$412 billion of U.S. GDP in 2016

or 2.2% of the economy

Employed 4.5 million people

$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

Percent
2.5

Outdoor recreation economy: 2.2
Mining: 1.4
Utilities: 1.5
Chemical products manufacturing: 2.1
Broadcasting and telecommunications: 2.3
Outdoor Recreation Employment, 2016

Thousands of employees

6,000

Outdoor recreation economy: 4,546
Educational services: 3,608
Nondurable goods manufacturing: 4,633
Hospitals: 5,009
Transportation and warehousing: 5,020
OUTDOOR RECREATION ROUNDTABLE

PRESENTS THE

OUTDOOR RECREATION SATELLITE ACCOUNT (ORSA)

SEPTEMBER 20, 2018 | CAPITOL HILL
Chart 3. Composition of Real Gross Output by Outdoor Recreation Category, 2016

- Travel and tourism\(^1\), 31.7%
- Multi-use apparel and accessories (conventional)\(^2\), 11.3%
- Local trips\(^3\), 10.2%
- Boating/fishing, 5.0%
- Game areas (includes golfing and tennis), 4.7%
- Rving, 4.1%
- Guided tours/outfitted travel, 3.5%
- Festivals/sporting events/concerts, 3.2%
- Motorcycling/ATVing, 2.8%
- All other, 18.9%

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: $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
• 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

- Arts, entertainment, recreation, accommodation, and food services: 43.0%
- Retail trade: 30.0%
- Manufacturing: 6.0%
- State and local government: 5.4%
- Transportation and warehousing: 4.5%
- All other industries: 11.1%

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]

<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
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
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!

- DCRANDALL@FUNOUTDOORS.COM
- ORAC@NPS.GOV
- WWW.RECREATIONROUNDTABLE.ORG