

PARTNERS FOR GOOD LIVES

– OUTDOOR RECREATION INDUSTRY AND COMMUNITIES

PRESENTATION BY DERRICK CRANDALL, PRESIDENT

OUTDOOR RECREATION ROUNDTABLE

PIEDMONT TRIAD REGIONAL COUNCIL 2018 SUMMIT

ORR MEMBERS



HOW BIG IS OUTDOOR REC?

\$412 billion of U.S. GDP in 2016

→ or **2.2%** of the economy



\$38.2 billion
Boating/Fishing



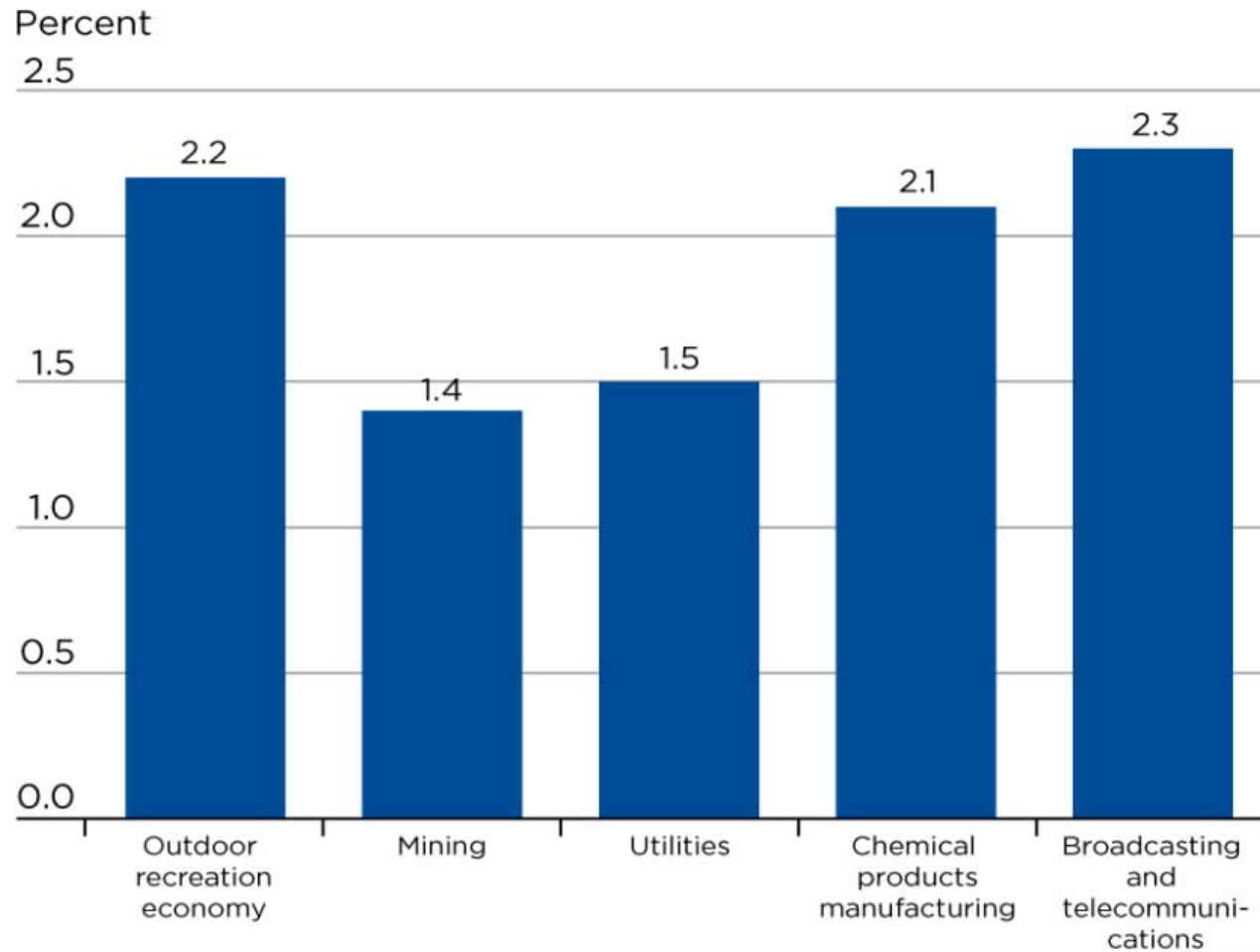
\$30.8 billion
RVing



\$19.5 billion
Motorcycling/ATVing

- Outdoor recreation GDP measures the value of production within the United States.
- Activities are measured by gross output, essentially sales or receipts.

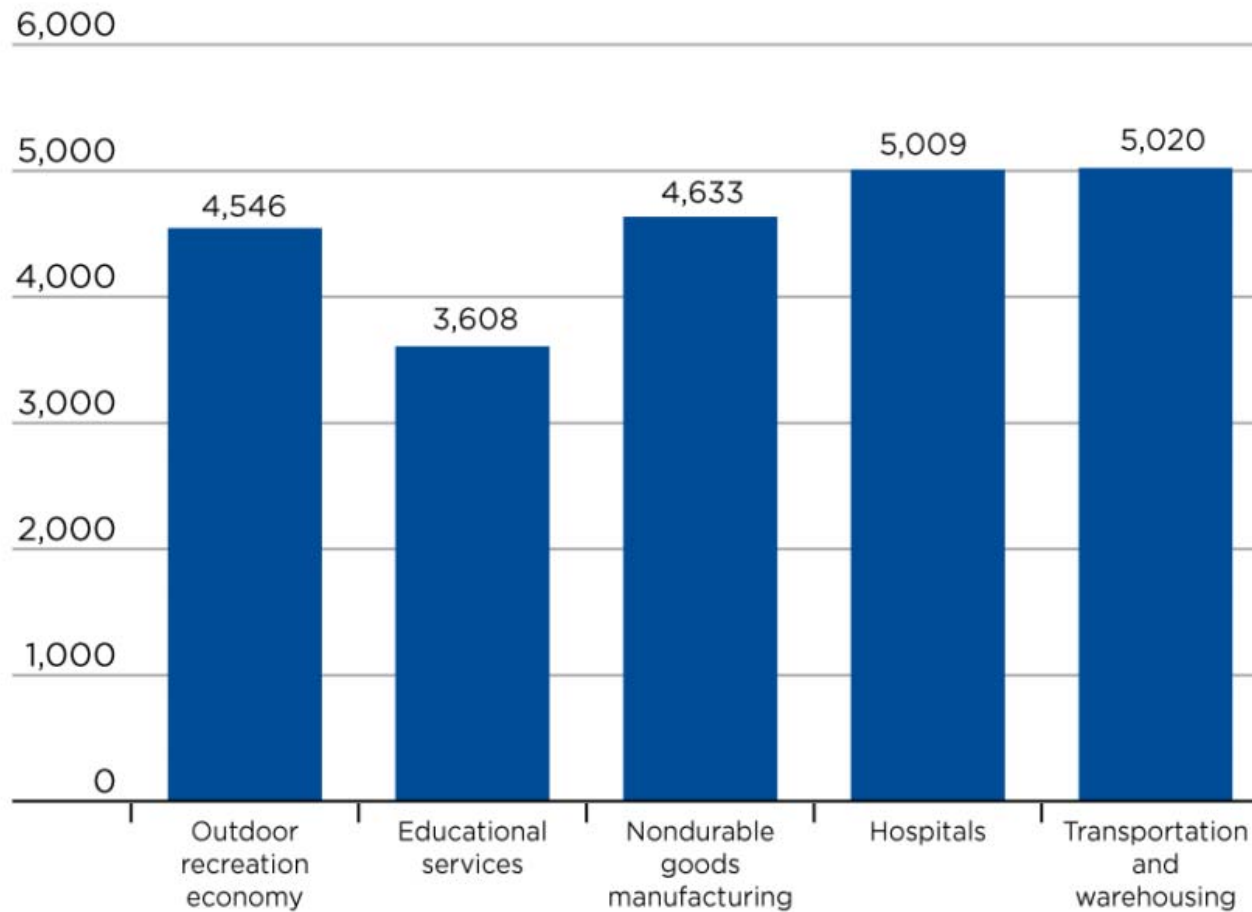
Outdoor Recreation as a Percent of GDP, 2016



Outdoor Recreation Employment, 2016



Thousands of employees



ORR OUTDOOR RECREATION ROUNDTABLE

PRESENTS THE

OUTDOOR RECREATION SATELLITE ACCOUNT (ORSA)

SEPTEMBER 20, 2018 | CAPITOL HILL



Growth in Outdoor Recreation Compared to Growth in the U.S. Economy, 2015-2016

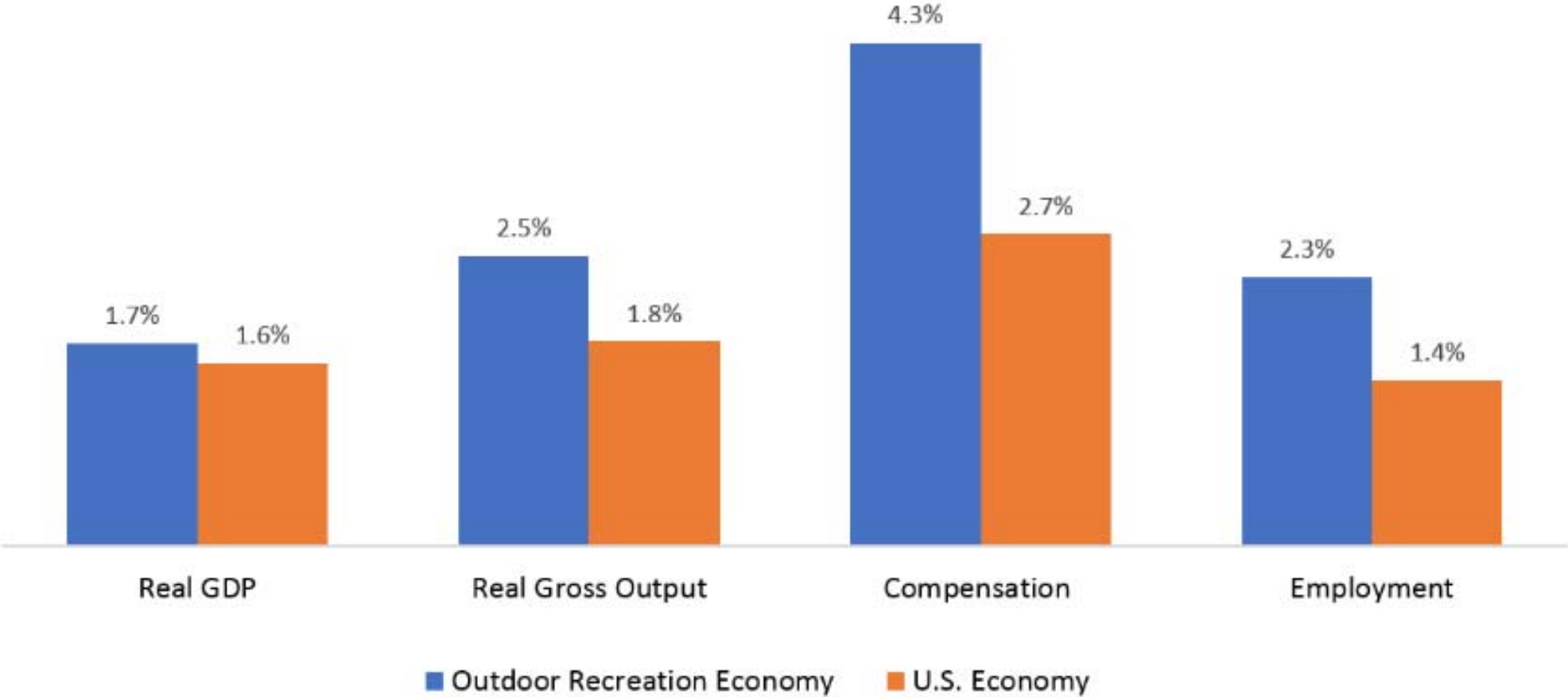
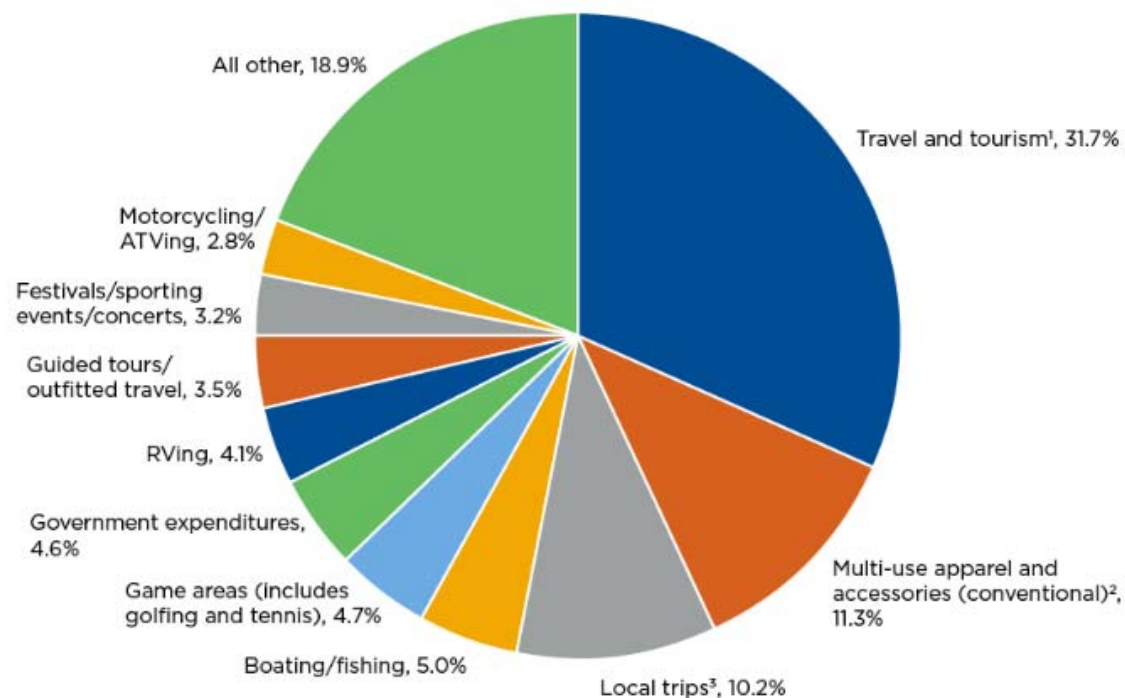


Chart 3. Composition of Real Gross Output by Outdoor Recreation Category, 2016



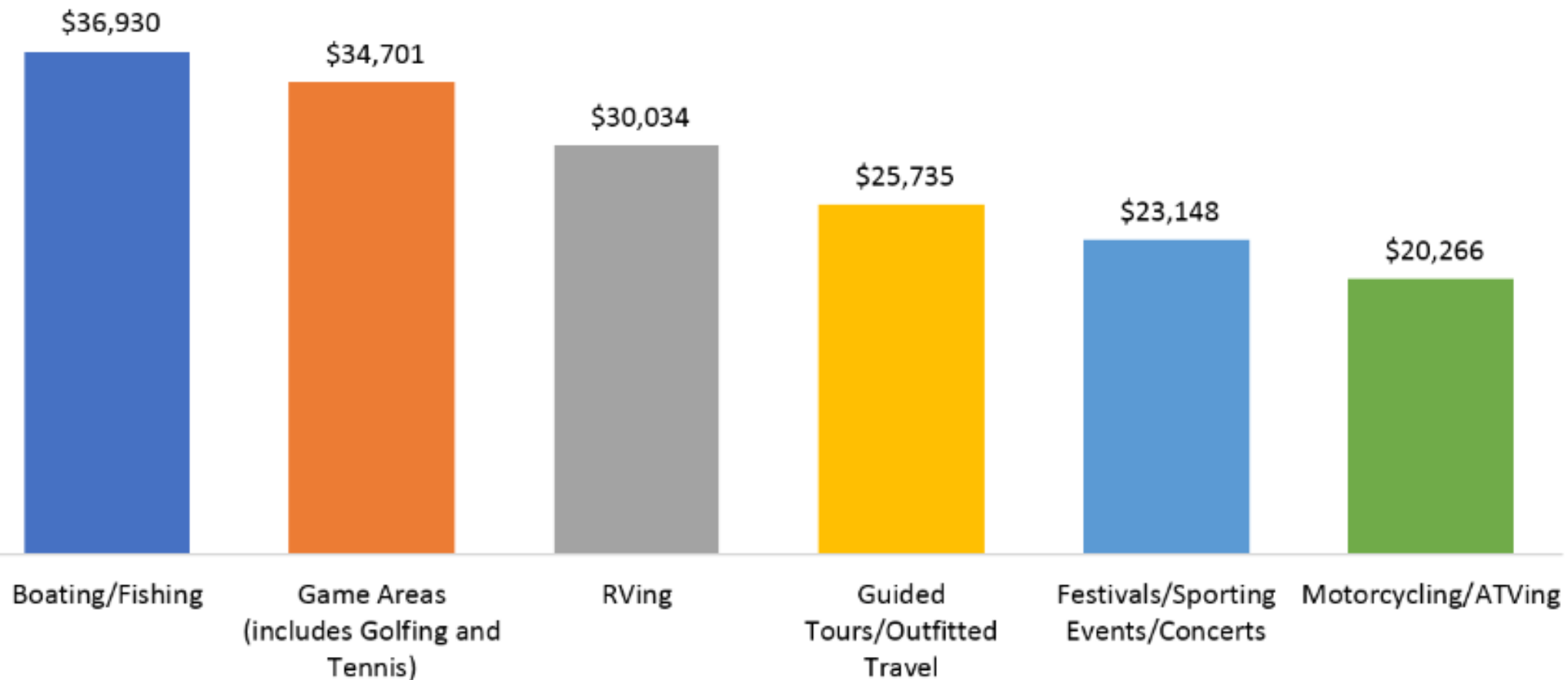
1. Travel and tourism expenses in the Outdoor Recreation Satellite Account are consistent with the Travel and Tourism Satellite Account, which includes only expenses for travel at least 50 miles away from home. Expenses include food and beverages, lodging, shopping and souvenirs, and transportation.

2. Consists of backpacks, bug spray, coolers, general outdoor clothing, GPS equipment, hydration equipment, lighting, sports racks, sunscreen, watches, and other miscellaneous gear and equipment.

3. Local trips include trips less than 50 miles away from home. Expenses include food and beverages, lodging, shopping and souvenirs, and transportation.

U.S. Bureau of Economic Analysis

Real Gross Output for the Largest Core Outdoor Recreation Activities, 2016
(Millions of chained 2012 U.S. dollars)



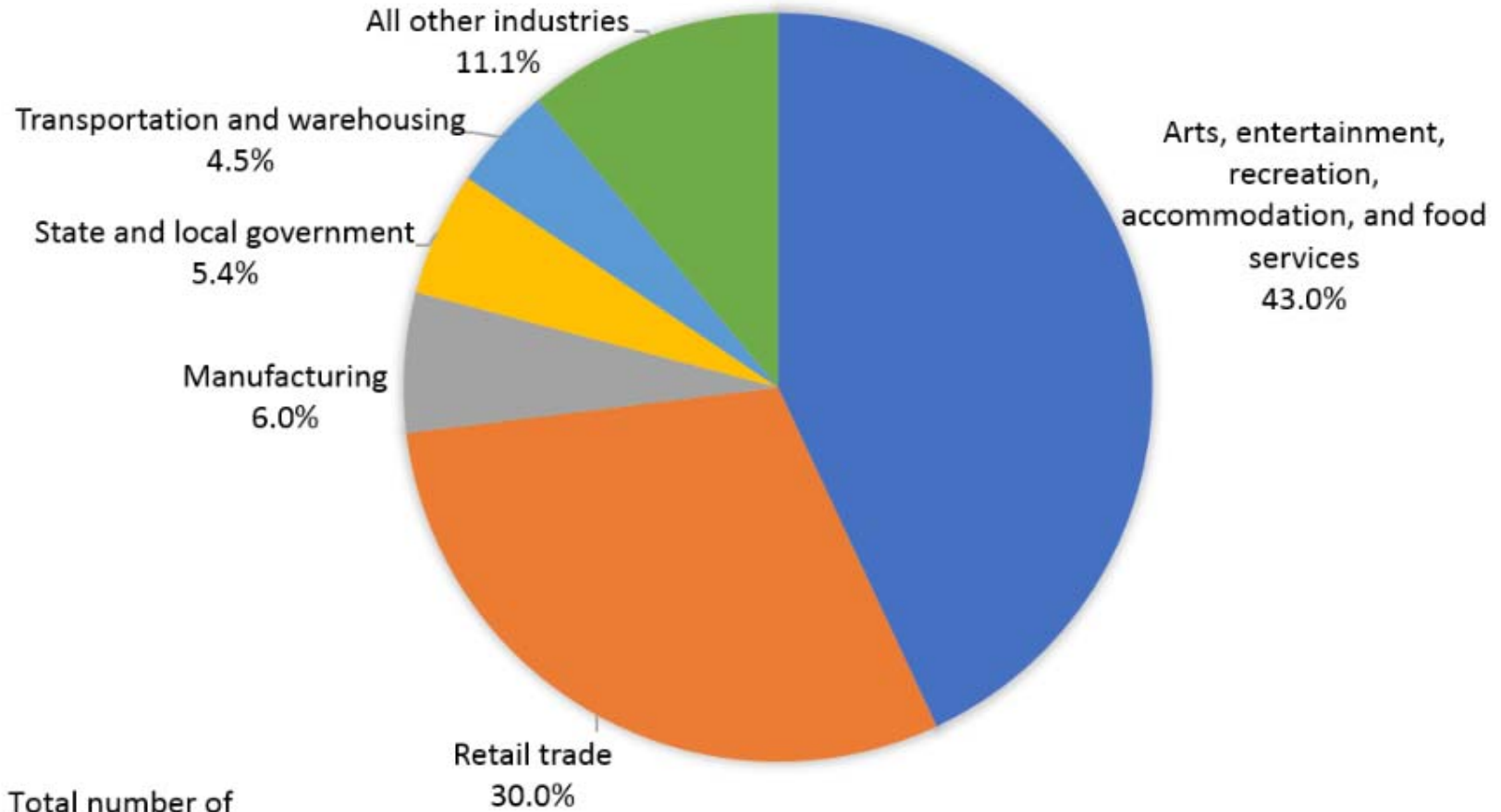
•Boating/Fishing was the largest core outdoor recreation activity in 2016, accounting for \$36.9 billion of real gross output.

•Motorcycling/ATVing activities accounted for \$20.3 billion of real gross output in 2016, representing one of the fastest-growing activities at 8.0 percent growth from the previous year.

•Multi-use Apparel and Accessories, such as backpacks and bug spray, that cannot be linked to a specific activity accounted for 12.2 percent, or \$89.3 billion, of real gross output in 2016.



Industry Composition of Outdoor Recreation Employment, 2016



Total number of employees = 4.55 million

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]

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

GOOD NEWS – ACTION ABOUNDS

- **State outdoor recreation offices, including in North Carolina – linking economic development, natural resource management, wildlife and tourism**
- **Outdoor Recreation Advisory Committee and reorganization**
- **US Department and Interior’s initiatives**
 - **Governor’s liaison in all 50 states**
 - **New coordination of federal assistance programs**
 - **Wildlife and shooting sports**
 - **Boating and fishing**
 - **Land and Water Conservation Fund**
 - **Recreational Trails Program and more**
 - **Outdoor Recreation Advisory Committee and reorganization**

OUTDOOR RECREATION ADVISORY COMMITTEE (ORAC)

U.S. Department of the Interior



ORAC CHARTER

"Made in America" Outdoor Recreation Advisory Committee



“The Committee will provide advice to the Secretary of the Interior on public-private partnerships across all public lands, with the goal of expanding access to, and improving infrastructure on public lands and waterways.”

The Outdoor Recreation Advisory Committee has established four subcommittees:



- ▶ **Partnerships and Collaboration**
- ▶ **Public Access and Infrastructure**
- ▶ **Technology and the Digital Experience**
- ▶ **Recreation Enhancement Through Reorganization**

AREAS OF SPECIAL OPPORTUNITIES

- **URBAN WILDLIFE REFUGES**
- **TRAILS**
- **INNOVATIVE PARTNERSHIPS**
 - **WAYNE NATIONAL FOREST**
 - **WHITE RIVER NATIONAL FOREST**
 - **TENNESSEE VALLEY AUTHORITY**
 - **REFOCUSING DMO EFFORTS**
 - **NPS EMPLOYEE HOUSING/MODERNIZED CAMPGROUNDS**

SHARING OUR KNOWLEDGE

- STATE COMPREHENSIVE OUTDOOR RECREATION PLANS
- INDUSTRY DATA – LIKE KOA’S ANNUAL NORTH AMERICAN CAMPER STUDY
- WWW.RECREATION.GOV AND ITS API-BASED CONSTRUCTION
- A NEW GIS-BASED AGGREGATION OF INFORMATION ON PLACES, OWNERSHIP OF LICENSES AND REGISTRATION DATA AND MORE

LET'S STAY IN TOUCH!

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