

Outdoor Recreation Satellite Account



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BEA Advisory Committee Meeting
Suitland, MD

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Overview

Outdoor Recreation Satellite Account

- Federal Recreation Council
- Outdoor Recreation Jobs and Economic Impact Act of 2016
- Goals and Timeline

Measuring the Outdoor Recreation Economy

- Defining Outdoor Recreation
- Data and Methods
- Next steps

Questions for the committee



What Are the Benefits?



- Allows economic activity associated with outdoor recreation to be separately identified
- Provides a detailed view of these activities and industries not possible with current statistics
- Informs decision making and improves governance and long-term management of public lands and waters
- Deepens public understanding of the economic impact of outdoor recreation

Our Partners



- Federal Recreation Council
- Seven federal agencies that are prominent stewards of federal public lands and waters



**US Army Corps
of Engineers**



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"

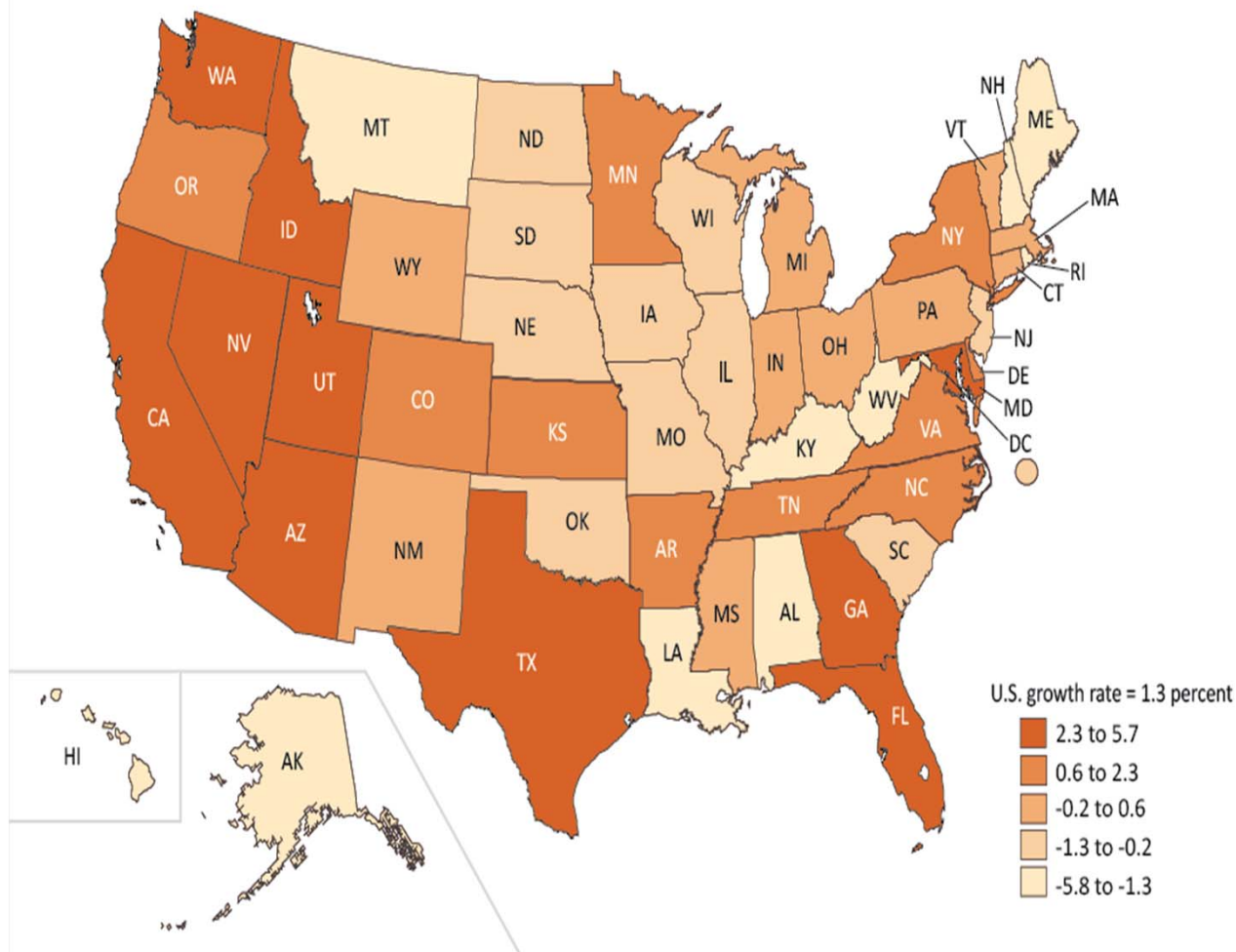
Arts and Cultural Production Satellite Account



Commodity	Industry					Domestic production at producers' prices
	Information	Manufacturing	Construction	Wholesale and retail trade	All other industries	
Core arts and cultural production.....	220,438	11,897	.....	3,325	32,338	571,068
Performing arts.....	.....	.....	.....	.....	1,128	60,001
Museums.....	.....	.....	.....	.....	.....	17,617
Design services.....	151,576	11,897	.....	3,226	31,196	312,934
Arts education.....	.....	.....	.....	100	.....	106,310
Entertainment originals.....	68,862	.....	.....	.....	13	74,203
Supporting arts and cultural production.....	325,869	27,043	20,875	114,751	9,415	561,186
Arts support services.....	93	.....	.....	693	100	55,804
Information services.....	325,332	.....	.....	.....	2,568	334,102
Manufacturing.....	247	26,978	.....	5,053	1,240	34,221
Construction.....	.....	.....	20,875	.....	163	22,120
Arts-related wholesale and retail trade	193	66	.....	109,008	5,345	114,940
Industry output.....	1,004,006	185,862	105,288	3,685,199	21,205,802	28,693,462
Intermediate inputs.....	396,761	105,848	53,056	1,420,823	9,686,259	12,448,878
Value added.....	607,243	80,012	52,232	2,264,377	11,519,543	16,244,584
Compensation of employees.....	211,901	57,307	33,097	1,179,199	5,720,810	8,619,970

Arts and Cultural Employment Across States

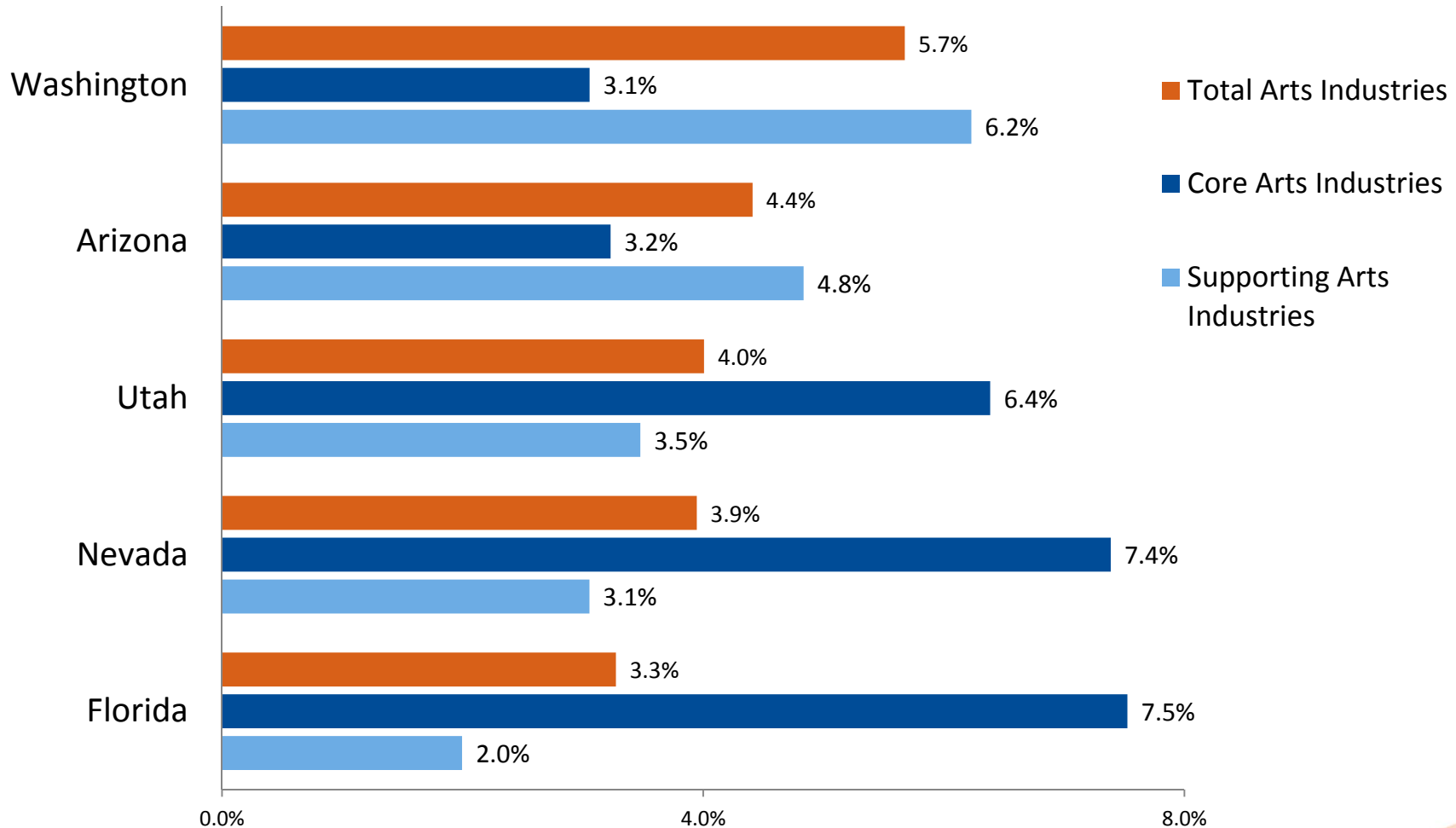
Arts and Cultural Employment: Percent Change 2013–2014



Arts and Cultural Employment: More Detail

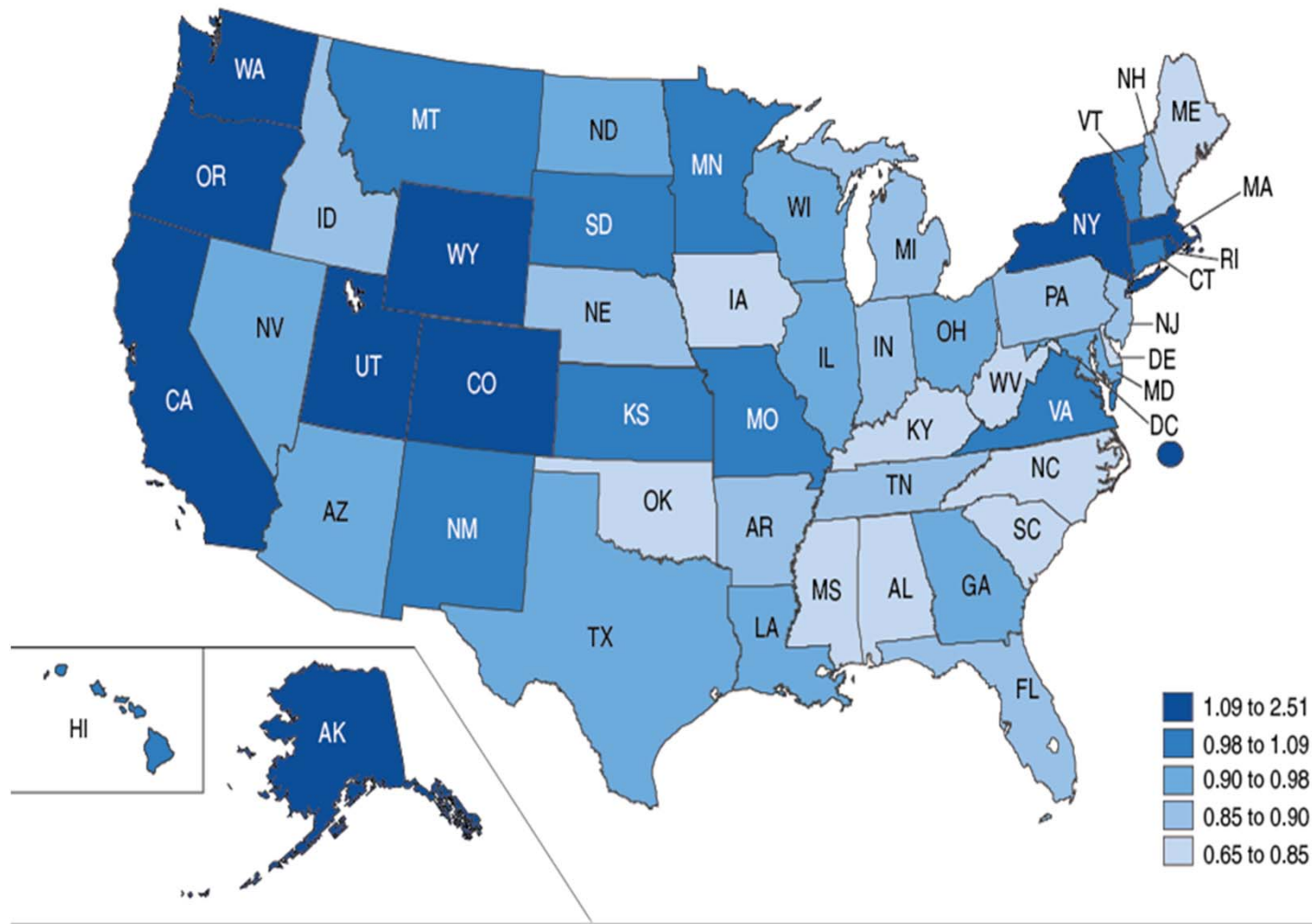


Arts and Cultural Employment Growth, 2014



Arts and Culture: Where Are the Job Clusters?

Arts and Culture Employment Location Quotient, 2014



Define Outdoor Recreation (January-July, 2017)

- Reconcile past research on measuring the outdoor recreation economy with feedback from subject matter experts and the public

Prepare prototype estimates (August-December, 2017)

- Procure and vet data from private industry and government sources

Publish estimates and gather feedback (Early 2018)

Finalize estimates (Late 2018 and beyond)

- Revise prototypes estimates using user feedback
- If resources permit, pursue regional and historical estimates

Specific outdoor recreation activities

- Involves deliberate participation; nature-based settings

Often broad reach of outdoor recreation

Economy

- Spending on the purchase of **gear and vehicles** and dollars spent on **trips and travel** (Outdoor Industry Association)



Source: Outdoor Industry Association

Broader scope of outdoor recreation activities

- E.g., Outdoor recreation refers to the non-work time you spend doing outdoor activities (Oregon State University)



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

Activities	Percent
Walking for pleasure	82.2%
Visiting historic sites	63.5%
Visiting parks (local, state, natl.)	50.6%
Visiting natural area/preserve/refuge	50.3%
Swimming/pool	43.1%
Sunbathing/relaxing on a beach	41.3%
Swimming/beach	38.3%
Jogging/running	33.6%
Using a playground	29.9%
Picnicking away from home	28.0%
Visiting gardens/arboretums	25.6%
Hiking/backpacking	24.8%

Source: Virginia Department of Conservation and Recreation

BEA's Working Definitions

With stakeholder input, BEA has developed two working definitions

- **Narrow:** Recreational activities undertaken for pleasure that generally involve some level of intentional physical exertion and occur in nature-based environments outdoors
 - Core outdoor recreation goods and services: gear, equipment, fuel, concessions, maintenance, repair, and fees
 - Supporting outdoor recreation goods and services: trip expenses, construction, and government expenditures
- **Broad:** All recreational activities undertaken for pleasure that occur outdoors



Examples



“Narrow” Outdoor Recreation Activities	Bicycling	Motorized vehicles in natural areas
	Birding	Recreational flying
	Boating/Fishing	Running/Jogging/Walking
	Camping/Hiking	Skiing
	Climbing/Caving	Snowboarding
	Equestrian	Water skiing
Hunting/Shooting/Trapping	All others	

“Broad” Outdoor Recreation Activities	Agritourism	Guided tours
	Festivals/Sporting events/Concerts	Photography
	Field sports	Yard sports
	Game area sports	All others

Methodology will be consistent with BEA national accounting framework and with other satellite accounts

- Goal is to determine portion of economy related to core and supporting outdoor recreation activities

Data from government and private sectors

- DOI, Forest Service, NPS, SCORPs
- Bureau of Labor Statistics' Time Use Survey and Consumer Expenditures Survey, Census Bureau Value of Construction
- National Marine Manufacturers Association, Motorcycle Industry Council, NPD Group, PeopleForBikes, International Snowmobile Manufacturers Association

Example: Bicycling



Bicycles	Bike Accessories	Bike Parts	Helmets/Footwear/ Gloves
BMX	Bike Lights	Components	Bike Footwear
Childrens	Bike Pumps	Forks & Suspension	Bike Gloves
Frames	Electronics	Pedals	Helmets
Lifestyle/Leisure	Fenders	Saddles/Pads	
Mountain	Locks	Tires/Tubes	Shop Services
Other Bicycles	On-BikePacks	Wheel Parts	Bike Rentals
Road	On-BikeRacks	Wheels	Bike Service/Repairs
Tandem	Repair/maintenance		
Transit/Fitness	Trailers		

Data Source: NPD Group.

Example: Bicycling

US Bicycling Participation Survey

Recreation only	55%
Transportation only	7%
Both	37%

Data Source: PeopleForBikes.

Next Steps

Finalize data and methods for prototype estimates

- Incorporate feedback from subject matter experts, including FRC
- Publish prototype statistics in early 2018 and seek additional feedback from the public
 - <https://bea.gov/outdoor-recreation/>
 - OutdoorRecreation@bea.gov
- Publish final report by end of Fiscal Year 2018
- Pending resources, begin work on regional and other statistics



Questions for the Committee



- What are your opinions of BEA's tiered approach to the definitions of outdoor recreation?
- How should input be weighed in prioritizing statistics in the context of a contracted satellite account versus a traditional BEA product?
 - E.g., national-level statistics, regional statistics, quarterly statistics—each requires resources
- Are there constituencies BEA should reach out to for future input?
 - Outreach efforts include Federal Register Notice and feedback from FRC, Small Business Administration, subject matter experts, trade associations