
Tom Howells

National Outdoor Recreation Conference
Burlington, VT  4/26/18
Outdoor Recreation Jobs and Economic Impact Act of 2016

“An *assessment and analysis of the outdoor recreation economy* of the United States...

And the effects attributable to such economy on the overall economy of the United States...

*May consider employment, sales, and contributions to travel and tourism*, and such other contributing components of the outdoor recreation economy.”
Our Partners

• Federal Recreation Council (FRC)
• Seven federal agencies that are prominent stewards of federal public lands and waters
Estimation Process

- Define Outdoor Recreation
- Link to Statistical Framework
- Estimate Partial Categories
- Generate Results
Defining Outdoor Recreation: Private Industry and Academics

Conventional outdoor recreation activities

- Outdoor activities that usually occur in nature-based settings and that require physical exertion

Source: Outdoor Industry Association
Comprehensive outdoor recreation activities

- Conventional activities, plus any non-work time spent doing outdoor activities (Oregon State University)

Table III-I: Percentage of Households Participating in Activities [2011 -- All Varieties]

<table>
<thead>
<tr>
<th>Activities</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking for pleasure</td>
<td>82.2%</td>
</tr>
<tr>
<td>Visiting historic sites</td>
<td>63.5%</td>
</tr>
<tr>
<td>Visiting parks (local, state, natl.)</td>
<td>50.6%</td>
</tr>
<tr>
<td>Visiting natural area/preserve/refuge</td>
<td>50.3%</td>
</tr>
<tr>
<td>Swimming/pool</td>
<td>43.1%</td>
</tr>
<tr>
<td>Sunbathing/relaxing on a beach</td>
<td>41.3%</td>
</tr>
<tr>
<td>Swimming/beach</td>
<td>38.3%</td>
</tr>
<tr>
<td>Jogging/running</td>
<td>33.6%</td>
</tr>
<tr>
<td>Using a playground</td>
<td>29.9%</td>
</tr>
<tr>
<td>Picnicking away from home</td>
<td>26.0%</td>
</tr>
<tr>
<td>Visiting gardens/arboretums</td>
<td>25.6%</td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td>24.8%</td>
</tr>
</tbody>
</table>

Source: Virginia Department of Conservation and Recreation
### Total Outdoor Recreation
- **Total Core Outdoor Recreation**
  - **Conventional Outdoor Recreation**
    - Bicycling
    - Boating/Fishing
    - Canoeing/Kayaking
    - Sailing
    - Other Boating/Fishing
    - Camping/Climbing/Hiking
    - Equestrian
    - Hunting/Shooting/Trapping
    - Hunting
    - Other Shooting/Trapping
    - Motorized Vehicles
    - Motorcycles
    - RVs
    - Other Motorized Vehicles
    - Recreational Flying

### Conventional Outdoor Recreation—continued
- Skiing
- Snowboarding
- Other Conventional Outdoor Recreation Activities¹
- Multi-use Apparel and Accessories (Conventional)²

### Other Outdoor Recreation
- Amusement Parks/Water Parks
- Festivals/Sporting Events/Concerts
- Field Sports
- Game Areas (including Golf and Tennis)
- Guided Tours/Outfitted Travel
- Productive Activities
- Other Outdoor Recreation Activities³
- Multi-use Apparel and Accessories (Other)²

### Supporting Outdoor Recreation
- Construction
- Trips and Travel⁴
- Government Expenditures
– BEA’s supply-use framework includes about 5,000 categories of goods and services
– Relevant goods and services are linked to each activity
– For example, goods and services tied to the bicycling activity include:
  • Bikes and bike parts
  • Specialty clothing and gear
  • Trailers and other transportation equipment
  • Bike rental fees
  • Bike repair services
Estimate Partial Categories

- Methodology tied to BEA’s national accounting framework and consistent with other satellite accounts
  - Goal is to determine portion of economy related to outdoor recreation activities

- Data from government and private sectors
  - DOI, Forest Service, NPS, SCORPs
  - Time Use Survey and Consumer Expenditures Survey from the Bureau of Labor Statistics and Value of Construction from the Census Bureau
Estimate Partial Categories: Bicycling

US Bicycling Participation Survey

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recreation only</td>
<td>55%</td>
</tr>
<tr>
<td>Transportation only</td>
<td>7%</td>
</tr>
<tr>
<td>Both</td>
<td>37%</td>
</tr>
</tbody>
</table>

Source: PeopleForBikes

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

Outdoor Recreation as a Percent of GDP with Comparable Industries, 2016

Percent
2.5

2.0
1.5
1.0
0.5
0.0

Outdoor recreation
Mining
Utilities
Chemical products
Broadcasting and telecommunications

Average Annual Growth Rate, 2012-2016
ORSO: 4.4%
U.S. GDP: 3.6%
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%
Results

Gross Output by Outdoor Recreation Activity

Millions of U.S. dollars, 2016

- Motorized vehicles: 59,378
- Boating/fishing: 38,200
- Game areas (including golf and tennis): 36,227
- Guided tours/outfitted travel: 26,489
- Festivals/sporting events/concerts: 26,481
- Amusement parks/water parks: 19,227
- Other outdoor recreation activities: 17,845
### Results

#### Outdoor Recreation Gross Output by Activity

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Total Outdoor Recreation</td>
<td>601,003</td>
<td>624,366</td>
<td>644,122</td>
<td>653,225</td>
<td>673,165</td>
</tr>
<tr>
<td>Total Core Outdoor Recreation</td>
<td>335,144</td>
<td>357,257</td>
<td>372,305</td>
<td>378,888</td>
<td>395,877</td>
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<tr>
<td>Conventional Outdoor Recreation</td>
<td>211,202</td>
<td>222,298</td>
<td>234,681</td>
<td>234,289</td>
<td>247,202</td>
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<tr>
<td>Bicycling</td>
<td>2,992</td>
<td>2,854</td>
<td>3,123</td>
<td>2,998</td>
<td>3,313</td>
</tr>
<tr>
<td>Boating/Fishing</td>
<td>30,943</td>
<td>32,440</td>
<td>34,122</td>
<td>36,734</td>
<td>38,200</td>
</tr>
<tr>
<td>Canoeing/Kayaking</td>
<td>590</td>
<td>552</td>
<td>624</td>
<td>658</td>
<td>682</td>
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<tr>
<td>Sailing</td>
<td>1,852</td>
<td>1,938</td>
<td>2,101</td>
<td>2,170</td>
<td>2,396</td>
</tr>
<tr>
<td>Other Boating/Fishing</td>
<td>28,501</td>
<td>29,950</td>
<td>31,397</td>
<td>33,906</td>
<td>35,122</td>
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<tr>
<td>Camping/Climbing/Hiking</td>
<td>6,545</td>
<td>6,807</td>
<td>7,131</td>
<td>7,615</td>
<td>7,927</td>
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<tr>
<td>Equestrian</td>
<td>9,971</td>
<td>10,646</td>
<td>11,972</td>
<td>11,818</td>
<td>12,674</td>
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<tr>
<td>Hunting/Shooting/Trapping</td>
<td>9,927</td>
<td>12,221</td>
<td>12,500</td>
<td>13,751</td>
<td>15,394</td>
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<tr>
<td>Hunting</td>
<td>6,300</td>
<td>7,626</td>
<td>7,724</td>
<td>8,434</td>
<td>9,292</td>
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<tr>
<td>Other Shooting/Trapping</td>
<td>3,627</td>
<td>4,595</td>
<td>4,776</td>
<td>5,317</td>
<td>6,101</td>
</tr>
<tr>
<td>Motorized Vehicles</td>
<td>58,229</td>
<td>60,221</td>
<td>62,145</td>
<td>57,837</td>
<td>59,378</td>
</tr>
<tr>
<td>Motorcycles</td>
<td>11,245</td>
<td>11,679</td>
<td>11,976</td>
<td>11,304</td>
<td>11,314</td>
</tr>
<tr>
<td>RVs</td>
<td>25,489</td>
<td>27,467</td>
<td>29,592</td>
<td>29,231</td>
<td>29,972</td>
</tr>
<tr>
<td>Other Motorized Vehicles</td>
<td>21,495</td>
<td>21,075</td>
<td>20,577</td>
<td>17,303</td>
<td>18,092</td>
</tr>
<tr>
<td>Recreational Flying</td>
<td>6,310</td>
<td>6,236</td>
<td>6,784</td>
<td>7,120</td>
<td>5,487</td>
</tr>
</tbody>
</table>

#### Outdoor Recreation Gross Output by Activity—continued

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Skiing</td>
<td>2,696</td>
<td>2,731</td>
<td>2,927</td>
<td>3,133</td>
<td>3,310</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>2,369</td>
<td>2,442</td>
<td>2,583</td>
<td>2,768</td>
<td>2,960</td>
</tr>
<tr>
<td>Other Conventional Outdoor Recreation Activities¹</td>
<td>9,991</td>
<td>8,868</td>
<td>9,666</td>
<td>9,727</td>
<td>11,957</td>
</tr>
<tr>
<td>Multi-use Apparel and Accessories (Conventional)²</td>
<td>71,228</td>
<td>76,833</td>
<td>81,728</td>
<td>80,788</td>
<td>86,601</td>
</tr>
<tr>
<td>Other Outdoor Recreation</td>
<td>123,942</td>
<td>134,958</td>
<td>137,624</td>
<td>144,598</td>
<td>148,675</td>
</tr>
<tr>
<td>Amusement Parks/Water Parks</td>
<td>14,805</td>
<td>15,625</td>
<td>16,552</td>
<td>18,066</td>
<td>19,227</td>
</tr>
<tr>
<td>Festivals/Sporting Events/Concerts</td>
<td>22,122</td>
<td>23,058</td>
<td>24,235</td>
<td>25,697</td>
<td>26,481</td>
</tr>
<tr>
<td>Field Sports</td>
<td>6,123</td>
<td>6,520</td>
<td>6,810</td>
<td>7,211</td>
<td>7,729</td>
</tr>
<tr>
<td>Game Areas (including Golf and Tennis)</td>
<td>31,414</td>
<td>31,747</td>
<td>31,170</td>
<td>33,300</td>
<td>36,227</td>
</tr>
<tr>
<td>Guided Tours/Outfitted Travel</td>
<td>26,359</td>
<td>27,248</td>
<td>28,634</td>
<td>28,173</td>
<td>26,489</td>
</tr>
<tr>
<td>Productive Activities</td>
<td>2,338</td>
<td>9,417</td>
<td>8,374</td>
<td>8,548</td>
<td>8,648</td>
</tr>
<tr>
<td>Other Outdoor Recreation Activities³</td>
<td>15,451</td>
<td>15,966</td>
<td>16,540</td>
<td>18,444</td>
<td>17,845</td>
</tr>
<tr>
<td>Multi-use Apparel and Accessories (Other)³</td>
<td>5,330</td>
<td>5,376</td>
<td>5,309</td>
<td>5,159</td>
<td>6,029</td>
</tr>
<tr>
<td>Supporting Outdoor Recreation</td>
<td>265,859</td>
<td>267,109</td>
<td>271,817</td>
<td>274,338</td>
<td>277,288</td>
</tr>
<tr>
<td>Construction</td>
<td>10,533</td>
<td>10,276</td>
<td>10,836</td>
<td>11,972</td>
<td>12,697</td>
</tr>
<tr>
<td>Trips and Travel⁴</td>
<td>224,295</td>
<td>225,395</td>
<td>228,657</td>
<td>229,107</td>
<td>230,492</td>
</tr>
<tr>
<td>Government Expenditures</td>
<td>31,031</td>
<td>31,437</td>
<td>32,324</td>
<td>33,259</td>
<td>34,100</td>
</tr>
</tbody>
</table>

¹ Includes hiking, climbing, fishing, hunting, wildlife observation, and other activities.
² Includes backpacking, camping, and other activities.
³ Includes fishing, hunting, wildlife observation, and other activities.
⁴ Includes sightseeing, outdoor photography, and other activities.
Next Steps

Prototype release

• Public release February 14, 2018
• March *Survey of Current Business* article

Seek additional feedback from the public

• OutdoorRecreation@bea.gov
• Open comment period ends April 27, 2018 (tomorrow!!)
• Suggestions on ORSA table presentation, activities, definitions
• Current feedback:
  – Additional activity detail (ex: guided tours breakout)
  – Travel spending on trips less than 50 miles from home

Finalize data and methods for final estimates by end of FY 2018

• Pending resources, begin work on regional and other statistics
Contact Information

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301.278.9586

Have feedback? Send it to us at:
OutdoorRecreation@bea.gov

Want more info?
Check out the ORSA page at:
www.bea.gov/outdoor-recreation