

Outdoor Recreation Satellite Account Methodology

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ABSTRACT

This paper details the methodology for the inaugural outdoor recreation satellite account (ORSA) statistics released September 2018. The statistics include 2012-2016 estimates of the outdoor recreation economy's contribution to gross domestic product (GDP), gross output, compensation, and employment. To explain the national economic accounting concepts used to develop the official federal statistics from which the ORSA statistics originate, the first section of this paper is derived from the methodology papers, "Concepts and Methods of the U.S. National Income and Product Accounts" and "Concepts and Methods of the U.S. Input-Output Accounts" (U.S. Bureau of Economic Analysis, 2017 and 2009). Following the introduction to the general national accounting concepts, the methods used to develop the ORSA estimates are explained.

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INTRODUCTION

The Outdoor Recreation Satellite Account (ORSA) is a collaborative effort to measure the impact of outdoor recreation on the U.S. economy. Using input from outdoor recreation economists, industry experts, and multiple government agencies, the Bureau of Economic Analysis (BEA) can now show the size of the U.S. outdoor recreation economy with the ORSA statistics. The ORSA provides an estimate of the outdoor recreation economy's contribution to current- and chained-dollar gross domestic product (GDP), illustrates the contributions of individual industries to the outdoor recreation economy, and provides gross output, compensation, and employment estimates for the outdoor recreation economy. This paper details the methodology used to develop the ORSA statistics released September 2018. The first section of this paper explains the national accounting concepts used to develop overall U.S. federal statistics, such as GDP, from which the ORSA statistics originate. After the general national accounting methodology is explained, the methods used to estimate the portion of the U.S. economy specific to outdoor recreation are described.

CONCEPTS AND METHODS

This section explains the national accounting concepts used to develop the economic statistics that form the framework for the ORSA statistics. The methods used to develop U.S. value added (GDP), gross output, compensation, and employment described in this section come from BEA papers, “Concepts and Methods of the U.S. National Income and Product Accounts” and “Concepts and Methods of the U.S. Input-Output Accounts” (U.S. Bureau of Economic Analysis, 2017 and 2009). Concepts that are significant to the ORSA statistics are highlighted in this section, including government production, construction expenditures, margins, and price indexes. Information about personal consumption expenditures (PCE) is also presented. Although the ORSA does not include PCE estimates, a description is included to distinguish

between estimates of the outdoor recreation economy produced by outside groups that use consumer spending as their measure of the outdoor recreation economy, which is most similar to BEA's PCE measure.

National Economic Accounting

Bureau of Economic Analysis estimates are generally consistent with the System of National Accounts (SNA), which serves as the internationally accepted set of guidelines for the compilation of national economic accounts. The National Income and Product Accounts (NIPAs) at BEA consist of a set of integrated accounts that provide statistics on the monetary value and sources of economic activity produced in the country and the distribution of incomes that production generates. In national economic accounting, each transaction is recorded as a payment by one sector and as a receipt by the same or another sector—for example corporate income tax is both a *payment* made by a corporation and a government *receipt*. This functions as a form of entry validation. In addition, this system of integrated, double-entry accounts provides comprehensive measures of economic activity in a consistently defined framework without double-counting. The NIPAs, in combination with BEA's other economic accounts, can be used to trace the principal economic flows among the major sectors of the economy.

Gross Domestic Product

Gross domestic product measures the market value of the goods, services, and structures produced within the nation's economy in a given period. Conceptually, GDP can be measured three separate ways: (1) as the sum of goods and services sold to final users, (2) as the sum of income payments and other costs incurred in the production of goods and services, and (3) as the sum of the value added at each stage of production. The primary way, known as the expenditures approach, sums the market value of all domestic expenditures made on final goods and services purchased by persons, businesses, governments, and foreigners. It is calculated by summing the

following final expenditures components: personal consumption expenditures (PCE), gross private domestic fixed investment (PFI), change in private inventories, government consumption expenditures and gross investment, net exports (exports minus imports). Net exports allow imports to function as an offset for non-U.S. production included in other final expenditure components. For example, PCE includes expenditures on imported cars as well on domestically produced cars; thus, to properly measure domestic production, the sales of foreign-produced cars that are included in PCE are offset by a comparable entry in the imports of these cars. The offset covers the foreign-produced portion of the value of these sales and the domestic value-added (such as the margin provided by domestic dealerships) on imported cars is measured by the difference between the two and is included in GDP.

Gross domestic product can also be measured using the income approach. This method of calculating GDP aggregates all income earned by domestic households and firms. Total expenditures on all final goods and services can also be seen as income *received* as wages, profits, rents, and interest income summed together. Therefore, the expenditure and income approaches arrive at the same estimate for GDP and can be used to check one another.

The third way to measure GDP is known as the value-added or production approach. Value added is defined as the difference between an industry's gross output (sales or receipts plus other operating income and inventory change) and its intermediate inputs (goods and services that are used in the production of other goods and services). When value added is aggregated across all industries in the economy, industry sales to and purchases from each other cancel out, and the remainder is industry sales to final users, or GDP, equal to the estimate reached using the two other methods. Bureau of Economic Analysis calculates GDP using all

three methods, but the two approaches relevant to the ORSA estimates are the expenditures and production approaches.

Supply-use tables, sometimes called input-output tables, serve as both the data source and the framework used to estimate GDP. Supply-use tables are typically presented in matrix form and provide a detailed “snapshot” of the economy. More specifically, supply-use tables show the commodity inputs that are used by each industry to produce its output, the commodities produced by each industry, and the use of commodities by final consumers. The principal measure of output in the supply-use tables is gross output.

Gross Output

Gross output is a measure of output or production activity that consists of sales or receipts and other operating expenses, commodity taxes, and inventory change. It reflects both the value of goods and services that are used in other production processes (intermediate inputs) and the value of goods and services purchased by end-use consumers (final products). Gross output is sometimes referred to as “gross duplicated domestic output,” because it inherently double-counts the industry output that is purchased by other industries and used as inputs for their production. In contrast, GDP counts only industry sales to final users, so it is considered a “nonduplicative” measure of production in the economy.

To illustrate the difference between these two estimates, consider a new car shipped from an auto assembly plant. The car reflects not only the costs and profit associated with final assembly of the car commodity but also the costs and profit associated with all stages of production that preceded final assembly. At an earlier stage, the tires that were put on that car were recorded as output of the tire plant and reflected the costs and profit associated with their manufacturer. Thus, in gross output, the value of the tires is counted twice—once in the value of the auto manufacturer’s output and once in the value of the tire manufacturer’s output.

Furthermore, including the value of the rubber and metal that were shipped to the tire plant would constitute triple counting, etc. In contrast, in the measurement of automobile industry value added, the value of the tires shipped to the assembly plant represents an intermediate input and is therefore subtracted from the value of the shipments of completed cars from the assembly plant.

Government

The gross output of general government consists of all goods and services produced by general government. For the nonmarket services produced by general government, the standard practice is to value output in terms of the input costs incurred in production. These costs include labor, materials, and supplies, and they also include the use of fixed capital. Bureau of Economic Analysis uses a depreciation measure known as “consumption of fixed capital” as a partial measure of the annual services produced by the existing stock of government fixed capital; this approach implicitly assumes that the net return for general government fixed assets is zero.

Construction

Construction gross output estimation relies on the Census Bureau Value of Construction Put-in-Place (VPIP) Program. The VPIP measures activity by collecting reports from the owners of the construction projects monthly (reported on a monthly and aggregated annual basis) and aims to capture the amount of construction activity accomplished on a project within a month. The VPIP also captures several important components of construction activity such as non-employer construction, architectural and engineering costs, own-account construction, and homeowner construction. This is a divergence from traditional collection methods of construction activity which rely on contractor estimations of the value of work accomplished, augmented by permits and sales data. The traditional approach risks misstating the distribution of construction output across the timeseries and has the potential for double-counting – for

example, in cases where businesses perform work as subcontractors for other construction companies rather than directly for the entities that are investing in the new structure. By collecting estimates on a project basis, the VPIP avoids these pitfalls.

Margins

Trade margins, or markups, reflect the value added by wholesalers and retailers in the distribution of a commodity from producers to final purchasers. Trade margins are the wholesale and retail costs of marketing goods or services to users, separate from the value of the commodities they distribute. Trade margins estimate the value added of having the wholesaler or retailer involved in the chain of distribution from the producer to the final purchaser. Notably, secondhand (used) goods do not reflect current production activity and therefore do not affect gross domestic product. However, trade margins and commissions earned by the services of brokers and dealers when selling secondhand goods are included in GDP as new activity in the relevant period. Transportation margins consists of those transport costs paid separately by the purchaser in taking delivery of goods.

Compensation and Employment

Compensation is the total remuneration of employees in return for their work. It consists of wages and salaries (primarily the monetary remuneration of employees) and supplements (employer contributions for employee pension and insurance funds and employer contributions for government social insurance). Employees include both part-time and full-time employees, as well as temporary (seasonal or short-term) employees, and employees on paid vacation or other paid leave.

Price and Quantity Indexes and Chained Estimates

The market values and imputations used to measure GDP and other economic statistics are in current dollars—that is, they reflect transactions in terms of their value in

the periods in which they take place. For many analyses, it is useful to separate the changes in current-dollar GDP that are due to changes in quantity from those that are due to changes in price to remove the influence of inflation. In the NIPAs, the featured measure of growth in the U.S. economy is the percent change in real GDP—that is, the quantity-change measure for GDP from one period to another. Thus, changes in real GDP provide a comprehensive measure of economic growth that is free of the effects of price change. The changes in quantities and prices are computed from chain-type indexes calculated using a Fisher formula. Because the formula for the chain-type quantity indexes uses weights of more than one period, the corresponding chained-dollar estimates are usually not additive and should be used cautiously in calculating price-adjusted shares of higher level aggregates.

Personal Consumption Expenditures

Personal consumption expenditures (PCE) is the primary measure of consumer spending on goods and services in the U.S. economy. It accounts for about two-thirds of domestic final spending, making it the primary engine driving future economic growth. Personal consumption expenditures show how much of the income earned by households is being spent on current consumption and how much is being saved for future consumption. Personal consumption expenditures also provide a comprehensive measure of types of goods and services that are purchased by households, including imported goods and services. Most of PCE consists of purchases of new goods and of services by households from private business.

The inaugural ORSA statistics do not include PCE estimates. However, many estimates of the “outdoor recreation economy” produced by groups outside of BEA measure consumer spending, not value added or gross output, making PCE an important concept for ORSA users to understand.

Outdoor Recreation Economic Statistics

The ORSA joins BEA's growing suite of satellite accounts that provide detailed information on key sectors of the U.S. economy, such as health care, travel and tourism, and arts and culture. Satellite accounts provide complementary statistics which have no impact on the official U.S. economic statistics BEA produces. The ORSA was built using BEA's comprehensive supply-use tables, which provide insight into the internal workings of the U.S. economy and detail the contribution of specific industries and commodities to GDP. The supply-use tables detail the flows of goods and services purchased by each industry, the incomes earned from production in each industry, and the distribution of sales for each commodity. The goal of the ORSA is to highlight outdoor recreation production and spending already present in the supply-use tables. In practice, the ORSA is a rearrangement of the current data to isolate outdoor recreation spending and production. For example, the ORSA shows the production of apparel used specifically for outdoor recreation activities, such as wet suits and hiking boots, while the published supply-use tables show the production of all apparel regardless of use. Likewise, construction spending related to outdoor recreation, such as construction of tennis courts and baseball diamonds, is already embedded in the supply-use tables as construction on amusement and recreation structures, the ORSA simply isolates such spending.

Defining Outdoor Recreation

The ORSA represents the value of the U.S. economy specific to the outdoor recreation economy. The term “outdoor recreation” spans many activities, from traditional or conventional activities like camping and hiking to more casual outdoor activities like gardening and outdoor festivals (Cordell, 2012; Godbey, 2009). To meet the diverse needs of data users, the ORSA was designed to capture both the conventional and broad conception of outdoor recreation.

Conventional outdoor recreation is defined by BEA as “all recreational activities undertaken for

pleasure that generally involve some level of intentional physical exertion and occur in nature-based environments outdoors.” The broader definition attempts to encompass the comprehensive viewpoint of outdoor recreation and is defined by BEA as “all recreational activities undertaken for pleasure that occur outdoors.” Bureau of Economic Analysis staff worked closely with outdoor recreation experts from academia, government, and private industry to develop these definitions to serve as a conceptual foundation for the ORSA. These definitions also reflect input received from the public. These definitions allow for new activities that may emerge in the future to be included in any forthcoming iterations of the ORSA.

A complete measure of the outdoor recreation economy includes the value of goods and services directly related to outdoor recreation (core goods and services), plus the value of goods and services that support access to outdoor recreation (supporting goods and services). Core outdoor recreation goods and services include gear, equipment, fuel, concessions, maintenance, repair, and fees related to outdoor recreation activities. Supporting goods and services includes travel and tourism, as well as local trips, construction, and government expenditures. Core and supporting goods and services included as part of the ORSA were chosen from BEA's comprehensive list of nearly 5,000 categories of goods and services that underpin the supply-use tables. The goods and services chosen as in-scope of the outdoor recreation economy were determined using existing outdoor recreation research and reports, as well as feedback from outdoor recreation economists, and experts in the private sector, academia, and federal agencies.

Core goods and services in the ORSA include outdoor recreation gear and equipment, such as boats, fishing rods, and helmets. Fuel refers to the fuel used to operate recreational vehicles, boats, and planes. Concessions refer to food and drinks sold by outdoor recreation site operators, such as at outdoor sporting events. Maintenance and repair refers to upkeep of outdoor recreation

equipment, including recreational vehicles and some equipment (for example, bicycles). Fees refer to expenditures on storage and docking, equipment rental, lessons, event admission, insurance, financing, and veterinarian services.

Supporting ORSA goods and services include outdoor recreation travel and tourism, as well as local trips, construction, and government expenditures. Travel and tourism includes spending on food, beverages, lodging, transportation, souvenirs, and shopping as part of an outdoor recreation trip. Outdoor recreation travel and tourism estimates are methodologically consistent with BEA's Travel and Tourism Satellite Account (TTSA). Outdoor recreation trips are defined as travel that occurs at least 50 miles from home, corresponding to the definition used in the TTSA. The definitions, framework, and estimating methods used for the TTSA follow the guidelines developed by the United Nations World Tourism Organization (WTO) and the Organization for Economic Co-operation and Development (OECD) for similar travel and tourism accounts. Outdoor recreation travel expenses specifically include food and beverages (groceries and restaurants), lodging, transportation (including fuel), and souvenirs and shopping. The U.S. Department of Transportation's Federal Highway Administration 2009 National Household Travel Survey (NHTS) and the Bureau of Labor Statistics (BLS) Time Use Survey (TUS) were the main sources used to determine the portion of travel related to outdoor recreation trips. The NHTS specifies the types of leisure/social trips taken, including sporting events, recreation, vacation, and family visits. Additionally, the NHTS provides the mode of transportation, such as airplanes, vehicles, and ferries, including miles travelled. The TUS shows the average time Americans spend on activities throughout a typical day, such as work and leisure/sports, including the travel time associated with each activity.

Local trips are defined as travel that occurs less than 50 miles from home. Local trips include spending on food, beverages, lodging, transportation, souvenirs, and shopping that occurs during a local outdoor recreation trip. The main data sources used to estimate local outdoor recreation trips are the NHTS and BLS Consumer Expenditures Survey and TUS. The Consumer Expenditures Survey provides detailed spending information separately for trips less than 50 miles from home and for trips at least 50 miles from home, including spending on restaurants, groceries, shopping, lodging, and transportation.

Construction includes spending on outdoor recreation structures, such as tennis courts and marinas. Construction activity included in the ORSA includes the construction of structures used while participating in some form of outdoor recreation and structures specifically built for the outdoor recreation activity. For example, a hospital's construction would not be included simply because an injured skier was treated in that hospital. However, amphitheaters, sports fields, and docks are built with the ORSA-defined activities in mind. Non-building construction related to outdoor recreation like campsites and trail building are also included. To capture the proportion of construction output that fits within the definitions of the ORSA, BEA collaborated with the Census Bureau for annual estimates of unpublished VPIP construction types. See Table 1 for the full list of construction categories included in the ORSA.

Government expenditures include federal, state, and local government spending that support outdoor recreation activities, such as maintaining hiking trails in a national park. Federal government spending encompasses expenditures by federal agencies that serve as stewards of public lands and waterways, specifically, the U.S. Army Corps of Engineers, Department of Agriculture, Department of the Interior, and National Oceanic and Atmospheric Administration. The portion of each federal agency's budget that is directly related to supporting outdoor

recreation activities is included in the ORSA. This information is available as part of each agency's budget or from existing reports from the agencies. State and local government spending represents the entirety of state and local budgets for parks and recreation. This information is available from internal BEA data as part of the classification of the functions of government (COFOG).

Recreational goods and services, such as fishing rods and guided tours, are often identifiable directly from data underlying BEA's economic accounts. However, many outdoor recreation goods and services can also be used for indoor recreation or non-recreational purposes. In these cases, BEA used a variety of data sources to estimate the portion specific to outdoor recreation (see Table 2). Proprietary retail sales data were used to determine outdoor recreation spending proportions for many water and winter activities, such as snorkeling and skiing. Many private industry reports were used to estimate recreational use, such as a survey commissioned by PeopleForBikes that shows the percentage of people who ride bicycles for recreation versus solely for commuting (Corona Insights, 2017). Participation rates commissioned by the Physical Activity Council and the Outdoor Foundation were used to parse out indoor and outdoor use of goods and services for activities that occur in both settings, such as soccer and other sports (Synovate/IPSOS, 2016).

Outdoor recreation gross output represents the share of each in-scope commodity's gross output specific to outdoor recreation for every industry that produces that commodity. Value added (GDP) for outdoor recreation is derived from the relationship between the industry output for outdoor recreation and total industry output. This means the ratio of intermediate consumption relative to industry output for outdoor recreation is the same as the ratio of total industry intermediate consumption to total industry output. Employment and compensation for

outdoor recreation are derived using the same methods used to generate value added. Specifically, the proportion of an industry's outdoor recreation output relative to its total output is applied to total employment and compensation for that industry. This information is presented traditionally, using the North American Industry Classification System (NAICS). In addition to BEA's standard presentation of gross output by industry using NAICS, gross output is also presented by outdoor recreation activity in the ORSA.

Gross Output by Outdoor Recreation Activity

The ORSA gross output by activity table was designed so users can track gross output for specific activities in a transparent manner. To do this, activities were either split into mutually exclusive categories if source data allowed or published as a single category containing closely related activities. For example, the category climbing/hiking/tent camping was created to avoid double-counting the many items that can be used across these activities, such as hiking boots. Likewise, a separate category was created for RVing because of the various uses for RVs outside of traditional camping. Another example is the category guided tours/outfitted travel, which contains all outdoor recreation activities that occur as part of an organized or guided tour, including sunset sailboat tours, guided horseback trail rides, and hunting trips. To prevent double-counting, a sunset sailboat tour is part of the guided tours category, not the boating/fishing category. Similarly, guided horseback trail rides are only part of guided tours, not the equestrian category.

All core goods and services that are activity-specific were allocated to individual activities, for example, skis were allocated to skiing. Footwear, equipment bags, uniforms, wet suits, swimsuits, personal safety equipment, and gloves are also allocated to individual activities using information from proprietary retail sales data. Items that are too general to allocate to individual activities are separated into a multi-use apparel and accessories category for both the

conventional and comprehensive definitions of outdoor recreation. This includes coolers, lighting, GPS devices, backpacks, sunscreen, bug spray, watches, sports racks, hydration equipment, and general outdoor clothing.

Supporting goods and services (local trips, travel and tourism, construction, and government) for recreational activities overlap for many activities. For example, a single outdoor recreation trip may encompass multiple activities, such as camping, wildlife watching, and fishing. Similarly, construction of outdoor fields and parks supports multiple types of outdoor recreational activities, as do government-run parks and forests. For this reason, supporting recreational goods and services are not allocated to individual activities and are presented in an aggregate ‘supporting outdoor recreation’ category.

Comparing ORSA Estimates to Existing Outdoor Recreation Economic Reports

The activity-level gross output estimates will likely be compared to external economic reports related to outdoor recreation activities. These external economic impact reports often use different economic measurement concepts from the ORSA, so their estimates are expected to differ. Specifically, external estimates of the outdoor recreation economy tend to measure consumer spending, which relates closer to BEA’s PCE estimates, and is not part of the ORSA. Economic impact reports for activities with a high share of spending on imported goods and services (such as apparel) will likely have higher estimates than the ORSA. External reports may also include spending on goods and services used for purposes unrelated to outdoor recreation, such as reports that include bicycles or motorcycles used for commuting and not recreation. For these reasons, caution is urged when comparing ORSA statistics to other economic impact reports.

CONCLUSION

Bureau of Economic Analysis developed the ORSA 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.” After publishing the final national estimates in September 2018, BEA will endeavor to produce state estimates and other extensions to this satellite account subject to time, data, resource, and funding constraints.

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TABLES

Table 1: Categories of Structures Included in ORSA Construction
Arboreta/Botanical Garden/Planetarium-Observatory
Amphitheatre/Pavilion
Amusement Building/Theme Park/Mini Golf
Aquarium/Zoo
Breakwater/Bulkhead/Gate-Tide/Jetty/Erosion Control/ Beach Nourishment/Water Retaining Wall/Seawall
Camp-Seasonal/Tourist (Rec Vehicles)
Camps-Retreats/Fellowship Halls/Sunday School
Dock/Pier/Wharf/Marina/Lighthouse
Driving Range/Rifle Range
Drydock/Maritime Freight Terminal
Equestrian Center/Riding Academy/Stable
Golf Course/Clubhouse
Outdoor Court/Racquetball/Rink/Tennis Court
Park/Concession/Landscaping
Pool-Outdoor Swimming, Non-Educational
Race Track
Resort Lodging
Ski Lodging/Park Lodging

Table 2: External Data Sources Used in the ORSA
American Beekeepers Association
American Horse Council
American Sportfishing Association
Archery Trade Association
Dodge Data and Analytics
General Aviation Association
International Snowmobile Manufacturers Association
Motorcycle Industry Council
National Bicycle Dealers Association
National Gardening Survey
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
U.S. Bureau of Labor Statistics
U.S. Census Bureau Value of Construction Put-in-Place
U.S. Department of Agriculture
U.S. Department of the Interior
U.S. Department of Transportation