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What is the Active Outdoor Recreation Economy?

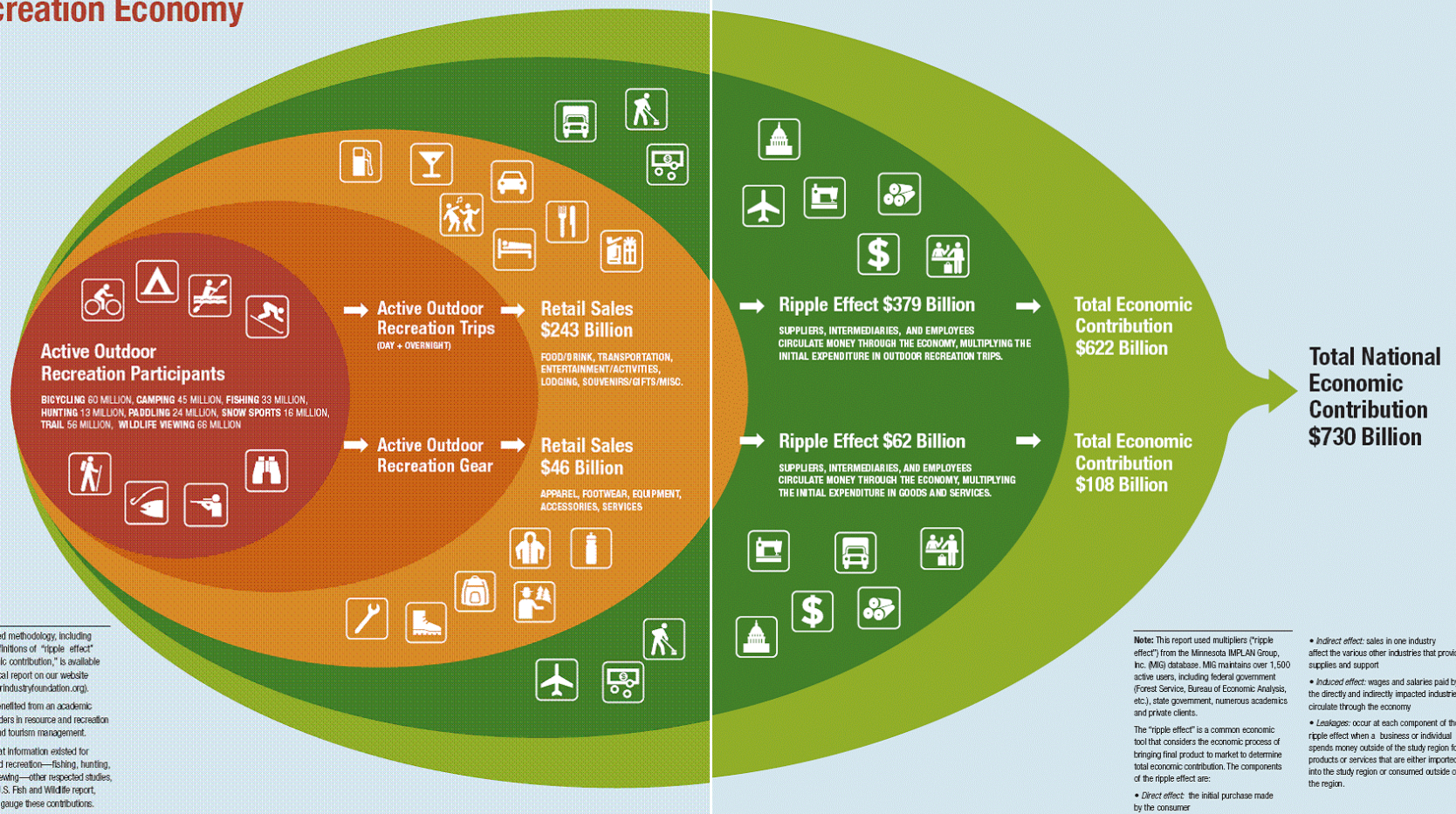
The Recreation Economy

- Contributes \$730 billion annual to the U.S. economy
- Supports nearly 6.5 million jobs across the U.S.
- Generates \$88 billion in annual state and national tax revenue
- Provides sustainable growth in rural communities
- Generates \$289 billion annually in retail sales and services across the U.S.
- Touches over 8% of America's personal consumption expenditures-more than 1 in every 12 dollars circulating the economy

What does Active Outdoor Recreation Include?

- Bicycling
- Camping
- Fishing
- Hunting
- Paddling
- Snow Sports
- Trail
- Wildlife Viewing

Meet the \$730 Billion Active Outdoor Recreation Economy



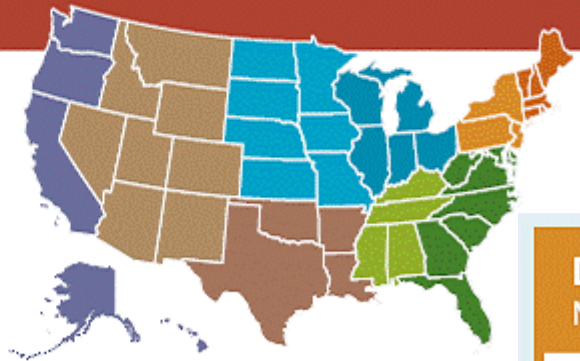
Pennsylvania Tourism Office

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Economic Contribution of Active Outdoor Recreation by Census Division

NATIONAL TOTALS

Total Contribution: \$730,979 million
Jobs Generated: 6,435,270
Gear Retail Sales: \$46,185 million
Trip-related Sales: \$243,244 million
Taxes (federal, state): \$87,867 million



DIVISION 2: MIDDLE ATLANTIC TOTALS

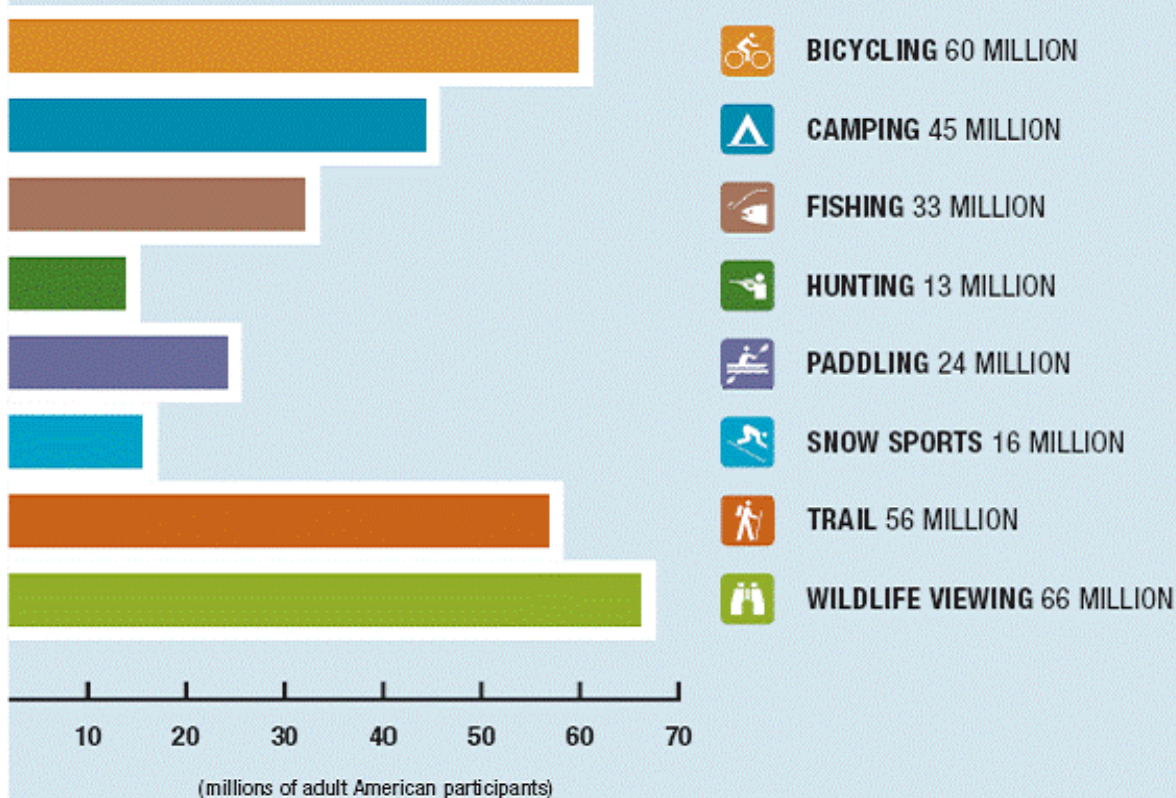
NY, NJ, PA

Total Contribution: \$38,300 million
Jobs Generated: 357,258
Gear Retail Sales: \$5,198 million
Trip-related Sales: \$22,951 million
Taxes (federal, state): \$4,499 million



Who Drives the Recreation Economy

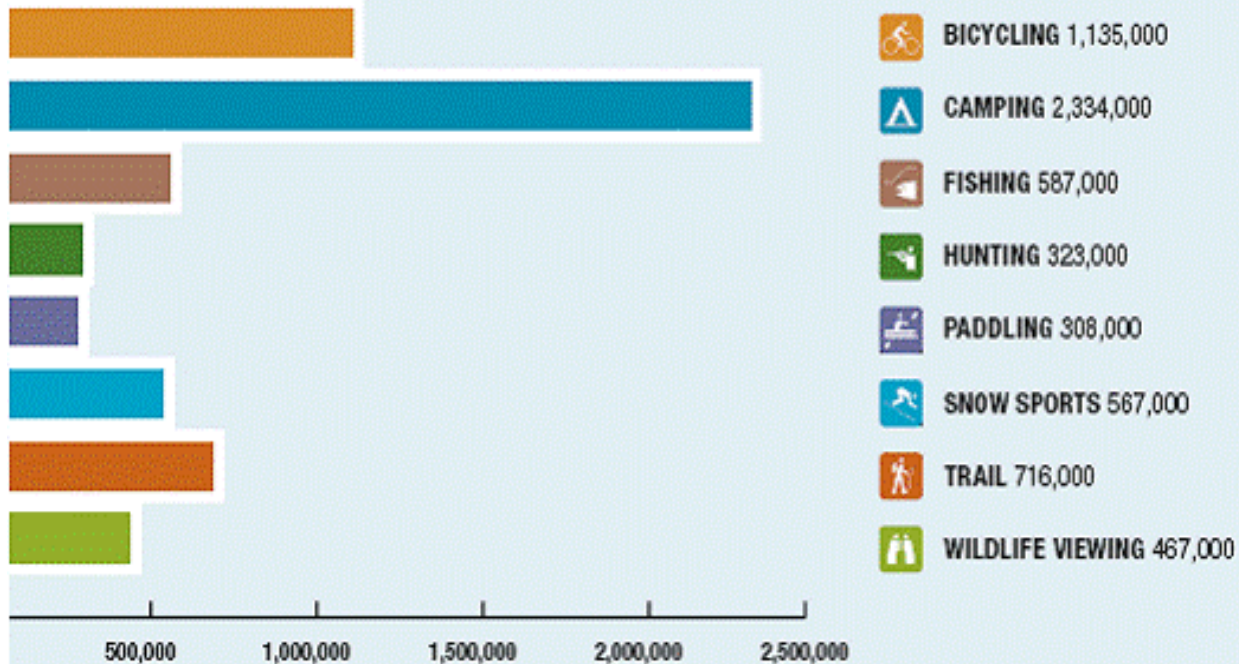
ACTIVE OUTDOOR RECREATION PARTICIPANTS BY THE NUMBERS



- Bicycling
60 Million
- Paddling
24 Million
- Trail
56 Million

The Active Outdoor Recreation Economy Employs America

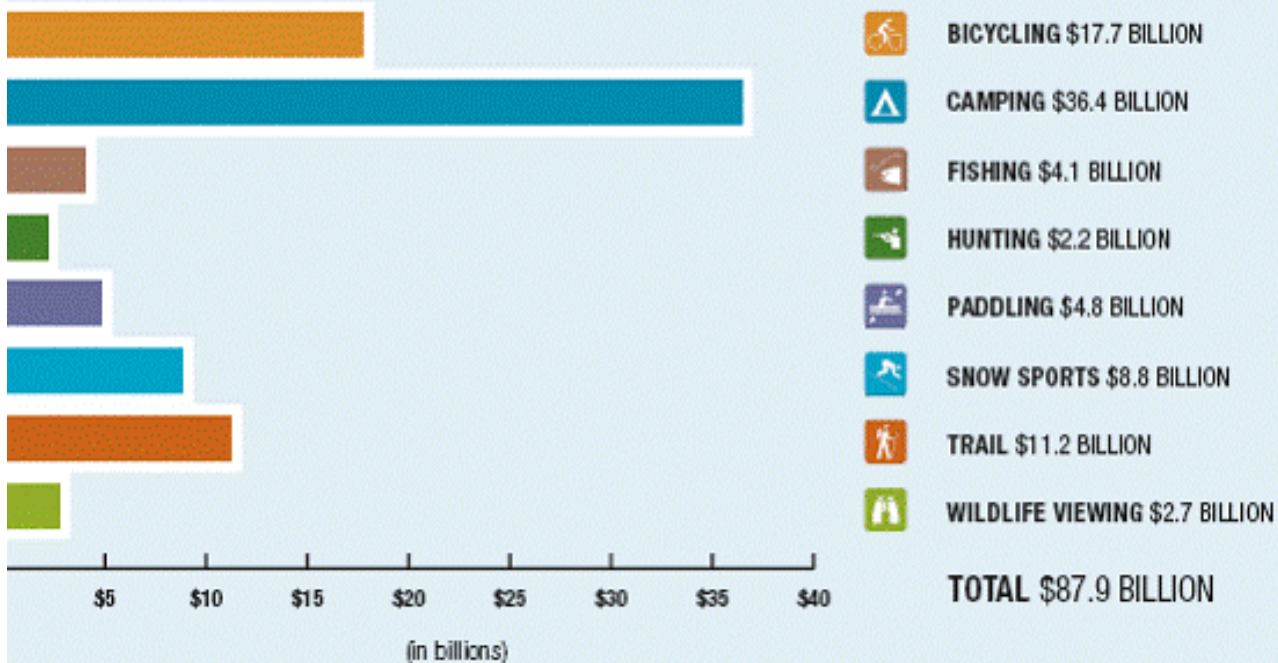
JOBS GENERATED BY ACTIVITY CATEGORY



- Bicycling
1,135,000
- Paddling
308,000
- Trail
716,000

\$88 Billion Coming Back to America: Tax Receipts

FEDERAL AND STATE TAXES GENERATED BY ACTIVITY CATEGORY

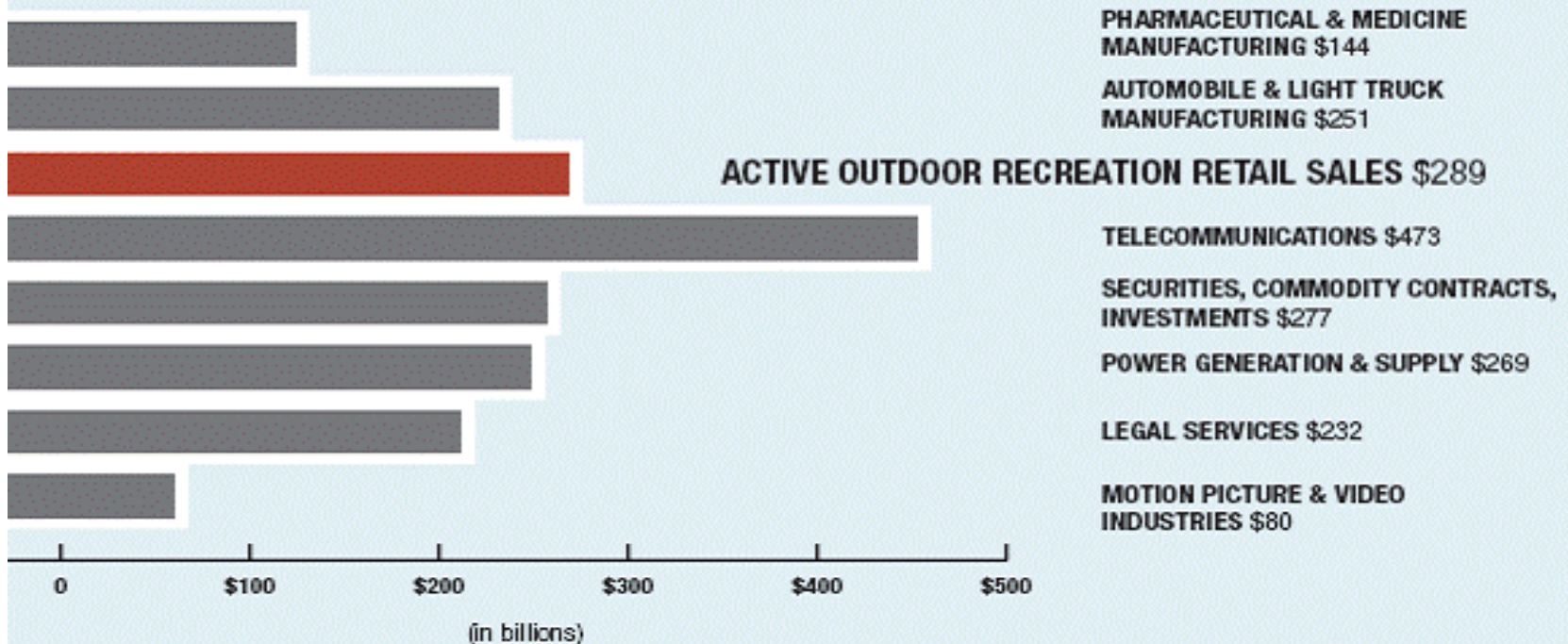


- Bicycling
\$17.7 Billion
- Paddling
\$4.8 Billion
- Trail
\$11.2 Billion

An Overlooked Economic Giant

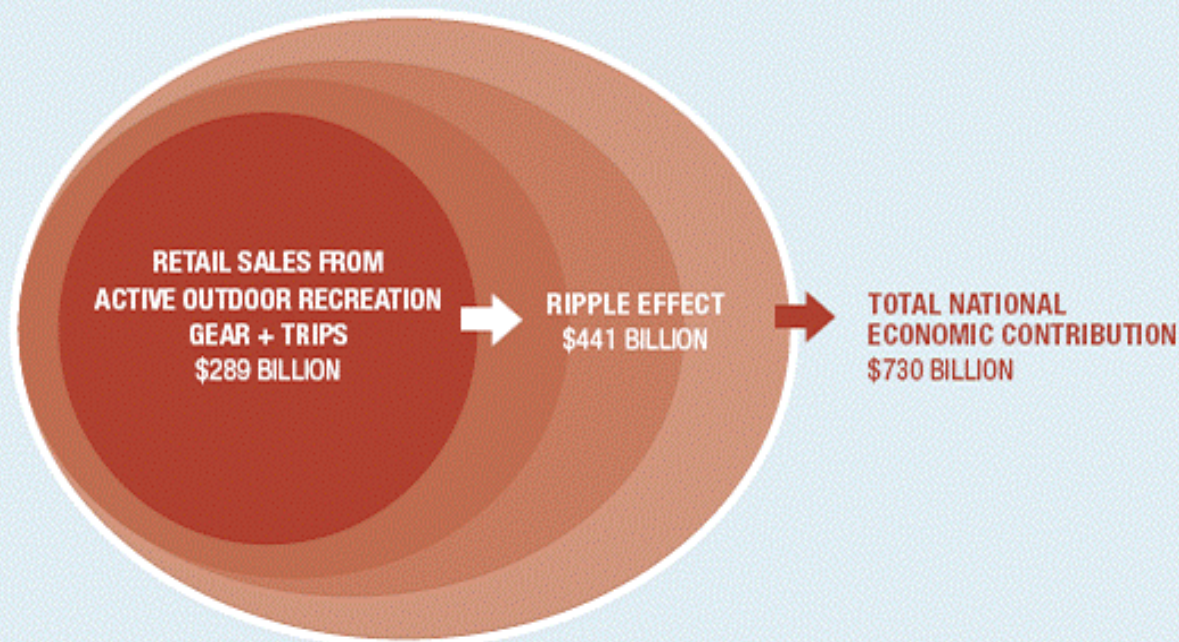
HOW ACTIVE OUTDOOR RECREATION STACKS UP¹²

Sales comparison to U.S. economic sectors.



Far Reaching Ripples

FAR REACHING RIPPLES



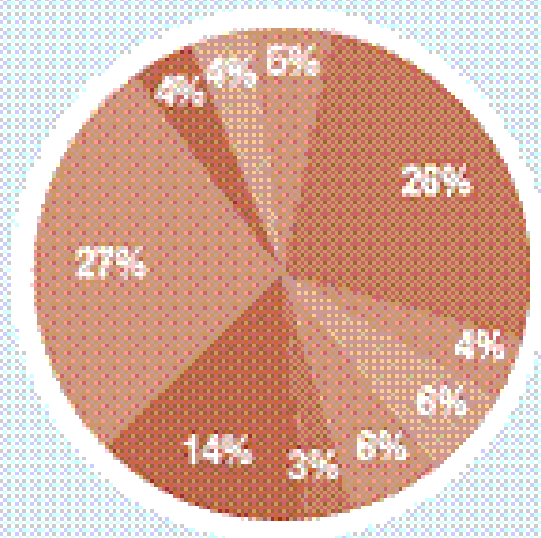
Methow Valley, Washington

- \$1,469 per party, per trip
- \$4.5 million annually to Methow Valley economy by trail users
- The ripple effect: additional \$4.1 million to local economy

An Essential Component of the American Economy

AN ESSENTIAL COMPONENT OF THE AMERICAN ECONOMY¹⁷

Active outdoor recreation spreads \$730 billion to all U.S. economic sectors



MANUFACTURING 26.2%
TRANSPORTATION & WAREHOUSING 4.1%
RETAIL TRADE 6.4%
REAL ESTATE & RENTAL 9%
ARTS, ENTERTAINMENT & RECREATION 3.2%
ACCOMMODATIONS & FOOD SERVICES 13.6%
FINANCE & INSURANCE 4.9%
PROFESSIONAL - SCIENTIFIC & TECHNICAL SERVICES 4.2%
INFORMATION 4.2%
ALL OTHER SECTORS 27.2%

2008 Outdoor Recreation Trends

- While overall participation in outdoor recreation among Americans is increasing, the connection to nature among youth is declining.
- 11% decline in participation in outdoor activities among youth age 6 to 17 with the sharpest declines among youth age 6 to 12.
- Over 50% of Americans participated in outdoor recreation in 2007, getting outside 11.36 billion times either close to home, in a nearby park, or overnight trip.

Key Findings

- **Participation among all Americans**

Participation in outdoor activities increased in 2007 to 50% of Americans - from 134.4 million in 2006 to 138.4 million in 2007.

- **Youth Participation**

Participation among boys and girls age 6-12 experienced the sharpest drop. Girls had the biggest decline falling from 77% to 61%. Boys fell from 79% to 72%.

- **Diversity**

Participation in outdoor activities is highest among Caucasians for all age groups. Participation is lowest among African Americans.

- **Gender**

Among males, participation in outdoor activities exceeds participation in indoor activities and team ball sports for ages 25 to 65

Among females, although indoor fitness activities are more popular than team ball sports and outdoor activities for ages 18 and under, participation in outdoor activities increases among female participants between 18 and 44.

Americans' Favorite Outdoor Activities

- **Running/Jogging/Trail Running**
3.87 billion outings/92 outings per runner or jogger (trail or road)
- **Bicycling**
2.62 billion outings/62 outings per bicyclist
- **Fishing**
1.09 billion outings/21 outings per angler
- **Wildlife Viewing**
638 million outings/ 28 outings per wildlife watcher
- **Skateboarding**
454 million outings/ 54 outings per skateboarder

Outdoor Industry Association, Outdoor Recreation Participation Report, 2008

Opportunities for Growth in Outdoor Recreation and the Outdoor Industry

1. Turn participants into enthusiasts
2. Engage Youth
3. Introduce the “gateway” activities
(camping, fishing, bicycling, hiking)
4. Connect the outdoors and health

Questions?

Contact Information

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