Overview

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

• Private Industry Associations
Goals and Timeline

**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

Source: Outdoor Industry Association
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]

<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>28.0%</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
Methodology and Data

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.*
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

2.2

1.4

1.5

2.1

2.3

Outdoor recreation economy

Mining

Utilities

Chemical products manufacturing

Broadcasting and telecommunications

Bureau of Economic Analysis
U.S. Department of Commerce
Outdoor Recreation Value Added, 2016

Millions of chained (2012) U.S. dollars

100,000
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
0

Arts, entertainment, recreation, accommodation, and food services
Retail trade
Manufacturing
Wholesale trade
Transportation and warehousing
Finance, insurance, real estate, rental, and leasing
State and local government
Agriculture, forestry, fishing, and hunting
Growth in Outdoor Recreation Compared to the US Economy, 2015-2016

- Real GDP: Outdoor Recreation Economy 1.7%, U.S. Economy 1.6%
- Real Gross Output: Outdoor Recreation Economy 2.5%, U.S. Economy 1.8%
- Compensation: Outdoor Recreation Economy 4.3%, U.S. Economy 2.7%
- Employment: Outdoor Recreation Economy 2.3%, U.S. Economy 1.4%
Composition of Real Gross Output, 2016

Total = $734B
Real Gross Output by Activity, 2016

(Millions of chained 2012 U.S. dollars)

- Boating/Fishing: $36,930
- Game Areas (includes Golfing and Tennis): $34,701
- RVing: $30,034
- Guided Tours/Outfitted Travel: $25,735
- Festivals/Sporting Events/Concerts: $23,148
- Motorcycling/ATVing: $20,266
Outdoor Recreation Compensation, 2016

<table>
<thead>
<tr>
<th>Category</th>
<th>Millions of U.S. dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor recreation economy</td>
<td>$213,603</td>
</tr>
<tr>
<td>Real estate and rental and leasing</td>
<td>$144,511</td>
</tr>
<tr>
<td>Educational services</td>
<td>$190,108</td>
</tr>
<tr>
<td>Securities, commodity contracts, and investments</td>
<td>$228,416</td>
</tr>
<tr>
<td>Computer systems design and related services</td>
<td>$245,051</td>
</tr>
</tbody>
</table>
Outdoor Recreation Employment, 2016

Thousands of employees

6,000

5,000

4,546

4,633

5,009

5,020

0

4,000

3,608

3,000

2,000

1,000

0

Outdoor recreation economy

Educational services

Nondurable goods manufacturing

Hospitals

Transportation and warehousing
Next Steps

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