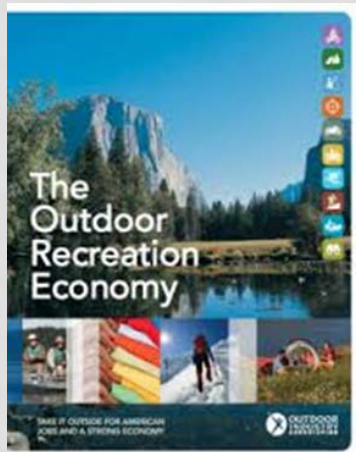


Understanding the Nation's Outdoor Recreation Economy

“The Experience Economy”

ONE THING IN COMMON: ALL AGENCIES MANAGE OUTDOOR RECREATION



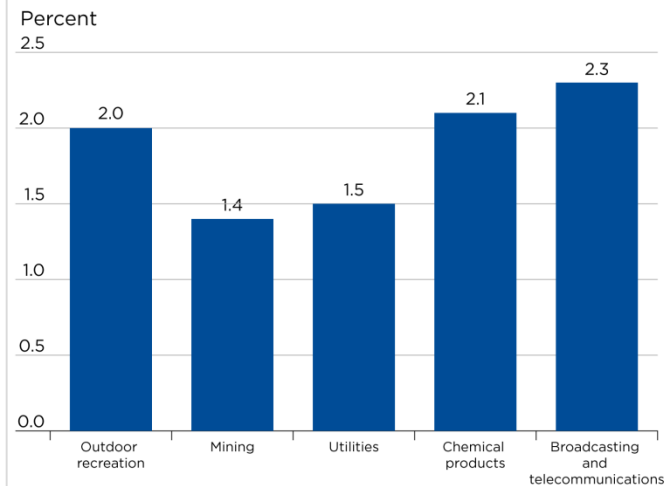
- Serve over 1 billion visitors each year
- Over \$800 billion in economic benefit (OIA)
- Outdoor Rec is 2% of US GDP (bigger than oil/gas)
- Plus Health, Education and community benefits

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).

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



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 3. Gross Output by Activity

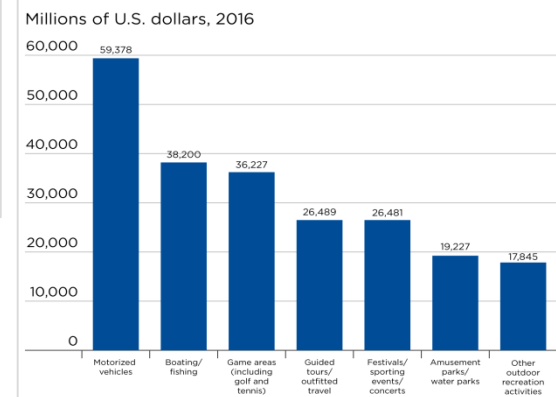
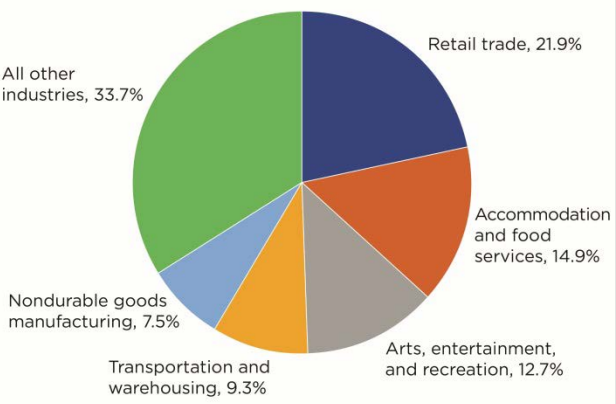


Chart 2. Industry Composition of Outdoor Recreation Value Added, 2016



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
- National Sporting Goods Association
- Outdoor Industry Association
- PeopleforBikes
- Pollstar
- 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

Supply-Use tables contain detailed estimates of all goods and services produced and purchased in the U.S. BEA identified production related to outdoor recreation activities using input from experts in government, academia, and private sector.

Outdoor recreation portions of industries are isolated. Using internal and external source data, BEA isolated the outdoor recreation portion of goods and services identified as being related to outdoor recreation.

Outdoor recreation economic statistics estimated. 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.

Publication 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.

What's included in output by activity?

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

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

Gross output:

- ✓ Includes exports of U.S. bikes & gear
- ✗ Doesn't include imported bikes & gear
- ✓ Does include U.S. stores' sales margins from selling those imports

Godbey, G. 2009. Outdoor Recreation, Health, and Wellness: Understanding and Enhancing the Relationship. RFF Discussion Paper No. 09-21; U.S. Department of Commerce, Bureau of Economic Analysis. 2018. "Outdoor Recreation Satellite Account: Prototype Statistics for 2012-2016." News release, February 14.