

# Toward an Outdoor Recreation Satellite Account for the United States

Erich H. Strassner



United Nations Economic Commission for Europe  
Meeting of the Group of Experts on National Accounts

May 23-25, 2018

Geneva, Switzerland

## Outdoor Recreation Satellite Account Background

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

## Measuring the Outdoor Recreation Economy

- Defining Outdoor Recreation
- Stakeholder Outreach and Input
- Methodology and Data

## Results

- Comparison to External Reports

## Outreach, Feedback, and Next Steps



# Background

BEA is developing the ORSA estimates under a two-year interagency agreement with the Department of Interior and other Federal Recreation Council (FRC) agencies

- The FRC consists of seven federal agencies that are prominent stewards of federal public lands and waters, headed by the Department of the Interior

Four FRC agencies funded the project for \$1 million



US Army Corps  
of Engineers



## The ORSA is also stipulated in the 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”

Five potential deliverables were outlined in the agreement, subject to timing and resources

1. Definitional Scope of Outdoor Recreation Economy
2. Nominal National-level Data
3. Inflation Adjusted National-level Data
4. Indirect Output Data
5. State-level Data

Deliverables 1-2 were part of the prototype release and deliverable 3 will be part of the September 2018 release

- Prototype includes an extra deliverable arising from stakeholder feedback: gross output by outdoor activity

Deliverables 4-5 possible next year, pending funding

# Goals and Timeline

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- 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

 <b>BICYCLING</b> Paved-road Off-road	 <b>MOTORCYCLING</b> On-road Off-road	 <b>TRAIL SPORTS</b> Trail running, unpaved Day hiking, unpaved Backpacking Rock climbing (natural rock or ice)
 <b>CAMPING</b> RV campsite Tent campsite Rustic lodging	 <b>OFF-ROADING</b> ATV ROV Dune buggies Jeeping	 <b>WATER SPORTS</b> Kayaking Stand-up paddling Rafting Canoeing Boating (motorized)
 <b>FISHING</b> Recreational fly Recreational non-fly Fishing from a boat	 <b>SNOW SPORTS</b> Downhill skiing (including telemark) Snowboarding Cross-country skiing Nordic skiing Snowshoeing Snowmobiling	 <b>WILDLIFE VIEWING</b> Bird watching Other wildlife watching
 <b>HUNTING</b> Shotgun Rifle Bow		

# 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]**

<b>Activities</b>	<b>Percent</b>
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
<b>Total Core Outdoor Recreation</b>	<b>Total Core Outdoor Recreation</b>	<b>Supporting Outdoor Recreation</b>
<b>Conventional Outdoor Recreation</b>	<b>Other Outdoor Recreation</b>	Construction
Bicycling	Amusement Parks/Water Parks	Trips and Travel <sup>4</sup>
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 <sup>3</sup>	
Hunting/Shooting/Trapping	Multi-use Apparel and Accessories (Other) <sup>2</sup>	
Hunting		
Other Shooting/Trapping		
Motorized Vehicles		
Motorcycles		
RVs		
Other Motorized Vehicles		
Recreational Flying		
Skiing		
Snowboarding		
Other Conventional Outdoor Recreation Activities <sup>1</sup>		
Multi-use Apparel and Accessories (Conventional) <sup>2</sup>		

# Stakeholder Outreach and Input

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Stakeholders were heavily involved in developing the definitions and activity lists

- BEA contracts with independent subject matter experts representing academia, private industry, and private advocacy groups for advice
- FRC economists reviewed and offered guidance on methodology

BEA sought feedback from other interested stakeholders

- ORSA website with FAQs, project timeline, and request for feedback
- [OutdoorRecreation@bea.gov](mailto:OutdoorRecreation@bea.gov) email address
- Federal Register Notice

BEA communicated with and incorporated feedback from a range of outdoor recreation organizations, including advocacy groups, lobbyists, retailers, elected officials, academics, and manufacturers

## 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.*

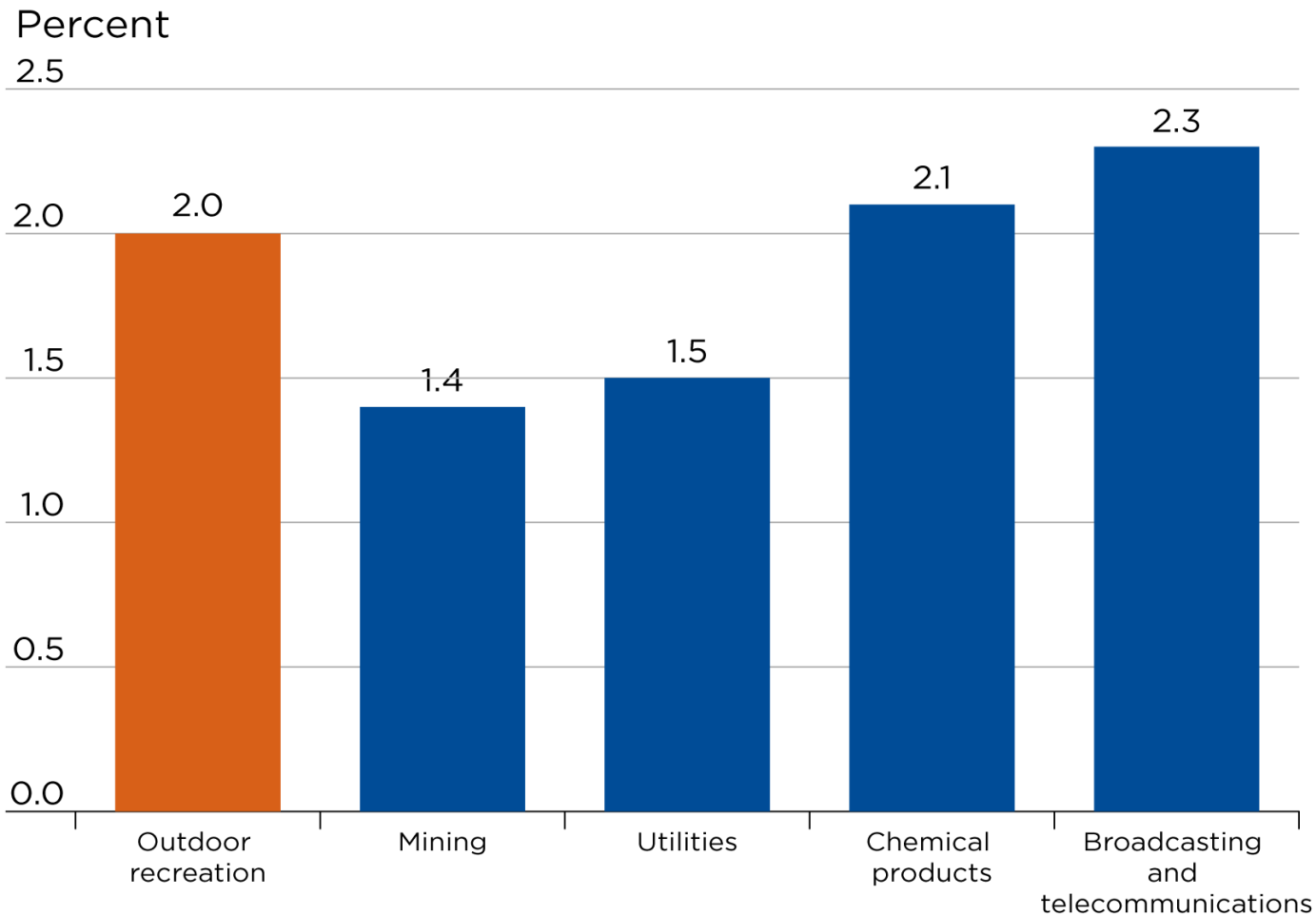


## Prototype ORSA estimates include 2012-2016 nominal values for

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

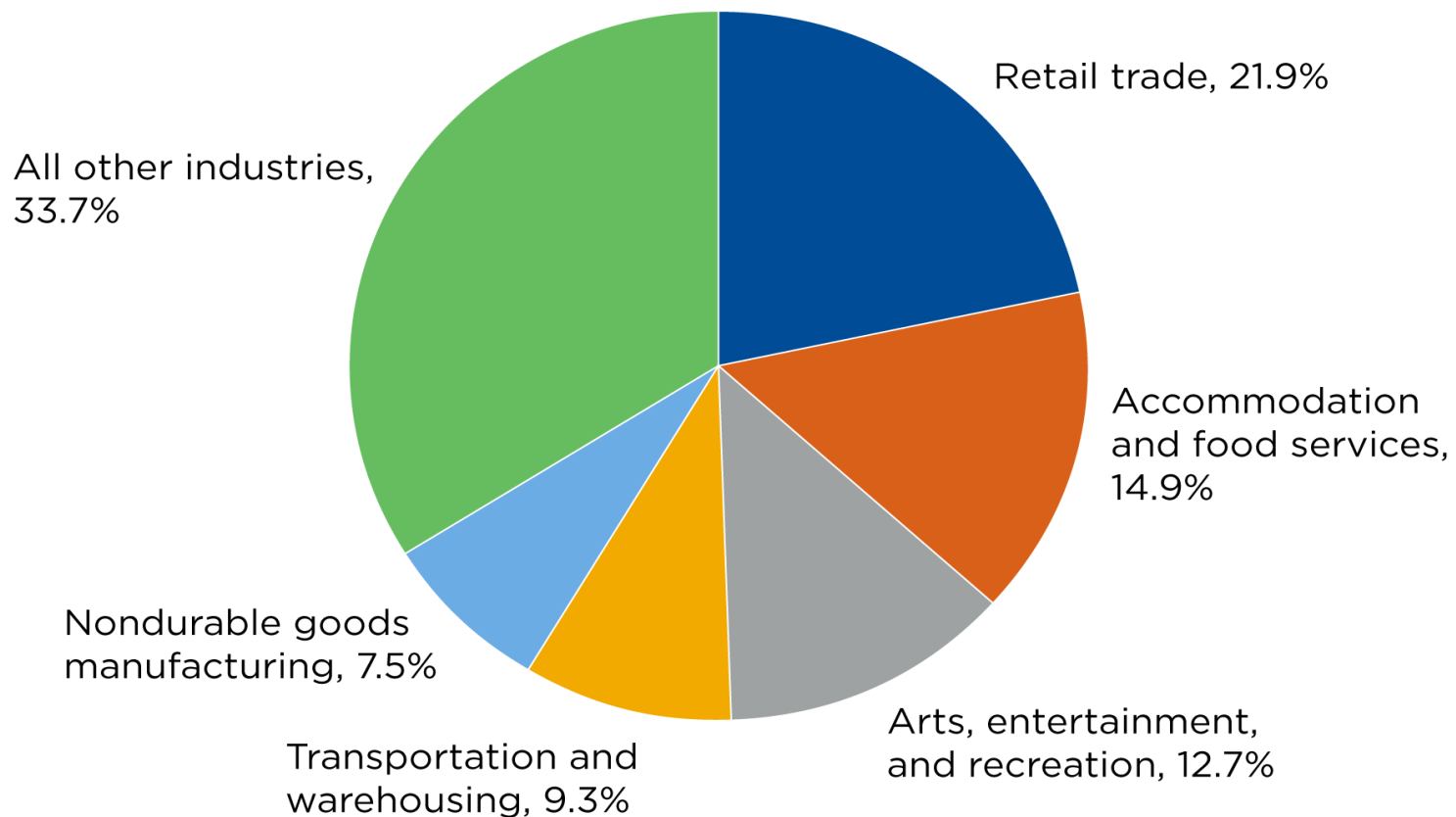
# Results

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



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

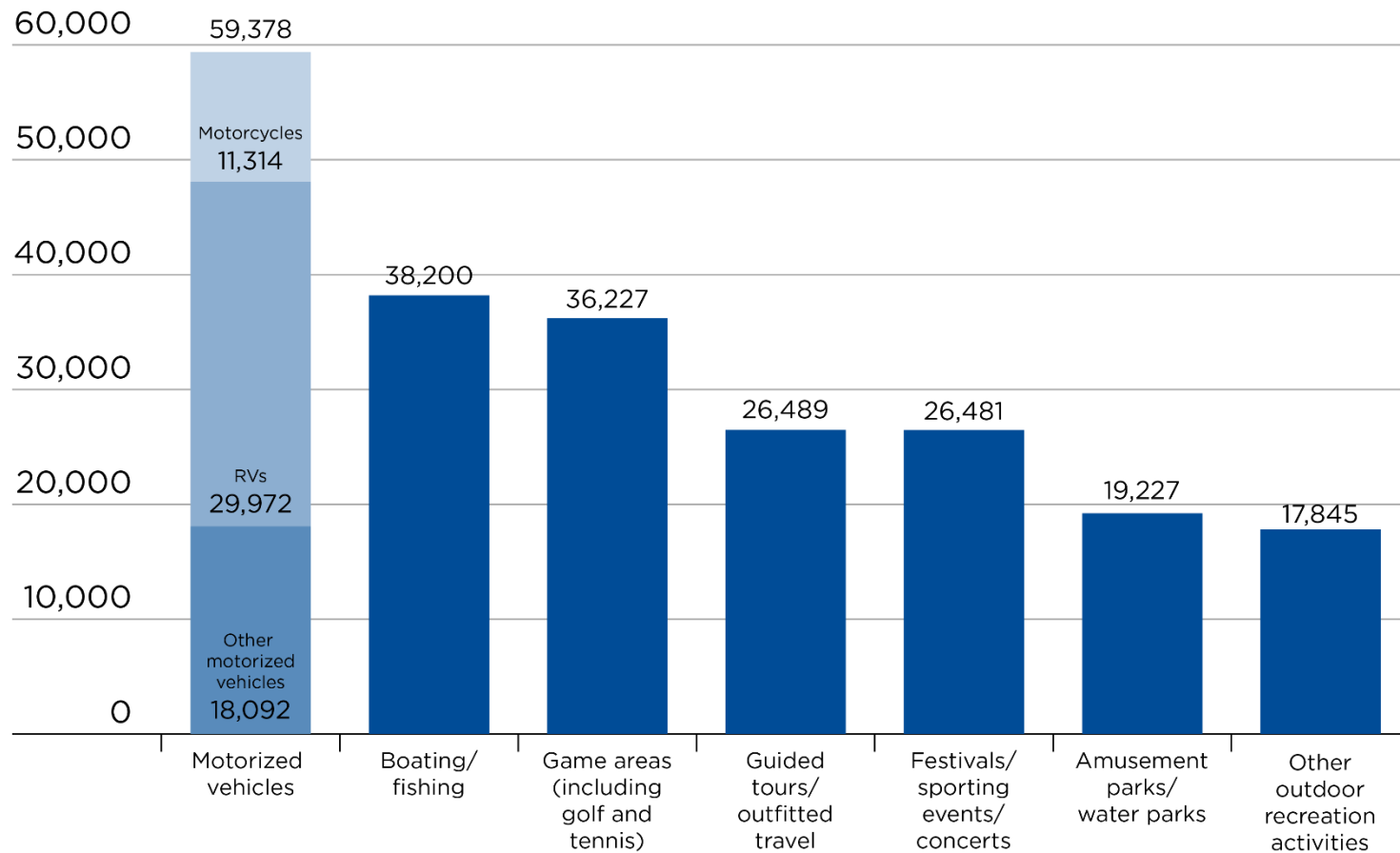
## Industry Composition of Outdoor Recreation Value Added, 2016





## Gross Output by Outdoor Recreation Activity

Millions of U.S. dollars, 2016



# 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
<b>TOTAL</b>	<b>\$184,508,963,838</b>	<b>\$702,301,506,848</b>	<b>\$886,810,470,686</b>

# 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
<b>Total</b>	<b>155,608</b>	<b>\$7,884,734,100</b>	<b>\$27,035,197,600</b>

**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
<b>Total expenditures (billions)</b>	<b>\$29.507</b>	<b>\$28.974</b>	<b>\$30.345</b>	<b>\$32.535</b>	<b>\$33.254</b>	<b>\$35.109</b>	<b>\$35.866</b>

**ORSA  
=  
\$38B**

**\$35.109      \$35.866**

## 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
- Infographics, tweets, blogs

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

## Continue to seek feedback from users

- [OutdoorRecreation@bea.gov](mailto: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

## Pursue regional, historical, and other estimates subject to resources