incomes than the population as a whole. Decision makers are more likely to have a high school education or some college or technical school than the overall population but less likely to have less than a high school education, a bachelor's degree, or an upper level degree.

Slightly over 61% of off-highway vehicle operators utilize public land. They make an average of 2.4 trips per year out of Iowa with their vehicles. These trips average just over 2 days in length. Wisconsin is the most popular destination. Minnesota, Missouri, Colorado, and South Dakota are also popular.

Iowa off-highway vehicle owners have an estimated \$772.8 million invested in their vehicles, associated tools, supplies, storage and maintenance sheds, trailers, etc.

Asset purchases in 2018 are estimated at \$74.7 million dollars. This includes approximately \$58.5 million for new vehicles, \$2.6 million for tools and supplies, \$1.6 million for dedicated buildings, and \$10.7 million for trailers and vehicle covers.

Iowa off-highway vehicle owners spent approximately \$72.4 million in 2018 on in-state operating expenses and related personal expenses. Total asset purchase and operating/personal expenditures generated approximately 1,018 jobs in the Iowa economy paying an average of \$42,850 annually.

Off-highway vehicle owners spent about \$28.9 million outside the state of Iowa in 2018. If that had been spent in-state, it would have generated \$34.9 million in Iowa industrial output and 374 jobs paying annual incomes of \$31,180 per job.

Over 63% of survey respondents would support increasing registration fees. On average, these respondents supported a \$14.21 increase or a registration fee of \$29.12. In addition to solid support for increasing registration fees, there also appears to be potential for increasing the number and proportion of registered vehicles by building stronger incentives into penalties and registration enforcement.

Survey respondents also indicated more and better facilities, increased facility monitoring, uniform access to secondary highways, county roads, and city streets and more safety training and enforcement are important issues.

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Introduction

Off-highway vehicles are a favorite form of recreation for many Iowans. They also play a critical role in the activities of farm operators and other businesses. While many off-highway vehicle operators are familiar with their own off-highway vehicle activities and expenditures, most are not aware of the economic or recreational footprint of the entire off-highway vehicle operating population in Iowa.

This study was commissioned by the Iowa Off-Highway Vehicle Association to provide an estimate of the expenditures, activities, and economic impacts of off-highway vehicle ownership and operation in Iowa. It is based on a survey of registered off-highway vehicle owners conducted in November and December 2018.

The Off-Highway Vehicle Association indicated the importance of distinguishing between three types of off-highway vehicles:

- All-terrain Vehicles
- Off-road Motorcycles
- Side-by-sides

The survey was designed to generate input specific to these three vehicle populations and to generate an overall off-highway vehicle total.

Survey results generated an operator profile for each vehicle type as well as a general operator profile for all vehicles. These profiles provide descriptive information on vehicle utilization, operator characteristics, and policy preferences.

The profiles also provide information on owner/operator expenses related to off-highway vehicle purchase and utilization. The expense data were used to develop per vehicle expense profiles for each vehicle type. These expense profiles were analyzed using IMPLAN, an economic input-output model, to estimate the total impact that off-highway vehicle operator expenditures generate throughout the Iowa economy.

The Survey

On November 8, 2018, 1500 surveys were sent to owners of registered off-highway vehicles in Iowa. Survey recipients were selected as follows:

- The initial population was 43,410 registered off-highway vehicles in Iowa
- 2,340 vehicles with corporate registrations were removed from the list, leaving 41,070 machines registered to individuals
- Population shares for individually registered machines were generated and multiplied by 1,500 (the commissioned survey size) giving survey numbers for each vehicle type.

Table 1 illustrates the process of determining survey numbers for each vehicle type.

Table 1: Survey Distribution Across Vehicle Type

	Tot. Reg.	Corp.	Ind.	Shares	Surveys
All-terrain Vehicles	21,603	937	20,666	0.503	755
Off-road Motorcycles	5,148	47	5,101	0.124	186
Side-by-Sides	16,659	1,356	15,303	0.373	559
TOTAL	43,410	2,340	41,070	1.000	1,500

With survey numbers determined, the population was randomized, and survey recipients selected. Duplicates (multiple machines registered to the same owner) were removed, generating a survey sample reflective of the population of individually-registered machines in Iowa.

In November 2018:

- November 5 – Advance postcards sent to recipients
- November 8 – Surveys sent to recipients
- November 13 – Follow-up postcards sent to recipients

Surveys were mailed with a cover letter from Justin Rath, President of the Iowa Off-Highway Vehicle Association. The survey instrument was a self-mailer that included return postage and instructions for folding, sealing, and returning.

Survey respondents were offered the opportunity to enter a raffle for one of six \$50 gift certificates from the Iowa Motorcycle Dealers Association. 234 respondents (78%) took advantage of this opportunity.

Surveys were returned throughout November and December 2018. Of the 1,500 surveys sent out, a handful were returned by the post office with recently expired forwarding addresses. These were resent, and all apparently were delivered (none came back). Only 13 surveys came back as undeliverable, giving us a net delivered number of 1487. Of these, we received 302 responses for an overall response rate of just over 20%. ATVs responded at over 21%. Motorcycles at just over 20%. Side-by-sides at just under 19%. Table 2 summarizes the survey response rate.

Table 2: Survey Response Rates

TYPE	Sent	Undel.	Net Out	Returned	Resp. Rate
All-terrain Vehicles	755	3	752	161	0.2141
Off-road Motorcycles	186	3	183	37	0.2022
Side-by-Sides	559	7	552	104	0.1884
TOTAL	1,500	13	1,487	302	0.2031

The Off-highway Vehicle Population

Table 3 provides the specifics of the off-highway vehicle population in Iowa. Information on registered off-highway vehicles was obtained from the Iowa Department of Natural Resources (DNR) complete list of registered vehicles and was current on August 31, 2018. Information on titled off-highway vehicles was obtained through email correspondence with the DNR on January 11, 2019. Other than gross numbers and county of title for registered vehicles, this investigation has no detailed information on titled vehicles. Expenditure and investment estimates for titled vehicles in the sections below were generated from the survey responses of registered off-highway vehicle owners.

There are significantly more titled vehicles of all three types than there are registered vehicles. Iowa requires vehicles to be registered when they are purchased or when titles change hands. Iowa does not require registration to be maintained unless vehicles utilize public lands or roadways. In addition, the penalty for not registering vehicles utilizing public lands may not be sufficiently high to incentivize operators to register (see the section on “Policy Issues” below).

Table 3: Registered and Titled Off-highway Vehicles in Iowa

	Registered	Titled	Difference	Titled/Reg.
All-terrain Vehicles	21,603	95,644	74,041	4.43
Off-road Motorcycles	5,148	20,761	15,613	4.03
Side-by-Sides	16,659	42,692	26,033	2.56
TOTAL	43,410	159,097	115,687	3.66

Source: Iowa Department of Natural Resources

Figure 1 and Figure 2 compare all-terrain vehicles identified from survey responses with the entire list of registered all-terrain vehicles. Figure 1 compares respondents to the registration list based on model year or vehicle age. It shows a reasonably close percentage-level match between respondents and the registration list.

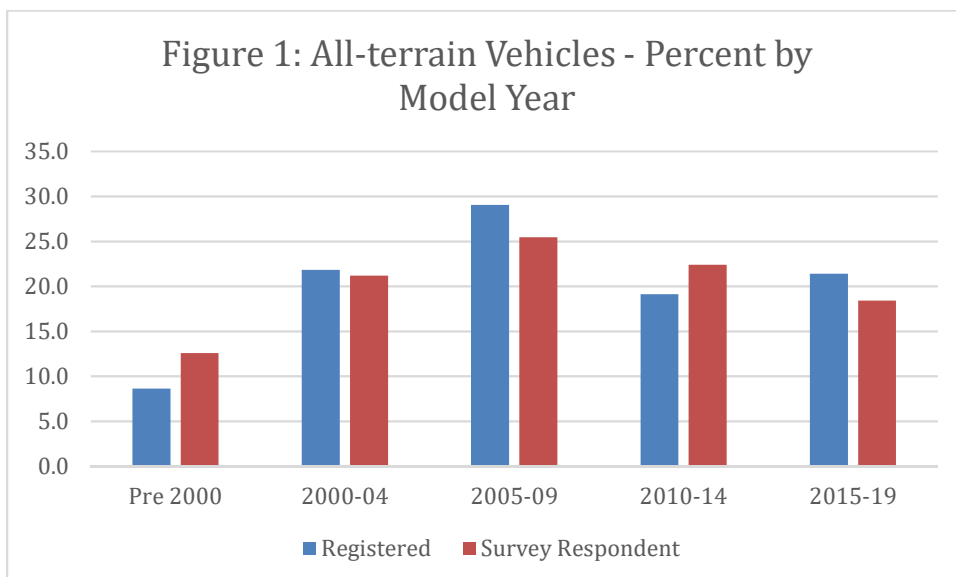


Figure 2 compares survey respondent's all-terrain vehicles with the overall registration list based on vehicle engine displacement. This match is not as close as the match of vehicle model years in Figure 1. This disparity could be at least partially caused by the lumpiness of engine displacement distributions. While years come at regular and continuous intervals, the distribution of displacements is grouped around popular engine sizes. The small size of our survey sample relative to the sizes of some of the popular displacement groupings may have made this comparison problematic.

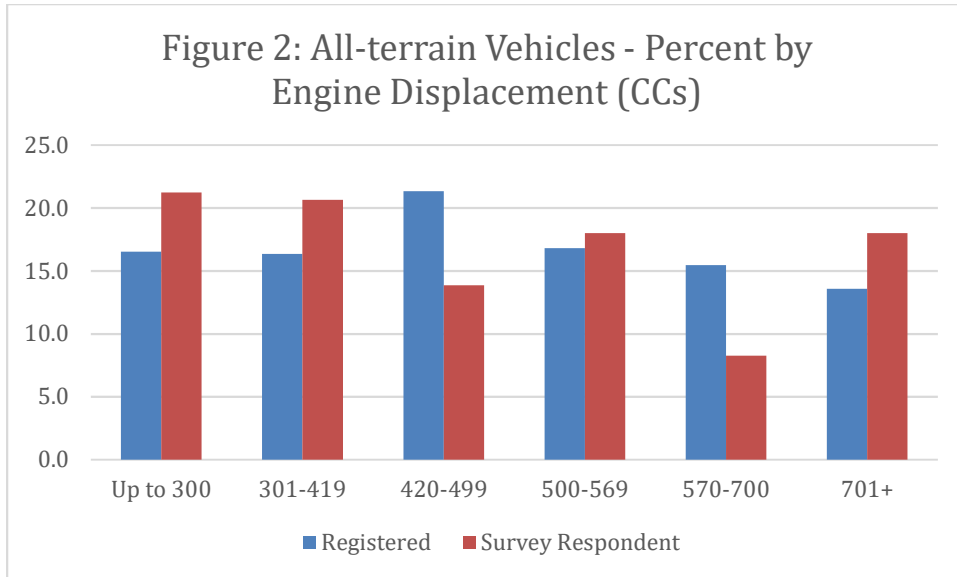


Figure 3 provides a geographic distribution of registered all-terrain vehicles in Iowa. Numbers range from 29 vehicles in Adams County to 1,767 vehicles in Polk County. Bear in mind that there are 3.43 titled but unregistered all-terrain vehicles in Iowa for every registered vehicle. This investigation assumes they are distributed similarly to registered vehicles, but this is not certain.

Figure 3: Registered All-terrain Vehicles by County

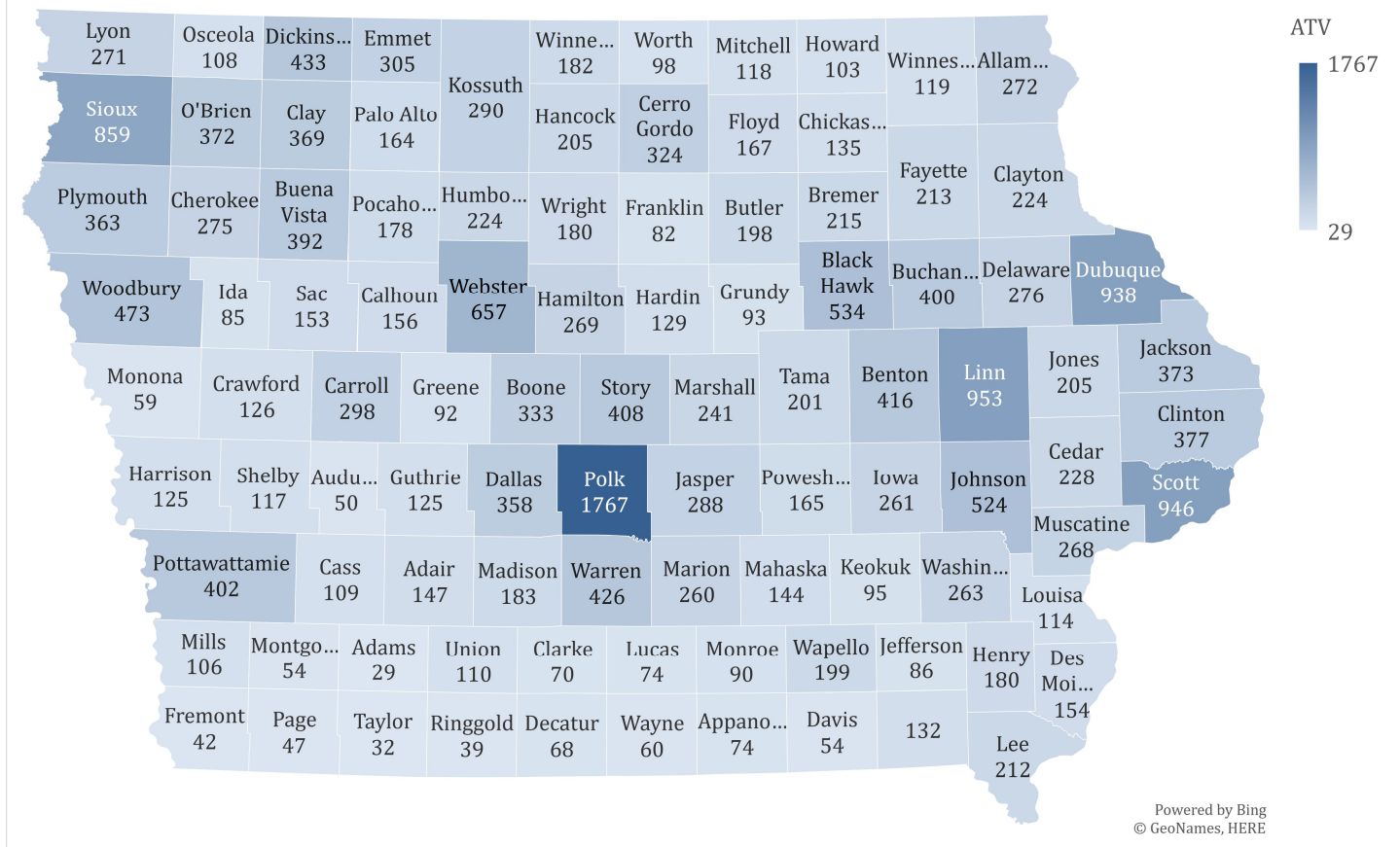


Figure 4 provides a geographic distribution of registered off-road motorcycles in Iowa. Numbers range from 2 vehicles each in Adams and Taylor Counties to 771 vehicles in Polk County. Remember that there are 3.03 titled but unregistered off-road motorcycles in Iowa for every registered vehicle. This investigation assumes they are distributed similarly to registered vehicles.

Figure 5 and Figure 6 compare off-road motorcycles identified from survey responses with the entire list of registered off-road motorcycles. Table 5 compares respondents to the registration list based on model year or vehicle age. It shows a reasonably close percentage-level match between respondents and the registration list for years prior to 2015. The percentage of survey respondents reporting vehicles with model years from 2015-2019 was significantly lower than the percentage of vehicles in the full registration list.

Figure 4: Registered Off-road Motorcycles by County

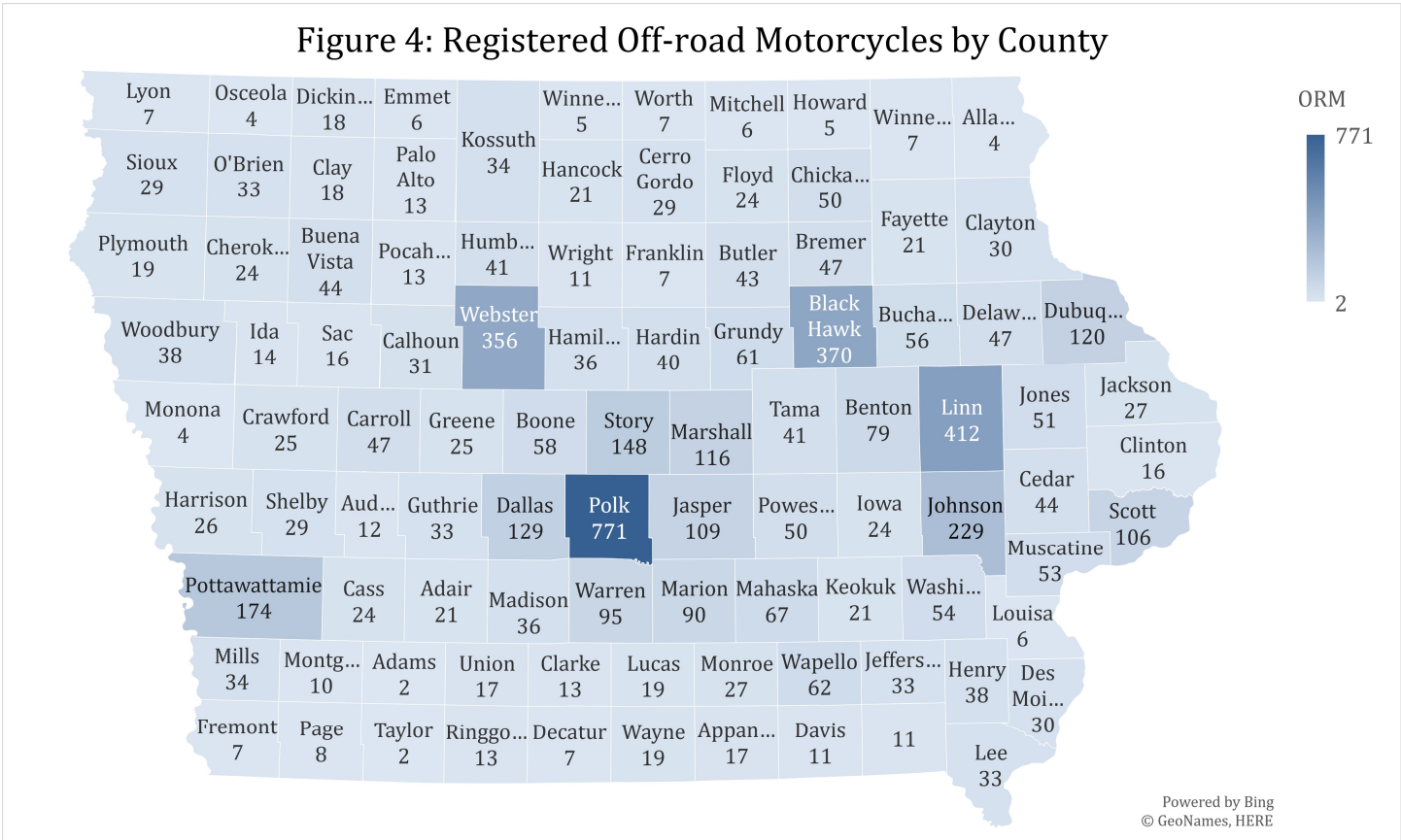
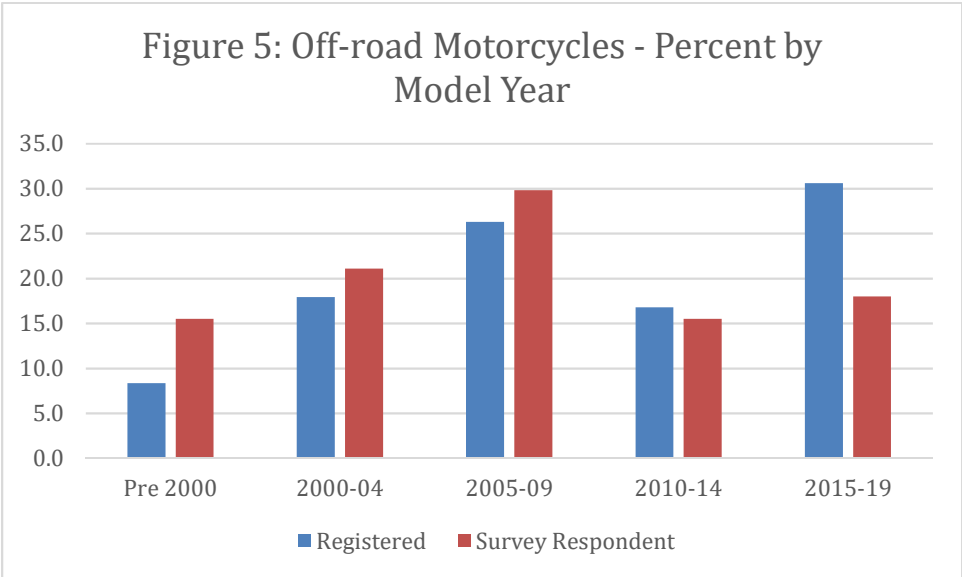


Figure 6 compares survey respondent’s off-road motorcycles with the overall registration list based on vehicle engine displacement. This match is relatively close with the exceptions of the low midrange displacements and the upper level displacements. In the 126-249cc displacement range, registrations were about 5% higher than survey responses. In the over-450cc range, registrations were about 4% lower than survey responses. This disparity could be at least partially caused by the lumpiness of engine displacement distributions.

Figure 5: Off-road Motorcycles - Percent by Model Year



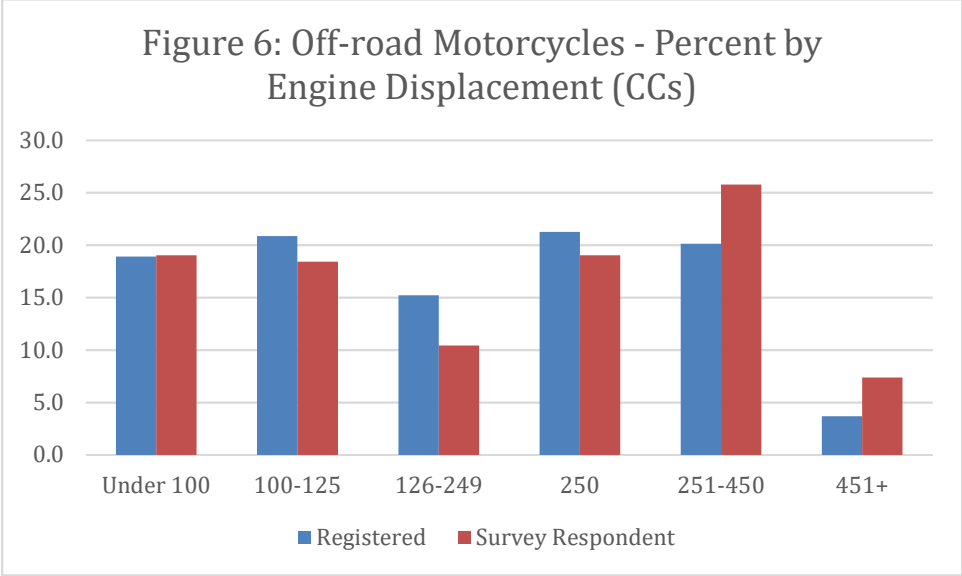


Figure 7 provides a geographic distribution of registered side-by-sides in Iowa. Numbers range from 25 vehicles in Adams County to 829 vehicles in Polk County. There are 1.56 titled but unregistered side-by-sides in Iowa for every registered vehicle. This investigation assumes they are distributed similarly to registered vehicles.

Figure 8 and Figure 9 compare side-by-sides identified from survey responses with the entire list of registered side-by-sides. Table 8 compares respondents to the registration list based on model year or vehicle age. It shows a reasonably close percentage-level match between respondents and the registration list.

Figure 7: Registered Side-by-sides by County

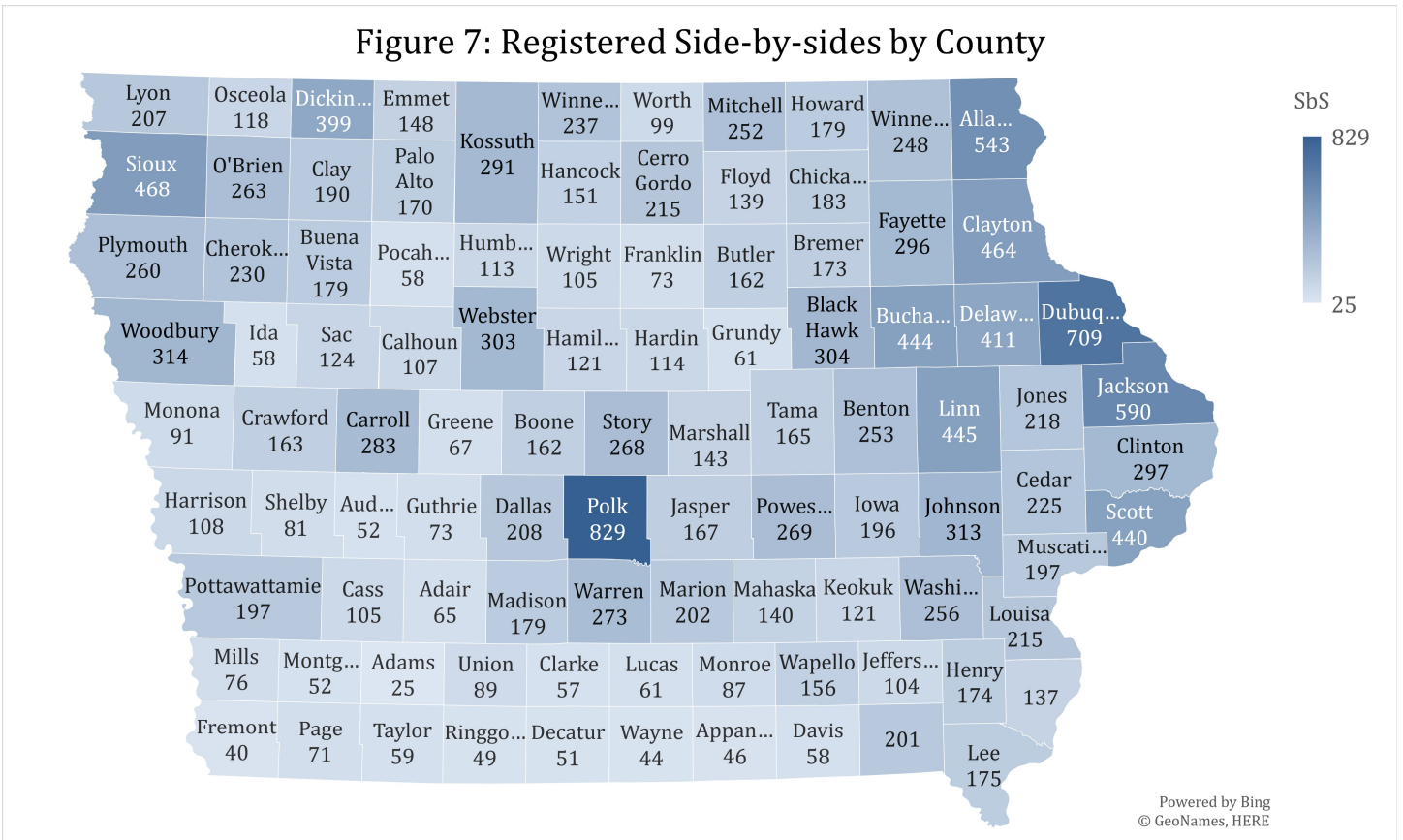
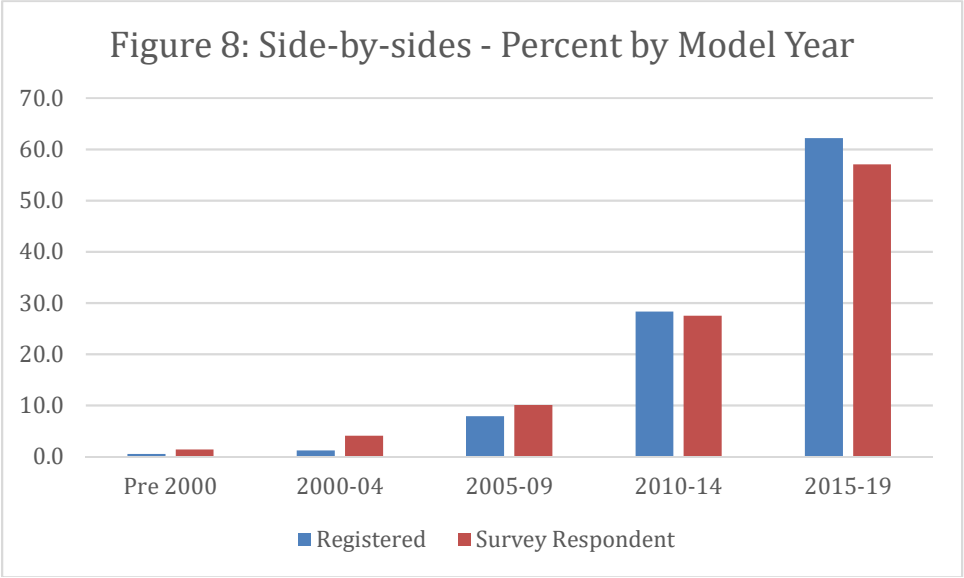
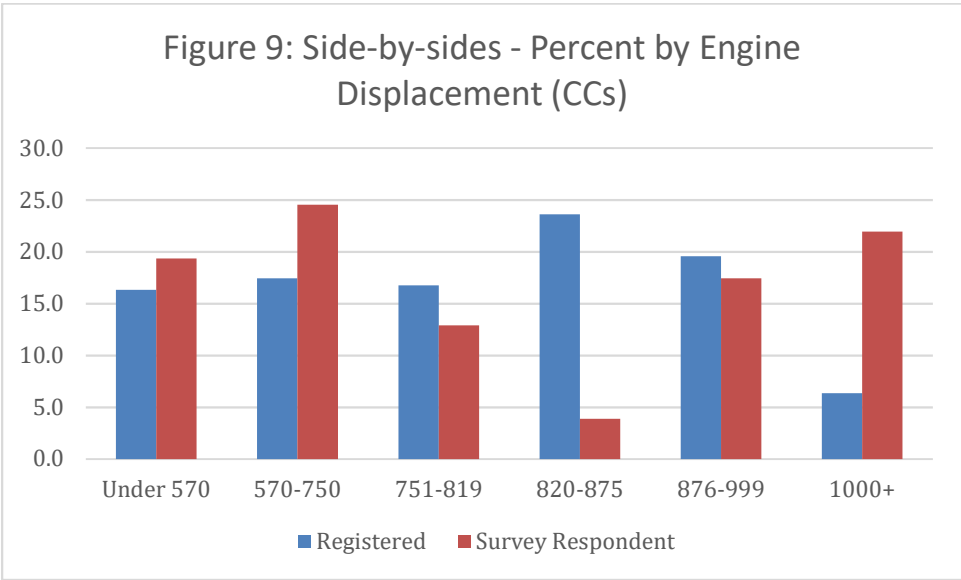


Figure 9 compares survey respondent's side-by-sides with the overall registration list based on vehicle engine displacement. This match is not close. This disparity could be at least partially caused by the lumpiness of engine displacement distributions. As with all-terrain vehicles and off-road motorcycles, the distribution of displacements is in groups around significant popular engine sizes.

Figure 8: Side-by-sides - Percent by Model Year





Characteristics of Primary Decision Makers and Riders

291 survey respondents provided information on personal characteristics and machine utilization. Of these:

- 196 reported owning 342 all-terrain vehicles
- 59 reported owning 161 off-road motorcycles
- 136 reported owning 154 side-by-sides

59.2% of respondents reported living at a rural address. These rural addresses ranged in area from 1 acre to 4,000 acres, with an average size of 138.6 acres. 45 respondents reported maintaining land specifically for their personal pursuit of off-highway vehicle activities. These plots averaged 103.5 acres in size with an average per-acre value of \$3,685.

Table 4 illustrates the estimated total rider population by machine type for Iowa. It repeats registered and titled machine numbers from Table 1 and multiplies those times the riders per machine estimates generated from the survey. The titled machine rider estimates in Table 4 assume that all titled machines are active, so this must be considered an upper bound on active riders in the state.

Table 4: Machines, Riders per Machine, and Total Estimated Riders

	Machines		Per Mach.	Riders	
	Registered	Titled		Reg. Mach.	Titled Mach.
All-terrain Vehicles	21,603	95,644	1.91	41,158	182,221
Off-road Motorcycles	5,148	20,761	1.15	5,907	23,822
Side-by-Sides	16,659	42,692	2.46	40,930	104,892
TOTAL	43,410	159,097	1.39	60,254	220,829

Table 5 shows the population of off-highway vehicle primary decision makers and riders is overwhelmingly male. For every vehicle type, primary decision makers are over 95% male and riders are over 60% male.

Table 5: Primary Decision Makers and Riders by Sex

	Decision Makers		Riders	
	% Male	% Female	% Male	% Female
All-terrain Vehicles	95.5	4.5	66.8	33.2
Off-road Motorcycles	100.0	0.0	69.2	30.8
Side-by-Sides	95.3	4.7	62.4	37.6
TOTAL	95.4	4.6	65.2	34.8

Table 6 shows the age distribution of primary decision makers and riders across vehicle types. The table also includes 2010 Census population statistics for persons aged 12 and above. The only group in the table that closely tracks Iowa population numbers is riders between the ages of 40 and 59. Decision makers are heavily represented in the upper age groups (40 and above). Riders are over represented in the 12-19 age group, and in the 20-39 age group for off-road motorcycles. Riders are significantly underrepresented in the 60+ age group. Riders tend to be concentrated in the younger age cohorts. Decision makers tend to be concentrated in the older age cohorts.

Table 6: Primary Decision Makers, Riders, and Iowa Population by Age Group

Primary Decision Makers	% 12-19	% 20-39	%40-59	% 60+	TOTAL
All-terrain Vehicles	0.0	14.4	54.2	31.4	100
Off-road Motorcycles	0.0	34.2	50.0	15.8	100
Side-by-Sides	0.0	11.8	50.0	38.2	100
TOTAL	0.0	17.6	50.9	31.5	100
Riders	% 12-19	% 20-39	%40-59	% 60+	TOTAL
All-terrain Vehicles	24.5	28.5	31.5	15.5	100
Off-road Motorcycles	28.2	33.8	31.3	6.7	100
Side-by-Sides	23.1	24.3	32.2	20.4	100
TOTAL	23.5	27.1	31.6	17.8	100
Iowa Population 12 and over	% 12-19	% 20-39	%40-59	% 60+	TOTAL
	13.1	30.2	32.4	24.2	100

Table 7 distributes survey estimates of primary decision makers by educational attainment across all vehicle types. It also provides the distribution of educational attainment by all Iowans over the age of 25 for comparison. In general, there are fewer off-highway vehicle decision makers without a high school diploma and with four-year or advanced college degrees than in the overall Iowa population. There are substantially more off-highway decision makers with high school diplomas or with some college or technical school than in the overall Iowa population.

Table 7: Percent of Primary Decision Makers by Educational Attainment

	All-terrain Vehicles	Off-road Motorcycles	Side-by- Sides	All Vehicles	Iowans Over 25 Years
Less Than High School	0.52	0.00	0.74	0.35	7.91
HS Diploma or GED	41.75	44.83	35.56	41.26	30.53
Some College/Tech School	38.66	36.21	38.52	37.76	32.63
Four-year College Degree	10.82	13.79	15.56	13.64	19.42
Advanced College Degree	8.25	5.17	9.63	6.99	9.51
Sum	100.00	100.00	100.00	100.00	100.00

Table 8 shows the distribution of primary decision makers with regards to their reported household incomes. The table also includes the overall Iowa household income distribution for 2017 obtained from the U.S. Census. Given that owning and operating an off-highway vehicle is a relatively expensive undertaking, it is no surprise that off-highway vehicle households are underrepresented in all household income categories below \$50,000 per year and overrepresented in all household income categories above \$50,000 per year.

Table 8: Percent of Primary Decision Makers by Household Income

Percent by Category	All-terrain Vehicles	Off-road Motorcycles	Side-by- Sides	Total for all Vehicles	IA Pop Distribution
Under \$25,000	2.76	1.96	5.38	3.33	20.29
\$25-34,999	2.21	3.92	2.31	2.59	9.87
\$35-49,999	6.63	13.73	6.92	8.15	14.04
\$50-74,999	26.52	31.37	25.38	25.56	19.56
\$75-100,000	27.07	17.65	25.38	26.67	13.98
\$100,000+	34.81	31.37	34.62	33.70	22.26
Sum	100.00	100.00	100.00	100.00	100.00

Finally, on average, respondents indicated their families had owned and operated off-highway vehicles for 16.7 years.

Utilization

Iowa off-highway vehicles owners utilize their vehicles close to home, but they also transport their vehicles to other locations, both in-state and out-of-state. In-state transport is supported by recreational areas that serve off-highway vehicles. Among respondents to this survey:

- 61.1% ride on public lands
- 53.2% use multi-use trails
- 41.0% utilize off-highway vehicle parks

Table 9 shows average miles per vehicle per year indicated in the survey response. Table 9 also shows the average number of days per year respondents' vehicles were engaged both in-state and out-of-state.

Table 9: Annual Operating Averages per Machine

	Miles/Year	Operating Days	
		In-state	Out-state
All-terrain Vehicles	333	43	2
Off-road Motorcycles	259	16	2
Side-by-Sides	617	105	7

While Table 9 shows annual averages, Table 10 shows the number of trips requiring transport in 2018, the days spent riding outside of Iowa, and the amount each respondent household spent on out-of-state registrations and user fees in 2018. The average respondent transported vehicles to riding areas slightly over 9 times in 2018. Out-of-state trips averaged a little over 2 days.

On average, each survey respondent paid the equivalent of slightly over 2 Iowa registration fees on out-of-state registrations and user fees during 2018. Survey responses also indicated respondents averaged about 2.25 vehicles apiece. As a result, Iowa's registered off-highway vehicle operators spend nearly as much on registrations and user fees outside of the state as they do for vehicle registrations in Iowa.

On average, recreational areas need to offer 42.7 miles of trails to justify transporting machines.

Table 10: 2018 Travel Days and Fees per Household

Trips requiring transport (number of trips)	
In-state	6.73
Out-of-state	2.43
Days Out of State	5.09
Out-of-state Reg. & Trail Fees (\$)	32.33

110 respondents identified 20 states visited in 2018. 128 respondents identified 13 states they consider to be their primary or preferred out-of-state destinations. These states and the number of respondents that identified them are listed in Table 11. First among them is Wisconsin, with 53 respondents visiting in 2018 and 54 respondents identifying as a primary destination. Other significant destinations on the list are Colorado, Minnesota, Missouri, and South Dakota.

Table 11: Respondents Visiting Other States

	In 2018	Primary Destination
Alabama	1	
Arizona	7	6
Arkansas	2	3
Colorado	14	10
Idaho	1	
Illinois	7	4
Indiana	1	
Kentucky	1	1
Michigan	2	
Minnesota	23	11
Missouri	17	9
Montana	2	
Nebraska	7	6
North Dakota	1	
Oklahoma	1	
South Dakota	26	19
Tennessee	1	
Utah	3	1
West Virginia		1
Wisconsin	53	54
Wyoming	6	3
TOTALS	176	128

Investment, Assets, and Expenses

The off-highway vehicle survey provided substantial information on respondent assets and expenditures. This information was utilized to generate per-machine averages. These averages, in turn, were applied to the population of individually-registered off-highway vehicles to generate total estimated investments and expenses for registered vehicles. Table 12 shows information from the vehicle registration list as of August 31, 2018. Individually registered machines (after corporate registrations are removed) are presented in the right-hand (shaded) column. These are the registered machine numbers multiplied by expenditures per machine to estimate expenditures for registered vehicles (the lower expenditure and impact estimates presented below).

Per-machine estimates were also applied to a portion of titled but unregistered machines in the state to get an upper estimate of Iowa off-highway vehicle investments and expenses (see Table 13).

Per-machine expense estimates of annual expenditures outside the state of Iowa were also generated.

Table 12: Individually Registered Machines

	Registered Machines			
	Total	Corporate	Corp/Tot	Individual
All-terrain Vehicles	21,603	937	0.0434	20,666
Off-road Motorcycles	5,148	47	0.0091	5,101
Side-by-Sides	16,659	1,356	0.0814	15,303
TOTAL	43,410	2,340	0.0539	41,070

To figure total expenditures on assets purchased and expensed associated with operating off-highway vehicles, per-vehicle estimates were multiplied by total individually registered off-highway vehicles to generate a low estimate.

To get an upper estimate of expenditures on assets and operations to reflect unregistered titled vehicles, we

- Took the total number of titled off-highway vehicles in Iowa
- Subtracted an estimate of corporate titles based on the share of corporate registrations in Table 12
- Subtracted individually registered machines from the remaining estimate of individually titled machines
- Multiplied this remainder by 0.75 to reflect the assumption that a higher proportion of titled but unregistered vehicles are inactive relative to registered vehicles

Table 13 shows how these numbers were generated. The estimate of corporate titles in Table 13 was derived from the proportion of corporate registrations calculated in Table 12. The number of titled machines utilized in developing the upper estimate of expenditures and economic impacts is included in the right-hand (shaded) column in Table 13.

Table 13: Estimating Individually Titled Active Unregistered Titled Machines

	Titled Machines			Unregistered Titled	
	Titled	Corp. Est.	Ind. Est.	Ind.	75%
All-terrain Vehicles	95,644	4,148	91,496	70,830	53,122
Off-road Motorcycles	20,761	190	20,571	15,470	11,603
Side-by-Sides	42,692	3,475	39,217	23,914	17,935
TOTAL	159,097	7,813	151,284	110,214	82,661

Additionally, all per-vehicle expenditure estimates were reduced by 25% when applying them to the remaining unregistered titled vehicles. This is based on the assumptions that:

- Unregistered vehicles should be older on average, as new machines must be registered on title transfer (we assumed that no new vehicles were purchased in the unregistered titled vehicle group)
- Unregistered vehicles should be less likely to utilize roadways or public land for recreation

Estimated numbers of individually registered vehicles and individually active titled but unregistered vehicles were applied to estimates of expenditures per machine to generate total estimates for 2018 Iowa off-highway vehicle:

- Asset values and purchases (including new machines)
- In-state vehicle and personal expenses for registered machines
- In-state vehicle and personal expenses for registered and titled machines
- Out-of-state vehicle and personal expenses for registered machines
- Out-of-state vehicle and personal expenses for registered and titled machines

These total expenditure estimates were then analyzed with IMPLAN PRO, an economic input-output model that estimates additional transaction activities related to spending in the economy.

In the process of estimating economic impacts from in-state and out-of-state transactions for three vehicle types (and totals) across two population estimates, 16 separate input-output models were run. The tables below attempt to consolidate the per-machine estimates used to drive this process and the economic impact estimates derived from those 16 models in an orderly and understandable manner.

Estimates of Asset Values and Asset Purchases

Table 14 shows estimate values of existing assets per vehicle. These are representations of pre-existing assets. They are not included in the economic impact estimates calculated in the sections below. They are, however, applied to vehicle numbers derived above to provide estimates of the total invested value of the Iowa off-highway vehicle industry.

The largest category of asset value is the vehicles themselves, followed by the construction or purchase of buildings particularly for machines, maintenance, and related activities. The “Other” category is primarily made up of operational accessories such as snowplows, tillage equipment, and vehicle cabs.

Table 14: Estimated Dollar Value of Assets per Vehicle

	Vehicles	Tools & Supplies	Special Shed	Trailers & Covers	Other
All-terrain Vehicles	2,959.00	311.81	1,654.95	590.69	16.32
Off-road Motorcycles	2,505.00	641.47	1,185.08	525.71	
Side-by-Sides	10,361.00	178.89	1,321.56	935.48	103.79

Table 15 applies the asset per machine estimates in Table 14 to the estimates of individually registered and active titled machines in Tables 12 and 13. The lower estimate total, including only registered machines, is over \$336.5 million. The upper total estimate, adding active titled but unregistered machines, is \$772.8 million – over double the lower estimate.

Table 15 asset value estimates are existing assets. They contributed to economic impacts somewhere sometime in the past, but they did not generate an economic impact in 2018. Tables 16 through 18 provide estimates of 2018 expenditures on assets associated with off-highway vehicle use (new machines, new buildings, new tools, etc.) These estimates will be utilized in generating economic impact estimates in the sections below.

Table 15: Total Dollar Value of Assets

LOWER ESTIMATE - For Registered Vehicles	Vehicles	Tools & Supplies	Special Shed	Trailers & Covers	Other	Total
All-terrain Vehicles	61,150,694	6,443,829	34,201,253	12,207,287	337,329	114,340,392
Off-road Motorcycles	12,778,005	3,272,119	6,045,091	2,681,670	0	24,776,885
Side-by-Sides	158,554,383	2,737,604	20,223,760	14,315,643	1,588,336	197,419,726
TOTAL	232,483,082	12,453,552	60,470,103	29,204,600	1,925,665	336,537,003

UPPER EST. – Registered and Titled Vehicles	Vehicles	Tools & Supplies	Special Shed	Trailers & Covers	Other	Total
All-terrain Vehicles	179,042,095	18,866,779	100,137,276	35,741,513	987,660	334,775,322
Off-road Motorcycles	34,576,846	8,854,242	16,357,811	7,256,508	0	67,045,407
Side-by-Sides	297,926,555	5,144,008	38,000,810	26,899,352	2,984,513	370,955,239
TOTAL	511,545,496	32,865,029	154,495,897	69,897,372	3,972,172	772,775,967

Table 16 shows per vehicle expenditure estimates. It does not include the purchase of new vehicles, as those estimates are directly applied to new vehicle registration information in Table 17. For all types of vehicles, 2018 purchases of trailers and covers for transport and storage were the largest category of asset expenditures per vehicle.

Table 16: Per Vehicle Dollar Value of Assets Purchased in 2018

	Tools & Supplies	Special Shed	Trailers & Covers	Other
All-terrain Vehicles	6.64	15.22	36.81	4.94
Off-road Motorcycles	152.55	10.34	193.49	
Side-by-Sides	2.72	17.01	202.57	33.29

Survey responses generated average prices paid for new vehicles purchased in 2018. The DNR registration list provides a count of new vehicles purchases statewide. In Table 17, the estimated purchase value and the purchase numbers are utilized to estimate the value of new vehicles purchased in 2018. Total value estimates in the right-hand column of Table 17 are incorporated into Table 18, estimated total statewide asset purchases in 2018. There is no difference in new vehicle values between the lower and upper estimate sections in Table 18. New vehicle purchases require a title transfer which requires a registration. All new vehicle purchases were assumed to originate as registered vehicles.

Table 17: Value of New Off-Highway Vehicles Purchased

	Survey Price Estimate	New Veh. in 2018	Value of New Veh.
All-terrain Vehicles	7,415	996	7,385,340
Off-road Motorcycles	6,443	534	3,440,562
Side-by-Sides	16,801	2,840	47,714,840
TOTAL		4,370	58,540,742

Total value of assets purchased in 2018 was nearly \$65.6 million in the lower estimate. This is about \$7 million more than new vehicle purchases. For the upper estimate, total asset purchases were nearly \$74.7 million, about \$16 million more than new vehicle purchases.

Table 18: Total Dollar Value of Assets Purchased in 2018

LOWER ESTIMATE - For Registered Vehicles	New Vehicles	Tools & Supplies	Special Shed	Trailers & Covers	Other	Total
All-terrain Vehicles	7,385,340	137,196	314,605	760,699	102,102	8,699,941
Off-road Motorcycles	3,440,562	778,169	52,752	986,989	0	5,258,472
Side-by-Sides	47,714,840	41,681	260,320	3,099,931	509,467	51,626,238
TOTAL	58,540,742	957,045	627,677	4,847,619	611,569	65,584,651
UPPER EST. - For Registered and Titled Vehicles	New Vehicles	Tools & Supplies	Special Shed	Trailers & Covers	Other	Total
All-terrain Vehicles	7,385,340	401,692	921,125	2,227,237	298,943	11,234,338
Off-road Motorcycles	3,440,562	2,105,698	142,745	2,670,760	0	8,359,765
Side-by-Sides	47,714,840	78,319	489,146	5,824,826	957,297	55,064,428
TOTAL	58,540,742	2,585,709	1,553,016	10,722,822	1,256,240	74,658,530

In-state per Machine and Total Operating Expenditures

In-state per machine operating expenses are divided into two parts:

- Expenses directly associated with owning or operating the off-highway vehicle
- Personal expensed incurred for machine transport or the safety and comfort of the operator

Table 19 shows actual expenses of maintaining and operating vehicles plus the per machine costs of memberships in off-highway vehicle organizations. Table 20 shows personal expenditures for expenses related to off-highway vehicles.

These personal expenditures include the costs of

- Transporting vehicles
- Special clothing, helmets, and boots, etc.
- Food, lodging, and entertainment when travelling with off-highway vehicles

Table 19: Dollar Values of In-state Operating Expenditures per Vehicle in 2018

	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	44.41	81.01	114.14	86.35	4.16	330.07
Off-road Motorcycles	25.37	38.72	134.22	88.52	8.82	295.65
Side-by-Sides	50.82	180.00	235.67	180.18	7.19	653.87

Overall in-state per machine expenditures total:

- \$543.03 per all-terrain vehicle
- \$626.53 per off-road motorcycle
- \$1,074.11 per side-by-side

Table 20: Dollar Values of In-state Personal Expenditures per Vehicle in 2018

	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Maps & Guides	Totals
All-terrain Vehicles	54.61	89.22	42.73	18.53	7.46	0.42	212.96
Off-road Motorcycles	83.52	127.26	75.86	28.66	15.57	0.00	330.88
Side-by-Sides	83.55	134.86	116.50	54.14	31.21	0.00	420.24

These per vehicle expenditure levels are applied to the number of individually registered vehicles and our estimate of active unregistered titled vehicles to estimate total in-state operating and personal expenditures associated with 2018 off-highway vehicle operation. Table 21 shows total values for in-state operating expenditures in 2018. The lower estimate is calculated for only individually registered vehicles. The upper estimate includes our estimated number of active unregistered titled vehicles from Table 13. Recall that we assume unregistered vehicle expenditures at only 75% of the registered vehicle estimate generated from the survey.

Table 21: Dollar Value of In-state Operating Expenditures in 2018

LOWER ESTIMATE - For Registered Vehicles	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	917,769	1,674,138	2,358,739	1,784,581	85,967	6,821,194
Off-road Motorcycles	129,408	197,519	684,652	451,537	45,007	1,508,123
Side-by-Sides	777,765	2,754,559	3,606,448	2,757,335	110,023	10,006,130
TOTAL	1,824,943	4,626,215	6,649,838	4,993,453	240,997	18,335,447

UPPER EST. - For Registered and Titled Vehicles	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	2,687,121	4,901,680	6,906,114	5,225,044	251,703	19,971,661
Off-road Motorcycles	350,175	534,480	1,852,644	1,221,844	121,788	4,080,930
Side-by-Sides	1,461,435	5,175,865	6,776,580	5,181,083	206,735	18,801,699
TOTAL	4,498,731	10,612,025	15,535,337	11,627,971	580,225	42,854,289

Table 22 is similar to Table 21, except that Table 22 details in-state personal expenditures associated with Iowa off-highway vehicle activities.

Table 22: Dollar Value of In-state Personal Expenditures in 2018

LOWER ESTIMATE - For Registered Vehicles	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Maps & Guides	Totals
All-terrain Vehicles	1,128,532	1,843,759	883,053	382,895	154,074	8,741	4,401,054
Off-road Motorcycles	426,035	649,174	386,972	146,179	79,446	0	1,687,806
Side-by-Sides	1,278,499	2,063,707	1,782,740	828,443	477,561	0	6,430,951
TOTAL	2,833,067	4,556,640	3,052,765	1,357,517	711,081	8,741	12,519,811

UPPER EST. - For Registered and Titled Vehicles	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Maps & Guides	Totals
All-terrain Vehicles	3,304,211	5,398,312	2,585,476	1,121,071	451,110	25,592	12,885,773
Off-road Motorcycles	1,152,836	1,756,642	1,047,132	395,557	214,979	0	4,567,147
Side-by-Sides	2,402,323	3,877,743	3,349,801	1,556,660	897,346	0	12,083,873
TOTAL	6,859,371	11,032,697	6,982,410	3,073,288	1,563,435	25,592	29,536,793

Table 23 sums the totals columns (the right-hand columns) of Tables 21 and 22. If we sum the overall totals figures from asset purchases (Table 18) and personal and operating expenditures (Table 23), we get total 2018 in-state expenditure estimates of:

- \$96.44 million for our low estimate
- \$147.05 million for our upper estimate

These are the overall values that will feed our in-state economic impact analysis in the sections below.

Table 23: Total In-state Expenditures in 2018

	Low Est.	Upper Est.	Midpoint
All-terrain Vehicles	11,222,249	32,857,434	22,039,841
Off-road Motorcycles	3,195,930	8,648,076	5,922,003
Side-by-Sides	16,437,080	30,885,572	23,661,326
TOTAL	30,855,259	72,391,082	51,623,170

Out-of-state per Machine and Total Operating Expenditures

This section mirrors the section above on In-state per machine and total operating expenditures. Tables 24 through 28 were developed through the same process as Tables 19-23. Out-of-state per machine expenditures derived from the survey are substantially different than in-state expenditures, so totals are substantially different from in-state estimates.

The values in this section will not be utilized in developing the Iowa economic impact analysis, because these expenditures were not made in Iowa. These numbers will be utilized later to develop an illustration showing what these expenditures would mean if they were made in Iowa. It should be recognized that, even if Iowa riders did not go out of state to ride, they would not make similar expenditures inside Iowa. A better way of looking at such an analysis is to imagine such expenditures being made inside Iowa by riders attracted from other states.

Table 24: Out-of-state Operating Expenditures per Vehicle in 2018

	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	8.46	2.00	10.97	7.84	0.49	29.77
Off-road Motorcycles	5.99	1.02	27.39	4.68	1.48	40.56
Side-by-Sides	22.41	18.82	36.55	22.71	1.65	102.14

Table 25: Dollar Values of Out-of-state Personal Expenditures per Vehicle in 2018

	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Totals
All-terrain Vehicles	13.42	44.27	29.65	53.59	15.84	156.77
Off-road Motorcycles	54.38	57.01	17.53	58.30	1.65	188.87
Side-by-Sides	12.84	123.62	81.06	150.99	31.70	400.21

Per vehicle estimates are applied to individually registered vehicles and our estimate of active unregistered titled vehicles to estimate total out-of-state operating and personal expenditures in 2018. Table 26 shows total values for out-of-state operating expenditures in 2018. The lower estimate is calculated for only individually registered vehicles. The upper estimate includes our estimated number of active unregistered titled vehicles from Table 13. Unregistered vehicle expenditures are assumed to be only 75% of the registered vehicle estimates.

Table 26: Dollar Value of Out-of-state Operating Expenditures in 2018

LOWER ESTIMATE - For Registered Vehicles	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	174,892	41,364	226,805	161,967	10,190	615,218
Off-road Motorcycles	30,533	5,217	139,732	23,859	7,537	206,877
Side-by-Sides	342,912	287,963	559,338	347,542	25,226	1,562,981
TOTAL	548,337	334,544	925,876	533,368	42,953	2,385,077

UPPER EST. - For Registered and Titled Vehicles	Reg. Fees & Permits	Insur.	Mech. & Dealer	Fuel & Fluids	OHV Org. Memb.	Totals
All-terrain Vehicles	512,065	121,110	664,058	474,219	29,836	1,801,288
Off-road Motorcycles	82,620	14,116	378,111	64,561	20,395	559,803
Side-by-Sides	644,338	541,087	1,051,007	653,038	47,399	2,936,869
TOTAL	1,239,023	676,313	2,093,176	1,191,818	97,630	5,297,960

Table 27 is similar to Table 26, except that Table 27 details out-of-state personal expenditures.

Table 27: Dollar Value of Out-of-state Personal Expenditures in 2018

LOWER ESTIMATE - For Registered Vehicles	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Totals
All-terrain Vehicles	277,429	914,985	612,671	1,107,424	327,261	3,239,770
Off-road Motorcycles	277,373	290,829	89,433	297,368	8,399	963,402
Side-by-Sides	196,525	1,891,715	1,240,479	2,310,617	485,081	6,124,416
TOTAL	751,326	3,097,529	1,942,583	3,715,408	820,742	10,327,588

UPPER EST. - For Registered and Titled Vehicles	Spec. Cloth.	Trans. Fuel & Fluids	Food & Bev.	Lodging	Other Ent.	Totals
All-terrain Vehicles	812,278	2,678,969	1,793,829	3,242,408	958,183	9,485,668
Off-road Motorcycles	750,562	786,974	242,002	804,667	22,729	2,606,933
Side-by-Sides	369,274	3,554,566	2,330,883	4,341,690	911,475	11,507,888
TOTAL	1,932,114	7,020,509	4,366,713	8,388,765	1,892,387	23,600,490

Table 28 sums the totals columns (the right-hand columns) of Tables 26 and 27.

Table 28: Total Out-of-state Expenditures in 2018

	Low Est.	Upper Est.	Midpoint
All-terrain Vehicles	3,854,988	11,286,956	7,570,972
Off-road Motorcycles	1,170,280	3,166,737	2,168,508
Side-by-Sides	7,687,397	14,444,757	11,066,077
TOTAL	12,712,665	28,898,450	20,805,557

Iowa Economic Impacts

The previous sections of this report have utilized survey-based expenditures per vehicle to generate state-wide estimates of total expenditures on off-highway vehicle related assets, operations, and personal expenses. This section analyzes statewide expenditures to estimate the Iowa economic impact of off-highway vehicle expenditures.

Iowa economic impacts were generated for each of the three vehicle types and for total vehicles. For each of these vehicle categories, impacts were generated for registered vehicles (the lower estimate detailed in Table 29) and for registered vehicles and our estimate of active unregistered titled vehicles (the upper estimate detailed in Table 30).

Before diving into the tables of results, some explanation of table terminology is in order:

The “Direct Effect,” line is the first line in every vehicle section. It is the starting point. It includes the local economic effects directly tied to the event or activity being investigated – in this case, the “Expenditure” made by Iowa off-highway vehicle operators.

“Expenditure” is the number that starts the model for each section. It is the total expenditures we have estimated above based on per vehicle expenditure estimates derived from the survey.

“Output” is the total value of Iowa product sold a result of the “Expenditure.” In the case of off-highway vehicle operation, “Output” is substantially lower than “Expenditure.” Most expenditures made to start this process are made in the retail system. The service or “Output” retailers provide is access to products made by others. The cost of goods sold for these goods passes through the retailer and is not calculated as part of the retailers “Output.” Retailer “Output” is the margin the retailer keeps after paying for the goods sold. This is also true of franchise fees in the hotel and restaurant industries.

“Value Added” is the portion of output value that is created by economic activity in the state’s economy. It excludes the value of purchased inputs that come from elsewhere. A sum of value added from all industries in the state should be equivalent to gross state product. Value added generally includes labor income, proprietor’s income, and property-based income.

“Labor Income” is part of “Value Added.” It includes wages and salaries for paid employees and proprietor’s income which accrues to the non-corporate owners.

“Jobs” is a simple count of the number of jobs. Jobs may be part-time, full-time, or require overtime. A job is counted as a job regardless of time involved.

The “Indirect Effect” rows include the economic effects of domestic (in-state) input industries that supply the providers of goods and services to the Iowa off-highway vehicle operator. Riding requires vehicles. Vehicles

require rubber tires, head gaskets, ball bearings, nuts, bolts, etc. Inputs purchased in support of the Direct Effect generate Indirect Effects.

The “Induced Effect” rows are derived from activities induced when workers, proprietors, or investors spend the earnings they are paid from the direct activity and the indirect (input supply) activity on goods and services within the economy. Direct and Indirect activities generate wages, salaries, and proprietors’ incomes. As the recipients of these funds spend them on groceries, automobiles, dance lessons, houses, bowling, etc., they induce additional economic impacts in the local economy.

“Total Effect” is the sum of direct, indirect, and induced effects.

“Multiplier” is simply the division of “Total Effect” by “Direct Effect.” The multiplier gives a quick insight into how strong the follow-up economic activity is relative to the initial economic stimulus.

In Tables 29 and 30, two things are immediately apparent. The first is that Direct Effect Output is substantially less than Expenditure. This reflects the fact that most off-highway vehicles, fuel, and special clothing purchased are manufactured outside the state of Iowa. This portion of the Expenditure passes through the model. The second thing to note is that the Multipliers are consistently strong. Multipliers consistently over 1.3-1.4 indicate solid economic impact beyond the initial stimulus. Multipliers in these scenarios range from 1.41 to 1.66.

Table 29: In-state Impacts for Registered Vehicles (lower estimate)

All-terrain Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	95.5	\$3,812,194	\$6,146,626	\$10,585,191	\$19,922,190
Indirect Effect	19.2	\$967,676	\$1,897,247	\$3,296,162	
Induced Effect	26.6	\$1,080,951	\$1,977,384	\$3,475,721	
Total Effect	141.4	\$5,860,821	\$10,021,256	\$17,357,074	
Multiplier	1.48	1.54	1.63	1.64	

Off-road Motorcycles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	40.8	\$1,630,721	\$2,447,628	\$3,949,230	\$8,454,402
Indirect Effect	6.6	\$317,995	\$624,111	\$1,078,759	
Induced Effect	10.9	\$440,549	\$805,912	\$1,416,539	
Total Effect	58.2	\$2,389,265	\$3,877,651	\$6,444,528	
Multiplier	1.43	1.47	1.58	1.63	

Side-by-sides

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	219.3	\$9,491,303	\$15,975,425	\$28,298,495	\$68,063,318
Indirect Effect	47.5	\$2,393,978	\$4,586,344	\$8,014,943	
Induced Effect	66.3	\$2,690,400	\$4,921,288	\$8,651,075	
Total Effect	333.1	\$14,575,681	\$25,483,056	\$44,964,513	
Multiplier	1.52	1.54	1.60	1.59	

All Off-road Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	355.6	\$14,934,219	\$24,569,679	\$42,832,916	\$96,439,910
Indirect Effect	73.3	\$3,679,649	\$7,107,702	\$12,389,864	
Induced Effect	103.7	\$4,211,900	\$7,704,583	\$13,543,336	
Total Effect	532.7	\$22,825,767	\$39,381,964	\$68,766,116	
Multiplier	1.50	1.53	1.60	1.61	

In the lower estimate (Table 29) expenditures by all Iowa off-highway vehicle operators generate a total of 533 Iowa jobs paying an average of nearly \$42,850 per year. The upper estimate (Table 30) generates a total of 1,018 Iowa jobs paying an average of \$41,110 per year. For every Iowa job created directly by Iowa off-highway vehicle activities, another half job is created by the indirect and induced economic activities driven by the industry. For every dollar of output directly generated, another 61 cents (Table 29) or 63 cents (Table 30) are generated by indirect and induced effects. This means that direct activities of off-highway vehicles in Iowa generate an additional \$23.8 million (Table 29) or \$47.7 million (Table 30) of Iowa industrial output from indirect and induced transactions generated in support of off-highway vehicle expenditures.

Table 30: In-state Impacts for Registered and Titled Vehicles (Upper estimate)

All-terrain Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	254.8	\$9,784,543	\$15,526,497	\$26,453,855	\$44,091,772
Indirect Effect	49.3	\$2,478,572	\$4,922,389	\$8,525,076	
Induced Effect	68.3	\$2,772,397	\$5,071,635	\$8,914,354	
Total Effect	372.4	\$15,035,513	\$25,520,521	\$43,893,286	
Multiplier	1.46	1.54	1.64	1.66	

Off-road Motorcycles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	101.1	\$3,903,773	\$5,691,215	\$9,348,243	\$17,007,841
Indirect Effect	15.5	\$746,716	\$1,481,574	\$2,555,744	
Induced Effect	25.9	\$1,051,017	\$1,922,695	\$3,379,396	
Total Effect	142.5	\$5,701,506	\$9,095,484	\$15,283,384	
Multiplier	1.41	1.46	1.60	1.63	

Side-by-sides

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	338.8	\$13,777,656	\$22,741,731	\$39,804,419	\$85,949,999
Indirect Effect	68.7	\$3,453,546	\$6,754,532	\$11,744,162	
Induced Effect	96	\$3,899,093	\$7,132,377	\$12,537,513	
Total Effect	503.5	\$21,130,295	\$36,628,640	\$64,086,095	
Multiplier	1.49	1.53	1.61	1.61	

All Off-road Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	694.7	\$27,465,973	\$43,959,442	\$75,606,517	\$147,049,612
Indirect Effect	133.6	\$6,678,834	\$13,158,496	\$22,824,983	
Induced Effect	190.2	\$7,722,507	\$14,126,707	\$24,831,264	
Total Effect	1,018.40	\$41,867,314	\$71,244,645	\$123,262,764	
Multiplier	1.47	1.52	1.62	1.63	

Out-of-state Impact Illustration

This section provides an illustration of the economic impact that would result if the money Iowa operators spent out-of-state were spent in Iowa. This is not to suggest Iowa operators should not travel (although comments indicate many would prefer not to). It also is not to suggest that if Iowa operators stayed in-state that they would spend money in the same manner that they make expenditures when they travel (although travelling money they didn't spend if they stayed in Iowa would effectively increase their available disposable income to spend on other things).

Table 31: Out-of-state Impacts for Registered Vehicles (lower estimate)

All-terrain Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	38.1	\$977,640	\$1,546,174	\$2,787,644	\$3,854,988
Indirect Effect	6.1	\$294,663	\$530,833	\$955,801	
Induced Effect	7.1	\$288,166	\$527,097	\$926,628	
Total Effect	51.3	\$1,560,469	\$2,604,103	\$4,670,073	
Multiplier	1.35	1.60	1.68	1.68	

Off-road Motorcycles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	9.8	\$280,250	\$432,433	\$740,222	\$1,170,280
Indirect Effect	1.6	\$73,822	\$133,630	\$238,482	
Induced Effect	2	\$80,117	\$146,554	\$257,617	
Total Effect	13.4	\$434,190	\$712,617	\$1,236,321	
Multiplier	1.37	1.55	1.65	1.67	

Side-by-sides

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	73.4	\$1,971,994	\$3,189,270	\$5,697,071	\$7,687,397
Indirect Effect	12.3	\$596,734	\$1,085,408	\$1,949,074	
Induced Effect	14.3	\$581,734	\$1,064,080	\$1,870,618	
Total Effect	100	\$3,150,462	\$5,338,758	\$9,516,763	
Multiplier	1.36	1.60	1.67	1.67	

All Off-road Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	121.2	\$3,229,885	\$5,167,877	\$9,224,938	\$12,712,665
Indirect Effect	20	\$965,219	\$1,749,871	\$3,143,357	
Induced Effect	23.4	\$950,017	\$1,737,730	\$3,054,863	
Total Effect	164.6	\$5,145,121	\$8,655,478	\$15,423,158	
Multiplier	1.36	1.59	1.67	1.67	

Perhaps the best way to interpret illustrations such as this is to consider what might be possible if out-of-state operators could be attracted to Iowa. If they were to spend money in the same way Iowans do when they travel, the state economy would benefit to the same extent other states do when Iowa operators choose to travel outside of Iowa.

Tables 31 and 32 replicate Tables 29 and 30 with impacts generated by total out-of-state expenditures by Iowa operators of registered (Table 31) and registered plus active unregistered titled vehicles (Table 32). The notes on terms and reading the table from the last section are applicable to these tables, as well.

Table 32: Out-of-state Impacts for Registered and Titled Vehicles (Upper estimate)

All-terrain Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	111.4	\$2,862,416	\$4,527,019	\$8,161,899	\$11,286,956
Indirect Effect	17.9	\$862,738	\$1,554,217	\$2,798,475	
Induced Effect	20.8	\$843,717	\$1,543,278	\$2,713,060	
Total Effect	150.1	\$4,568,871	\$7,624,513	\$13,673,434	
Multiplier	1.35	1.60	1.68	1.68	

Off-road Motorcycles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	26.6	\$758,348	\$1,170,148	\$2,003,016	\$3,166,737
Indirect Effect	4.2	\$199,761	\$361,598	\$645,324	
Induced Effect	5.3	\$216,794	\$396,569	\$697,102	
Total Effect	36.2	\$1,174,904	\$1,928,315	\$3,345,441	
Multiplier	1.36	1.55	1.65	1.67	

Side-by-sides

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	137.8	\$3,705,412	\$5,992,694	\$10,704,897	\$14,444,757
Indirect Effect	23.1	\$1,121,274	\$2,039,501	\$3,662,344	
Induced Effect	26.9	\$1,093,088	\$1,999,424	\$3,514,925	
Total Effect	187.9	\$5,919,775	\$10,031,620	\$17,882,166	
Multiplier	1.36	1.60	1.67	1.67	

All Off-road Vehicles

Impact Type	Jobs	Labor Income	Value Added	Output	Expenditure
Direct Effect	275.9	\$7,326,176	\$11,689,861	\$20,869,811	\$28,898,450
Indirect Effect	45.2	\$2,183,773	\$3,955,316	\$7,106,142	
Induced Effect	53	\$2,153,600	\$3,939,271	\$6,925,086	
Total Effect	374.1	\$11,663,548	\$19,584,448	\$34,901,039	
Multiplier	1.36	1.59	1.68	1.67	

In this illustration, Direct Effect Outputs are also lower than Direct Effect Expenditures, but the gap is not as wide as in the impacts associated with in-state expenditures. The gap reduction is due primarily to new vehicle and asset purchases. Most new vehicles purchased are sourced from out-of-state manufacturers. This means a smaller proportion of expenditure passes through the model in the out-of-state expenditure estimates.

As mentioned at the beginning of this section, it is unreasonable to believe that Iowa operators can be enticed to completely forego out-of-state opportunities. It is also unreasonable to assume they would spend their money in the same manner in Iowa if they were not spending it in other states.

The value of this illustration is to show what might be possible if riders from out-of-state could be attracted to Iowa for their recreational activities. If they spend similarly to travelling Iowa operators, the lower estimate (Table 31) indicates they could generate 165 jobs with annual incomes of approximately \$31,260. The upper estimate (Table 32) generates 374 jobs with annual incomes of nearly \$31,180.

Policy Issues

The survey directly addressed one policy issue: whether respondents would support an increase in registration fees if the revenue generated was completely earmarked for expansions and improvements to parks and trails. Additionally, the comments section of the survey asked respondents for their priority issues.

Support for Increasing Registration Fees

Table 33 presents information on respondent’s preferences regarding increasing registration fees. A clear majority of respondents for each type of machine was positive towards paying higher registrations if the fees were earmarked. The average maximum amounts respondents were willing to pay ranged from \$12.81 per machine to \$15.23 per machine over the current \$15.00 registration fee.

While just over 63% of all respondents expressed a willingness to pay higher registrations, if we assume that all titled but unregistered machines oppose increased fees, the approval rate across all machines falls to just over 17%.

A big question when considering fee increases is whether a significant portion of current registrations will not be renewed at the higher rate. A very rough calculation, assuming all people favorable to paying a higher registration did accept a registration fee of \$29.21 and that all people opposed did not renew their current \$15.00 registration, a new fee would net nearly \$150,000. The assumption that all respondents that do not support increases would cease registration is probably unreasonable, so this should be considered a conservative estimate. Any changes to registration fees should look closely at how robust these preferences are.

Table 33: Percent of Respondents Supporting Increased Registration Fees

	From Survey		Machines		Titled Pct.
	% Yes	Avg. Amt.	Registered	Titled	Yes
All-terrain Vehicles	62.24	27.81	21,603	95,644	14.06
Off-road Motorcycles	54.24	28.53	5,148	20,761	13.45
Side-by-Sides	62.50	30.23	16,659	42,692	24.39
TOTAL	63.14	29.21	43,410	159,097	17.23

Increasing the Number of Registered Vehicles

An alternative to raising registration fees might be to entice more vehicle owners to register. Table 33 shows that there are over 115,000 titled but unregistered vehicles in Iowa. Several survey respondents commented that the number of unregistered vehicles on trails and in parks was significant and asked for increased enforcement to limit public areas to only registered vehicles.

Currently:

- Registration fees are \$15.00 per year per vehicle
- The penalty for being apprehended on public land with an unregistered vehicle is \$127.50
- The registration fee penalty for renewing a lapsed registration is \$5.00

This fee structure may provide little incentive to maintain vehicle registrations unless enforcement is strict enough that unregistered riders expect to be apprehended and fined at least once every 8.5 years on every unregistered vehicle they own and operate in public venues. If we assume, for example, that 75% of unregistered machines are active (consistent with our expense estimate assumption for titled but unregistered vehicles), and that 61.1% of active unregistered machines are operated in public venues (consistent with survey results for registered vehicle owners), then we should see total annual apprehension fines of at least \$795,204 if current apprehension penalties and enforcement rates are sufficiently high to encourage registration. This would be substantially more than current annual registration revenue for 43,410 personally registered machines at \$15.00 per machine (\$651,150).

Additionally, the \$5.00 registration fee penalty for renewing lapsed registrations provides virtually no incentive for maintaining current registrations. If the lapsed registration penalty were at least equivalent to one-year's registration fee, it might reduce the incentive to "go bare" on registrations occasionally.

The multi-tiered registration structure included in some respondent's comments also deserves some consideration. In many environments where public recreational facilities are funded through user fees rather than general revenue, such facilities are naturally under-provided. In instances requiring user-fees (registration) to fund facilities, but user-fees are not enforced in actual use, under-provision often becomes chronic.

It may be worth considering registration fees for general public use or secondary road access and enforced park or trail-specific user passes to support individual facilities. In such cases, recreational facility funding would mimic the local country club golf course, where members have user rights, but those rights are restricted to members only. Given that nearly 15% of respondents reported owning an average of just over 100 acres of land specifically for the pursuit of off-highway vehicle recreation, user-pass or membership supported riding parks might be an option in some areas.

While there may be very good reasons and solid support for increasing registration fees, there also appears to be significant potential for increasing the number and proportion of registered vehicles by building stronger incentives into penalties and registration enforcement.

Issues Identified by Survey Respondents

The survey included two areas for respondents to provide comments. Each respondent was asked:

1. To list up to three major concerns and/or suggestions regarding legislation and park operations, maintenance, and opportunities for off-highway vehicle operation in Iowa.
2. If they had any additional comments or other issues related to off-highway vehicle recreation in Iowa

Respondent comments are included in Appendix B. Not all respondents provided comments, and not all commenters utilized all available comment options. Appendix B divides comments by respondents that reported:

- Owning only off-highway motorcycles
- Owning only all-terrain vehicles
- Owning only side-by-sides
- Owning multiple vehicle types

Comments are coded so readers can identify multiple comments by individual respondents (respondents, however, are not identified). Table 34 provides the number of respondents in each category that provided comments and how many total comments were provided.

Table 34: Distribution of Commenting Respondents and Comments by Vehicle Type

Vehicle Type	Number of	
	Commenters	Comments
Only Off-Highway Motorcycles	20	52
Only All-Terrain Vehicles	72	121
Only Side-by-Sides	49	93
Multiple Vehicle Types	73	162
Totals	214	428

While individual comments were not strictly scored and tallied, several issues are readily apparent with even a quick scan.

1. Given the specific inquiry concerning increasing registration fees to expand parks and trails, it is not surprising that a high percentage of comments called specifically for more parks, better trails, and more maintenance of both parks and trails. These concerns reflect the list of other states visited in Table 11 above. Many respondents noted that most of their riding is outside of Iowa, and that they would like to have opportunities to stay at home. A few noted that they never ride in Iowa. In many of these cases, respondents questioned what they were paying registration fees for.
2. Several off-road motorcycle riders indicated a preference for specialized facilities exclusively for motorcycles. These included competition areas (particularly motocross tracks) and single-track trails.
3. A related issue is a strong interest in broader and more uniform access to secondary highways, county roads, and/or city streets. Several respondents noted that they would support a multi-tiered registration system that set fees for statewide road access at some uniform level and pass-fees for individual parks or trail systems. This particularly seemed to appeal to respondents in areas of the state lacking parks and trail systems. Here, too, respondents referenced their experiences in other states.
4. Safety was also regularly cited. Many people indicated that two-way trails are often dangerous. Helmets, safety equipment, operator safety training, and improved monitoring of trail use (both registration-wise and behavioral) all came up. The issue of non-registered vehicles in parks and on multi-use trails came up from some

respondents. A few also commented on supervision of younger riders and consumption of alcohol while operating vehicles in parks and on trails.

5. Noted less often, but still significant, was an interest by several operators for less regulation and more freedom to ride. More than one requested open access to public lands, roadway ditches, and bicycle paths.

All comments by vehicle type are included in Appendix B.

Conclusions

This study was commissioned by the Iowa Off-Highway Vehicle Association. It is based on a survey of 1500 registered off-highway vehicle owners. Survey responses generated per-vehicle estimates of

- Asset values
- Asset purchase
- Operating expenses
- Related personal expenses

For activities within Iowa and outside of the state. Estimates were generated for all-terrain vehicles, off-road motorcycles, and side-by-sides.

Total asset and expenditure values and economic effects were estimated for 43,410 registered vehicles (the survey population) to generate a lower estimate of economic effects in Iowa. Economic effects were also estimated across all 159,097 titled vehicles in Iowa to generate an upper estimate. The upper estimate accounts for vehicle retirement and reduced expenditures per vehicle and is assumed to provide a conservative estimate of total off-highway vehicle economic effects in Iowa.

An estimated 220,829 Iowans operate off-highway vehicles. This is slightly over 7% of the Iowa population. Decision makers in off-highway vehicle owning households are older and have higher incomes than the population as a whole. Decision makers are more likely to have a high school education or some college or technical school than the overall population but less likely to have less than a high school education, a bachelor's degree, or an upper level degree. Riders and decision makers are overwhelmingly male.

Slightly over 61% of off-highway vehicle operators utilize public land. They make an average of 2.4 trips per year out of Iowa with their vehicles. These trips average just over 2 days in length. Wisconsin is the most popular out-of-state destination. Minnesota, Missouri, Colorado, and South Dakota are also popular.

Iowa off-highway vehicle owners have an estimated \$772.8 million invested in their vehicles, associated tools, supplies, storage and maintenance sheds, trailers, etc. Asset purchases in 2018 are estimated at \$74.7 million dollars. This includes approximately \$58.5 million for new vehicles, \$2.6 million for tools and supplies, \$1.6 million for dedicated buildings, and \$10.7 million for trailers and vehicle covers.

Iowa off-highway vehicle owners spent approximately \$72.4 million in 2018 on in-state operating expenses and related personal expenses. Total Iowa asset purchase and operating/personal expenditures generated approximately 1,018 jobs in the Iowa economy paying an average of \$42,850 annually.

Off-highway vehicle owners spent about \$28.9 million outside the state of Iowa in 2018. If that had been spent in-state, it would have generated \$34.9 million in Iowa industrial output and 374 jobs paying annual incomes of \$31,180 per job.

Over 63% of survey respondents would support increasing registration fees. On average, these respondents supported a \$14.21 increase or a registration fee of \$29.12. A very conservative estimate (assuming all non-supporters would let registrations lapse) shows this would generate \$150,000. In addition to solid support for increasing registration fees, there also appears to be significant potential for increasing the number and proportion of registered vehicles by building stronger incentives into penalties and registration enforcement.

Survey respondents also indicated more and better facilities, increased facility monitoring, uniform access to secondary highways, county roads, and city streets and more safety training and enforcement as important issues.

Appendix A: A Brief Discussion of I-O Modeling

An I-O model is a generalized accounting system of a regional economy. It tracks the purchases and sales of commodities between industries, businesses, and final consumers. Successive rounds of transactions stemming from the initial economic stimulus (in this case, expenditures related to off-highway vehicle recreation) are summed to provide an estimate of direct, indirect, induced (or consumer-related) and total effects of the event. This study calculated these effects using the IMPLAN Input Output modeling system (www.implan.com). This modeling system is widely used in the U.S. and worldwide to estimate economic impacts.

I-O models are capable of providing many types of reports on regional data and interactions among sectors. For economic studies, several of the more important indicators are: 1) total output, 2) personal income, 3) value added, and 4) jobs. Total output for most non-retail industries is simply gross sales. Personal income includes the wages and salaries of employees, along with non-corporate proprietor profits. Value added is another appropriate measure of economic effects. Value added is analogous to gross regional product. It includes all personal income, plus estimates of returns to investors, and indirect business taxes paid to state and local governments. In short, value added gives us a measure of the income or wealth that accrues to individuals and governments as a result of industrial activity in an area. Jobs, the fourth measure, represent the number of positions in the economy, not the number of employed persons.

We also get detailed breakdown of this data into direct, indirect, induced, and total economic effects. *Direct effects* in this case refer to the set of expenditures made by off-highway vehicle owners net of retailer costs of goods sold for goods sourced from manufacturers outside of Iowa. *Indirect effects* measure the value of supplies and services that are provided to the businesses providing products and services to vehicle owners. *Induced effects* accrue when workers in the direct and indirect industries spend their earnings on goods and services in the region. Induced effects are also often called household effects. *Total effects* are the sum of direct, indirect, and induced effects. They are the total of transactions attributable to the direct activity that we are measuring.

The term *multiplier* is also often used when referring to economic effects or economic impacts. A multiplier is simply the total effects divided by the direct effects. It tells how much the overall economy changes per unit change in the direct effects (a dollar of output, a dollar of personal income, a dollar of value added, or a job). Multipliers help us to anticipate the potential change in the regional economy attributable to a change in direct activity in a particular industry. Firms with strong linkages to area supplying firms or that pay relatively high earnings may yield high multipliers. Firms that are otherwise not connected strongly locally or that pay lower than average wages will have lower multipliers. Urban areas with their more developed economies have, on the average, much higher multipliers than rural areas.

Appendix B: Survey Respondent Comments by Vehicle Type

Survey respondent comments are included in the tables below for respondents:

- Reporting only off-road motorcycles
- Reporting only all-terrain vehicles
- Reporting only side-by-sides
- Not reporting vehicles or reporting vehicles of multiple types

Respondents were given four comment options, so many provided more than one comment. The “Respondent” column provides respondent codes so multiple comments by the same respondent can be identified.

Owners Reporting Off-road Motorcycles Only

Respondent	Comments
ORM-003	Availability of non-ethanol fuel.
ORM-005	More parks! More MX tracks.
ORM-005	More maintenance on current OHV parks.
ORM-005	Camping at OHV parks. Electricity hook-ups.
ORM-005	DNR needs to check more often at Bluff Creek Park for riders' registration stickers. I see a lot of bikes with no stickers. Thank you.
ORM-006	Making all parks available to all age groups (mainly looking at the under-12 group).
ORM-006	The parks that are available are a great addition to further the OHV recreation/sport. Would love to see the maintenance of the parks catered to the younger (under-12) crowd. For example: the small ORMs are very small and low powered and cannot navigate sand well. It would be great to have a clear (minimal sand) path for these small machines to navigate the trails.
ORM-010	Make certain that funds from registration fees go to the OHV parks!
ORM-010	Expand parks when possible.
ORM-010	There is additional land next to Nicholson Ford OHV park for expansion, but local officials with the city and county are blocking the project. (Marshalltown)
ORM-013	I would like to see all work done by a funded Iowa DNR department.
ORM-013	We need larger and more parks and trails.
ORM-013	Raise the OHV registration fee, but also work harder to increase the number of parks. There are several "Dead Zones" in Iowa that would be prime areas for OHV parks: NE, NW, SE, and SW corners and a location closer to the Des Moines Metro Area. I'm sure the DNR is sitting on land that could be used for OHV parks.
ORM-014	There are not enough places in Western Iowa to ride.
ORM-014	Iowa, especially the DNR is an anti-OHV state. Iowa public lands are for hunters only. Iowa needs to look more closely at how the Colorado BLM treats OHVs. In Iowa, we are treated as low-life scum. In Colorado, they treat you as friends.
ORM-018	In a lot of our OHV parks there is a lack of correct trail signs.
ORM-018	Need strict control of correct protective gear while riding.
ORM-018	Need strict control of riders riding under the influence.
ORM-020	Better maintenance on dirt bike tracks.
ORM-020	Actual groomed tracks. That is the reason for so much out of state use.
ORM-022	Need more areas.
ORM-022	Need area in or very close to Des Moines so you can access weekdays after work.
ORM-022	Would prefer to pay per use - similar to boat ramps or camping. Happy to pay \$10 or more per ride.
ORM-023	Camping - RV hook-ups.
ORM-023	Marked trails
ORM-023	Safety in parks

ORM-023	Need trails going one-way with a destination.
ORM-024	Prefer harder trails.
ORM-024	More single-track.
ORM-024	Need more and better parks or I won't pay more. Plus, the state takes the funding for other reasons - which is bullshit.
ORM-025	I just use my ORM to ride around the farm.
ORM-028	Open the Council Bluffs OHV park again!
ORM-028	More single-track trails.
ORM-028	If the money is going to support expanding OHV opportunities in Iowa, I will pay more. Iowa has a lot of OHV users with very few places to ride (Western Iowa).
ORM-029	More trails.
ORM-029	Allow dirt bikes (ORM) on mountain bike trails. Most mountain bike trails in the Des Moines area were made by ORM dirt bikes, and now we are not allowed on them.
ORM-031	More parks.
ORM-033	Iowa needs more single-track ONLY trails.
ORM-033	Create trails in current public lands to registered dual-use vehicles (licensed only).
ORM-033	Open multi-use trails, such as horseback and snowmobile, for special paid-use holidays.
ORM-033	2-wheel fees should go toward dedicated single-track trail systems. These have much less of an impact on habitats than 4-wheeled vehicles. Due to increased popularity of side-by-sides, especially, dedicated usage days for 4-wheeled and 2-wheeled vehicles would be safer and allow users of each type to have more fulfilling experiences.
ATV-153	Need a park closer to Des Moines.
ATV-153	Spend all the fees on what they are for - no taking them for the state budget.
ATV-153	Need a hold-harmless law. This would help land owners.
ATV-153	I race.
ORM-034	Safety
ORM-034	Make sure fees are put to good use
ORM-035	Keeping enduro races available through IERA
ORM-035	Trail maintenance
ORM-035	Where to ride when it is wet
ORM-037	Well-kept parks
ORM-037	More and larger parks

Owners Reporting All-terrain Vehicles Only

Respondent	Comments
ORV-036	Our closest OHV park is in Fort Dodge. I have found that it is quite often closed if the trails are wet or muddy. I wish that wasn't the case as that is generally when I can go riding due to the business I am in.
ATV-001	Maintenance of trails
ATV-002	Have more trails or groomed areas for ATV or ORV like they have for snowmobiles. I would probably buy a new ORV.
ATV-005	Open county roads
ATV-006	Year-round trail and park access
ATV-006	More places to ride like snowmobiles
ATV-006	Trails connecting to towns to have access to food and hotels.
ATV-006	It would be nice to be able to ride ATVs on city streets of 25 mph or less, like golf carts. More freedom to use the machines in Iowa will keep me from going to other states so much. I understand Wisconsin has a good model of connecting towns with ATV trails.
ATV-007	We need more riding parks in the state.
ATV-007	A nice trail system like in Wisconsin would be great.

ATV-009 I use my ATV to hunt and yard work because I am not able to walk much. I depend on it to get around outside. I would like to have some use on public roads for all ATV owners above 16 years old.

ATV-011 The 2 places I have been to have trails that are not one-way. This can be very dangerous if you cannot see around corners.

ATV-014 Charge only folks that want to use it with fees or memberships. Not us old guys that plow snow or use a 4-wheeler on lakes ice fishing.

ATV-015 We haven't traveled out of state for riding purposes but would like to see something closer to home.

ATV-016 Ride on gravel or secondary roads

ATV-016 How much registration I would support depends on where we get to operate them.

ATV-017 Make fees affordable and reasonable

ATV-017 Do it state of Iowa all counties

ATV-017 Would like to see ATV trails in all counties in Iowa. This way don't have to drive as far to go and have a fun weekend. Would be interested in being employed in ATV park in Iowa.

ATV-020 Safety

ATV-020 Accessible trails

ATV-021 Parks are great, but a nice trail system might generate more outside interest.

ATV-024 Don't ride trails. It's used at home only.

ATV-025 Wish we had a trail system like Wisconsin does.

ATV-026 Need to be able to drive on county roads in Dallas County

ATV-026 Would support higher registration fees if able to drive on county roads

ATV-028 That they can be ridden on public roads in small towns with city council approval as with other states.

ATV-030 Being able to drive ATV on gravel roads.

ATV-031 Don't like the idea of having ATVs or side-by-sides on public roads except for law enforcement and fire fighters.

ATV-034 We need more freedom to use them.

ATV-034 Can't even drive them to buy fuel.

ATV-034 Why do we even register them if we can't use any roads. What are ATV owners paying for?

ATV-035 Not being able to retrieve my deer on public land with my ATV

ATV-035 Not being able to use them recreationally on gravel roads

ATV-037 Availability of trails

ATV-041 Please re-open the park in Council Bluffs!!

ATV-041 To have everyone behave in staging areas.

ATV-041 Paid \$30 per ATV in Colorado for only 5 days

ATV-042 Only support raising fees if more opportunities to ride exist

ATV-043 Keep trails open

ATV-044 Open all roads to ATVs and OHVs with routes to gas, food, lodging in each town. Not allowed in major heavy populated cities and highways. Cedar County, Iowa has got correct policy in place. Should be statewide.

ATV-044 Ride the roads like a motorcycle does!

ATV-044 Forget off road parks. Just a place to create accidents. Waste of money. OK to acquire public forest for trails. Not much forest in Iowa, though. Ride the roads!

ATV-045 Restricting trail use. OHV should be allowed where snowmobiles are allowed as long as a plan is in place to maintain the trails - who is accountable and enforced.

ATV-047 Not being able to ride them in state parks and land

ATV-047 If you need more money, charge horses to rid trails at Brushy.

ATV-053 That they remain available

ATV-054 There should be no registration required for rural roads or state property.

ATV-054 I never trail ride. Only use ATV to pull ice sled on public land. All other use is private land

ATV-055 More places to ride

ATV-055 A place closer to the Davenport area to ride

ATV-056 Places to ride in Eastern Iowa (Clinton County)

ATV-057 Make all rules and regulations at the state level only.

ATV-057 Stop letting individual counties have separate sets of rules. For example, Dubuque County allows no use of roads anywhere, while Jackson County has many allowed roads.

ATV-058 Have the state pay half of the operating cost.

ATV-058 If making new parks, make sure they are worth going to.

ATV-058 Have ATV clubs do some of the maintenance to keep costs down.

ATV-058 Have the DNR involved in all aspects of things to make sure things are run safe. Educate people on safe use of ATVs and UTVs to try to make them aware of the damages of the sport if not done safely.

ATV-063 Any unusable land that the state owns should be considered for ATV parks.

ATV-067 Able to ride certain county roads

ATV-067 Certain streets in town

ATV-067 Not enough places to ride. Closest to me is about 90 miles.

ATV-068 Make legal on roadways.

ATV-069 Safety of riders

ATV-071 This is a work vehicle. Charge recreational users for trails, parks, etc.

ATV-073 Be able to drive ATV to them

ATV-075 Lobby for ways to make ATVing more affordable for families, not more expensive. For example, this year my umbrella liability insurance policy rose 50% with insurance company citing simple ownership of ATV as cause. We use it around the farm, lawn, garden, and nobody else is in danger or liability.

ATV-076 Open roads up to use

ATV-079 I'm in between the kids riding them and the grandkids that will be riding in a few years.

ATV-080 Let them ride on railroad trail in Cerro Gordo

ATV-084 This is for farm use - not play!

ATV-086 More trails are needed.

ATV-088 Lack of ability to ride our ATVs/side-by-sides on rural roads in all Iowa counties is a problem.

ATV-088 NW Iowa has little to no ATV trails. ATV trails could be built along the Big Sioux, Missouri, and other major rivers. They are areas that flood almost every year and are not usable for any other reason. Other than recreation at Iowa's great lakes, NW Iowa receives no support from the state of Iowa. Except for a handful of riding areas in other areas of the state, Iowa is close to being anti ATV. Iowa DNR is a lot of the problem. They want more state land. They just don't want anyone to use it.

ATV-093 I just use the ATV for ice fishing.

ATV-096 I bought my Polaris Sportsman 400 as a farm tool. I don't use it for recreation.

ATV-098 Side-by-sides or 4-wheelers allowed on government set-aside acres like snowmobiles are.

ATV-098 Allowing open trails for OHV in Iowa (make trails available)

ATV-098 Maintaining road ditches and trail us similar to snowmobiles but for off-road

ATV-098 What are these fees currently used for? They need to be making facilities better already. I have not seen many, if any, in my area.

ATV-100 ATV secondary road use

ATV-100 Wisconsin makes a lot of money because they support ATVs (gas, food, lodging)

ATV-101 Having more areas to ride

ATV-102 Camping on-site

ATV-109 Open more OHV in Iowa - trails

ATV-111 Helmets for under 18 years old

ATV-111 License with the Dept. of Motor Vehicles

ATV-111 I get mine licensed in South Dakota. They allow dual state registration. I would pay up for a license plate. South Dakota fee is \$28.50 for tags every year.

ATV-113 Add ATV access to Pleasant Creek Park

ATV-114 Access to public hunting areas to retrieve deer

ATV-114 I have a disabled license and there are areas with no availability

ATV-116 Legalize secondary road operations statewide for all, not just agriculture

ATV-116 The state could license them like automobiles and have the revenue generated. Also, secondary market for lights and turn signals to retrofit older ATVs. Allow road usage to all. Everyone is currently running on the road illegally. Why not license and make legal and make revenue for the state?

ATV-125 Would like ATVs allowed on all roads in Clayton County and Dubuque County.

ATV-125	More ATV parks in Northeast Iowa
ATV-125	Allow ATVs on Heritage trail
ATV-125	I would support an increase in fee if the money was spent in Northeast Iowa.
ATV-126	There are not enough parks available, none around where I live at all.
ATV-134	More parks by Spirit Lake
ATV-134	Would use OHV parks if we had some closer. Have to drive across the state to get to a park.
ATV-135	Keeping trails safe to ride
ATV-137	Support development of trails and parks
ATV-137	Play areas along trails are interesting/fun.
ATV-137	If there are several small parks in a vicinity, find a way to operate between them via ATV/OHV.
ATV-137	Protect land owners from liability so land might open up. Get on trails directly from my residence or at least nearby. Trails should have points of interest - sights, park areas, play areas, etc. Desire a place rider could go for a long weekend and overnight stays. Needs a lot of trails to connect points of interest. Lodging, towns, government land, forests, overlooks, camping, fishing, breweries, restaurants, ATV play areas, etc. Drawing in riders (local and regional) will require a complete experience like I mention above.
ATV-139	Farm use
ATV-142	I see more Iowa plates on vehicles in Wisconsin ATV parking lots. Places like Backbone State Park, Yellow River Forest, Volga River, could have trails in them and keep some of the money going out of state here!
ATV-143	Lots of bicycle trails in Iowa. Where are the ATV trails?
ATV-143	Too many good places to ride that we can't access without penalties. These are economically missed opportunities.
ATV-146	Expanding park more areas to ride
ATV-146	My family goes to Missouri because they have parks with 1000 acres or more. There is camping, sand areas, timber and hill climbs.
ATV-147	Where does the current \$15 vehicle fee go? What is it spent on?
ATV-150	We would like an OHV park in Central Iowa.
ATV-151	Make sure operators qualify to ride on road
ATV-151	Know all rules and regulations
ATV-151	Take responsibility of action when on the road driving
ATV-156	Keep costs low
ATV-156	Easy access
ATV-157	Get ATV street legal
ATV-157	More trails
ATV-157	Each county should have at least one public area to ride on

Owners Reporting Side-by-sides Only

Respondent	Comments
ORV-001	To be able to continue riding on the shoulder of paved roads and on gravel roads.
ORV-002	I want roads in Iowa open statewide like South Dakota, not county-by-county.
ORV-002	Parks are OK for moto-xers. Most are not large enough for actual trail riding. Ft. Dodge isn't worth the drive. Iowa doesn't have enough land to have linear trails. We ride roadways open to riding in counties allowing it, but there are very inconsistent rules.
ORV-003	Offer insurance rates for road use.
ORV-003	Fees 2018 \$17.94 plus \$2.50 convenience fee for internet use. Total \$20.44.
ORV-004	Safety
ORV-004	Make counties open up to ATV/UTV traffic. I think it is a no-brainer.
ORV-015	More in-town and rural road usage
ORV-015	New to this. We were hoping to do more riding but were only able to get to Gypsum City. We were not able to get much riding in from poor travel conditions. Tried to ride the perimeter trail. Big water holes and deep mud in both directions in second section. Just looking for scenic trails.
ORV-020	Need easily accessible

ORV-020 Lodging nearby

ORV-020 Open year-round

ORV-020 Keep money in Iowa - give more places to ride.

ORV-021 Millions spent on bicycle trails with no fees or registration required for them.

ORV-021 I would absolutely love to see more trails along rivers and in heavily wooded areas. I haven't owned and ATV since 1995. 2018 is my first year with a side-by-side. I put 3000 miles on my 2018 machine in 6 months. I traded for a 2019 and am taking it to Arizona for the winter, but next year plan on doing more trails in Iowa, but they are few and far between. Definitely need more trails.

ORV-022 Want to drive on all roads except highways

ORV-024 To get all 99 counties open to ride on county roads

ORV-024 Leave registration at \$15

ORV-026 We pay \$17.75

ORV-027 Availability

ORV-027 Hours for which you can ride (it should be 5 a.m. to 11 p.m.)

ORV-027 It would be nice to have more public trails.

ORV-027 Not enough public trails. Outdoor maps on trails. Easements of private ground to get to trails. We have a good thing started. We need to look at Wisconsin and follow their lead. They are years ahead of us.

ORV-029 Consider opening bike trails on special days for ATV or UTV

ORV-029 More counties open to ride UTVs

ORV-029 More trails

ORV-031 Open state parks and land for OHV use.

ORV-032 It is just awesome that there are places to ride and have fun.

ORV-037 Legal to ride secondary roads

ORV-039 Trails suitable for side-by-side use

ORV-039 Legal to use county roads

ORV-039 Would like to see legislation passed to allow the use of side-by-sides on secondary roads

ORV-040 Being able to drive ATV on blacktop roads

ORV-040 I have never been on Iowa trails, because there are none in Northwest Iowa.

ORV-041 More accessibility, if possible, without damaging the environment and natural resources

ORV-041 Our Ranger was purchased mainly for farm use, but we are finding that in addition it is just a lot of fun. Although we haven't used any OHV public trails as yet we support the recreational use.

ORV-046 I farm. I just use the side-by-side for moving machinery farm-to-farm.

ORV-048 I would like to see more state land open to OHV use.

ORV-048 I would like to see the use of ORVs on secondary roads legal 24/7 365 days a year with proper safety equipment (lights, turn signals, seatbelts, etc.)

ORV-048 I have owned and operated dirt bikes, ATVs and recently purchased a side-by-side due to the eligibility to ride on secondary roads in Allamakee County. My family and friends have gone to Wisconsin for the past 10 years to ride because of the lack of trails in Iowa. We have visited the OHV parks in Iowa, but they are only a day's worth of riding at best. We would like to keep our money in Iowa but until the state is willing to open up some of their land to OHV use, we will continue to go to Wisconsin.

ORV-049 More trails in Central and Northeast Iowa.

ORV-049 Be able to ride into small towns.

ORV-049 Jesup mayor does not want side-by-sides in town!

ORV-050 Buchanan County allows ATVs - BUT - some of these small towns only let you go on a couple streets. If they want us to support their towns - then open them up! Every county should be open and have the same laws.

ORV-053 No usable trail system in my area

ORV-053 If Iowa had a usable trail system like Wisconsin, I would support a trail pass fee.

ORV-054 Create more trails

ORV-054 Allow use in towns and on rural roads

ORV-057 Safety

ORV-057 Pay more (*than \$15*) now

ORV-058	Make them legal
ORV-059	I don't know of any parks in Iowa, but I think there should be some.
ORV-059	I would pay for a parks tag in Iowa to help with costs.
ORV-059	I think people would pay if there were places to ride.
ORV-059	I know Wisconsin is the destination for many of my friends simply because of the abundance of trails.
ORV-060	Could use some trails in Northeast Iowa
ORV-060	If we had some trails to ride it would help.
ORV-061	Trail maintenance - in 2018 the trails by my house were not groomed or cut once
ORV-061	Maintaining safe operating conditions
ORV-062	Not applicable - Farm use, OK?
ORV-062	My only use is for the farm; checking crops and livestock
ORV-066	Letting UTV ride on roads
ORV-071	Able to operate on streets
ORV-071	Mainly use on streets in town.
ORV-072	Allowance of OHV on roads
ORV-077	Open up ATV routes on roads in Iowa. It will keep money in the state.
ORV-079	I would use OHV parks if I knew more about them.
ORV-079	I will now have to research available parks. I use mine mainly for work around the property.
ORV-082	Handle side-by-side size
ORV-082	Miles of trails need to be above 100
ORV-087	Speed limits
ORV-087	Insurance
ORV-087	Good marked trails so people know where they are going
ORV-087	It would be really nice to have trails here, so I don't have to spend my money in another state.
ORV-088	Would like to see statewide operation on county roads.
ORV-088	Would be willing to pay more licensing fees.
ORV-088	Trail pass if you go to park. Regular registration for county roads and private land statewide.
ORV-092	Safety
ORV-092	Trails
ORV-092	I pay 2 fees now on my WilCraft.
ORV-094	Make all counties adopt the same rules and regulations.
ORV-094	Make all parks available to side-by-sides.
ORV-094	We have travelled to Wisconsin previously to ride and have spent several thousand dollars while there for food, lodging, fuel, etc. Had a knee replaced this year so riding was limited. We are really missing out on revenue by not pushing harder to attract tourism in Iowa from ATV-UTV use.
ORV-096	This does not apply to me. Used mainly for acreage chores.
ORV-097	Make them street legal so you can ride to the trails.
ORV-098	Just to be able to run on the roads like a lot of other states
ATV-004	Mostly farm use.
ATV-037	Beginner level trails available
ATV-059	We should be able to ride just like pedal bikes.
ATV-070	Make registered side-by-sides legal on county roads (all counties)
ATV-070	Trail system similar to snowmobiler
ATV-085	I am not much help on your survey. We use our Chuck Wagon for acreage use. We use it hauling hay and other farm purposes only. It doesn't leave our acreage. It is more for work than pleasure.
ORV-100	Keep it simple. Don't make too many laws.

Owners Not Reporting Vehicles or Reporting Vehicles of Multiple Types

Respondent	Comments
ORM-001	Personally, the questions you are asking are none of your business. For example: Annual income and what I pay for my vehicles. This is personal information. NONE of your business.

- ORM-002 Off-highway vehicles are very popular among our friends. It is too bad to have to travel and spend money in another state to do this. We love Iowa, but we have no choice because of lack of trails for this recreation.
- ORM-002 Let's increase places to ride and enjoy this recreation. We believe Iowa is missing out on great revenue and bringing people to this wonderful state. In Iowa, we ride on private land. We plan on spending at least 4 weeks per year in Wisconsin with friends that also own off-highway vehicles.
- ORM-004 Maintaining motocross/supercross tracks.
- ORM-004 Build more dirt bike-exclusive motocross/supercross tracks.
- ORM-007 Making single-track trails.
- ORM-007 Keeping single-track trails.
- ORM-007 Preventing ATV and SXS from using single-track trails.
- ORM-007 2018 sucked! Would probably support a higher fee if weather was more favorable for riding in areas that weren't flooded (private and public), but that is out of our hands, of course! Just keeping what we have is the major issue. It seems the ORM category is being forgotten and is getting smaller. Sad.
- ORM-008 Marshalltown needs an MX track.
- ORM-009 More places to ride.
- ORM-009 Regulations that keep only registered riders in the parks.
- ORM-009 Have registration stickers have a chip in them to open a gate to keep un-registered people out.
- ORM-011 More parks.
- ORM-011 Gravel travel legally would be nice to have. If they had more parks near Sioux City, I would pay registration of \$20-30.
- ORM-012 Safety
- ORM-012 Need more patrols.
- ORM-015 Upkeep is most important - trails cleared, trees trimmed, etc.
- ORM-015 Ample parking is always nice.
- ORM-015 Another park closer to me would be nice as well. (Clarinda)
- ORM-015 The amount of increase I would support would be depending on how the money was being spent. If there was a guarantee of park upkeep, expansion, or even a new park, then I would support \$5 per registration. If nothing can be promised, then it would be hard to support an increase because I feel it would fall under typical state government money mismanagement.
- ORM-017 Loss of trails.
- ORM-017 No trail/park near east side of Iowa (Clinton).
- ORM-017 Showers and more camp areas (Clinton).
- ORM-017 Need to develop more areas in the east side of the state. More advertising - most don't even know about Iowa parks - need to advertise magazines, also. Could charge daily fee for out-of-state vehicles. It could be facilitated on-line.
- ORM-019 There are areas with lots of acreage that a small portion could be turned into riding areas. Flood plain areas purchased by the state.
- ORM-019 Convert more public areas into riding areas. We drive 1 hour one way to go riding. Next closest area is 2 hours away. (Muscatine)
- ORM-021 Good MX track.
- ORM-026 Need more trails that are public. Most of the places in Eastern Iowa are private land that do not require registration, so what am I paying for?
- ORM-030 Hire out track workers.
- ORM-030 The Fort Dodge OHV park was a fun place to ride when I was younger. Then the DNR took over operations, and the tracks were in bad shape. Recently, the tracks were taken over by a guy who has raced. The track's popularity has grown tremendously. Hire out track workers! Not the DNR!
- ORV-007 We need legislation so tags in state are good in other states.
- ORV-007 Legal to ride and use day or night with lights and signal lights on roadways.
- ORV-007 DNR doesn't let these units on their land, so county should get registration fees and we should be allowed to use roads. Also, Winn (*Winnebago or Winneshiek counties?*) needs to have the same use laws as neighboring counties and states.

- ORV-008 Make street legal in Iowa.
- ORV-008 Make legal to operate in ditches.
- ORV-008 Bike trails in winter months like snowmobiles.
- ORV-008 Iowa is NOT an off-road-friendly state. Need to copy South Dakota.
- ORV-009 Trails (new and old)
- ORV-009 Open more trails in Dubuque County. Pass on-road travel in Dubuque County.
- ORV-010 We need to be able to drive these machines on rural roads.
- ORV-010 It would be good to be able to purchase a permit (with training) that would allow a user to use some designated public land for riding.
- ORV-011 Expansion
- ORV-011 Access
- ORV-011 Corridor trail system
- ORV-012 Let us use all types of trails since our registration money goes to maintain them.
- ORV-012 Also, statewide ordinances/laws regarding use of OHVs on roadways (currently, state is against home rule).
- ORV-012 The current registration fee for the state totals \$16.50 per vehicle plus a \$1.25 writing fee. I think counties should get a greater portion of the money we pay. So many of us go to our local recorder's office to do these things, but yet they only get \$1.25? That seems crazy since it is on the county to create and maintain trails.
- ORV-013 Able to ride all county roads in every county in Iowa.
- ORV-013 Side-by-sides should come street legal from all brands - horn, turn signals, mirrors, windshields, lights, safety equipment, etc.
- ORV-016 Dear Justin (*Justin Rath, President of the Iowa OHV Association, signed the survey cover letter*): I am not answering your survey questions. They feel like "Big Brother" and government getting into our private business. It shouldn't matter to you what we pay for our property.
- ORV-023 More trails - example: railroad beds going to ATV.
- ORV-030 Safety
- ORV-030 Creating trails for revenue generation through fees and goods sold (tourism)
- ORV-030 Fees to allow for trail operation and maintenance
- ORV-030 The counties should work together to make Iowa an attractive place to come ride (including towns). Have snowmobile and ATV trails work together to create scenic and town accessible places to ride. We would love to stay in Iowa, have places to ride, and spend our money here.
- ORV-033 Safety
- ORV-033 We use our ATV and side-by-side for farm use 95% of the time.
- ORV-042 Finding a way to get an ATV titled on one that has been lost
- ORV-051 Should be able to ride gravel roads in every county
- ORV-051 A trail system like Wisconsin's - example - Black River Falls
- ORV-051 Have a license plate of some type for gravel road use - like a motorcycle has or something
- ORV-055 All lakes should be open to operate ATVs
- ORV-056 Making them more able to run on rural roads
- ORV-063 Iowa OHV parks do not accommodate side-by-sides well. Too narrow trails and gates.
- ORV-063 Need more larger parks. More camping.
- ORV-063 I would like to ride my side-by-side from my house on county roads to the OHV park.
- ORV-063 I have heard in past years the registration money was not going towards OHV parks. That is not fair for the ones that are paying. Iowa OHV parks are too small and need to be bigger with more miles of trails.
- ORV-065 More places to ride.
- ORV-065 All state-run parks should have 1-way travel on trails.
- ORV-069 Iowa has very few riding areas and they are small.
- ORV-069 Statewide, county roads should open to ATV ORV use. It would increase revenue in small towns and riding opportunities.
- ORV-069 Side-by-side accessible nice campgrounds
- ORV-075 Not enough trails to operate on

ORV-075 I would have to have proof of the money actually goes to expanding the sport before I would say yes to increasing the amount (*of the fee*)

ORV-084 Let us use county roads more.

ORV-085 We should be able to ride bike trails in winter.

ORV-085 We should be able to ride gravel roads.

ORV-085 We need more trails.

ORV-085 I spend a lot of money going out of state because Iowa is not ATV-friendly.

ORV-090 I use it for farming to go from my acreage to land that I farm (about 3 miles away)

ORV-090 I mainly use mine for farming, pick up rocks, etc.

ORV-095 Legislation to authorize use on county highways

ORV-099 More parks in Central Iowa (Des Moines area)

ORV-099 Leeway to ride on bike paths in winter

ORV-099 Use as slow-moving equipment on roads (like a tractor)

ORV-099 Police harassment on my own property. If I didn't stop riding on my own property, he would ticket me for noise. (I'm 60 years old. Stock exhaust. No noise.)

ATV-003 Not too many regulations - speed limits - age - lighting - SMV signs - mirrors

ATV-003 My wife and I totally enjoy going for a ride out to our 2 different farms from town. We load a cooler with pop and snacks and have a great time. We do stuff together that we probably would not do otherwise, and our grandchildren love it, too.

ATV-008 We need more parks to ride in.

ATV-008 More areas for youths 5 and under

ATV-008 If my memory serves me correctly, the state of Iowa (2002) seized the money the OHV members paid and then used that money for general fund purposes. My money I paid for OHV was now an extra tax I paid. That is wrong. P.S. The Fort Dodge park is awesome!

ATV-013 Road legal

ATV-018 Open all gravel and secondary roads to OHV use in the state.

ATV-018 Need more OHV parks.

ATV-018 Have an "All access" OHV registration and a "Road use only" registration for half the cost.

ATV-018 It is apparent that there should be 2 different OHV registrations. With gravel and secondary roads open in many counties, many users only use the roads and private land. These registered vehicles are paying for OHV parks and the law enforcement in those while never entering these areas. I understand the OHV Association and the state parks would not like this idea as it would be less of a money draw, but when the OHV registration rules went into effect, there was not legal road riding for recreation.

ATV-022 I use mine for work only (minimal recreational riding on my own property)

ATV-022 I use mine for farm work primarily, but it sounds like fun to ride elsewhere. But it would have to be close proximity because if I am going to pay extra fees I would need to utilize it often.

ATV-023 Need places to ride

ATV-029 I do all my riding in Wisconsin.

ATV-029 Open the county roads so I can spend my money in Iowa.

ATV-036 Destination riding from town to town on trails like Wisconsin and Utah.

ATV-036 Gravel road and secondary road access like Fort Dodge

ATV-036 Plates should be state-wide, not county by county

ATV-036 Don't support higher fees because the state taps into the money for other purposes

ATV-048 We love Gypsum City. Please keep it going.

ATV-049 Charge \$30 for 2-year license and send out a renewal reminder.

ATV-049 Have more trails running through woods and on roads.

ATV-049 Make it more appealing to ride in Iowa.

ATV-049 Get more trails and riding areas - not just in ATV/OHV parks - then I'll think about increasing fees

ATV-060 Safety and maintenance

ATV-060 I see more Iowa plates on vehicles in Wisconsin ATV parking lots. Places like Backbone State Park, Yellow River Forest, Volga River, could have trails in them and keep some of the money going out of state here!

ATV-072 To be able to ride on all streets in Maquoketa so I can use my side-by-side to take brush from my yard to take it to the city yard waste site.

ATV-072 I wish people would have to take a safety course like a license or motorcycle license because too many people get hurt on them.

ATV-074 Do not use OHV parks or trails. I use mine for farming.

ATV-074 I am a farmer and all three of our machines are used for that purpose so I don't feel that farmers or people who don't use the OHV trails or parks should have to help pay for something the we will not use.

ATV-077 More counties adopting ordinances to use OHV on roads

ATV-077 Allow snowmobile trails alongside roadways to be used as ATV trails

ATV-081 Maintain track conditions for safety.

ATV-081 Would be nice to be able to street-title ORMs with street kits as in other states.

ATV-083 Helmet requirement

ATV-083 Good overall. Bathrooms with showers are nice for drives home. Would like to see less than a 2 hour drive to the nearest park. I ride on my own property, but do enjoy exploring and trail riding with my boys upon occasion. Nearest is 2 hour drive.

ATV-087 No parks in Louisa County - public hunting, but no riding

ATV-087 Maintain low fees. Taxes high enough. Registration

ATV-087 Statewide riding on all secondary roads, not county-by-county different rules.

ATV-089 More parks

ATV-089 Less restrictions

ATV-091 Allow to ride on more roads

ATV-091 Allow to ride on state parks

ATV-092 We like to ride in the state, so use the money to improve parks and increase riding hours.

ATV-092 Open to traveling all over the state if parks are open. We ride in a group that invests easily over \$50,000 per family in their side-by-sides. A little increase in the registration fee won't bother us.

ATV-108 Our registration/trail fees are spent out of our county - keep local.

ATV-108 Need to open parts of county parks to ATV use.

ATV-108 I also have 2 snowmobiles and take multiple trips per year to other states - Wyoming, Minnesota. I already pay enough registration and insurance fees per year for all my off road vehicles (6). No money is spent locally that I could use or benefit from. Don't want my registration fee going to other parts of the state.

ATV-112 I would pay more to be allowed to ride on gravel roads, special plate

ATV-112 Open gravel roads to ATV OHV

ATV-115 All fees are spent on parks

ATV-115 Expand the number of acres to ride

ATV-115 I would like the late penalty removed from residents registering late after January 1. Nonresidents don't get penalized.

ATV-118 To ride ditches and gravel roads to and from

ATV-118 Need much more

ATV-120 Safety

ATV-120 Insurance

ATV-120 I use my own property.

ATV-121 Being able to legally operate on public roads, primarily rural gravel roads

ATV-121 My vehicles are used primarily for farming operations.

ATV-122 Need for trails in the Des Moines area

ATV-127 Trade digitally

ATV-127 Helmet use - especially under 16

ATV-131 Need to be public road accessible

ATV-136 On-site camping

ATV-136 Restroom and shower facilities

ATV-136 Trail maintenance

ATV-138 More locations in Eastern Iowa

- ATV-141 More places to ride
- ATV-148 South Dakota allows OHVs on public roads. This would help get more people interested in OHVs. Iowa is very limited for riding opportunities compared to neighboring states.
- ATV-152 Multi-use trails
- ATV-152 Winter trails
- ATV-152 Restrooms that are clean for women as well
- ATV-152 We need more riding areas for the kids and adults. Also, events at the riding areas, such as family fun rides.
- ATV-154 Iowa parks are so limited and so far apart. That is why Iowa loses so many registrations to Wisconsin. They truly cater to the off-road community. Food, gas, and lodging is all money they get.