Understanding the Nation’s Outdoor Recreation Economy

“The Experience Economy”
ONE THING IN COMMON: ALL AGENCIES MANAGE OUTDOOR RECREATION

- Serve over 1 billion visitors each year
- Over $800 billion in economic benefit (OIA)
- Outdoor Rec is 2% of US GDP (bigger than oil/gas)
- Plus Health, Education and community benefits
Introducing the Outdoor Recreation Satellite Account

**Motivation**

BEA developed the Outdoor Recreation Satellite Account under a 2-year interagency agreement with the Department of Interior and other federal agencies that serve as stewards of public land and waterways and as stipulated in the Outdoor Recreation Jobs and Economy Act of 2016. “Businesses need the right data to help them hire, invest and grow. The historical lack of detailed federal data regarding outdoor recreational activities has handicapped both the private and public sectors,” U.S. Commerce Secretary Wilbur Ross (U.S. Department of Commerce 2018).

**External Data Sources**

- American Horse Council
- American Sportfishing Association
- Archery Trade Association
- General Aviation Association
- International Snowmobile Manufacturers Association
- Motorcycle Industry Council
- National Bicycle Dealers Association
- National Marine Manufacturers Association
- National Shooting Sports Foundation
- Outdoor Industry Association
- PeopleforBikes
- Proprietary Point-of-Sale Retail data
- Recreational Vehicle Industry Association
- SnowSports Industries America
- Sports & Fitness Industry Association
- The Outdoor Foundation
- U.S. Bureau of Labor Statistics
- U.S. Census Bureau
- U.S. Department of Agriculture
- U.S. Department of the Interior
- U.S. Department of Transportation

**Methodology**

Outdoor recreation goods and services are identified using internal and external source data, BEA isolated the outdoor recreation portion of goods and services identified as being related to outdoor recreation. Supply-Use tables estimate the flow of goods and services to specific industries, allowing BEA to estimate important economic statistics for the outdoor recreation economy, including Value Added (GDP), Gross Output, Compensation, and Employment.

The Outdoor Recreation Satellite Account rearranges BEA’s Supply-Use tables to highlight economic production specific to outdoor recreation activities.

**Defining Outdoor Recreation**

The term “outdoor recreation” spans many activities, from traditional activities like camping and hiking to more casual outdoor activities like gardening and outdoor festivals (Godbey 2009). To meet the diverse needs of data users, the Outdoor Recreation Satellite Account (ORSA) was designed to capture both viewpoints. BEA staff worked closely with outdoor recreation experts from academia, government, and private industry to develop both conventional and comprehensive definitions of outdoor recreation.

**Chart 1. Outdoor Recreation as Percent of GDP with Comparable Industries, 2016**

- Outdoor recreation: 2.0%
- Mining: 1.4%
- Utilities: 1.5%
- Chemical products: 2.1%
- Broadcasting and telecommunications: 2.3%

**Chart 2. Industry Composition of Outdoor Recreation Value Added, 2016**

- Retail trade: 21.9%
- Accommodation and food services: 14.9%
- Nondurable goods manufacturing: 7.5%
- Transportation and warehousing: 9.3%
- Arts, entertainment, and recreation: 12.7%
- All other industries: 33.7%

**Chart 3. Gross Output by Activity**

U.S. goods and services related to an activity, such as hiking.

- Recreational vehicles: $10,578 million
- Bicycles: $36,300 million
- Snowmobiles: $36,227 million
- Boats: $26,450 million
- Hunting/ fishing: $26,301 million
- Hiking/camping: $19,227 million
- Other outdoor activities: $11,645 million

**What’s included in output by activity?**

People who ride bicycles might buy biking shoes, gloves, backpacks and repair services, as well as bikes and parts.

**Public Input is Sought**

The public is invited to submit comments and feedback on these preliminary statistics by emailing OutdoorRecreation@bea.gov by April 27, 2018. Final statistics are scheduled for release in late 2018.