

# Outdoor Recreation Satellite Account: Updated Statistics, 2012-2016



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## Outdoor Recreation Satellite Account Background

- Rec Act of 2016 and Federal Recreation Council
- Goals and Timeline

## Measuring the Outdoor Recreation Economy

- Defining Outdoor Recreation
- Methodology and Data
- User Feedback

## Results

## Outreach and Next Steps



## 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
  - Seven federal agencies that are prominent stewards of federal public lands and waters



US Army Corps  
of Engineers



- Private Industry Associations

# Goals and Timeline

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**Completed**—Prepare and release prototype ORSA estimates (January 2017-February 2018)

**Completed**—Gather feedback and finalize ORSA estimates (March-September 20, 2018)

**Possible next steps**—Subject to resources, pursue annual ORSA updates, plus regional and other estimates (October 2018-forward)

# Defining Outdoor Recreation

## Conventional outdoor recreation activities

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

|  |  |   |
|--|--|---|
|  <b>BICYCLING</b><br>Paved-road<br>Off-road   |  <b>MOTORCYCLING</b><br>On-road<br>Off-road   |  <b>TRAIL SPORTS</b><br>Trail running, unpaved<br>Day hiking, unpaved<br>Backpacking<br>Rock climbing<br>(natural rock or ice) |
|  <b>CAMPING</b><br>RV campsite<br>Tent campsite<br>Rustic lodging                   |  <b>OFF-ROADING</b><br>ATV<br>ROV<br>Dune buggies<br>Jeeping  |  <b>WATER SPORTS</b><br>Kayaking<br>Stand-up paddling<br>Rafting<br>Canoeing<br>Boating (motorized)                            |
|  <b>FISHING</b><br>Recreational fly<br>Recreational non-fly<br>Fishing from a boat |  <b>SNOW SPORTS</b><br>Downhill skiing<br>(including telemark)<br>Snowboarding<br>Cross-country skiing<br>Nordic skiing<br>Snowshoeing<br>Snowmobiling |  <b>WILDLIFE VIEWING</b><br>Bird watching<br>Other wildlife watching   |
|  <b>HUNTING</b><br>Shotgun<br>Rifle<br>Bow  |  |   |

# Defining Outdoor Recreation

## Comprehensive outdoor recreation activities

- Any non-work time spent doing outdoor activities  
(Oregon State University)



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

| <b>Activities</b>                     | <b>Percent</b> |
|---------------------------------------|----------------|
| 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

## Methodology is consistent with BEA national accounting framework

- BEA's supply-use framework includes about 5,000 categories of goods and services
- For every in-scope good or service, the portion related specifically to outdoor recreation is estimated

## Dozens of data sources were used from the private sector and government, for example:

- Department of the Interior, Forest Service, National Park Service, Bureau of Labor Statistics, Census Bureau, Department of Transportation
- American Horse Council, Motorcycle Industry Council, National Marine Manufacturers Association, PeopleForBikes, Recreational Vehicle Industry Association

# Example: Bicycling

## US Bicycling Participation Survey

|                     |     |
|---------------------|-----|
| Recreation only     | 55% |
| Transportation only | 7%  |
| Both                | 37% |

Source:  
PeopleForBikes

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



# User Feedback on Prototype Statistics Led to Improvements

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Addition of spending on local trips

Recategorization of activities

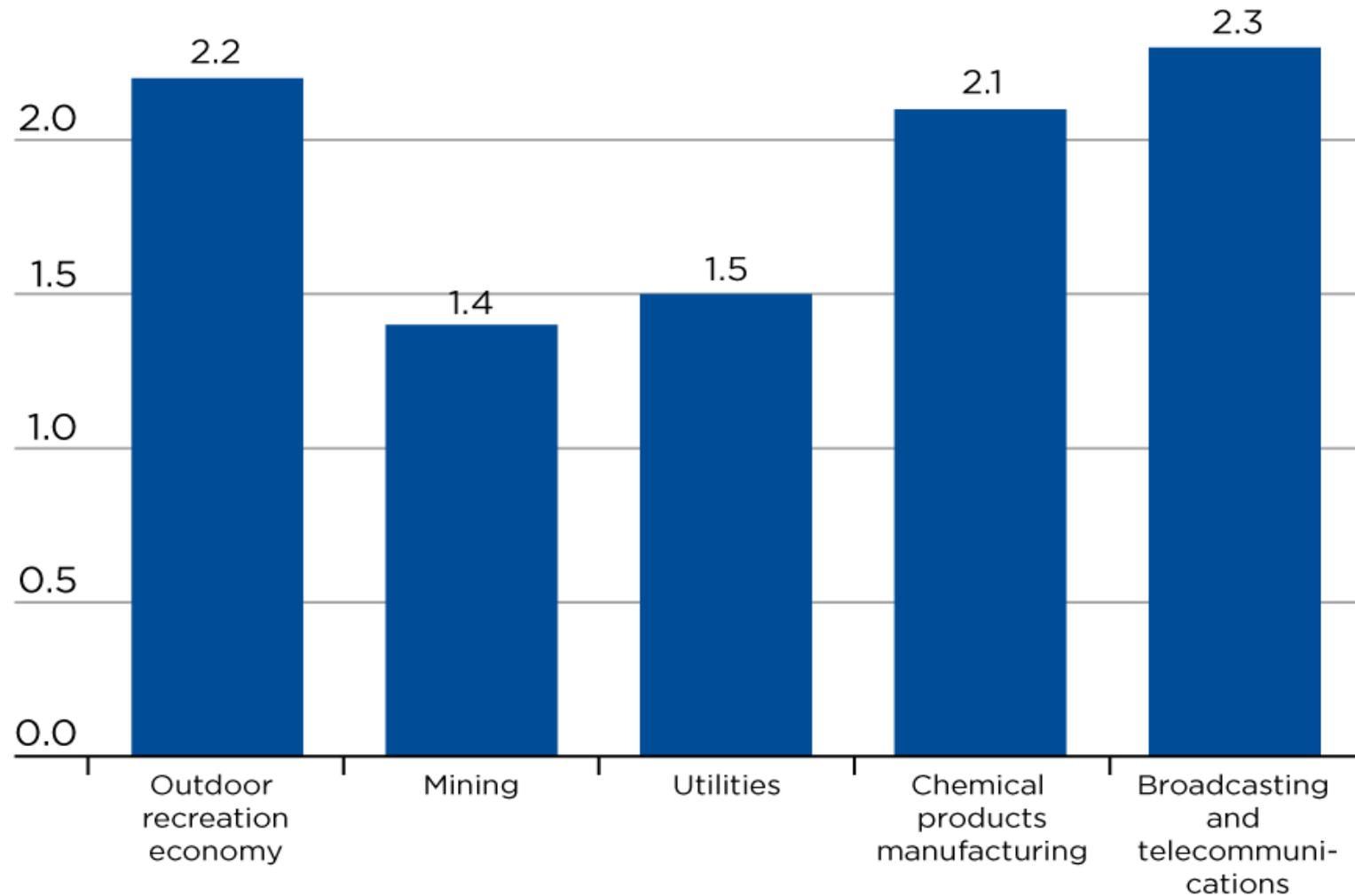
- **Motorized Vehicles** disaggregated (RVing, Motorcycling, etc.)
- **Trapping** added to **Hunting** category

Additional detail about activities

- **Fishing** is now a stand-alone line item
- **Travel and Tourism** separated into major components:  
Transportation, Lodging, Food and Beverages, Shopping and Souvenirs

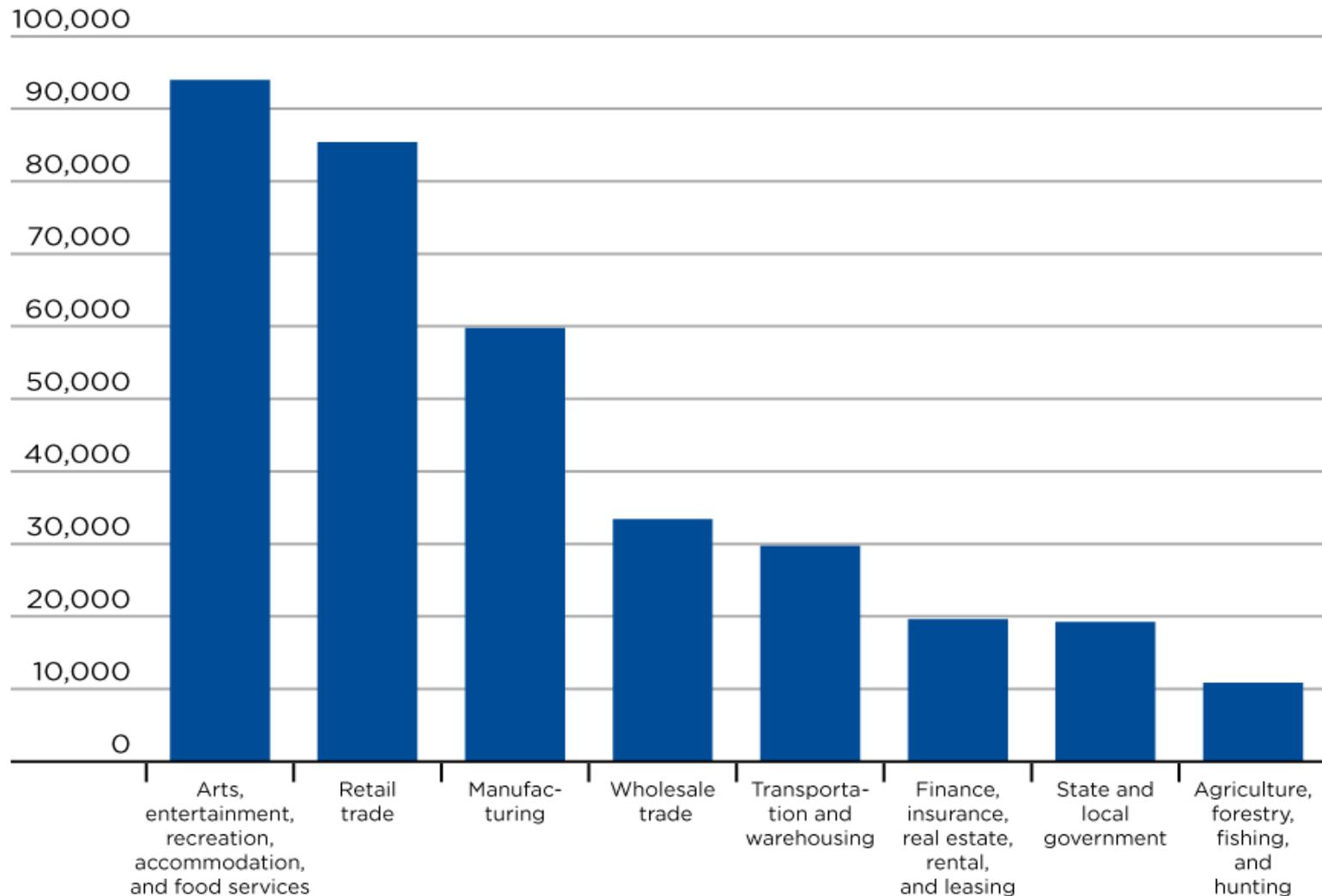
# Outdoor Recreation as a Percent of GDP, 2016

Percent  
2.5

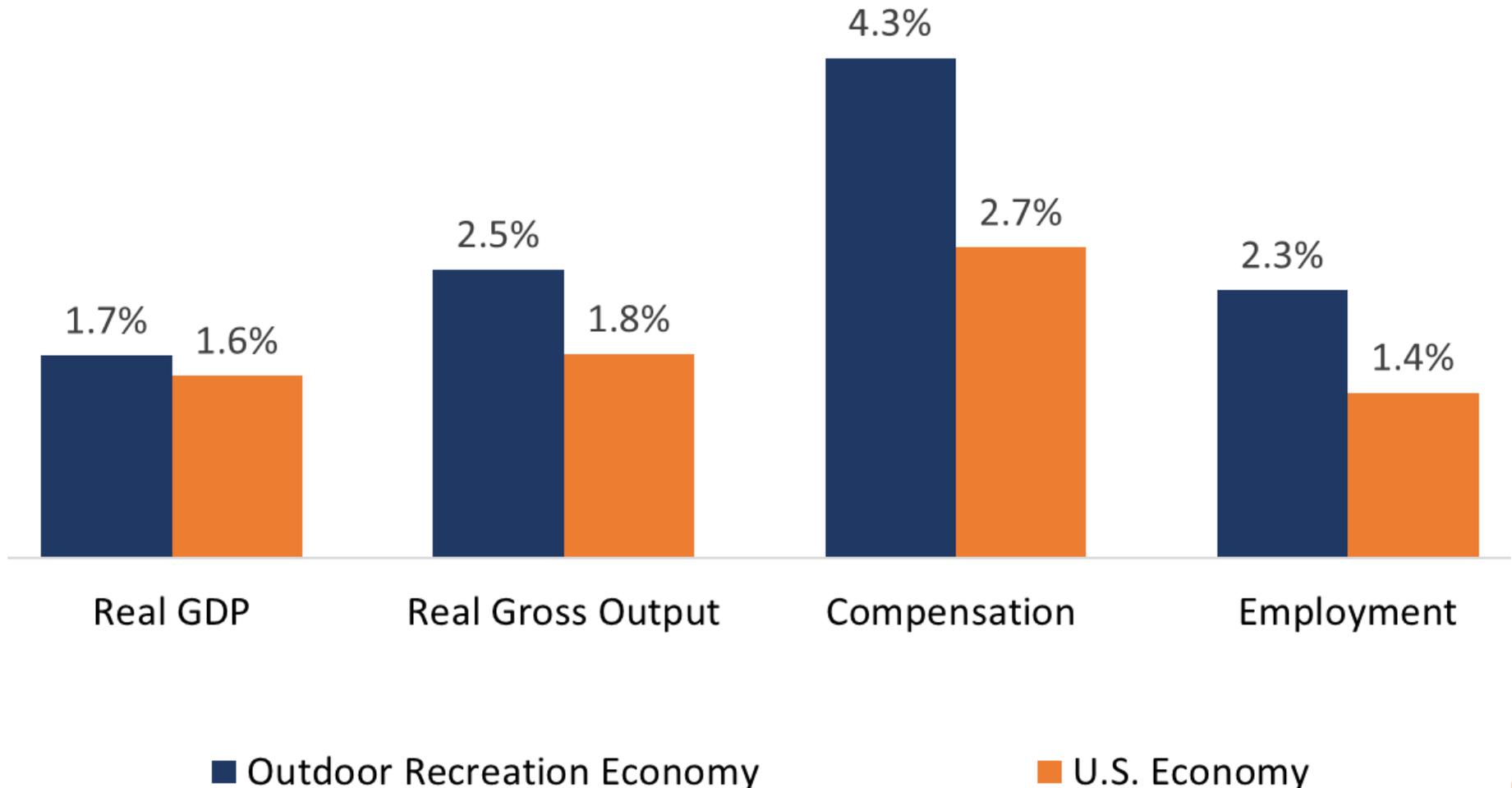


# Outdoor Recreation Value Added, 2016

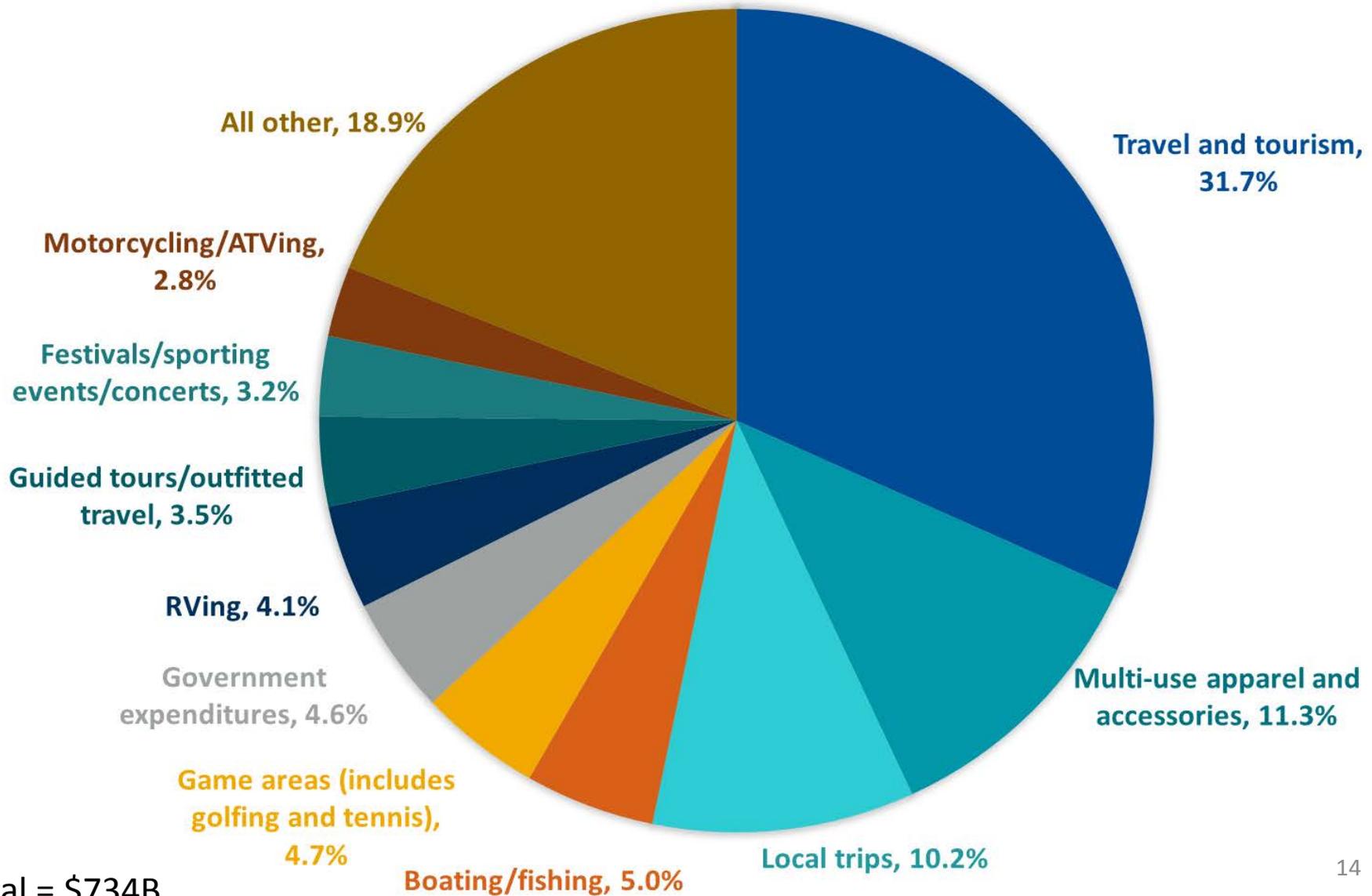
Millions of chained (2012) U.S. dollars



# Growth in Outdoor Recreation Compared to the US Economy, 2015-2016



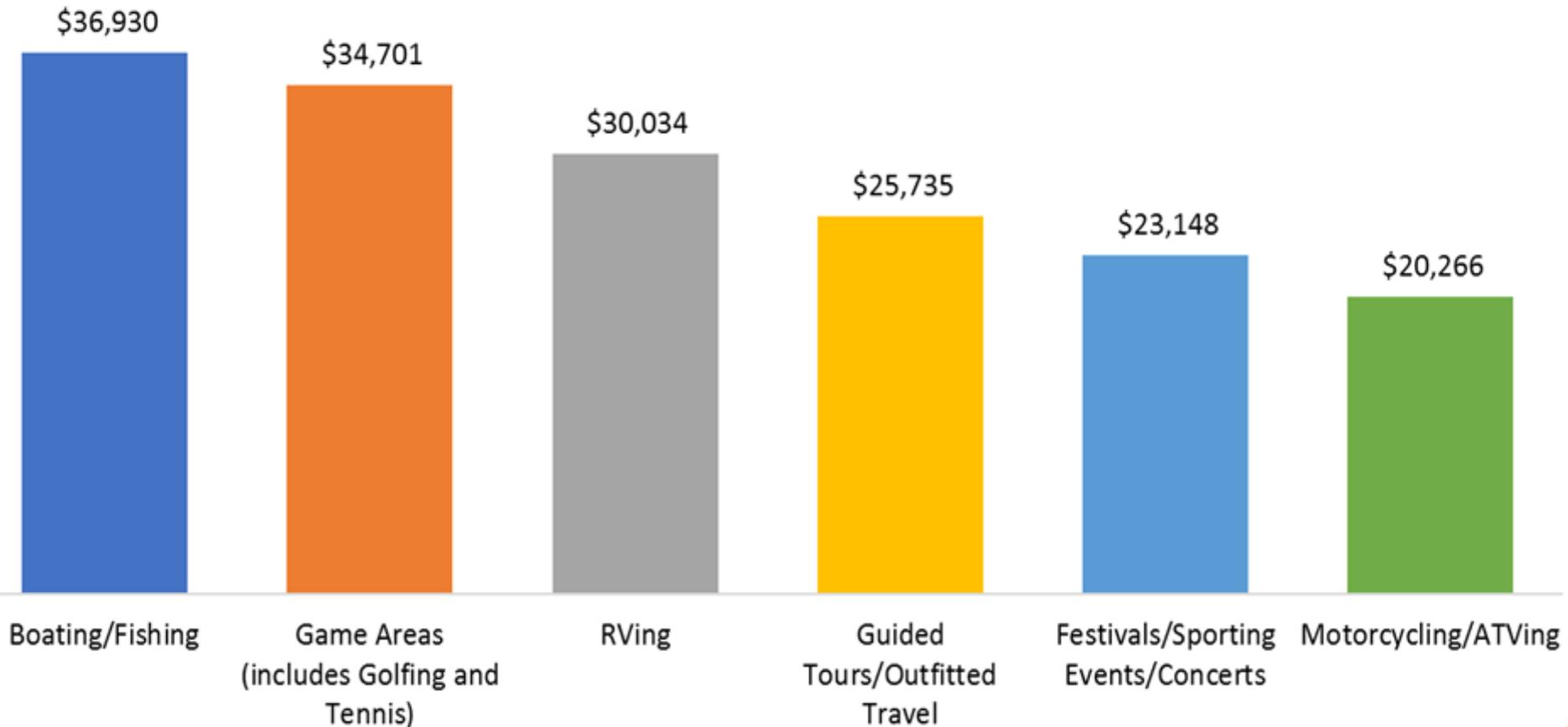
# Composition of Real Gross Output, 2016



Total = \$734B

# Real Gross Output by Activity, 2016

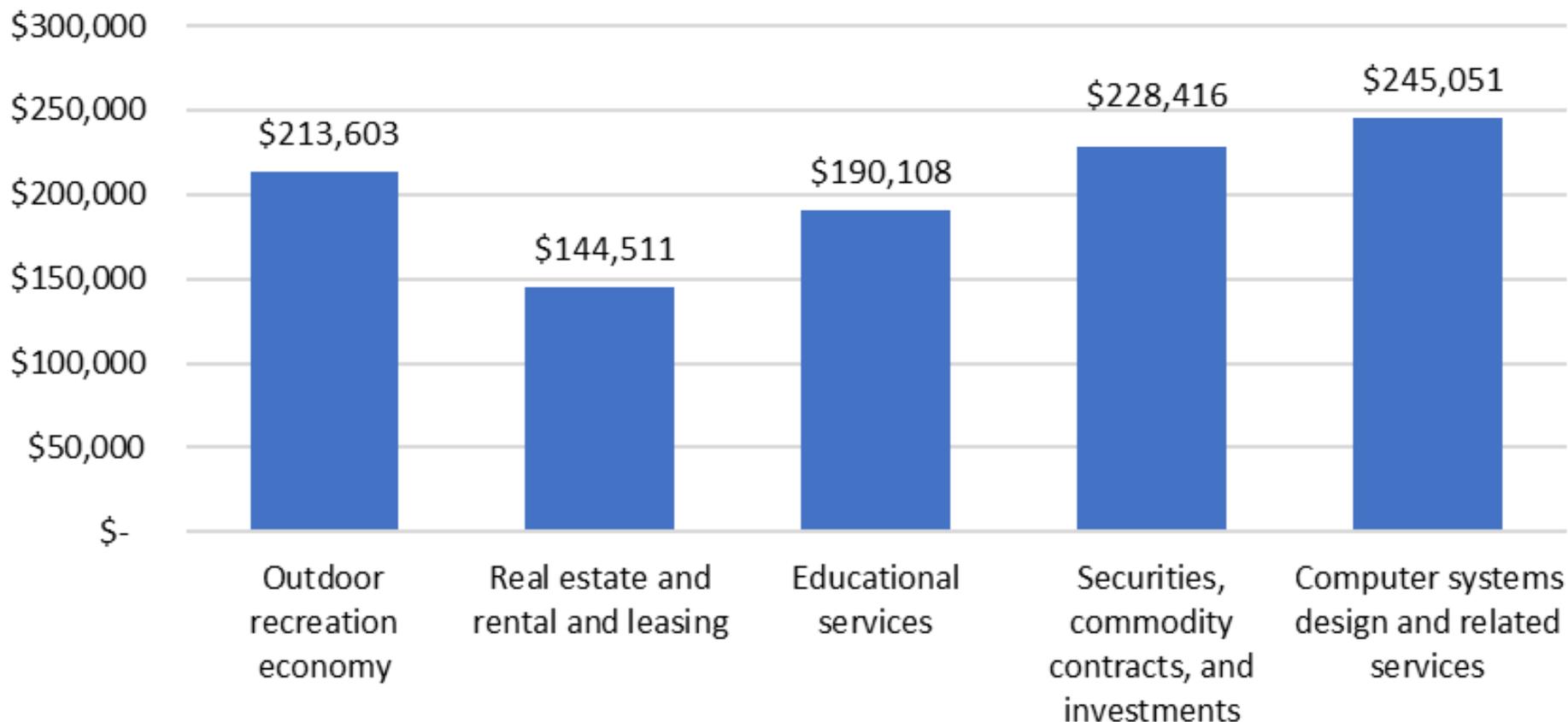
(Millions of chained 2012 U.S. dollars)



# Outdoor Recreation Compensation, 2016

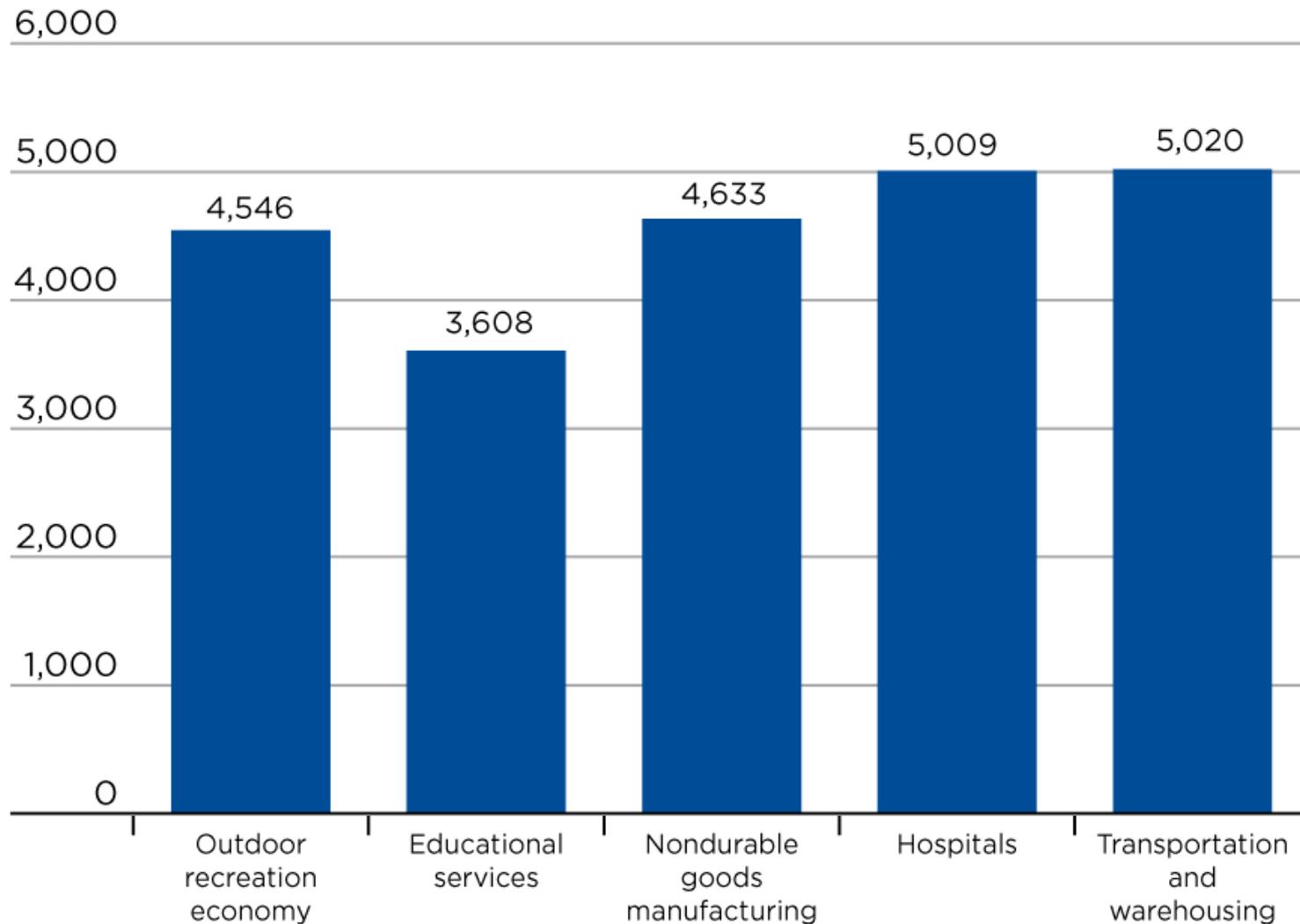


Millions of U.S. dollars



# Outdoor Recreation Employment, 2016

Thousands of employees



# Next Steps

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## September 20, 2018 release

- News release
- *Survey of Current Business* article
- Methodology white paper



## Continued outreach

- Extending contract with subject matter experts
- Upcoming events: Association of Outdoor Recreation and Education (Utah), Outdoor Retailer (Colorado)

Subject to resources, pursue annual ORSA updates, plus regional and other estimates