

Outdoor Recreation Satellite Account: Prototype Estimates, 2012-2016



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Advisory Committee Meeting

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Outdoor Recreation Satellite Account Background

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

Measuring the Outdoor Recreation Economy

- Defining Outdoor Recreation
- Methodology and Data

Results

- Comparison to External Reports

Outreach, Feedback, and Next Steps



Our Partners

- Federal Recreation Council
- Seven federal agencies that are prominent stewards of federal public lands and waters



**US Army Corps
of Engineers**



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"

Goals and Timeline



- Prepare and release prototype estimates (January 2017 - February 2018)—**Completed**
- Gather feedback and finalize estimates (March-September 2018)—**In progress**
- Subject to resources, pursue regional, historical, and other estimates (September 2018-forward)—**To be determined**

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

- Conventional activities, plus 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

ORSA Activity-Based Presentation



Total Outdoor Recreation	Total Outdoor Recreation	Total Outdoor Recreation
Total Core Outdoor Recreation	Total Core Outdoor Recreation	Supporting Outdoor Recreation
Conventional Outdoor Recreation	Other Outdoor Recreation	Construction
Bicycling	Amusement Parks/Water Parks	Trips and Travel ⁴
Boating/Fishing	Festivals/Sporting Events/Concerts	Government Expenditures
Canoeing/Kayaking	Field Sports	
Sailing	Game Areas (including Golf and Tennis)	
Other Boating/Fishing	Guided Tours/Outfitted Travel	
Camping/Climbing/Hiking	Productive Activities	
Equestrian	Other Outdoor Recreation Activities ³	
Hunting/Shooting/Trapping	Multi-use Apparel and Accessories (Other) ²	
Hunting		
Other Shooting/Trapping		
Motorized Vehicles		
Motorcycles		
RVs		
Other Motorized Vehicles		
Recreational Flying		
Skiing		
Snowboarding		
Other Conventional Outdoor Recreation Activities ¹		
Multi-use Apparel and Accessories (Conventional) ²		

Methodology is consistent with BEA national accounting framework

- BEA's supply-use framework includes about 5,000 categories of goods and services
- Relevant goods and services are chosen for each activity
- For every good or service chosen, the portion related specifically to outdoor recreation is estimated

Methodology is consistent with other satellite accounts

- Similar framework as the Travel and Tourism Satellite Account (TTSA) and Arts and Cultural Production Satellite Account (ACPSA)
- Unlike TTSA and ACPSA, there was no international guidance on estimating the outdoor recreation economy

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

- **Federal, State, and Local Recreation Agencies:** Department of the Interior, Forest Service, National Park Service, SCORPs
- **Other Federal Agencies:** Bureau of Labor Statistics' Time Use Survey and Consumer Expenditures Survey, Census Bureau Value of Construction, Department of Transportation's National Household Travel Survey
- **Private Industry Groups:** American Horse Council, International Snowmobile Manufacturers Association, Motorcycle Industry Council, National Marine Manufacturers Association, NPD Group, 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.



Prototype ORSA estimates include 2012-2016 nominal values for

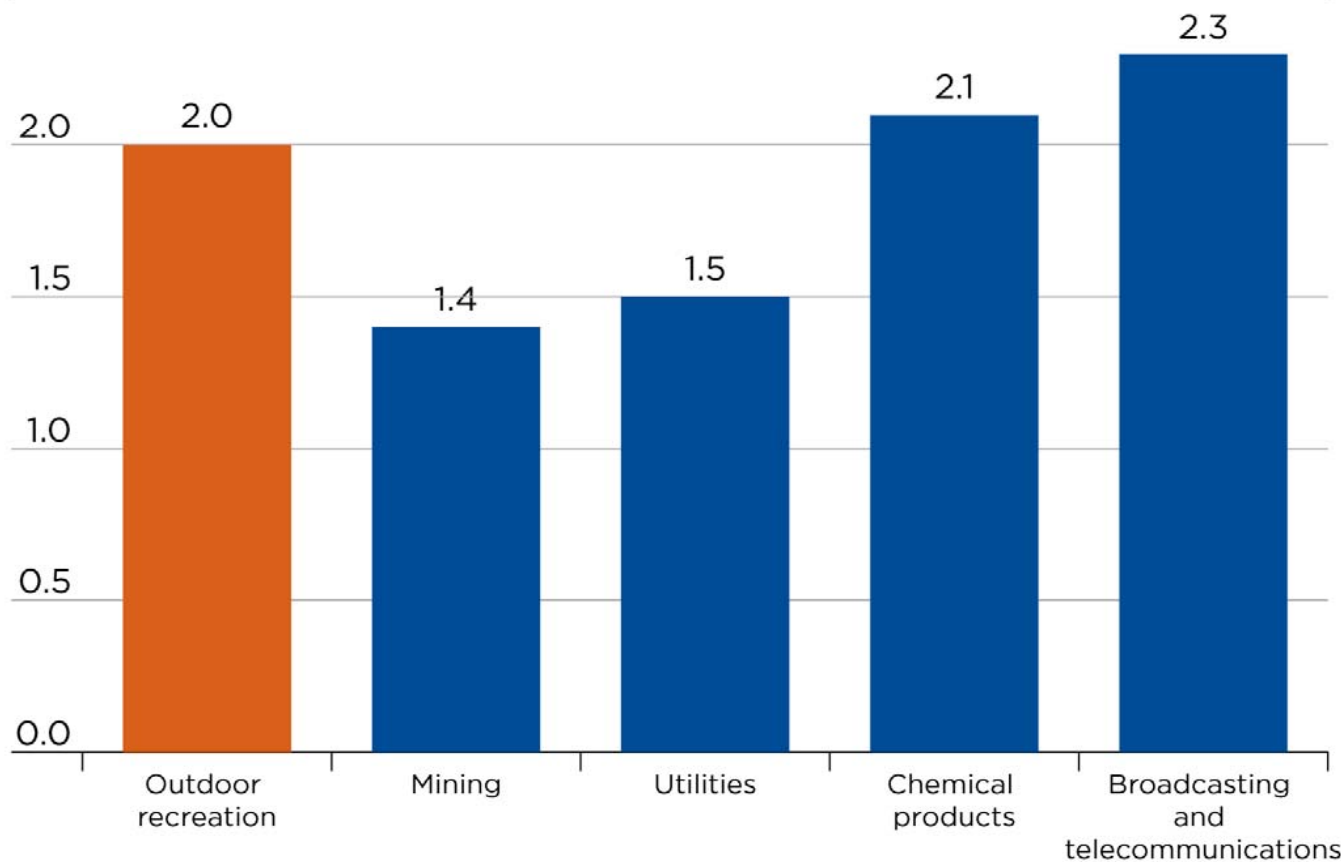
- Value Added by Industry
- Employment by Industry
- Compensation by Industry
- Gross Output by Industry
- **Gross Output by Activity**

Results



Outdoor Recreation as a Percent of GDP with Comparable Industries, 2016

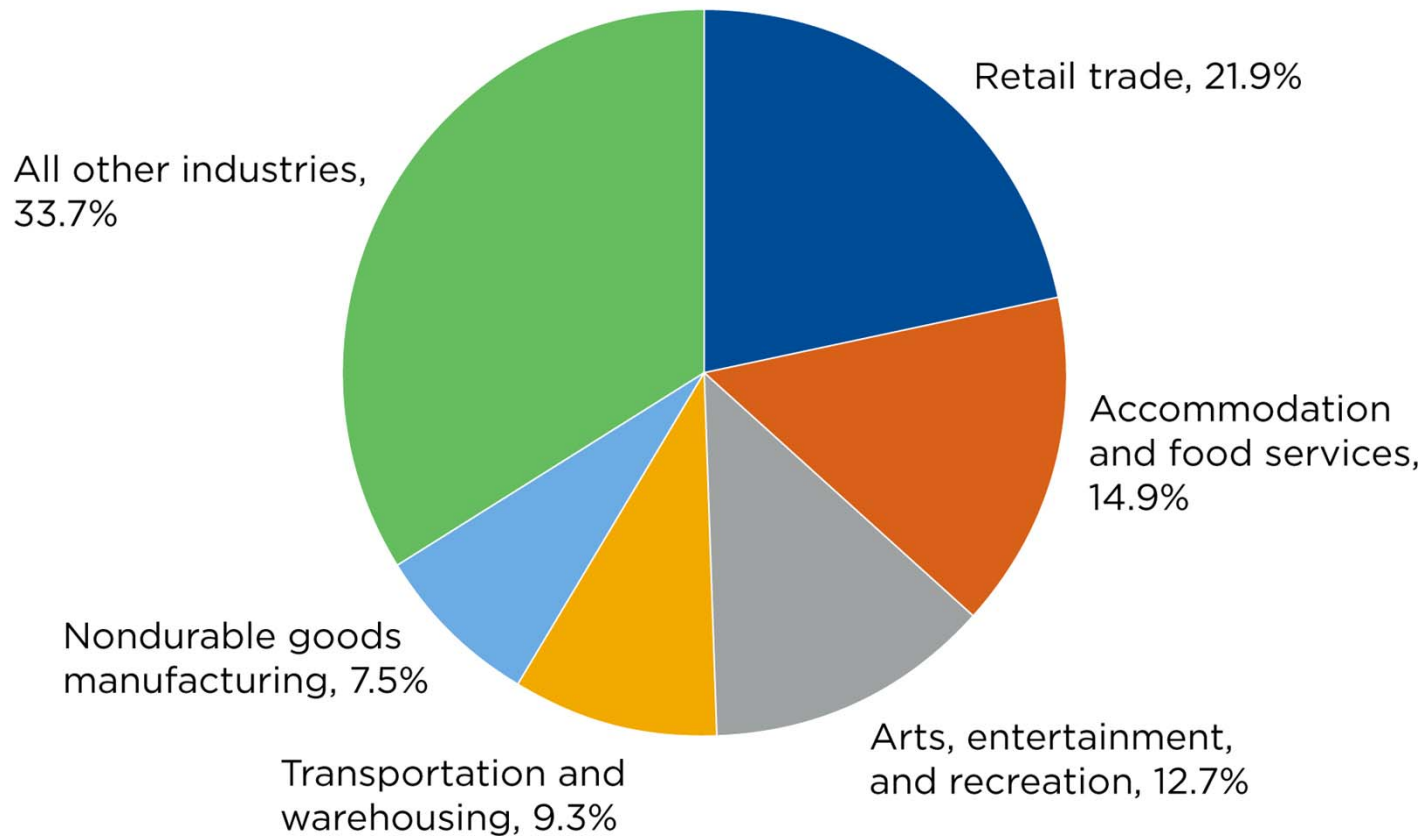
Percent
2.5



**Growth Rate,
2015-2016**
ORSA: 3.8%
U.S. GDP: 2.8%

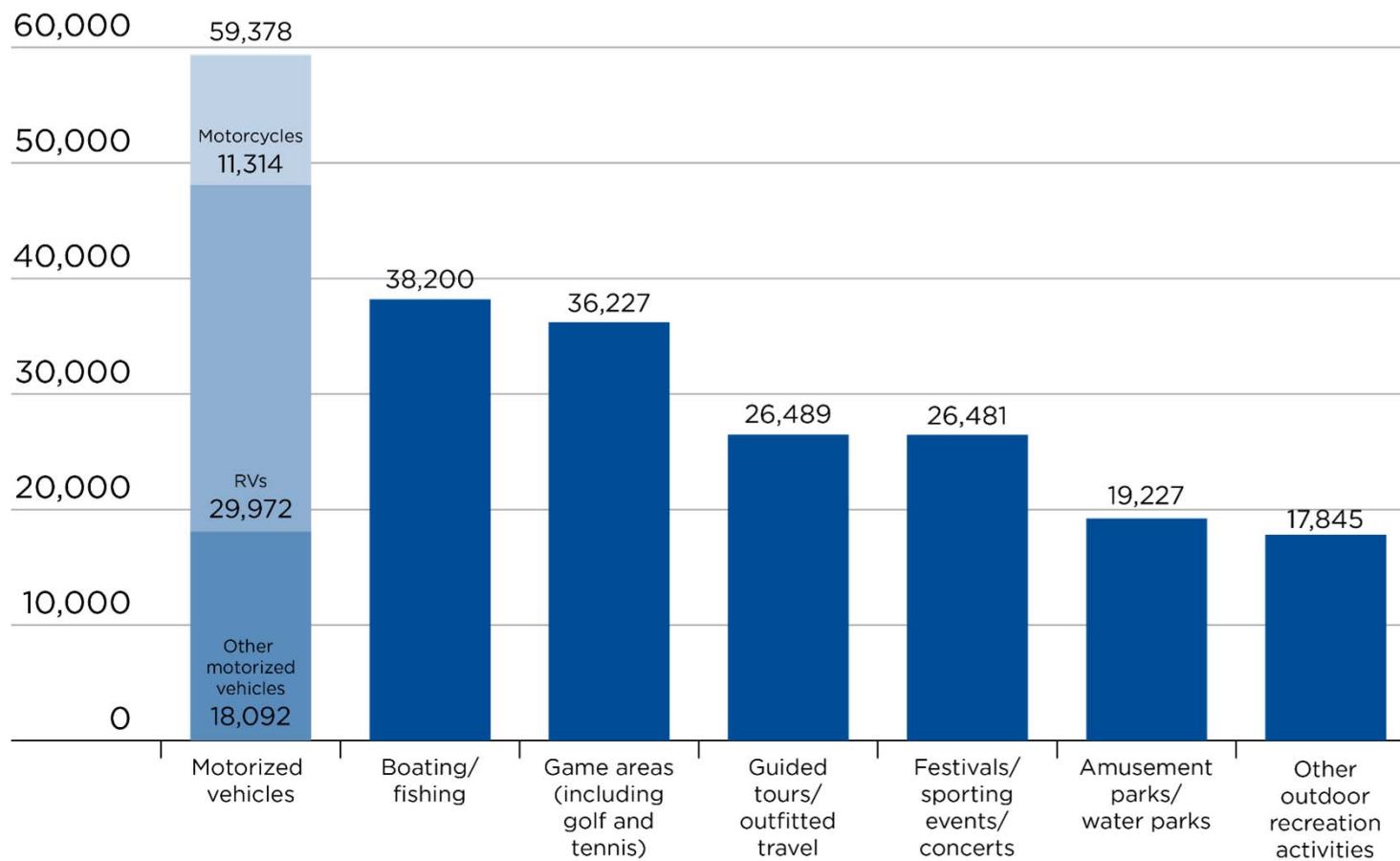
**Average Annual
Growth Rate,
2012-2016**
ORSA: 4.4%
U.S. GDP: 3.6%

Industry Composition of Outdoor Recreation Value Added, 2016



Gross Output by Outdoor Recreation Activity

Millions of U.S. dollars, 2016



Outdoor Recreation Gross Output by Activity

[Millions of current dollars]

	2012	2013	2014	2015	2016
Total Outdoor Recreation	601,003	624,366	644,122	653,225	673,165
Total Core Outdoor Recreation	335,144	357,257	372,305	378,888	395,877
Conventional Outdoor Recreation	211,202	222,298	234,681	234,289	247,202
Bicycling	2,992	2,854	3,123	2,998	3,313
Boating/Fishing	30,943	32,440	34,122	36,734	38,200
Canoeing/Kayaking	590	552	624	658	682
Sailing	1,852	1,938	2,101	2,170	2,396
Other Boating/Fishing	28,501	29,950	31,397	33,906	35,122
Camping/Climbing/Hiking	6,545	6,807	7,131	7,615	7,927
Equestrian	9,971	10,646	11,972	11,818	12,674
Hunting/Shooting/Trapping	9,927	12,221	12,500	13,751	15,394
Hunting	6,300	7,626	7,724	8,434	9,292
Other Shooting/Trapping	3,627	4,595	4,776	5,317	6,101
Motorized Vehicles	58,229	60,221	62,145	57,837	59,378
Motorcycles	11,245	11,679	11,976	11,304	11,314
RVs	25,489	27,467	29,592	29,231	29,972
Other Motorized Vehicles	21,495	21,075	20,577	17,303	18,092
Recreational Flying	6,310	6,236	6,784	7,120	5,487
Skiing	2,696	2,731	2,927	3,133	3,310
Snowboarding	2,369	2,442	2,583	2,768	2,960
Other Conventional Outdoor Recreation Activities ¹	9,991	8,868	9,666	9,727	11,957
Multi-use Apparel and Accessories (Conventional) ²	71,228	76,833	81,728	80,788	86,601
Other Outdoor Recreation	123,942	134,958	137,624	144,598	148,675
Amusement Parks/Water Parks	14,805	15,625	16,552	18,066	19,227
Festivals/Sporting Events/Concerts	22,122	23,058	24,235	25,697	26,481
Field Sports	6,123	6,520	6,810	7,211	7,729
Game Areas (including Golf and Tennis)	31,414	31,747	31,170	33,300	36,227
Guided Tours/Outfitted Travel	26,359	27,248	28,634	28,173	26,489
Productive Activities	2,338	9,417	8,374	8,548	8,648
Other Outdoor Recreation Activities ³	15,451	15,966	16,540	18,444	17,845
Multi-use Apparel and Accessories (Other) ²	5,330	5,376	5,309	5,159	6,029
Supporting Outdoor Recreation	265,859	267,109	271,817	274,338	277,288
Construction	10,533	10,276	10,836	11,972	12,697
Trips and Travel ⁴	224,295	225,395	228,657	229,107	230,492
Government Expenditures	31,031	31,437	32,324	33,259	34,100

Comparison to External Reports



Outdoor Industry Association (OIA)

Direct Impacts of the Outdoor Recreation Economy by Activity Category

	GEAR, ACCESSORIES & VEHICLES	TRIP RELATED	TOTAL
CAMPING	\$31,271,155,486	\$135,591,624,999	\$166,862,780,485
FISHING*	\$11,867,666,850	\$23,908,160,290	\$35,775,827,140
HUNTING*	\$16,059,527,274	\$11,318,772,808	\$27,378,300,082
MOTORCYCLE RIDING	\$16,726,560,701	\$47,428,610,964	\$64,155,171,665
OFF ROADING	\$15,520,574,134	\$35,996,107,969	\$51,516,682,103
SNOW SPORTS	\$12,530,315,740	\$60,190,242,316	\$72,720,558,056
TRAIL SPORTS	\$25,342,546,672	\$176,144,141,213	\$201,486,687,885
WATER SPORTS	\$29,059,965,205	\$110,911,844,967	\$139,971,810,172
WHEEL SPORTS	\$13,857,894,195	\$82,864,146,456	\$96,722,040,651
WILDLIFE WATCHING	\$12,272,757,581	\$17,947,854,866	\$30,220,612,447
TOTAL	\$184,508,963,838	\$702,301,506,848	\$886,810,470,686

Comparison to External Reports



RVing: Recreational Vehicle Industry Association

Direct Economic Impact	Jobs	Wages	Output
RV Manufacturers and Suppliers	43,867	\$2,897,001,500	\$15,843,057,000
RV Sales and Service	39,247	\$2,422,748,100	\$4,860,691,300
RV Campgrounds and Travel	72,494	\$2,564,984,500	\$6,331,449,300
Total	155,608	\$7,884,734,100	\$27,035,197,600

ORSA
=
\$29B

\$27,035,197,600

Boating: National Marine Manufacturers Association

TABLE 1.5 Retail expenditure estimates for recreational boating (continued)

	2009	2010	2011	2012	2013	2014	2015
Estimated boat/motor/trailer dollars (billions)	\$18.741	\$17.771	\$16.595	\$17.677	\$18.549	\$19.695	\$20.742
Estimated accessory aftermarket sales (billions)	\$2.309	\$2.443	\$3.980	\$5.585	\$4.918	\$5.640	\$5.956
Subtotal (billions)	\$21.050	\$20.214	\$20.575	\$23.262	\$23.467	\$25.335	\$26.698
Estimated "other" (fuel, finance, insurance, docking, maintenance, etc.) (billions)	\$8.457	\$8.760	\$9.769	\$9.273	\$9.787	\$9.774	\$9.169
Total expenditures (billions)	\$29.507	\$28.974	\$30.345	\$32.535	\$33.254	\$35.109	\$35.866

ORSA
=
\$38B

\$35.109

\$35.866

Release and Outreach

Prototype release

- Public release February 14
- March *Survey of Current Business* article



Outreach

- Miami International Boat Show, National Park Hospitality Association Conference, National Environment and Recreation Research Symposium, Snowmobilers Fly-In, National Outdoor Recreation Conference, Outdoor Industry Association Capitol Summit
- Meetings and conference calls with users and subject matter experts

Additional activity detail in Gross Output by Activity table, for example:

- Disaggregate “Guided Tours” into Air, Land, and Water Guided Tours
- Disaggregate “Trips and Travel” into major components: Transportation, Lodging, Food and Beverages, Shopping and Souvenirs

Travel spending on trips less than 50 miles from home

Quantify the value of imports

Next Steps



Continue to seek feedback from users

- OutdoorRecreation@bea.gov
- Extending contract with subject matter experts
- Additional outreach throughout the summer

Finalize data and methods for final estimates by end of FY 2018

- Potentially adding prices indexes and inflation-adjusted series

Subject to resources, pursue regional, historical, and other estimates