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## Federal Interagency Council on Outdoor Recreation

### *Outdoor Recreation: Jobs and Income*

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*The Federal Interagency Council on Outdoor Recreation is helping to capture the breadth of economic contributions from outdoor recreation on Federal lands and waterways. This paper synthesizes historic information from a variety of sources.*

### Background

Outdoor recreation is fun—and so much more. It provides physical challenge, helps development of lifelong skills, provokes interest and inquiry, and inspires wonder and awe of the natural world. Recreation also contributes greatly to the physical, mental, and spiritual health of individuals, bonds family and friends, and instills pride in heritage. Outdoor recreation is also a multi-billion dollar industry.

### Federal Initiatives on Outdoor Recreation

Recognizing the importance of outdoor recreation, the Federal Interagency Council on Outdoor Recreation (FICOR) was established by the America's Great Outdoors Initiative to support and enhance outdoor recreation access and opportunities on Federal lands and waters. FICOR is a seven agency council that promotes better coordination and collaboration among Federal agencies whose missions or programs include providing outdoor recreation and conserving or managing natural and cultural resources. The FICOR agencies are the Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, and National Oceanic and Atmospheric Administration. This paper is a snapshot of the contribution outdoor recreation had on jobs and the economy in 2012 using data from the seven FICOR agencies.



Federal lands and waters offer a wide variety of outdoor recreation opportunities to millions of Americans each year.

*Credit for both images: Thinkstock*

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## Outdoor Recreation

Outdoor recreation has become an essential part of our American culture, and thousands of rural communities benefit from the proper management of our Federal lands. When Americans play outside during outings or overnight trips, their spending directly supports professions such as guides and outfitters, lodging operators, park managers and rangers, concessionaires, other small business owners, and many more. Outdoor recreationists made more than 938 million visits to Federal lands and waterways, spending \$51 billion and supporting 880,000 jobs.

People enjoy all the benefits available in our national forests and parks, but the way that society recreates is changing. Across the country, fewer and fewer two week vacations are being taken. Instead, people are opting for closer and shorter “weekend” getaways that offer opportunities to experience these natural wonderlands. As society changes, we must adapt the way we manage Federal lands and waterways. This paper summarizes economic contributions from 2012, as shown in the table below.

In addition to visits, spending, and jobs, the table also includes a dollar amount for value added. Value added is often referred to as the contribution to gross domestic product (GDP). It presents the value of final goods and services produced in the economy and includes wages and salaries, self employment income, property income, and indirect business taxes. The value added measure is separate from spending; the two are not additive.



Hiking is one outdoor activity made possible by Federal lands.  
*Credit:* Thinkstock

### *2012 Economic Contributions of Visitor Spending for Recreation on Federal Lands and Waters*

|   | Recreation Visitation<br>(millions) | Visitor Spending<br>(billion \$) | Jobs<br>(thousands) | Value Added<br>(billion \$) |
|---|-------------------------------------|----------------------------------|---------------------|-----------------------------|
| National Park Service   | 283                                 | 15                               | 243                 | 16                          |
| Bureau of Land Management                                       | 59                                  | 3                                | 58                  | 4                           |
| U.S. Fish and Wildlife Service                                  | 47                                  | 2                                | 37                  | 2                           |
| Bureau of Reclamation   | 28                                  | 1                                | 26                  | 2                           |
| Forest Service <sup>1</sup>                                     | 161                                 | 11                               | 194                 | 13                          |
| National Oceanic and<br>Atmospheric Administration <sup>2</sup> | Not Available                       | 5                                | 135                 | Not Available               |
| U.S. Army Corps of Engineers                                    | 360                                 | 13                               | 187                 | 14                          |
| All FICOR Agencies  | 938                                 | 51                               | 880                 | 51                          |

<sup>1</sup>Forest Service visitation estimates come from a 5-year period, obtaining estimates on 20% of forests each year. Results for FY2012 are from data collected in FY2008 – FY2012.

<sup>2</sup>NOAA spending and jobs estimates come from data relating to National Marine Sanctuaries; all Exclusive Economic Zone (EEZ) waters are not included.

## Methods and Data Sources

Americans spent \$51 billion in 2012 in nearby communities during their trips to recreate on public lands and waters. The value added contribution was calculated using established direct and multiplier effects. To conduct this analysis, results from the FICOR agencies were synthesized. The FICOR agencies used the following methods to compile their outdoor recreation data:

### *Forest Service*

Forest Service visitation estimates are from the National Visitor Use Monitoring (NVUM) 2012 national report. The national value is the sum of the most recent estimate for each forest unit. The NVUM program also obtains data used to identify visitor segments with unique spending patterns and to estimate the average spending per visit within each. Total spending equals spending per visit in segment times the number of visits estimated for that segment. Economic effects are calculated from that using the IMpact analysis for PLANning (IMPLAN) model.



### *National Park Service*

The National Park Service (NPS) visitation estimates are reported in the NPS Statistical Abstract. The agency's Visitor Services Project (VSP) conducts surveys of visitor characteristics at select parks; a subset of VSP surveys contain visitor spending questions. Generic spending profiles were developed using data from the surveyed park units. The economic effects are estimated using the visitor spending effects (VSE) model, which uses multipliers from the IMPLAN input-output modeling system to measure the economic effects of visitor spending.



### *U.S. Fish and Wildlife Service*

Visitation data for units in the National Wildlife Refuge system for FY2012 were obtained from the U.S. Fish and Wildlife Service (FWS). Data from the 2006 FWS National Survey of Hunting, Fishing, and Wildlife Associated Recreation were used to determine the average trip spending per day. The values were converted to 2012 dollars using the Consumer Price Index (CPI) deflator. The economic effects of this spending were calculated using multipliers from the 2008 version of IMPLAN. The FWS recreation value added figures are based on the ratio of NPS value added to total output.



### *Bureau of Reclamation*

Bureau of Reclamation (BOR) visitation data was collected from 2010 to 2012. Expenditure data from the 2006 U.S. FWS National Survey of Hunting, Fishing, and Wildlife Associated Recreation state-level data were used to determine the average recreationist's trip spending per day. Dollar values were converted to 2012 dollars using the CPI deflator. The economic effects were calculated using multipliers from the 2008 version of IMPLAN. BOR value added figures are based on the ratio of NPS value added to total output.





## Methods and Data Sources Continued

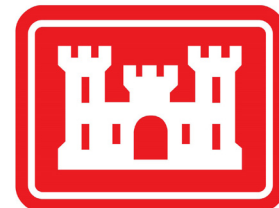
### *Bureau of Land Management*

Bureau of Land Management (BLM) visitation data was obtained from the BLM Recreation Management Information System (RMIS). USDA Forest Service expenditure data was used to develop spending profiles for BLM sites. The BLM economic effects were estimated using the IMPLAN model.



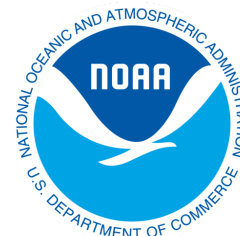
### *Army Corps of Engineers*

Visitation data for the Army Corps of Engineers (Army Corps) are from the Operations and Maintenance Business Information Link (OMBIL) and Visitation Estimation & Reporting System (VERS) from 2012. Spending profiles were derived from a national visitor spending survey conducted in 1999/2000 and indexed using 2012 CPI figures. Spending averages were computed and multiplied by visitation statistics to estimate total annual visitor spending. Multipliers were estimated using the IMPLAN system. The Army Corps' Regional Economic System was used to estimate total spending, jobs, income, value added, and sales effects.



### *National Oceanic and Atmospheric Administration*

For the National Oceanic Atmospheric Administration, national estimates for economic effects of spending associated with visits to National Marine Sanctuaries were developed by extrapolation from the sample of sites on which studies have been done. Roughly 75 percent of sanctuaries have had visitor studies over the last 15 years. Estimates were indexed to 2012 dollars using general CPI inflators.



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