

## Blazing trail

### Outdoor recreation's path to becoming a political and economic force

---

Over the years, countless families have quietly enjoyed our nation's outdoors, hiking, skiing, biking, backpacking and paddling their way to bliss and a deep appreciation for nature and our place in it. For decades, outdoor recreation kept to mostly to itself, behind the scenes on America's backroads, trails, rivers and snowfields. That is changing quickly. The millions of Americans who participate in outdoor recreation, as this background paper documents, have become a force that is hard to ignore.

Take for example, the case of Utah Gov. Gary Herbert. In early 2012, he was in the midst of carrying on his state's long history of antagonism toward the federal government and its ownership of large swaths of land in the West. He signed into law a measure that demanded the federal government give back to the state more than 20 million acres of land, and he sued the U.S. Department of Interior, claiming the state had rights to roads on federal land, including inside several national parks, monuments and wilderness areas.

Those decisions did not sit well with the Outdoor Industry Association, which represents the outdoor industry. In a not-so-subtle letter to Gov. Herbert in August 2012, the OIA said it was [“frustrated by Utah’s unfavorable positions on public lands policy ... \[which\] threaten the recreation infrastructure that is fundamental to the outdoor industry.”](#) More directly, the OIA's board also boldly threatened to pull up stakes and move the organization's winter and summer retail trade shows to someplace other than Salt Lake City, saying that the “political climate in a host state” would be a factor in considering whether and where to relocate.

The prospect of losing the \$40 million in economic impact created by the trade shows and their 17,000 attendees – not to mention marring the reputation of a state where outdoor recreation contributes \$4.5 billion annually to the economy (wages and salaries plus state and local tax revenue) – was too risky for Herbert to ignore. He heeded the warning, and at the OIA's winter show in January, capitulated by unveiling a 59-page [Outdoor Recreation Vision](#), which was meant to promote the economic development of outdoor industry while also recognizing [“the need to ensure a balanced and responsible approach to developing, enhancing and protecting public lands.”](#) Within a week, the OIA announced that it was staying in Salt Lake. More importantly, the policy document laid the foundation for Utah to formally establish the nation's [first-ever state level Office of Outdoor Recreation](#) less than a year later.

Herbert's experience might be one of the most glaring examples of outdoor recreation's hidden clout. But it is hardly the only one. Economically, politically and organizationally, data and anecdotes paint a picture of a sector that has come of age:

## ECONOMICS

[According to the OIA](#), outdoor recreation generates \$646 billion in annual consumer spending nationwide, more than American's combined spending on gasoline and utilities (page 3), and the same size as the entire gross domestic product of Switzerland. Outdoor recreation also is responsible for \$80 billion in federal and state tax revenue (page 1). And the industry employs 6.1 million Americans, nearly three times as many people as the oil and gas industry (page 8). [A map of state-by-state data on spending, jobs and economic impact is available here.](#)

Beyond the direct economic impact of retail sales, wages, jobs and tax revenue that come from outdoor recreation, there are less tangible but equally important economic benefits related to consider:

- **Attracting Business:** A research survey conducted by the Sonoran Institute found that [“outdoor recreation in a natural setting is a key element in attracting the highly skilled workers necessary for a modern economy.”](#) For the study, researchers interviewed HR professionals from top firms in the sunbelt corridor from Phoenix to Nogales and found strong evidence that “access to recreation on public land is an important factor in attracting ... vital employees.”
- **Attracting Workers:** According to a survey of 200 business owners conducted in September 2013, [“the outdoor lifestyle” was the single most important factor](#) in deciding to locate or expand business in Montana for 70 percent of the survey's respondents, outranking favorable tax rates, access to raw materials, utility costs, quality health care, access to high speed internet, and airline service. Of the Montana businesses surveyed, 89 percent also viewed national parks, forests and wildlife areas as “an essential part of Montana's economy,” and 80 percent said it was a key factor in being able to attract or retain employees.
- **Revitalizing Local Economies:** Outdoor recreation as an economic development tool are playing out in large scale in the small town of Caliente, Nev., where elected officials are working with the International Mountain Bicycling Association and the Bureau of Land Management to design and build the first stages of what could be [150 miles of mountain biking trails on 4 million acres of surrounding federal public land](#), something that local officials and businesses are licking their chops over.
- **Building an Empire:** How strong is the outdoor retail market? Consider the story of Cabela's, the 52-year-old outdoor retailer. For decades, the company's mail order catalog was the bible of must-have outdoor gear and its lone store in Nebraska a mecca for hunters and anglers. As the outdoor recreation industry has grown, Cabela's business has expanded with it to meet rising demand for equipment from hiking boots and camouflage

to guns, compasses and life vests. As of 2013, [Cabela's](#) had more than 50 stores in the U.S. and Canada.

- **Monumental Economics:** Analyzing the economies surrounding 17 national monuments in 11 Western states, Bozeman-based Headwaters Economics found continued growth in nearby communities after a monument designation. Other Headwaters studies have found similar results. One found that counties with larger shares of public lands, for example, [Gallatin and Flathead counties in Montana](#), attract more jobs and see stronger growth than other areas with fewer public lands.

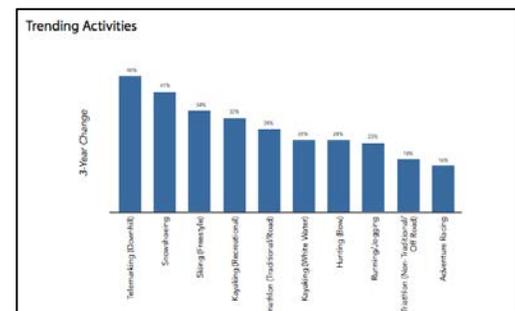
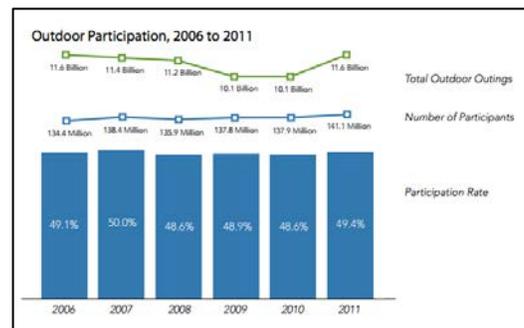
## PARTICIPATION

Despite the draw of the digital age and a recession that tightened Americans' spending, participation in outdoor recreation activities has continued to climb.

- **Immense Popularity:** [In 2011, outdoor recreation reached its highest participation level in the previous five years](#) in the United States, with nearly 50 percent of all Americans ages 6 and older (141.1 million people) taking part in at least one outdoor activity in 2011. Combined, Americans participated in 11.6 billion outings, a 13.5 percent increase over 2010.

**Trending Activities:** From 2008 to 2011, telemark skiing, snowshoeing, skiing, kayaking and adventure racing all saw substantial increases in participation, according to a comprehensive survey by the Outdoor Foundation.

- **Record-breaking Crowds:** [National parks across the country enjoyed record-breaking crowds in 2014](#), a testament to the draw of nature and the outdoors as America's economy rebounded. There was a 20 percent increase in visitors to Zion, [more than 3.4 million people visited Rocky Mountain National Park](#), an all-time record, and both [Grand Teton](#) and [Joshua Tree](#) also had banner years.



## ORGANIZING

From their grassroots beginnings, a number of organizations have morphed over the past decade into powerful voices for outdoor recreation, giving bikers, hikers, climbers and paddlers more of a say in decisions that affect them, the activities they do, and the places they do them:

- **Coalition Building:** The [Outdoor Alliance](#) was established in 2005 to strengthen efforts aimed at “protecting and promoting the human powered enjoyment of the outdoors.” The coalition comprises five

member organizations – the International Mountain Bicycling Association, American Whitewater, American Canoe Association, the Access Fund and Winter Wildlands – that collectively represent around 100,000 hikers, paddlers, skiers, snowboarders and mountain bikers who are members of 1,100 local and clubs.

- **Latinos:** Social media has provided a limitless outlet for outdoor recreation communities of every shape, size and ethnic persuasion to share information and get involved, which is evident in groups such as those focused on cultural components of outdoor recreation. [HECHO – Hispanics Enjoying Camping, Hiking and the Outdoors](#) – was formed to “balance land conservation with oil and gas development.” The [Latino Outdoors](#) website, along with its complementary [Facebook page](#), have a wealth of information, including blogs, on outdoor recreation opportunities for Latino communities.
- **Snowbound:** The [Winter Wildlands Alliance](#) was formed in 2000, “out of the recognition that skiers, snowshoers, snowboarders, winter mountaineers and other backcountry adventurers needed a collective voice advocating on issues that impact the winter backcountry.” Through a combination of grassroots groups and corporate partnerships, the WWA’s activities include: national policy advocacy with the U.S. Forest Service, National Park Service and elected officials; support for local backcountry policy issues; a stewardship program; and promotion/education, particularly through its [Backcountry Film Festival](#).
- **State-level Organizing:** At the same time it is working on federal policy, the Outdoor Alliance also has established a program for more direct “grasstops” work. The [Outdoor Alliance Colorado](#) is one of the first subgroups of the national coalition to organize for engaging more directly in policy decisions that affect public lands and the outdoor recreation activities at the state level. “With the launch of Outdoor Alliance Colorado, human-powered outdoor recreation has a powerful, united voice advocating for the recreation economy and the protection of the lands that support it,” said Scott Braden, the conservation director for the Colorado Mountain Club, one of the group’s members.
- **Public-Private Collaboration:** The [Colorado Outdoor Recreation Resource Partnerships](#) is a collaboration between state and federal government agencies and user groups started in 1985. The group meets monthly to discuss issues related to promoting the state’s recreation tourism sector. Among the feathers in its cap are official designations – which come with an increased public profile – for the Arkansas Headwaters Recreation Area and the Alpine Loop National Back Country Byway.
- **Big Business in Idaho:** Industry and outdoor recreation groups combined efforts two years ago to create the Idaho Outdoor Business Council, whose mission includes “educating public officials as to the importance of conservation measures and public lands funding initiatives as drivers for Idaho’s outdoor recreation economy and quality of life.” The organization now includes 50 members. It’s this type

***“In today’s world, recreation is a dominant part of our community. The public lands are viewed as a tremendous asset.”***

– Blaine County (Idaho) Commission  
Chairman Larry Schoen, on a resolution  
requesting national monument status for  
Boulder-White Clouds

of partnership that has given new legs to a push for a proposed [Boulder-White Clouds National Monument](#) first proposed almost 30 years ago (see below).

- **Montana, too:** Like its neighbor to the west, Montana's outdoor industry also has organized to boost its influence. [Business for Montana's Outdoors](#) was launched to lobby for "the preservation of our outdoor heritage through common-sense policy and collaboration, raising awareness about the role Montana's public lands play in providing a competitive advantage to our state's economy."
- **Tapping the Cache of Pro Athletes:** The group [Protect Our Winters](#) was formed by pro snowboarder Jeremy Jones to organize skiers and snowboarders and "create a social movement against climate change, and ultimately to affect policy." The organization, funded in part by the ski industry, now has an annual budget of about \$500,000.
- **New Bedfellows:** In an effort to expand its reach beyond the traditional base of traditional recreationists, new groups such as the [Conservation for Economic Growth Coalition](#) are forming. Established by venture capitalist Nancy Pfund, the coalition represents the recreational interests of the technology industry. As one of the group's representatives noted in a story in the *Guardian*, "[the innovation economy, and the companies that comprise it, benefit enormously from accessible outdoor recreation provides.](#)" The best and the brightest in the tech industry, he says, want to work in places with easy access to the great outdoors.

## POLITICAL CLOUT

- **Biking vs. Drilling:** In November's elections, [a trio of moderate and progressive candidates easily won election to the Grand County Council in Moab, Utah](#), all by comfortable margins of 10 percentage points or more. Moab is a mountain biking mecca surrounded by national parks, attracting upward of a half million people a year. Economic data show that about seven out of every 10 jobs in Grand County are tourism-related, with visitation to Moab's biking and off-road trails and Arches and Canyonlands national parks generating more than \$6.6 million in local tax revenue and upwards of \$200 million in economic activity each year. But [the Moab area is also seeing increasing encroachment by oil and gas development](#), and the conflict between a recreation-based economy and drilling rigs, flaring, fracking and pipeline construction became an important part of campaign rhetoric. In the end, the candidates on the side of protecting the environment, public lands and recreation won a majority, and one of their first actions was to [opt out of a coalition formed with adjacent counties to spearhead oil and gas development](#).
- **Finding Common Ground:** An agreement hammered out between the Idaho Conservation League, The Wilderness Society, a local mountain bike club and the International Mountain Bicycling Association, [balances mechanized and non-mechanized access on more than a 570,000 acres](#) of national forest and BLM land north of Sun Valley, carving out travel corridors where riding is allowed and areas such as alpine lake basins that are accessible only on foot and horseback. With widespread support from both wilderness advocates and mountain bikers – communities that haven't always seen eye-to-eye on issues

like access – the groups plan to present their proposal to the Obama administration. An excellent [summary of how outdoor recreation has been a moving force](#) in the Boulder-White Clouds designation.

- **Putting a \$ Figure on Outdoor Recreation:**

Saying his state was lagging behind others, Washington Gov. Jay Inslee in February 2014 established a blue-ribbon task force to find ways to [“increase outdoor recreation activities as well as promote the jobs and businesses associated with outdoor recreation.”](#) According to the Outdoor Industry Alliance, consumers spend \$22.5 billion on outdoor recreation equipment, apparel, lodging and services annually in Washington, which generates \$1.6 billion in state and local tax revenue and supports 227,000 jobs. Despite the sizable economic contribution, the governor’s office said that outdoor recreation was [“an underappreciated part of our economy”](#) and

*“Congressional candidates would be wise to consider their position on conservation and land use issues carefully. Westerners want their air, water and land protected, and where a candidate stands on these issues could potentially sway votes.”*

– Colorado College economist Walt Hecox

that policies supporting it were addressed “in a piecemeal fashion. . . . the infrastructure for outdoor recreation — the natural settings and places we have to play — is perceived as ‘nice to have’ instead of ‘must have.’ ” In the executive order creating the task force, Inslee recognized a range of benefits from expanding support for outdoor recreation: improving public health, cleaner air and water, and community cohesion and even mitigating the impacts of climate change. He also said Washington’s outdoor recreation opportunities are “an important incentive for attracting new businesses and retaining all types of employers.”

- **Finding Balance:** Ad hoc coalitions are increasingly being culled together to support policy decisions in the name of protecting outdoor recreation. Take, for example, a group of 12 local politicians, small businesses, rafting outfitters who called on Interior Secretary Jewell in January 2014 to ensure that rafting, hunting and fishing were given equal consideration in the agency’s master leasing plans for energy development near Dinosaur National Monument and the Green River in Colorado. While recognizing the importance of oil and gas development to local economies, the signatories also said they do not want to see their way of life sacrificed in a rush to drill.

*“[W]e do not have to choose between developing our wealth of oil and gas resources and supporting those aspects of our local economies that depend on the beauty of our landscapes and health of our rivers. We can do both, even if we have to make tough choices to strike the right balance.”*

- **Making Recreation Count:** Progressive think-tank Center for American Progress is making the case for outdoor recreation jobs to be formally recognized by the federal government as a powerful economic force through accounting. Totaling some 6 million employees – more direct jobs than oil, natural gas and mining combined – there currently is no formal government measure of the industry’s importance like there is for energy, health care and education sectors, which makes it difficult to sort out spurious

jobs claims when battle lines are drawn with other industries. See more at:  
<http://thinkprogress.org/climate/2015/01/21/3613721/uncle-sam-count-those-recreation-jobs/>

**PUBLIC OPINION**

- In a 2014 poll of 2,400 voters across six Western states, [an overwhelming majority \(85 percent\) agreed that restricting access to national parks and public lands hurts small businesses and local economies](#) in the West. Likewise, 83 percent believe that funding to national parks, forests and other public lands should not be cut, as it provides a big return on a small investment. The annual *Conservation in the West* poll also found that 69 percent of Westerners are more likely to vote for a candidate who supports enhancing protections for some public lands, like national forests.

- In the 2015 version of the *Conservation in the West* poll, an overwhelming majority of voters (80 percent) in the same six Western states again said that [access to public lands and the opportunity to live an outdoor lifestyle were the top reasons they choose to live in the Mountain West](#), outweighing even economic opportunities, quality of education, and quality of healthcare.

Reasons for Living in West Ranked By Significant Factor	Significant Factor	A Factor
Clean air, clean water and environment	57%	85%
Healthy, outdoor lifestyle	56%	88%
Ability to live near, recreate on and enjoy public lands like national parks and forests	49%	80%
Cost of living	44%	80%
Economic opportunities	41%	78%
Quality of public schools	36%	63%
Quality of health care and hospitals	32%	66%
Level of traffic congestion	32%	64%
Amount of taxes	27%	61%
Hunting and fishing opportunities	25%	48%
Opportunities to open my own business	25%	45%

###