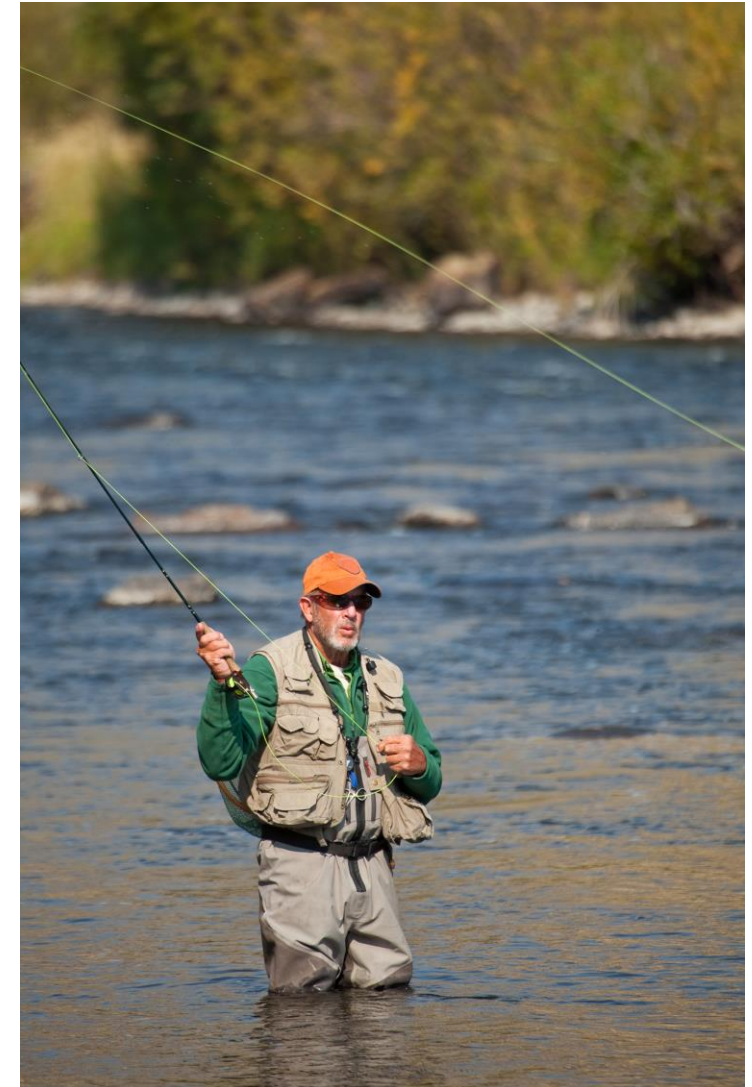


The Economics of Outdoor Recreation



The Value Outdoor Recreation in General



Outdoor Industry Association



Outdoor Industry Association



CAMPING

RV campsite
Tent campsite
Rustic lodge



OFF-ROADING

ATV
ROV
Dune buggy
4x4 and Jeep



WHEEL SPORTS

Bicycling,
paved road
Bicycling, off-road
Skateboarding



FISHING

Recreational fly
Recreational
non-fly



SNOW SPORTS

Cross-country
skiing
Downhill skiing
Nordic skiing
Snowboarding
Snowmobiling
Snowshoeing
Telemark skiing



WATER SPORTS

Kayaking
Rafting
Canoeing
Surfing
Scuba diving
Sailing
Stand-up paddling
Boating (cruising,
sightseeing, wake-
boarding, tubing,
kneeboarding,
waterskiing)



HUNTING

Shotgun
Rifle
Bow



TRAIL SPORTS

Day hiking on trail
Backpacking
Rock or
ice climbing
Running 3+ miles
Horseback riding
Mountaineering



MOTORCYCLING

On-road
Off-road



WILDLIFE VIEWING

Outdoor Industry Association

7.6 million jobs



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RV campsite
Tent campsite
Rustic lodge



OFF-ROADING

ATV
ROV
Dune buggy
4x4 and Jeep



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Shotgun
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Bow



TRAIL SPORTS

Day hiking on trail
Backpacking
Rock or
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Running 3+ miles
Horseback riding
Mountaineering



MOTORCYCLING

On-road
Off-road



WILDLIFE VIEWING

Outdoor Industry Association

7.6 million jobs

\$887 billion consumer spending

\$65.3 billion federal tax revenues

\$59.2 billion state & local taxes



CAMPING

RV campsite
Tent campsite
Rustic lodge



OFF-ROADING

ATV
ROV
Dune buggy
4x4 and Jeep



WHEEL SPORTS

Bicycling,
paved road
Bicycling, off-road
Skateboarding



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Rifle
Bow



TRAIL SPORTS

Day hiking on trail
Backpacking
Rock or
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Running 3+ miles
Horseback riding
Mountaineering



MOTORCYCLING

On-road
Off-road



WILDLIFE VIEWING



Bureau of Economic Analysis



A measure of how outdoor products & services contribute to Gross Domestic Product (GDP)

“all recreational activities undertaken for pleasure that generally involve some level of intentional physical exertion and occur in nature-based environments outdoors”

Bureau of Economic Analysis



Core activities

production and purchase of gear, equipment, fuel, concessions, maintenance, repair, and fees.

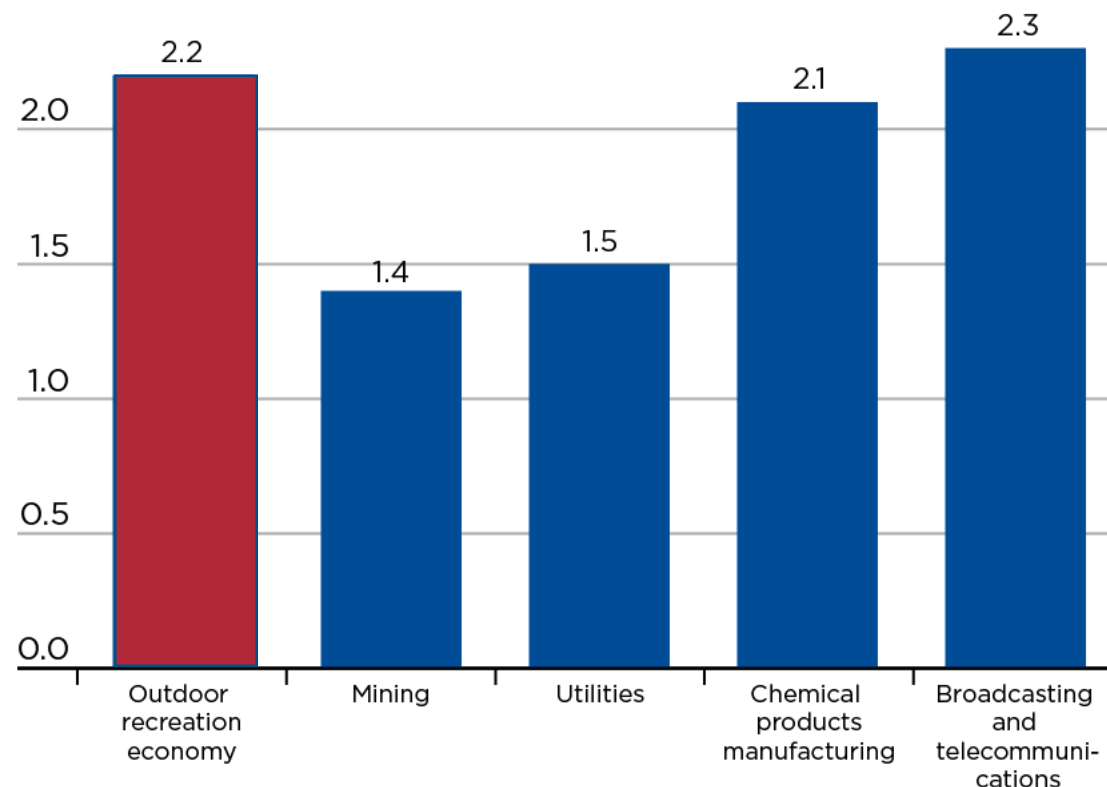
Supporting activities

travel and tourism expenses, construction,
and government expenditures related to
outdoor recreation activities.

Outdoor Recreation Satellite Account (ORSA)

% of GDP

Percent
2.5

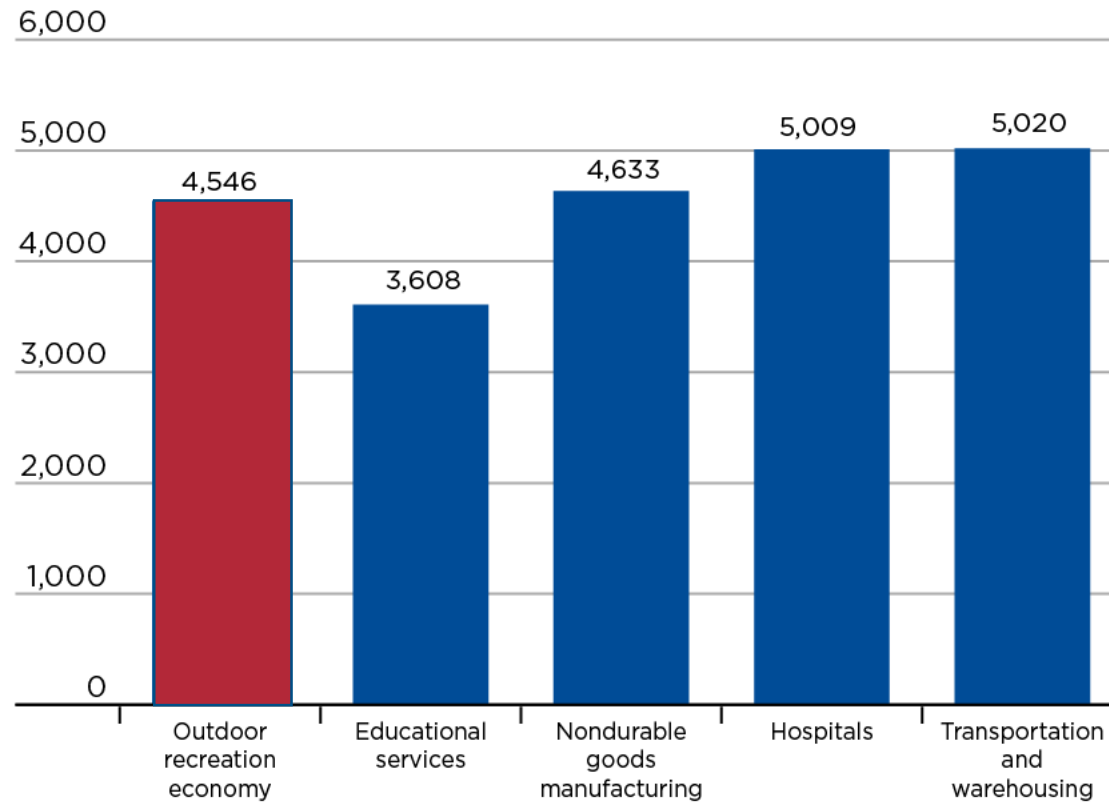


2.2% of GDP

Grew by 1.7% in 2016
Rest of economy by 1.6%

Outdoor Recreation Satellite Account (ORSA)

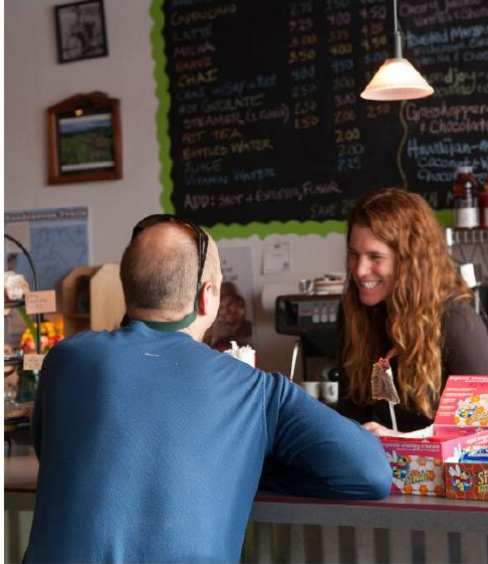
Jobs (x1,000)



4.55 million jobs

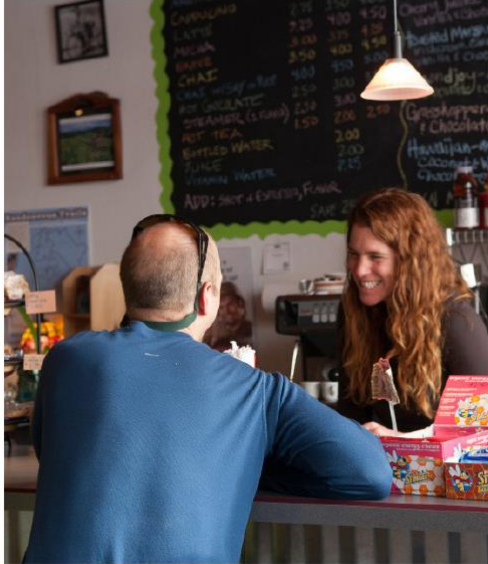


The Many Benefits of Recreation



**STIMULATING
LOCAL
BUSINESS**

The Many Benefits Recreation

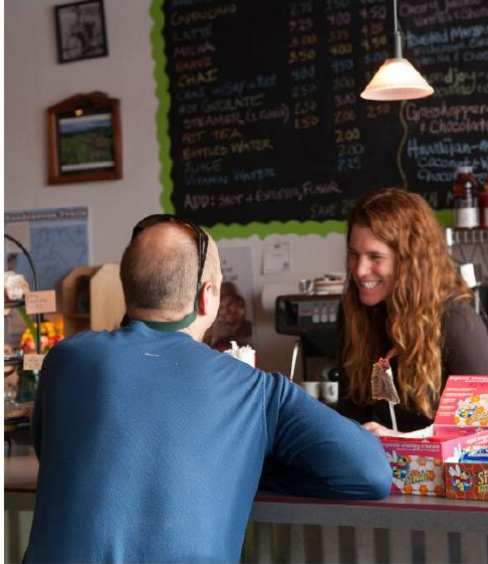


**STIMULATING
LOCAL
BUSINESS**



**ATTRACT AND
RETAIN TALENT**

The Many Benefits of Recreation



**STIMULATE
LOCAL
BUSINESS**



**ATTRACT AND
RETAIN TALENT**




**QUALITY
OF LIFE,
HEALTH**



**Goldman Sachs' online recruitment
promotion for their SLC office:**



A wide-angle photograph of the Salt Lake City skyline. In the foreground, there are lush green trees and some low-rise buildings. The middle ground is filled with various skyscrapers and commercial buildings, including a prominent white building with a spire. In the background, majestic snow-capped mountains rise against a clear blue sky. A semi-transparent white box is overlaid on the right side of the image, containing text.


Goldman Sachs' online recruitment promotion for their SLC office:

“Salt Lake City offers great outdoor recreation with 15 national parks and monuments, all within a one-day drive”



A woman wearing a white mountain bike helmet with a camera mounted on top and a white jersey with yellow and red accents. The jersey has "TROY LEE DESIGNS" and "BICYCLE · BMX · MOTO" printed on it. She is outdoors with mountains in the background.

Ali Knapp CEO, WISETAIL, Bozeman:

A woman wearing a white mountain bike helmet with a camera mounted on top and a white jersey with yellow and red accents. The jersey has "TROY LEE DESIGNS" and "BICYCLE · BMX · MOTO" printed on it. The background shows a mountain range under a hazy sky.

Ali Knapp CEO, WISETAIL, Bozeman:

“Access to the Montana outdoors is a competitive advantage to attract top talent”



“The National Monument provides activities normally associated with university towns that are now available to all of us in this remote area.”

- Peter Gillespie, Kanab

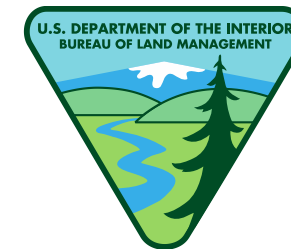


“The National Monument provides activities normally associated with university towns that are now available to all of us in this remote area.”

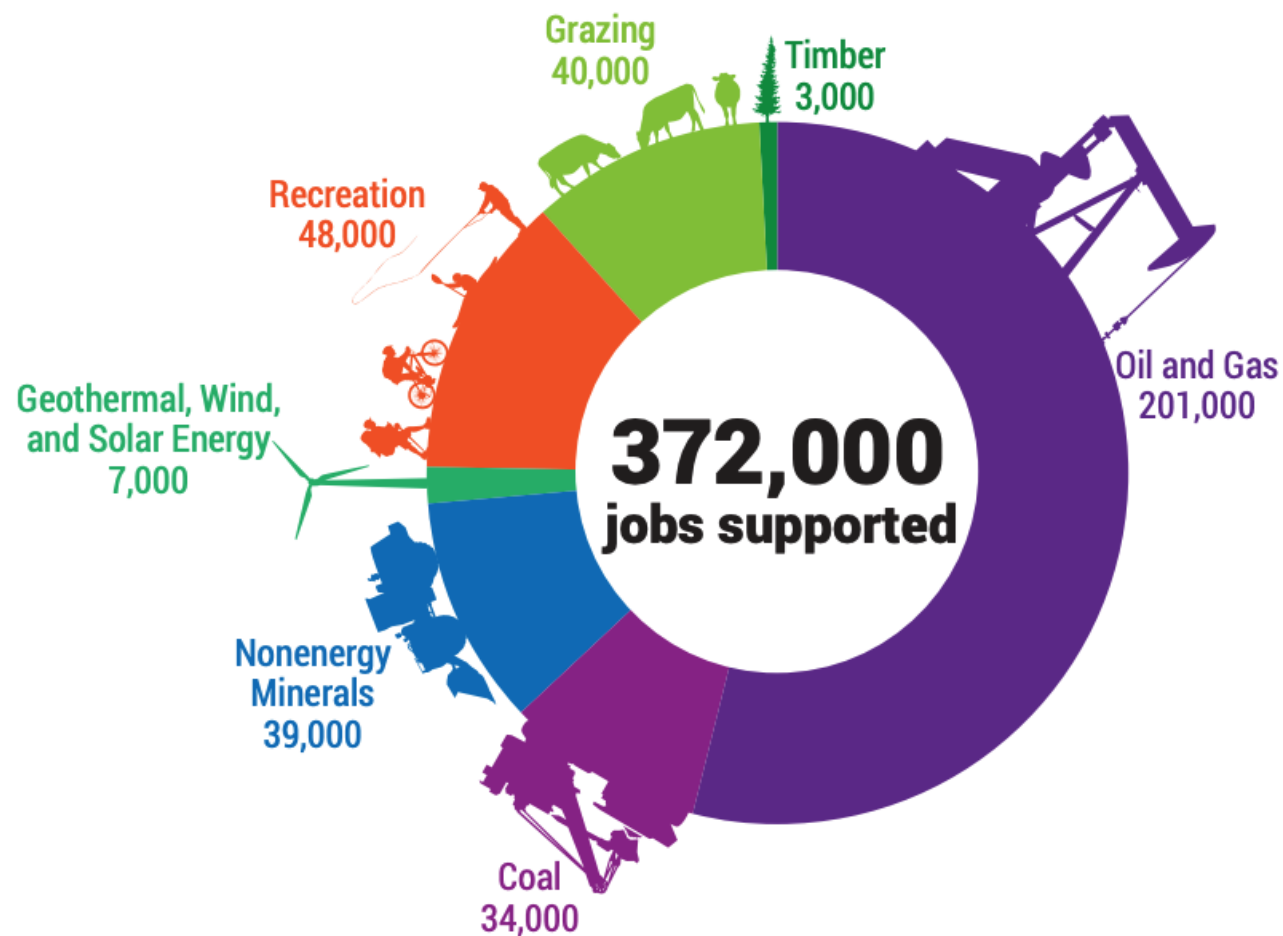
- Peter Gillespie, Kanab



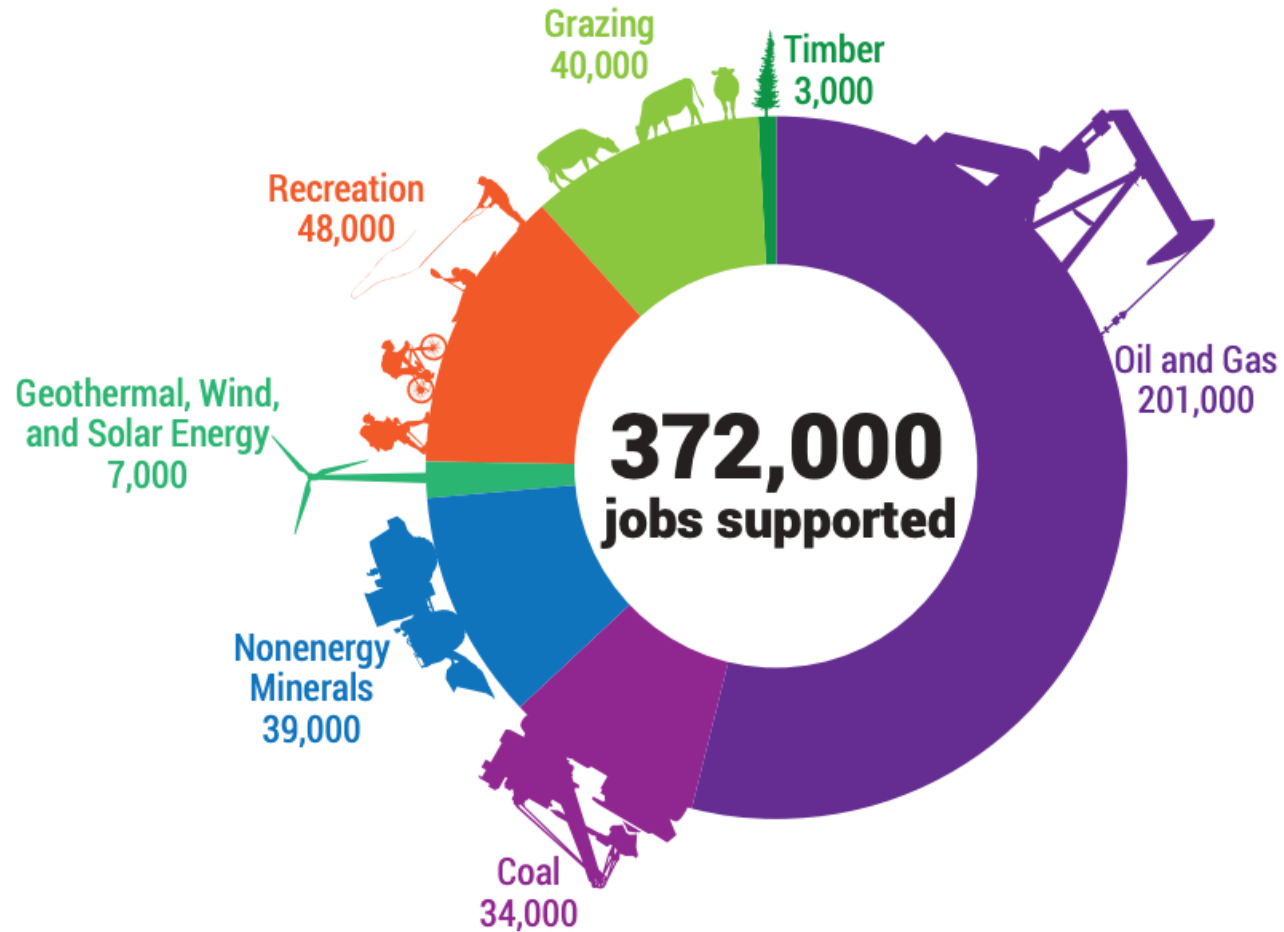
Retirement and investment income is 44% of total in Kane County and 50% of net growth since 2000



Economic Contributions from BLM-Managed Lands



Economic Contributions from BLM-Managed Lands



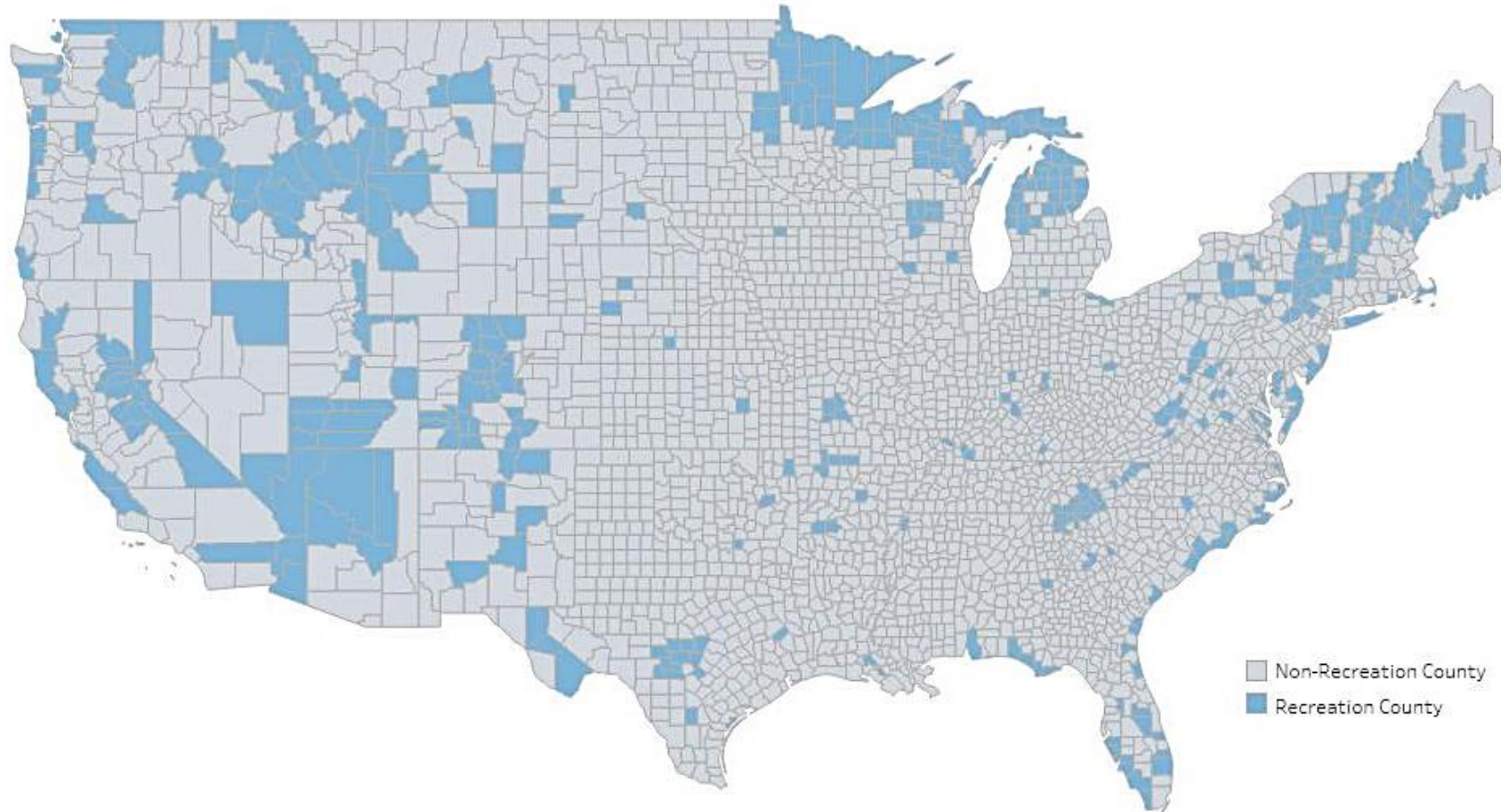
Plus





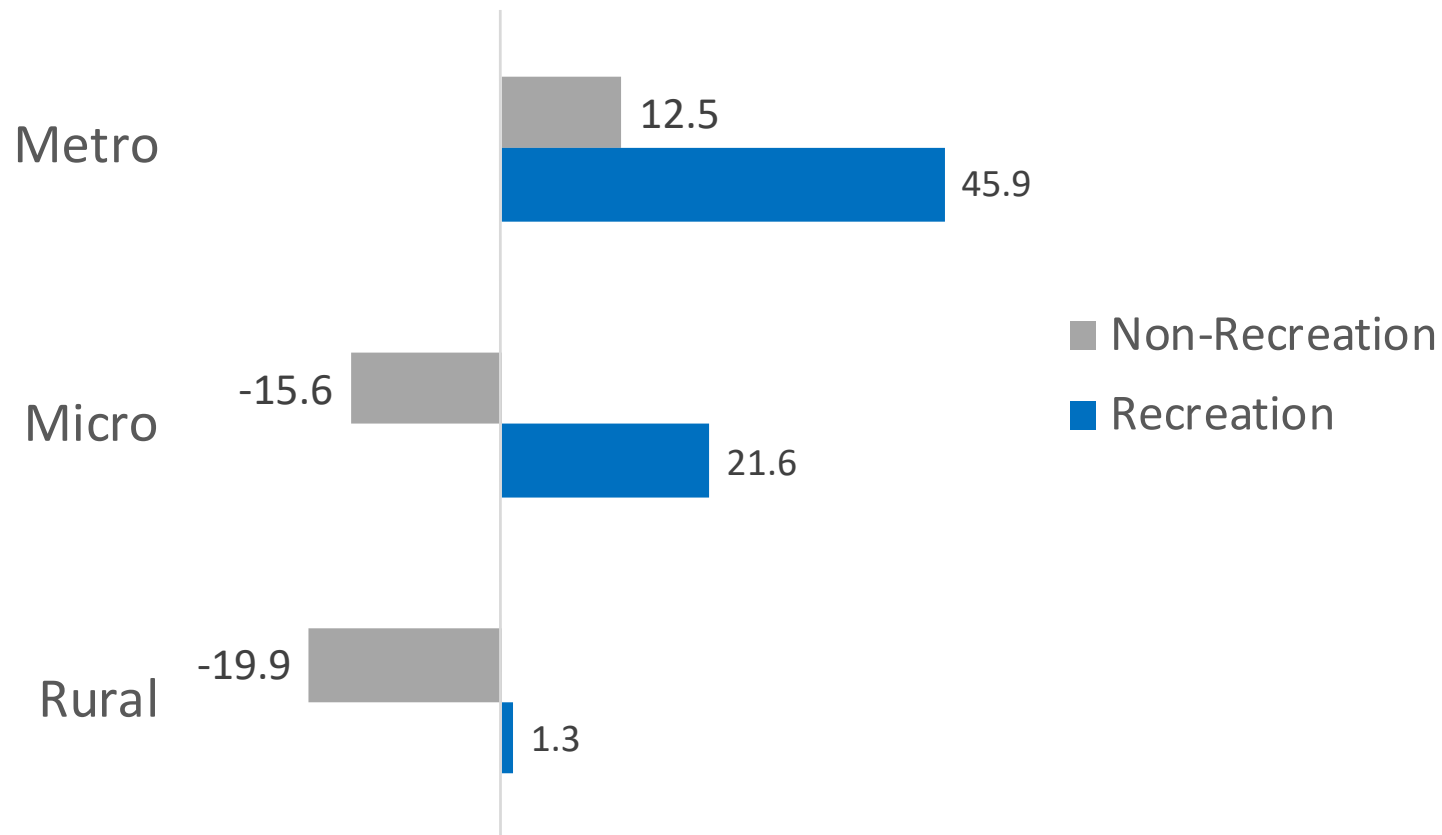
"It would be good to settle in a place that has recreational facilities."

Recreation Counties Perform Better



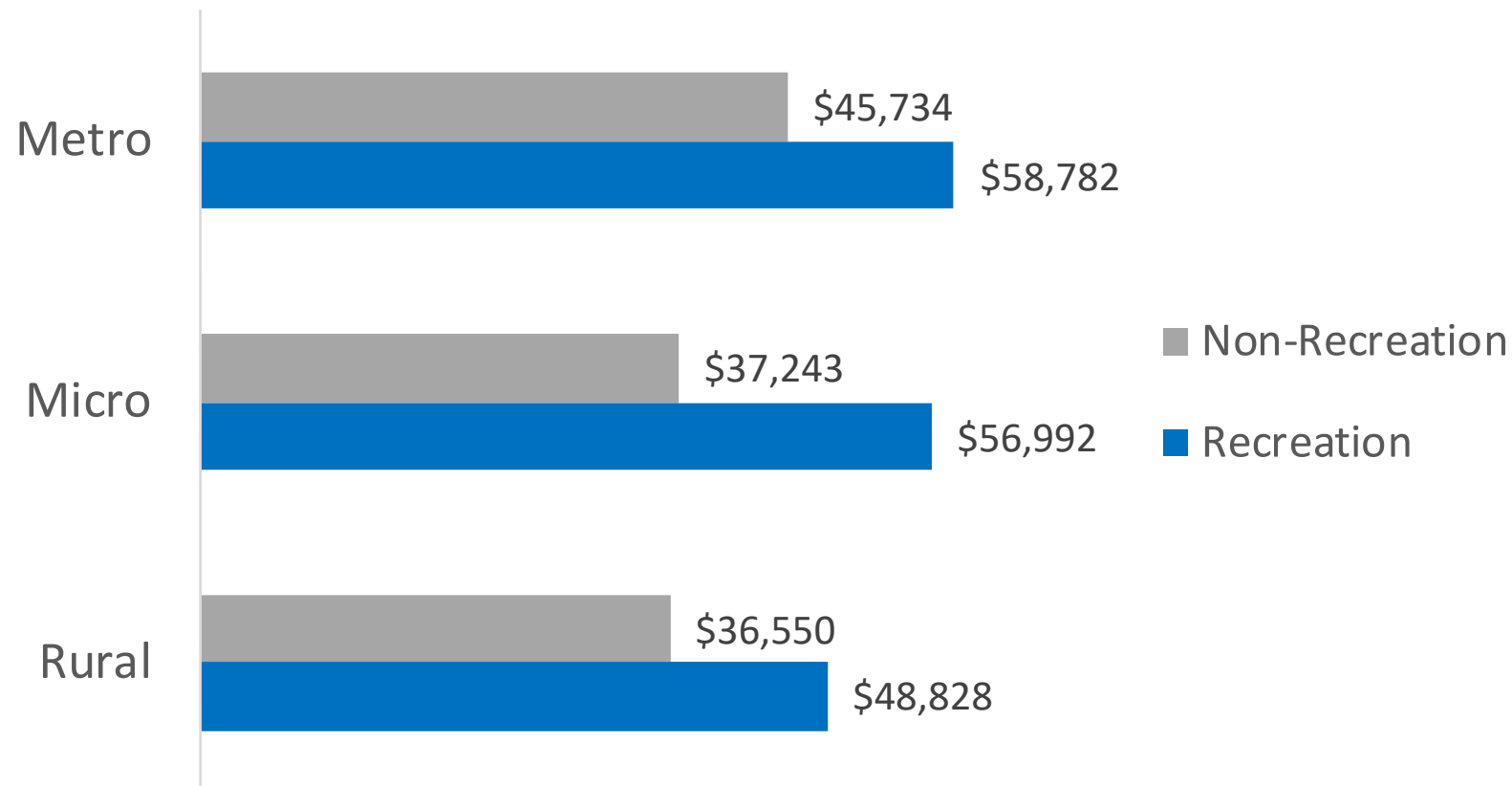
Recreation Counties Have Higher Migration

Ave. Net Migration per 1,000 Residents, 2010-2016



People Moving In Have Higher Income

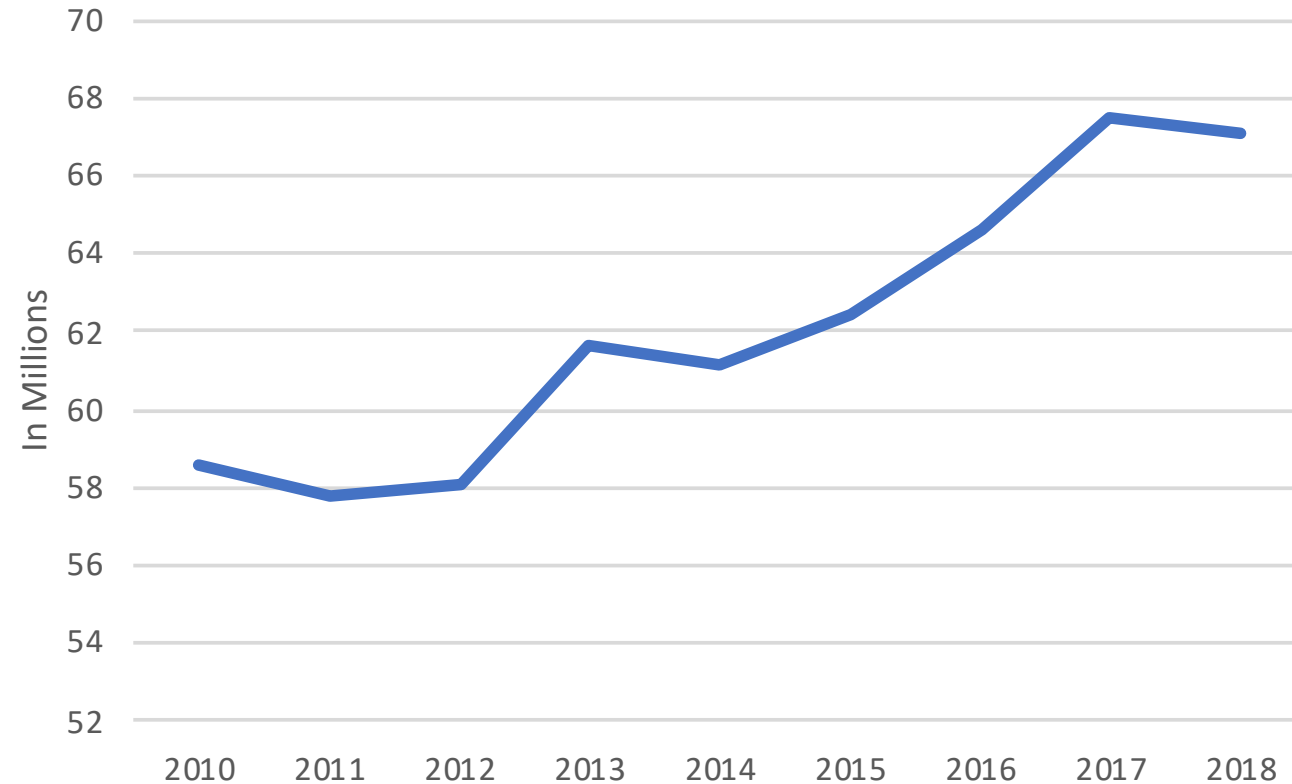
Average Household Income of People Moving In 2010-2016



Recreation Visits to Public Lands



BLM Visitation



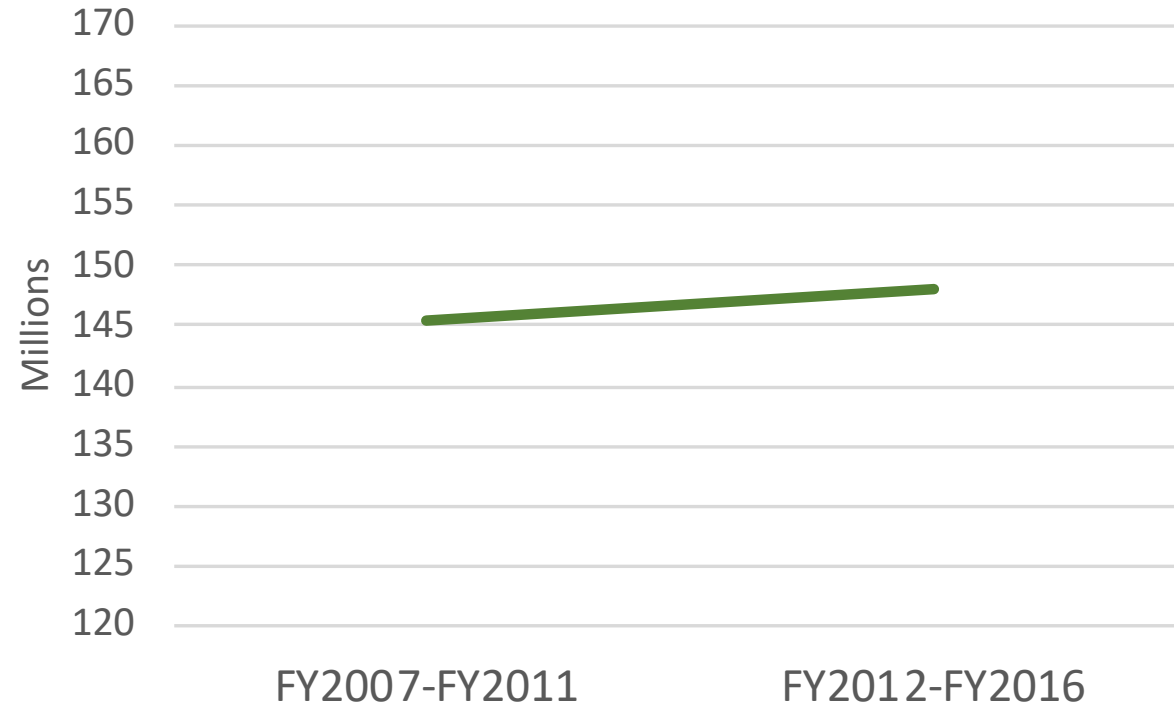
2010-2018:

+ 15%

+ 8.5 million more visits

national

Forest Service Visitation



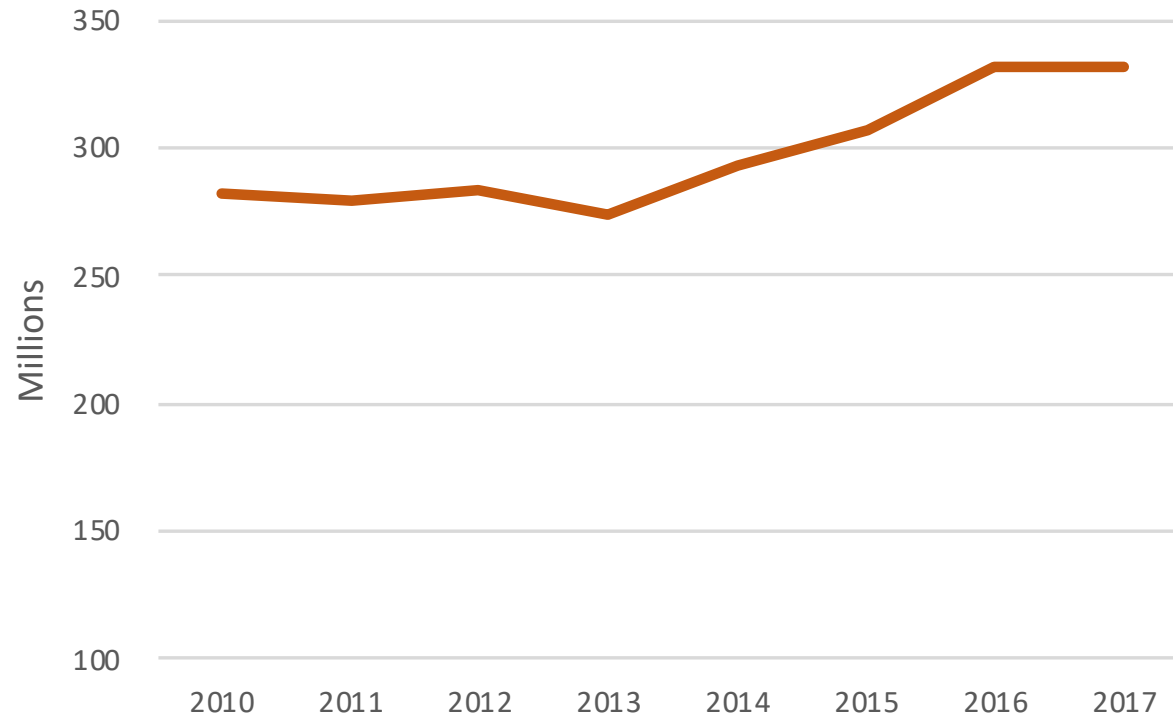
In the last decade:

+ 2%

+ 3 million visitors

national

National Park Service Visitation



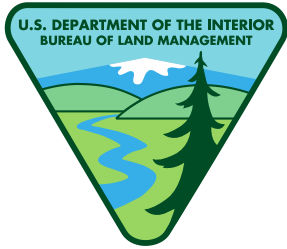
2010-2017:

+ 18%

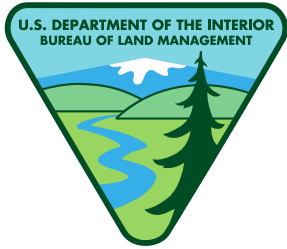
+ 50 million more visits

national

Jobs Impact from Visitor Expenditures (2016)



Jobs Impact from Visitor Expenditures (2016)



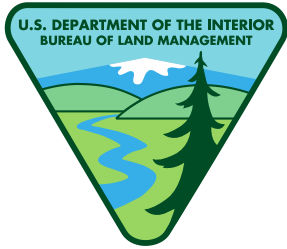
65 million visits



48,000 jobs



Jobs Impact from Visitor Expenditures (2016)



65 million visits

48,000 jobs



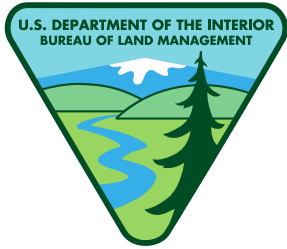
146 million visits



148,000 jobs



Jobs Impact from Visitor Expenditures (2016)



65 million visits

48,000 jobs



146 million visits

148,000 jobs

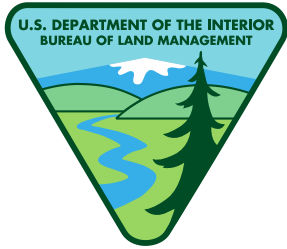


331 million visits



318,000 jobs

Jobs Impact from Visitor Expenditures (2016)



65 million visits

48,000 jobs



146 million visits

148,000 jobs



331 million visits

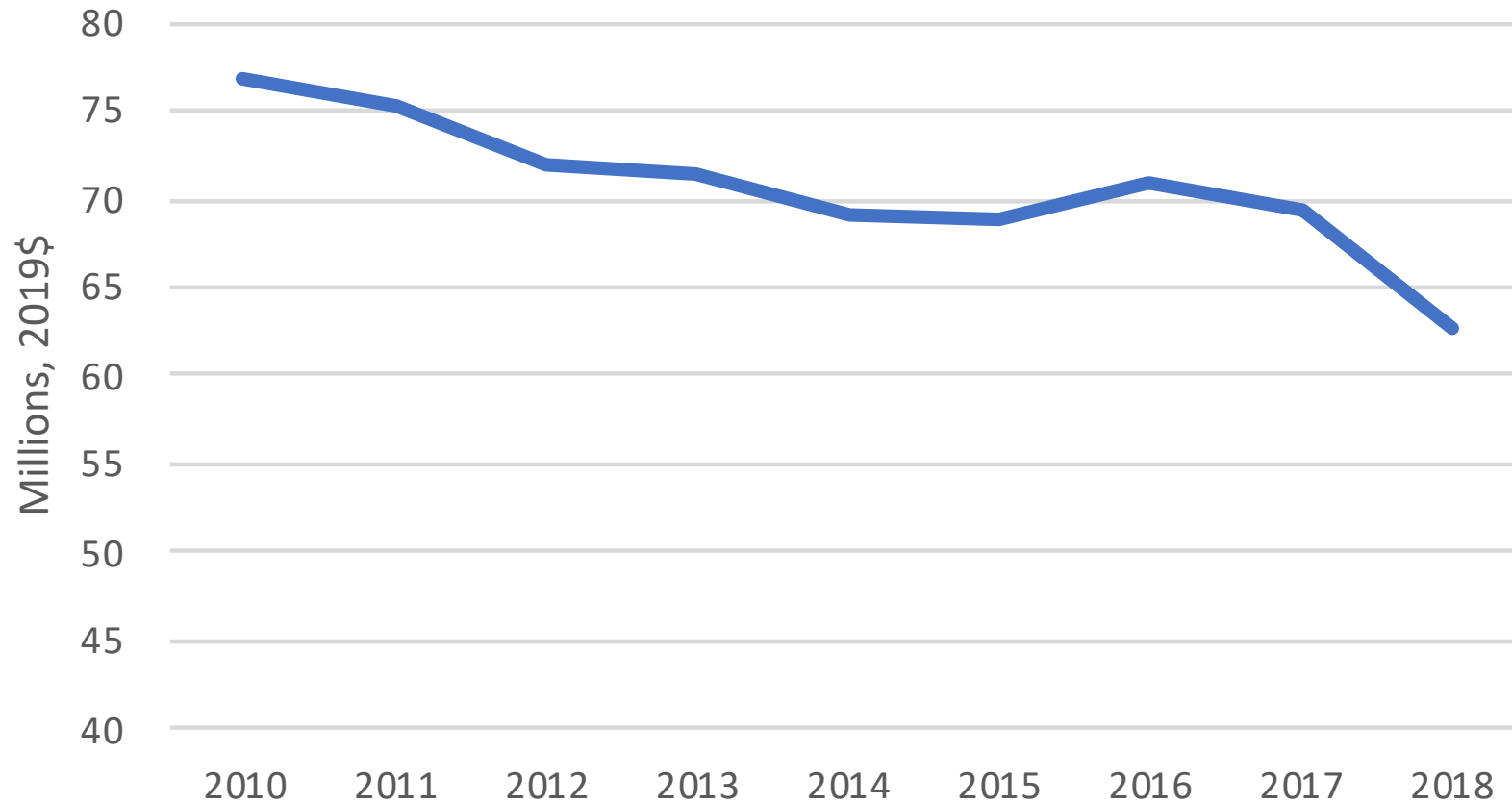
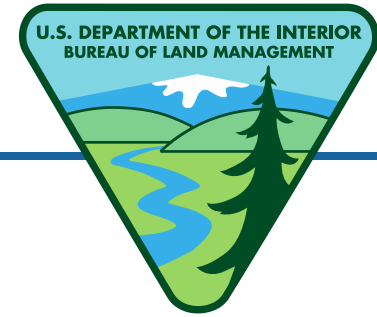
318,000 jobs

542 million visits → 514,000 jobs TOTAL

Federal Agency Recreation Funding

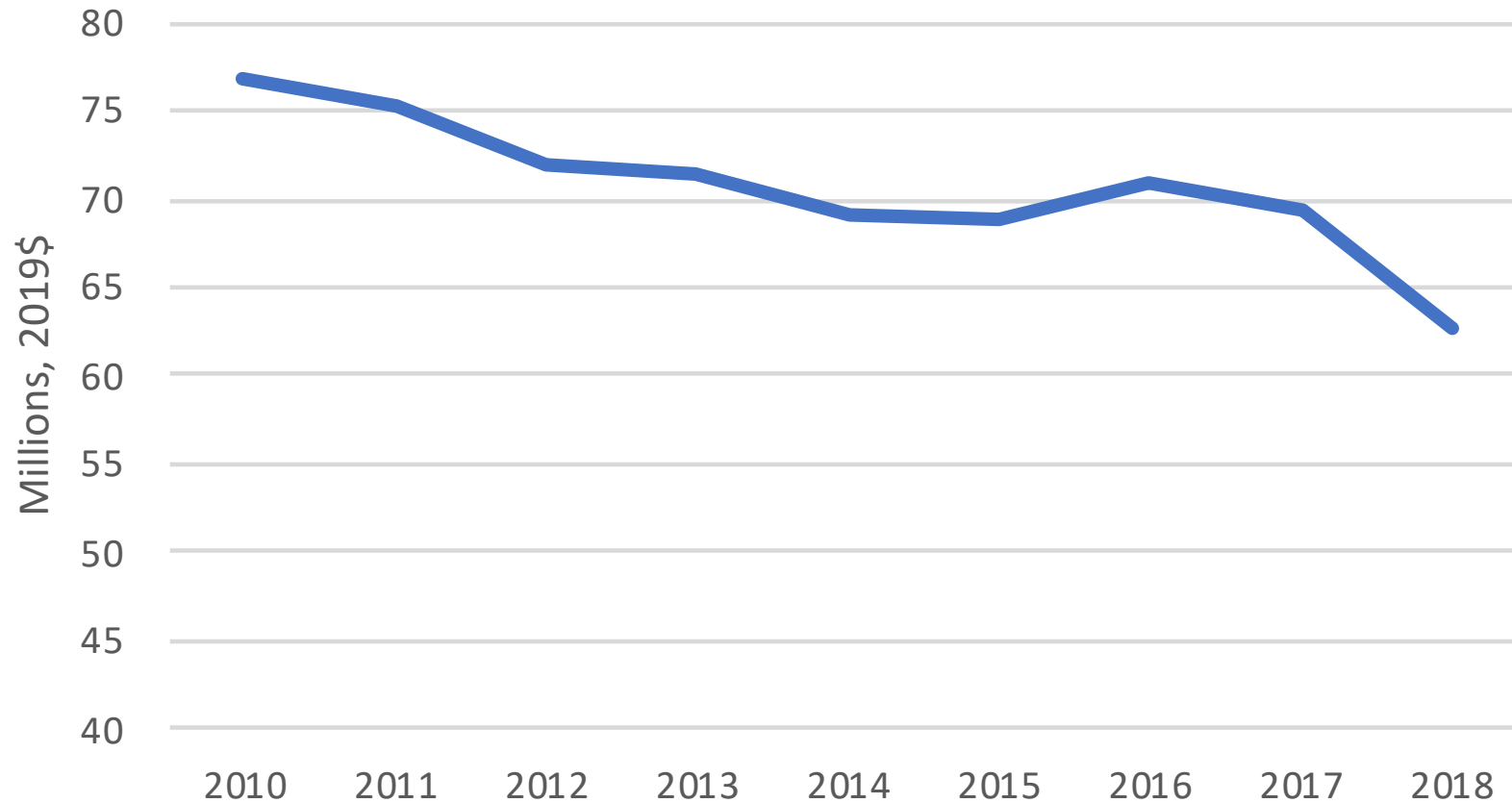
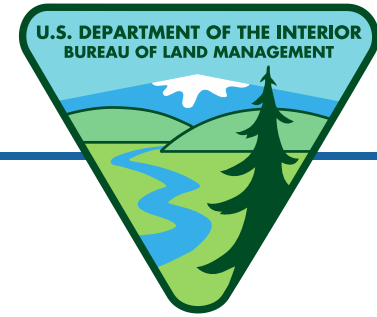


BLM Recreation Budget



- 18%
- \$14 million

BLM Recreation Budget

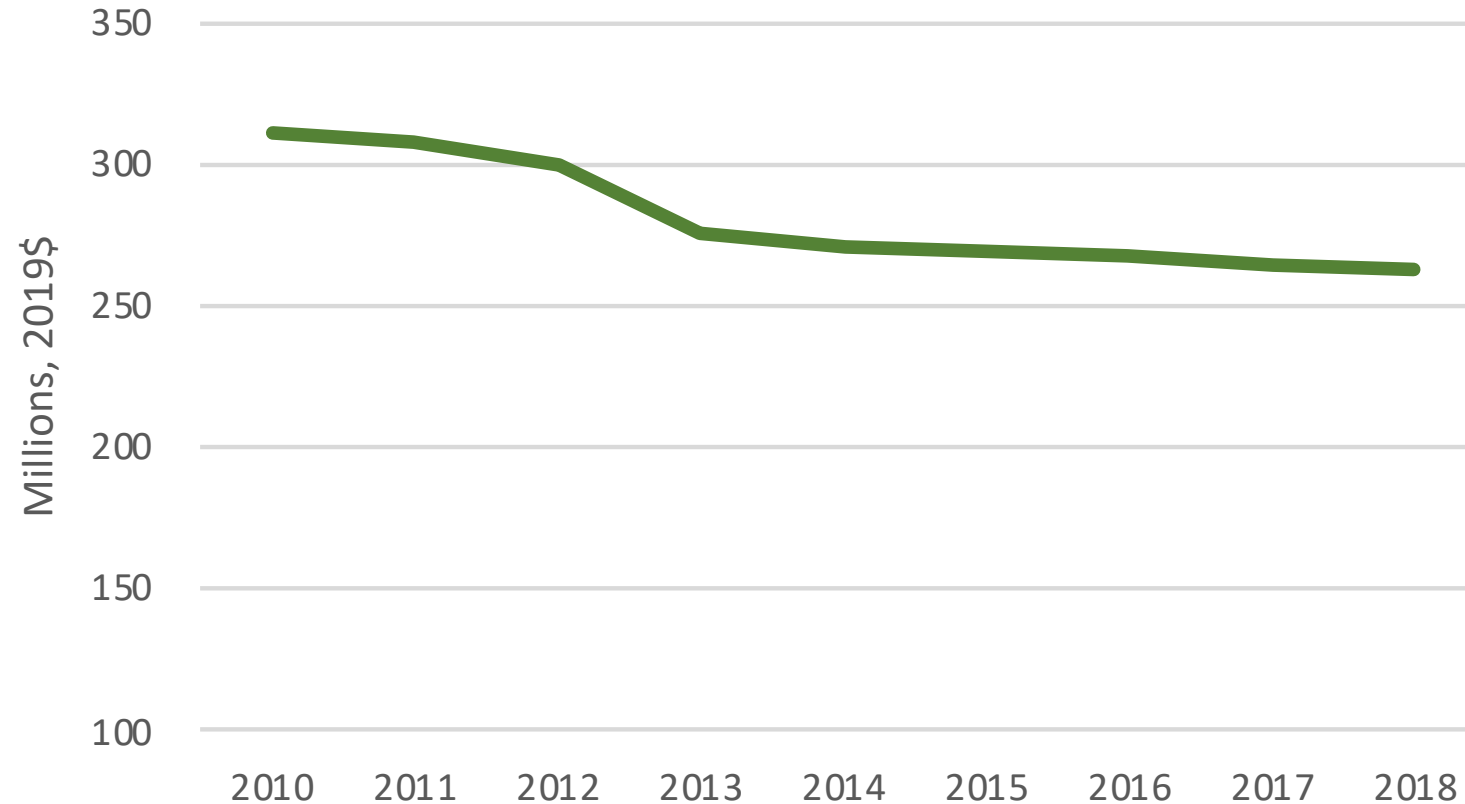


- 18%

- \$14 million

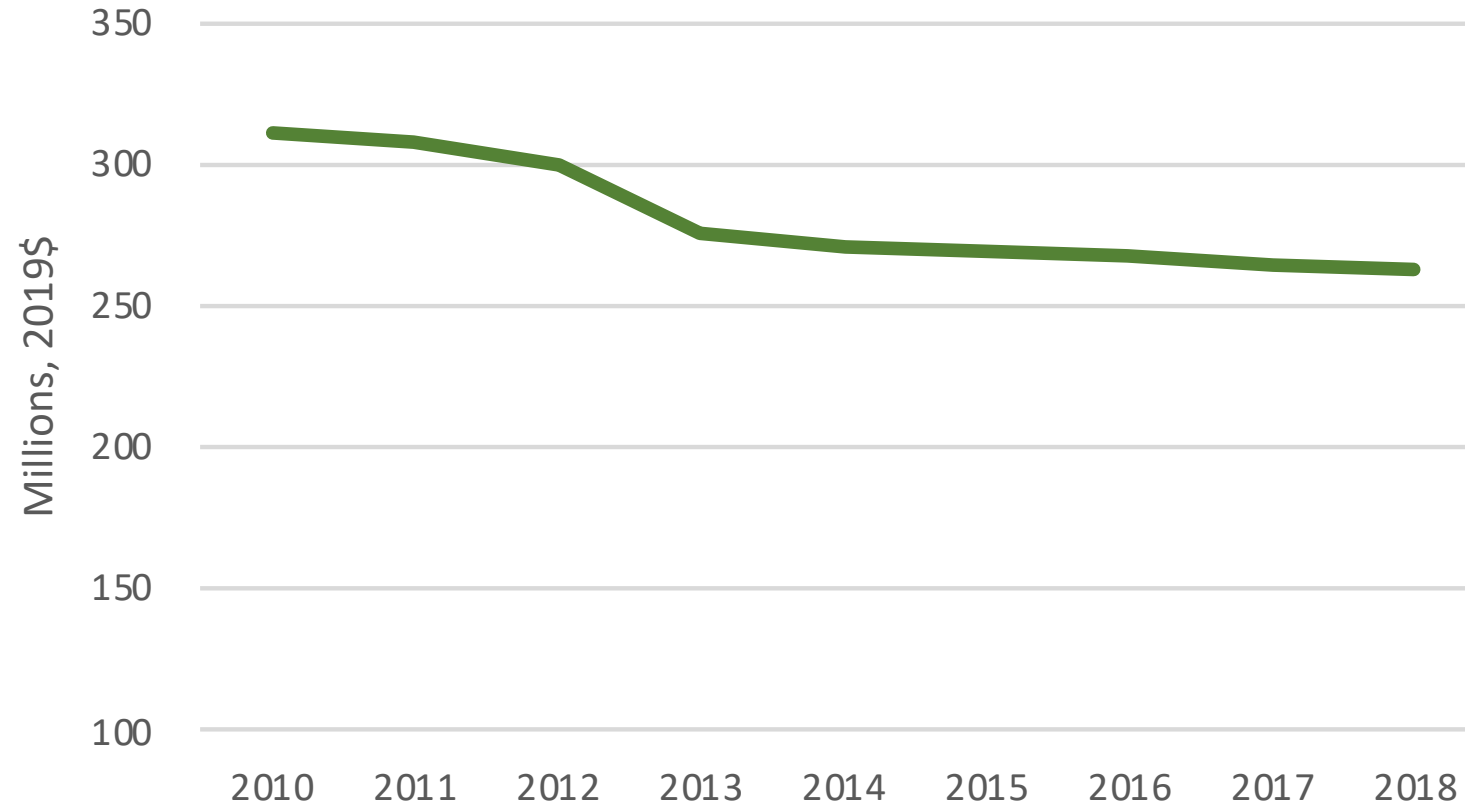
4% of total budget

Forest Service Recreation Budget



- 16%
- \$49 million

Forest Service Recreation Budget



- 16%
- \$49 million

4% of total budget

Fire Borrowing Impacts Recreation Budgets

2000-2015, Forest Service:

Gained



+ 114% fire staff

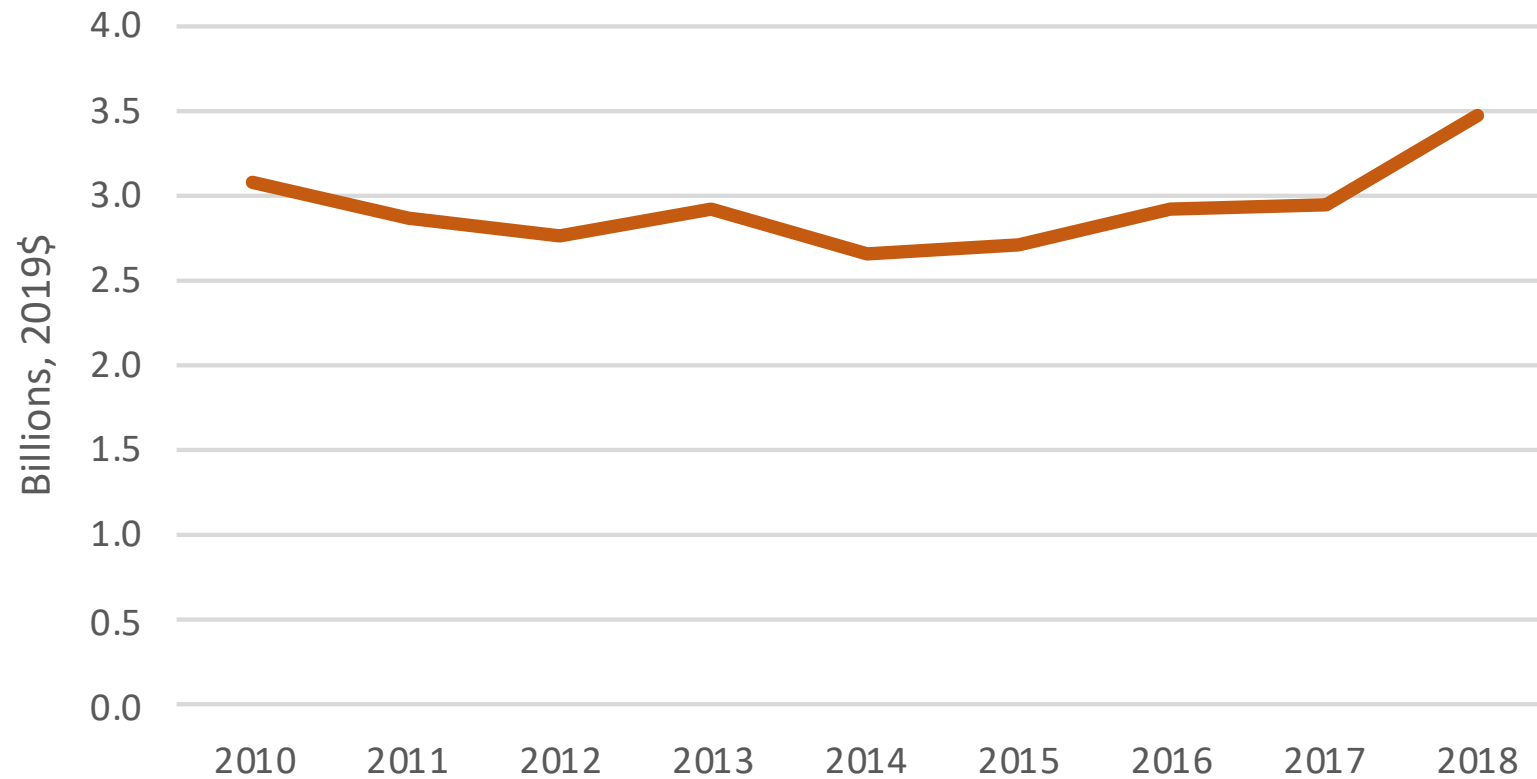
Lost



- 28% recreation, heritage, wilderness
- 18% wildlife and fish management



National Park Service Budget



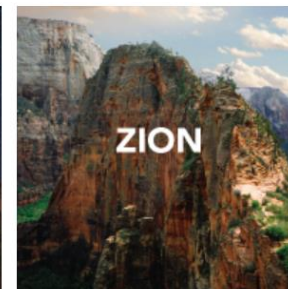
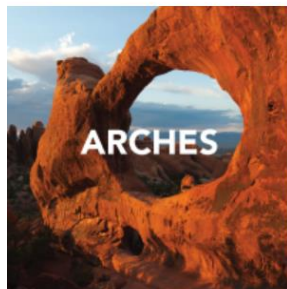
+ 12%

+ \$38 million

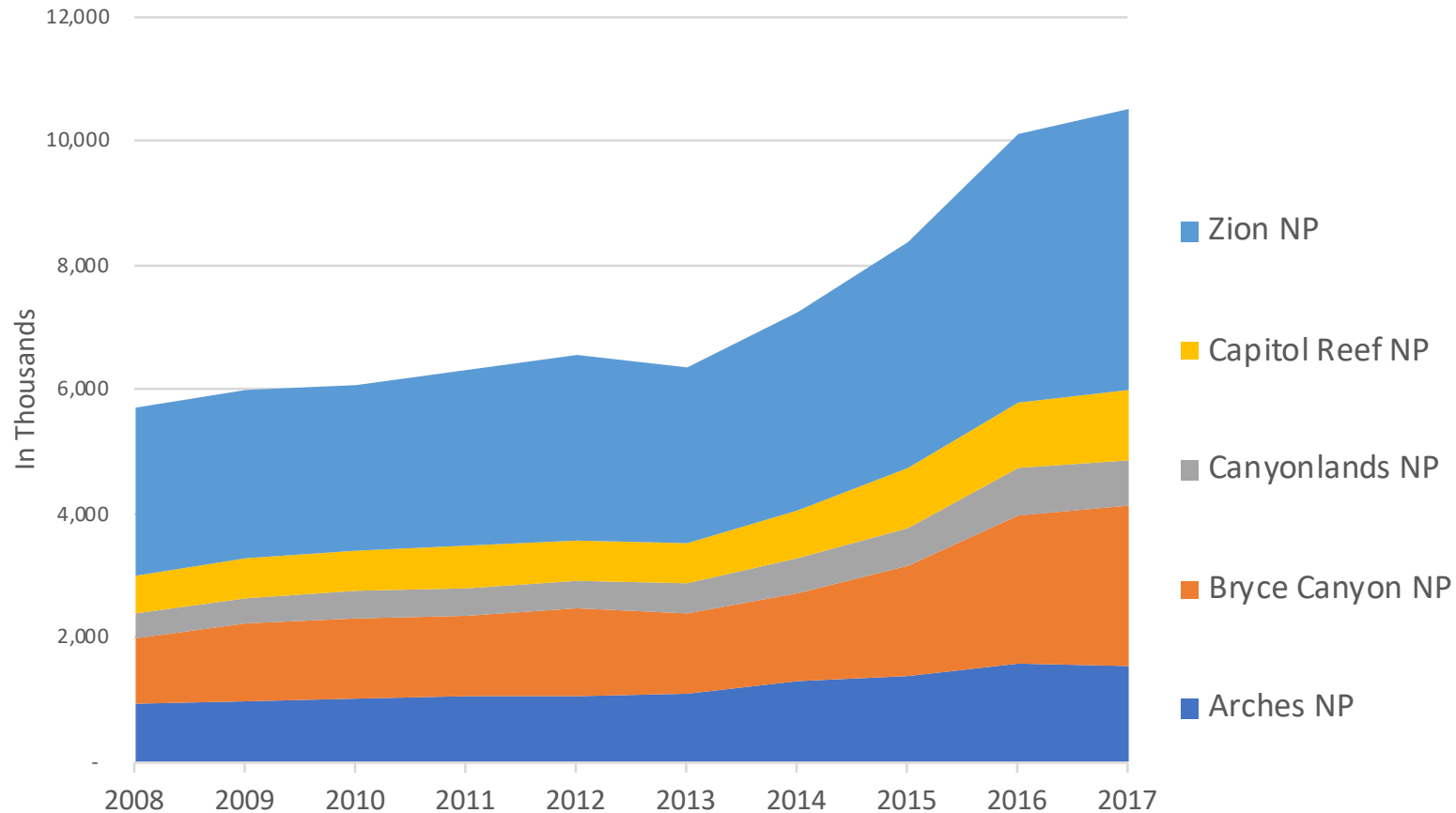


UTAH'S NATIONAL PARKS

EXPLORE THE MIGHTY 5®



Visits to Utah's "Mighty Five"

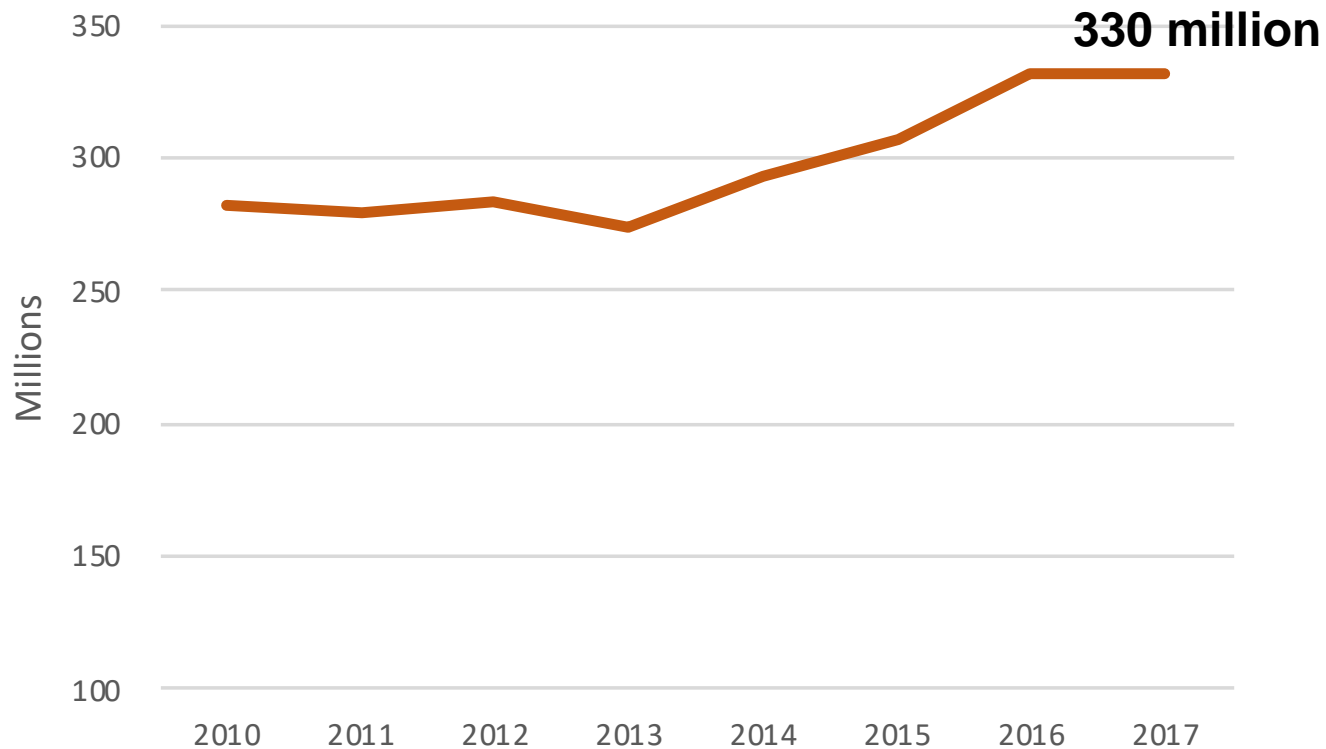


**2013-2017:
for the 5 parks**

+ 66%

+ 4.2 million visits

All National Park Unit Visits: U.S.

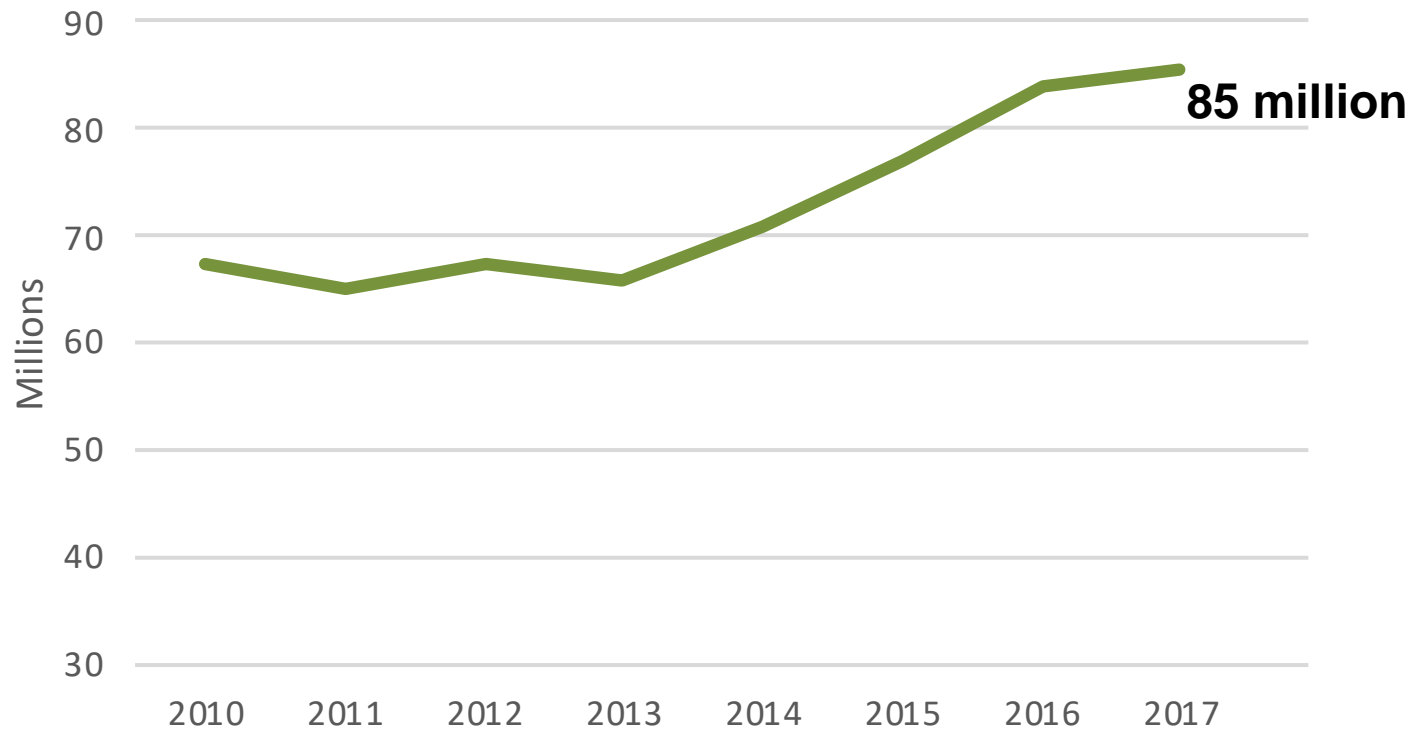


Since 2013:

57 million more visits

21% increase

National Parks Visits: U.S.

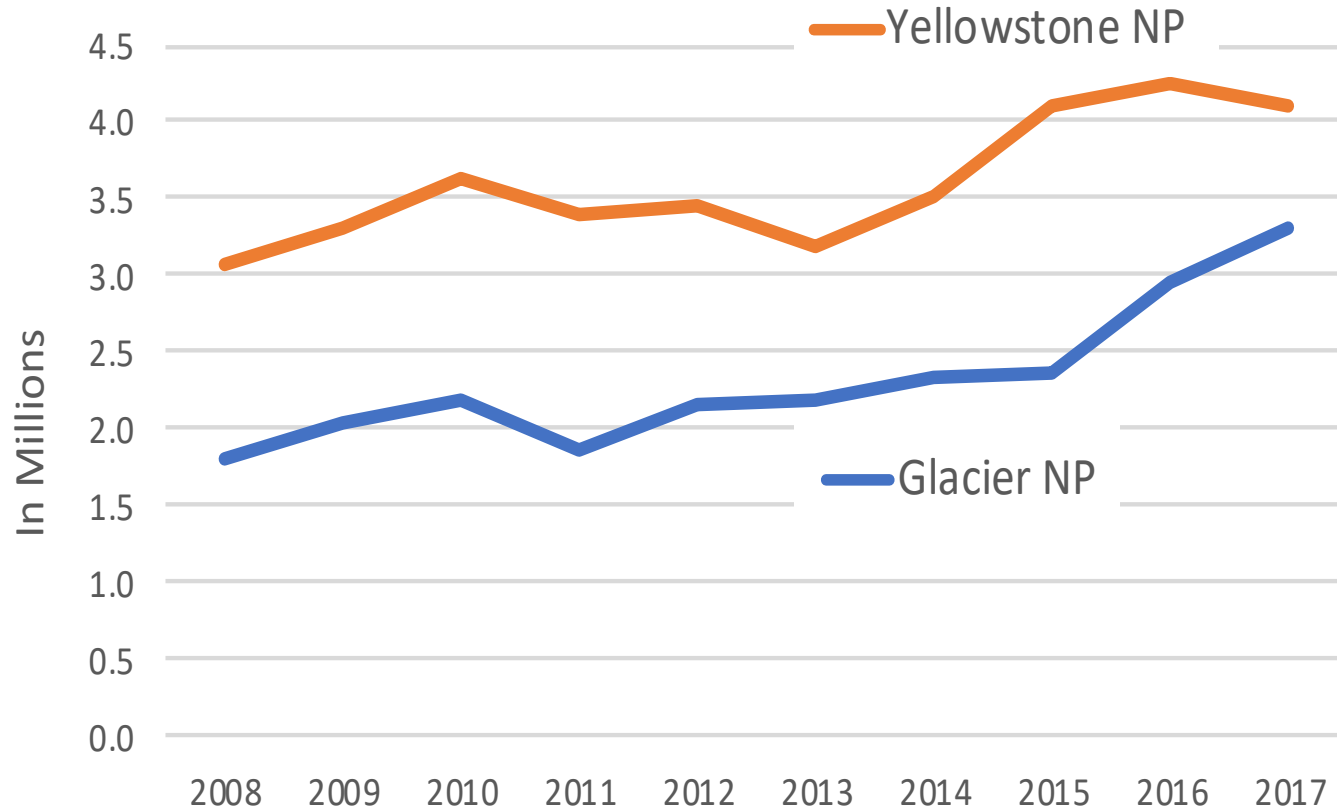


Since 2013:

20 million more visits

30% increase

Almost 1 Million More Visits in Four Years



2013-2017:

Yellowstone

+ 29%

+ 930,000 new visits

Glacier

+ 41%

+ 970,000 new visits



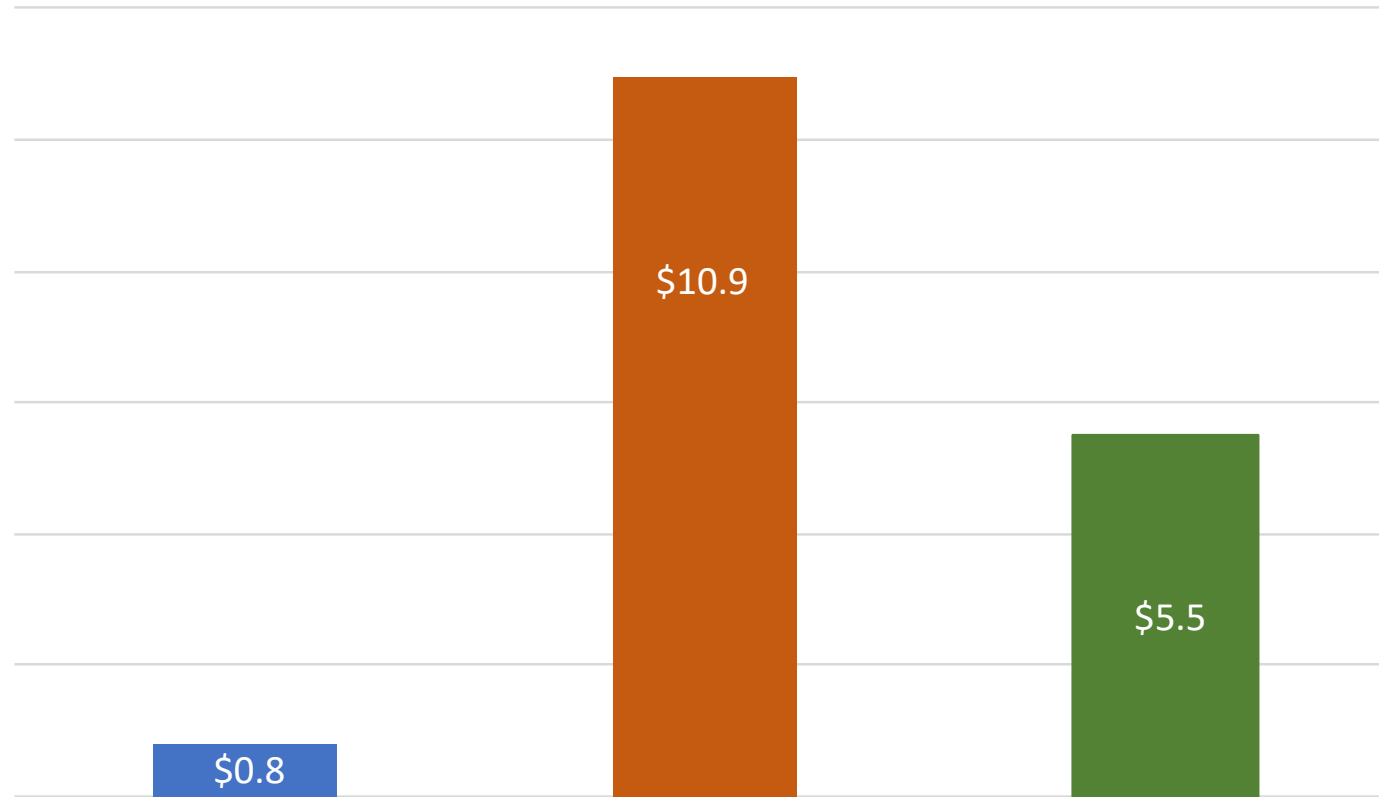






Image from High County News.

>\$17 Billion in Deferred Maintenance



**FY2016 figures
In \$Billions**

> \$17 Billion



Government's Expenditures in Recreation

Expenditures by government on
outdoor recreation: **\$34 billion**



Government's Expenditures in Recreation



Expenditures by government on
outdoor recreation: **\$34 billion**

Federal agencies: **\$4 billion**

State & Local: **\$30 billion**

State and Local Funding for Recreation



State and Local Funding for Recreation

Colorado lottery, Great Outdoor Colorado (GOCO)

State and Local Funding for Recreation

Colorado lottery, Great Outdoor Colorado (GOCO)

California voter approved bonds, >\$10 billion

State and Local Funding for Recreation

Colorado	lottery, Great Outdoor Colorado (GOCO)
California	voter approved bonds, >\$10 billion
Utah	bed tax, grants of up to \$50,000

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State and Local Funding for Recreation

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Minnesota	3/8 of 1% of general sales tax

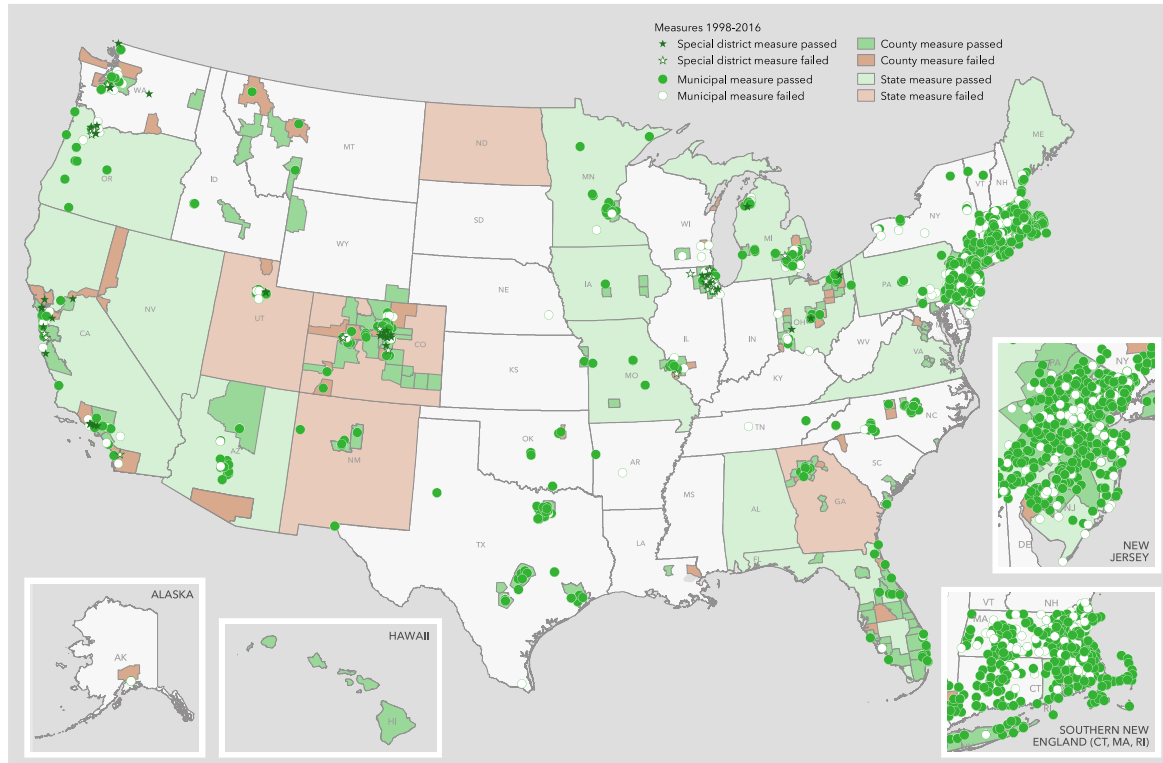
State and Local Funding for Recreation

Colorado	lottery, Great Outdoor Colorado (GOCO)
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Utah	bed tax, grants of up to \$50,000
Washington	legislature approved appropriations
Minnesota	3/8 of 1% of general sales tax
Texas	tax on sporting goods

State and Local Funding for Recreation

Colorado	lottery, Great Outdoor Colorado (GOCO)
California	voter approved bonds, >\$10 billion
Utah	bed tax, grants of up to \$50,000
Washington	legislature approved appropriations
Minnesota	3/8 of 1% of general sales tax
Texas	tax on sporting goods
Alabama	10% of interest earned from royalties on offshore natural gas

Voter Approved Measures



1988 – 2018:

2,060 measures

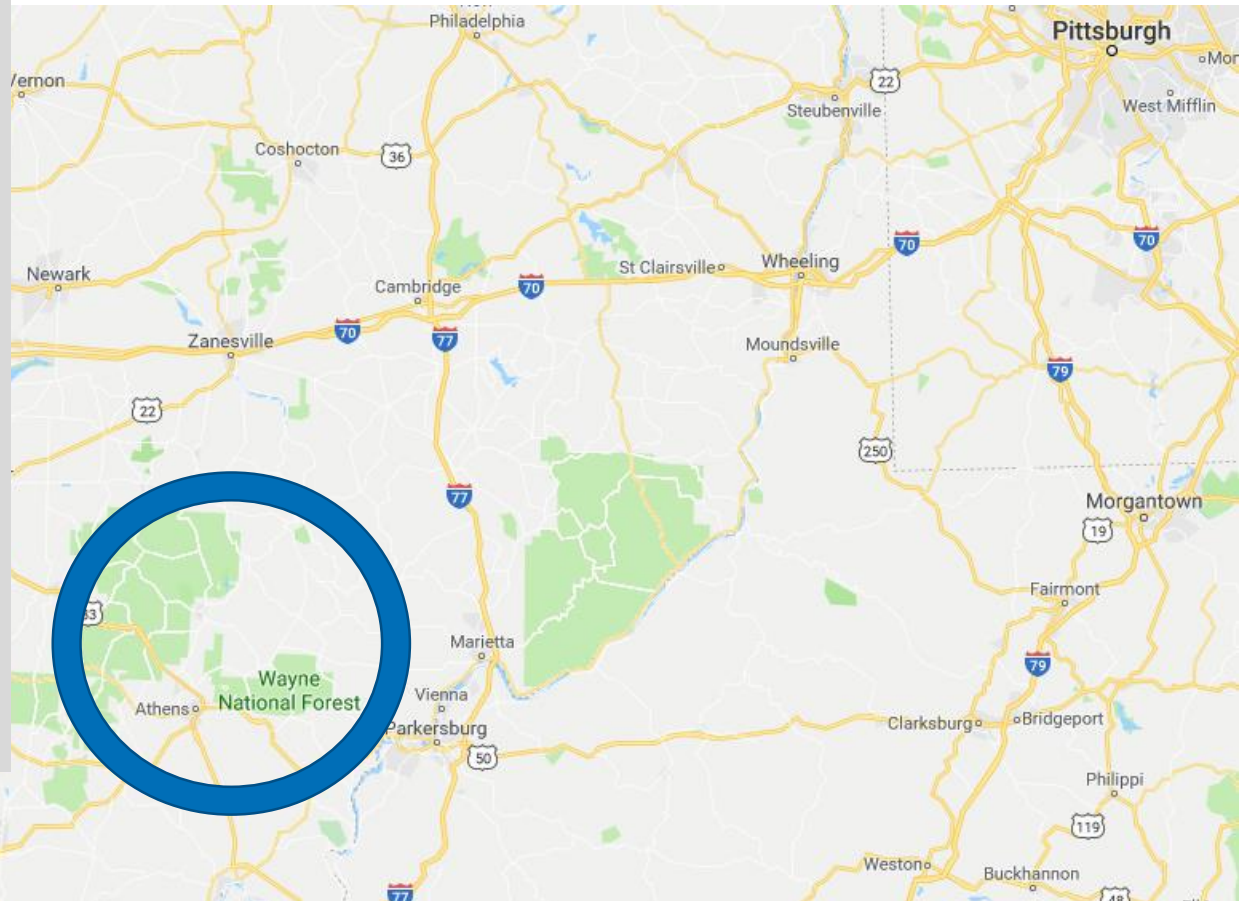
raised \$79.6 billion

Goal: 88 miles of mountain bike trails

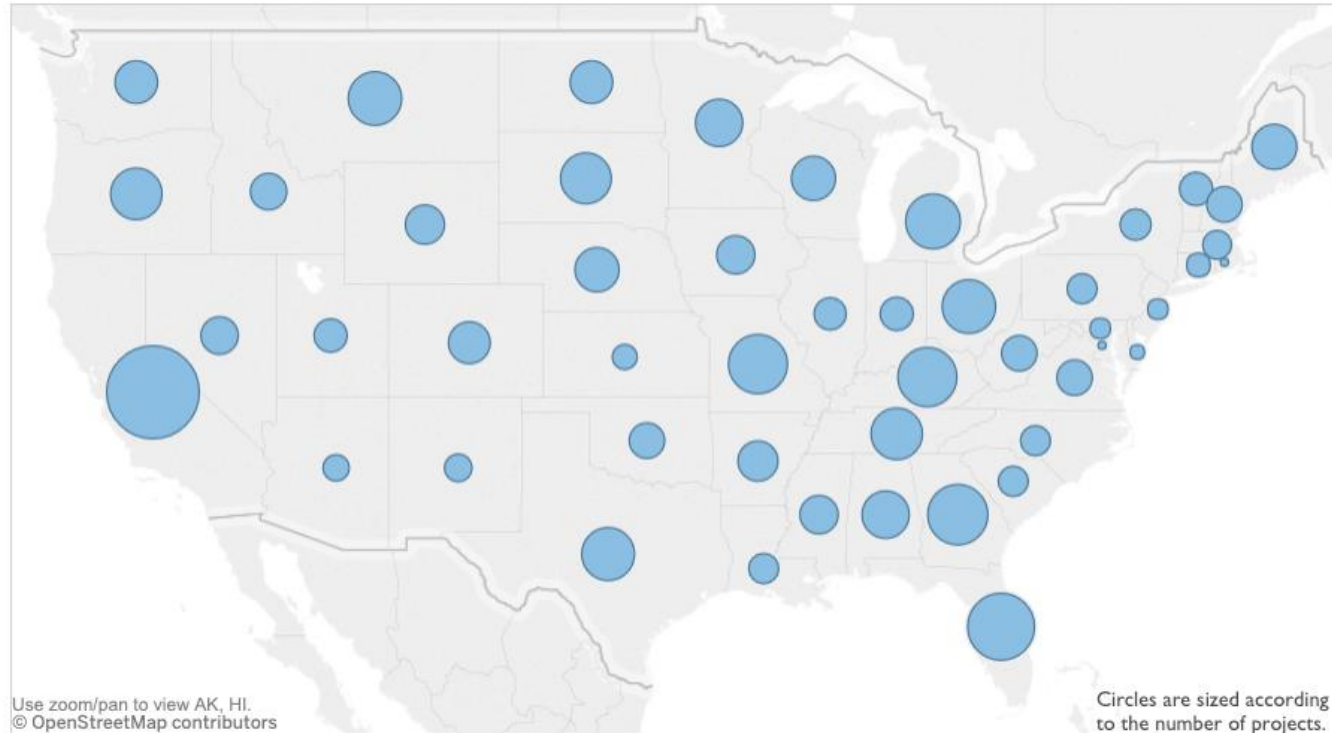


Impact Investing

\$11 million total cost
\$2.5 million city & county
increase in taxes expected
impact investors sought
will be paid back through
increased taxes



LWCF: Benefits all 50 States



United States

Projects by Highlighted Benefit*, 2011-2014

	Access / Sportsmen	Cultural/ Historical	Recreation/ Parks	Species/ Habitat	Water	Working Lands
Projects	145	81	1,048	347	156	74
Acres	321,177	173,512	365,533	734,982	293,621	412,316
Dollars	\$329.9M	\$179.0M	\$460.0M	\$667.9M	\$337.1M	\$252.2M

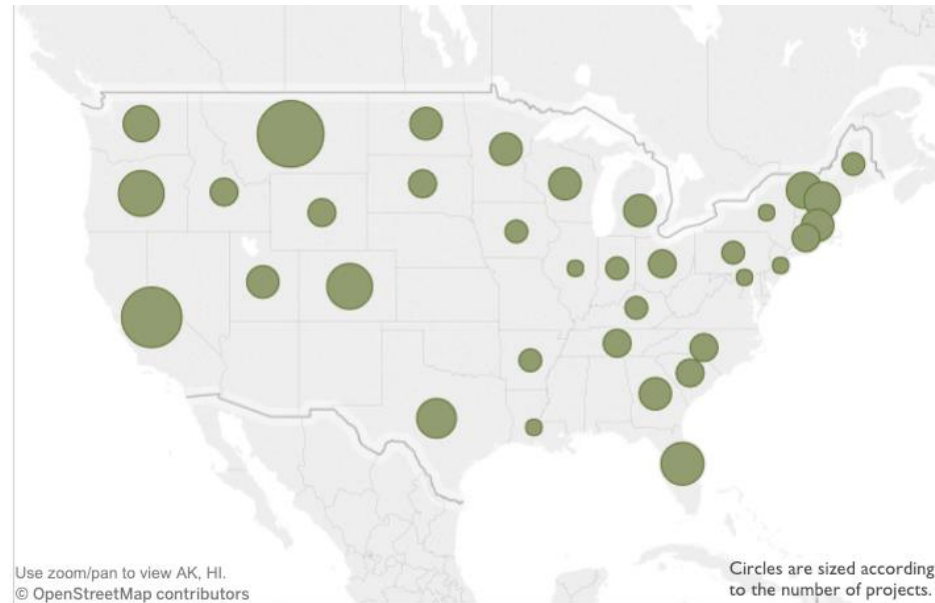
* Note: Each LWCF project is assigned one or more highlighted benefits. Values do not sum to the total number of projects.

2011-2014

\$2.2 billion



LWCF: Hunting and Fishing



United States

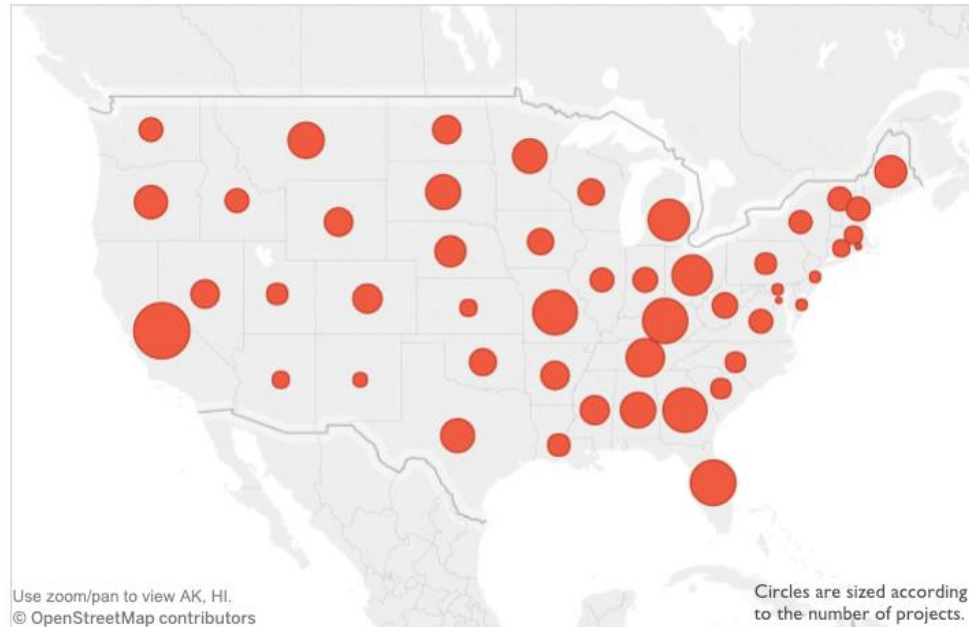
Highlighted Benefit: Access / Sportsmen

Agency	Program	Projects	Acres	Dollars
Bureau of Land Management	Federal Land Acquisitions	14	18.9K	\$34.3M
Fish and Wildlife Service	Federal Land Acquisitions	52	125.4K	\$98.1M
Forest Service	Federal Land Acquisitions	29	32.0K	\$73.2M
	Forest Legacy Program	27	138.9K	\$95.3M
National Park Service	Federal Land Acquisitions	8	2.1K	\$23.3M
	State and Local Assistance	15	3.8K	\$5.7M
Total		145	321.2K	\$329.9M



2011-2014

LWCF: Recreation and Parks



United States

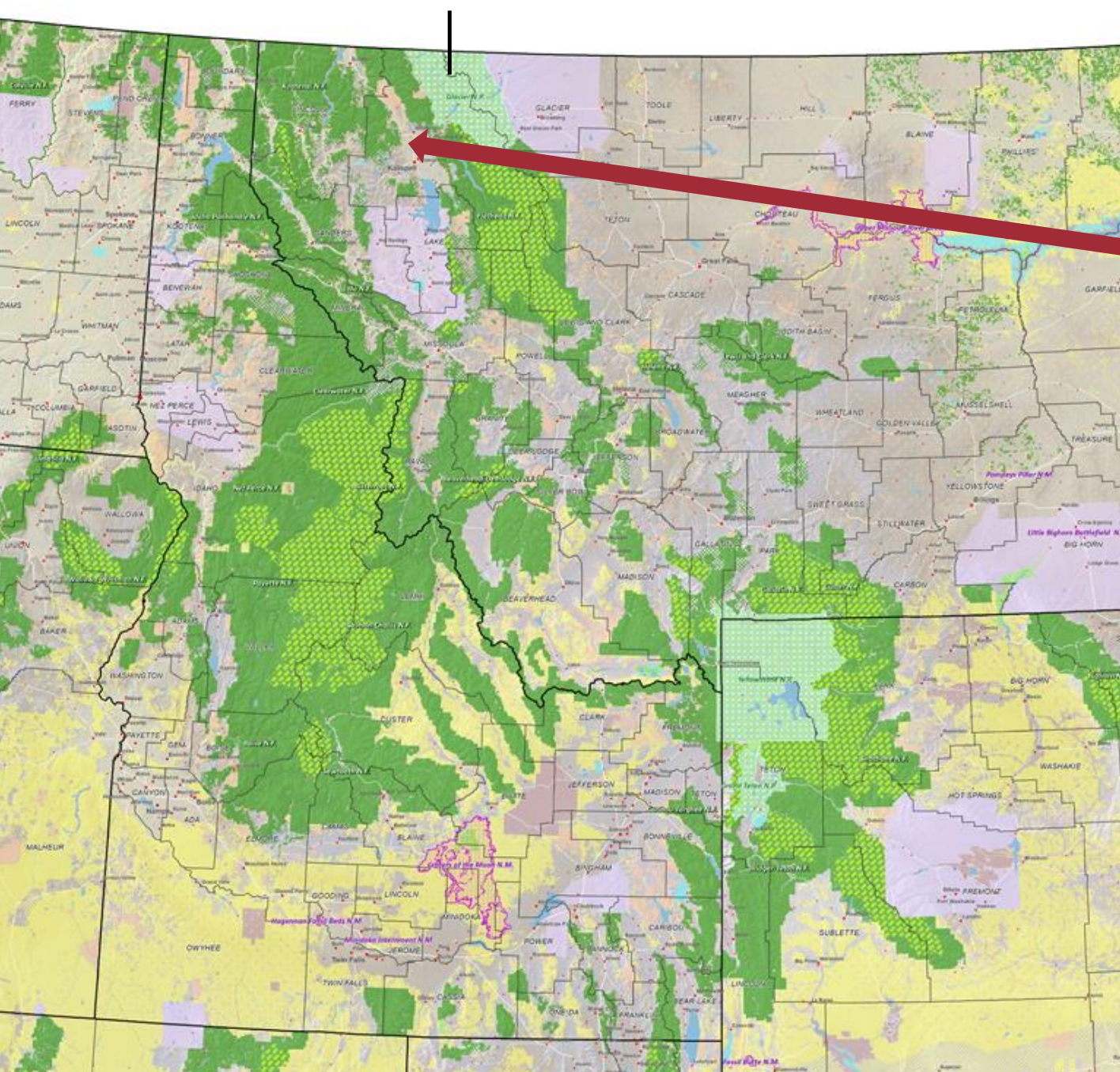
Highlighted Benefit: Recreation / Parks

Agency	Program	Projects	Acres	Dollars
Bureau of Land Management	Federal Land Acquisitions	21	37.6K	\$53.2M
Fish and Wildlife Service	Federal Land Acquisitions	27	37.1K	\$51.4M
Forest Service	Federal Land Acquisitions	36	38.5K	\$84.0M
	Forest Legacy Program	36	206.1K	\$119.7M
National Park Service	Federal Land Acquisitions	11	29.2K	\$27.4M
	State and Local Assistance	917	17.0K	\$124.3M
Total		1,048	365.5K	\$460.0M



2011-2014

Glacier NP



The Whitefish Trail

Partnerships: Whitefish Trails



A Research Paper by



**The Economic Impact of Outdoor
Recreation and the Whitefish Trail in
Whitefish, Montana**



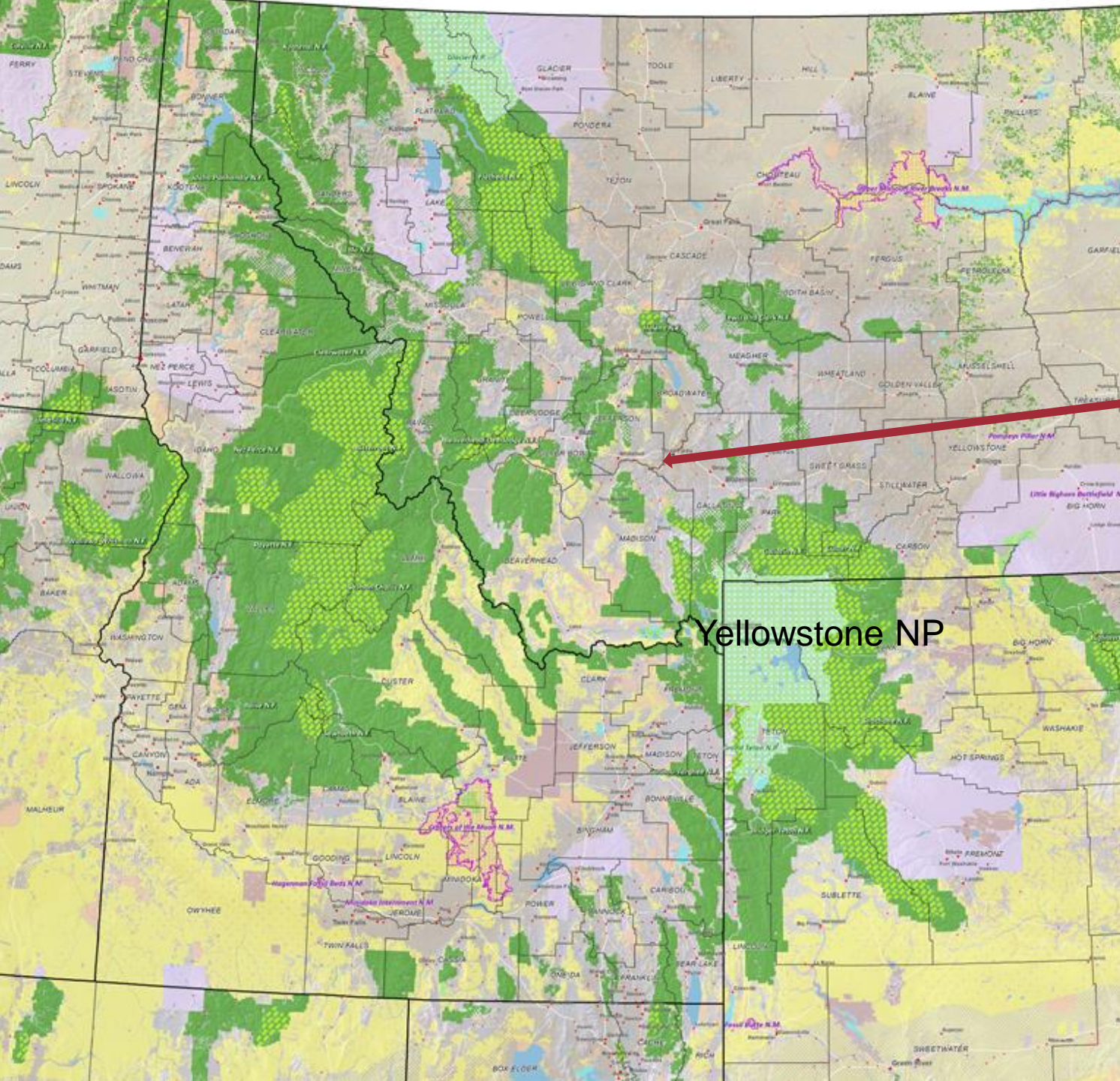
April 2018

Spending by visitors leads to:

68 jobs

\$1.9 million in labor income

**Locals who use the trails spend 2x more
than non-users in local gear shops
(\$1,400/year vs. \$660/year)**



Copper City
Trails

Partnerships: Copper City Trails



Photos from: <https://www.southwestmontanamba.org/copper-city>

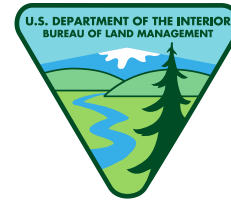
Partnerships: Copper City Trails



Partnerships: Copper City Trails



Partnerships: Copper City Trails





Partnerships: Copper City Trails





Conclusions



the industry is huge




the industry is huge
it's not just about tourism



huge pressure on National Parks



A mountain biker is riding a trail through a vast, green mountain landscape. The trail is a narrow dirt path that winds through a lush, green valley. The biker is wearing a black and white jersey and a helmet. The background features rolling green hills and distant mountain ranges under a clear blue sky. The text is overlaid on a semi-transparent white box in the upper half of the image.

huge pressure on National Parks
the feds can't do it alone

A person is riding a mountain bike on a dirt trail that winds through a lush green mountain landscape. The rider is wearing a dark jacket and a backpack. The trail is surrounded by dense green grass and small shrubs. In the background, there are rolling green hills and distant mountain ranges under a clear blue sky. The overall scene is bright and sunny, suggesting a clear day.

LWCF

voter approved measures

impact investing (?)

partnerships are key





THANKS

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Headwaters Economics

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406 570-7044



