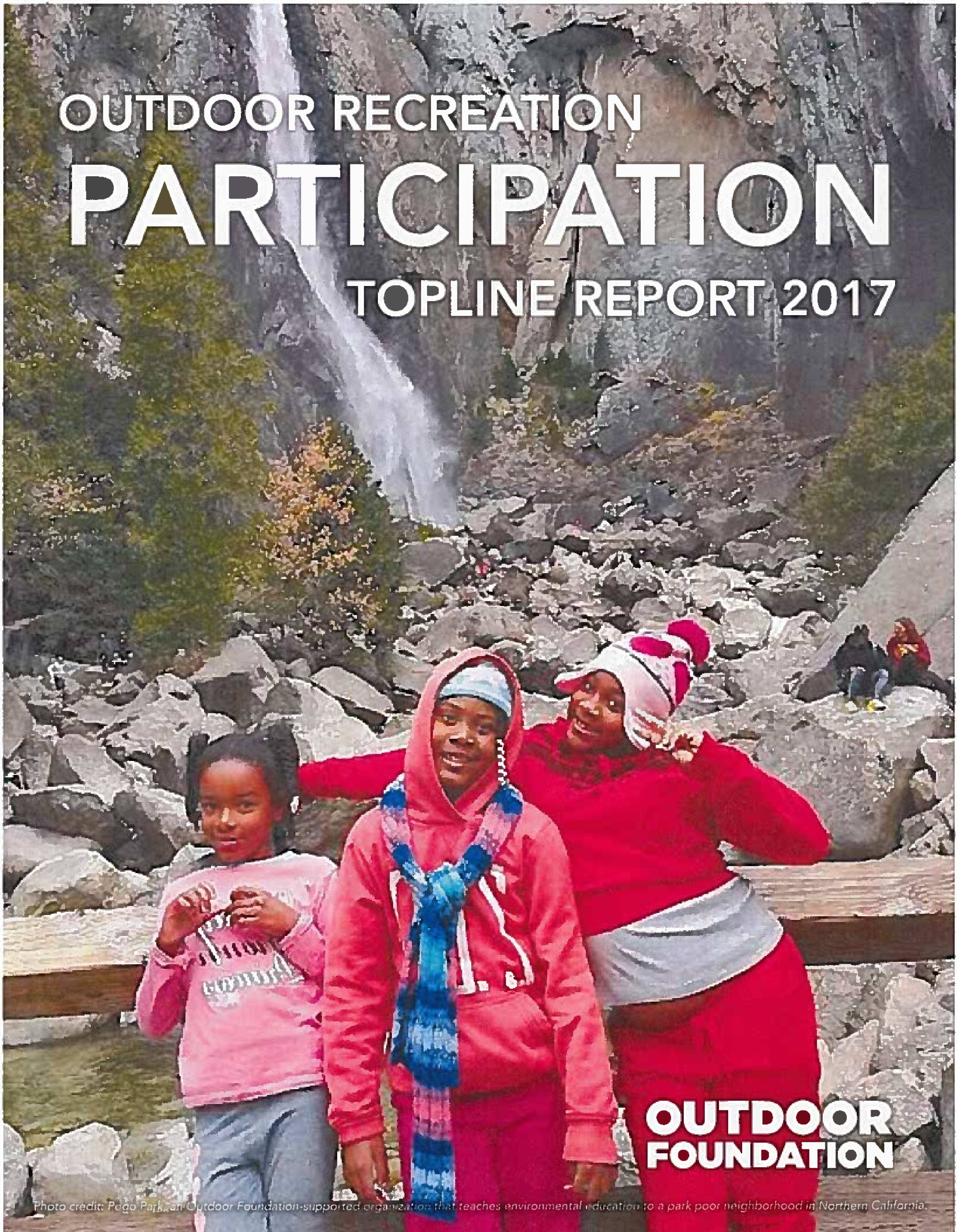
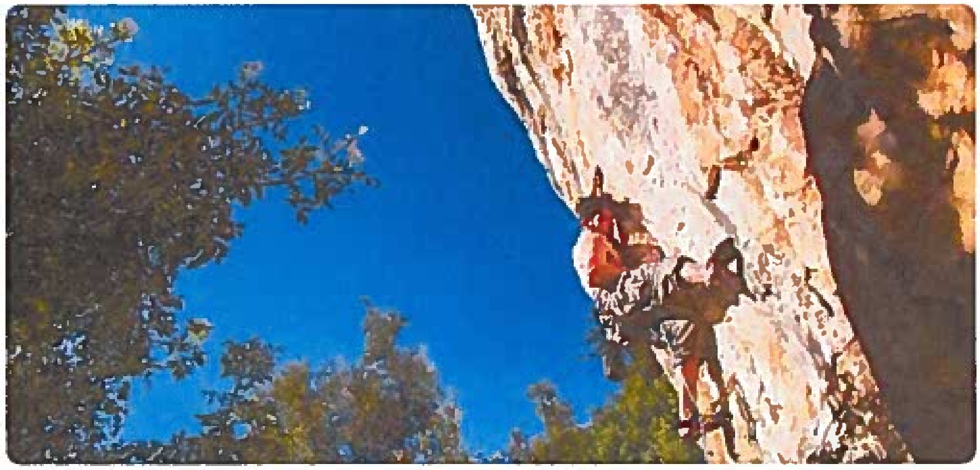
OUTDOOR RECREATION PARTICIPATION

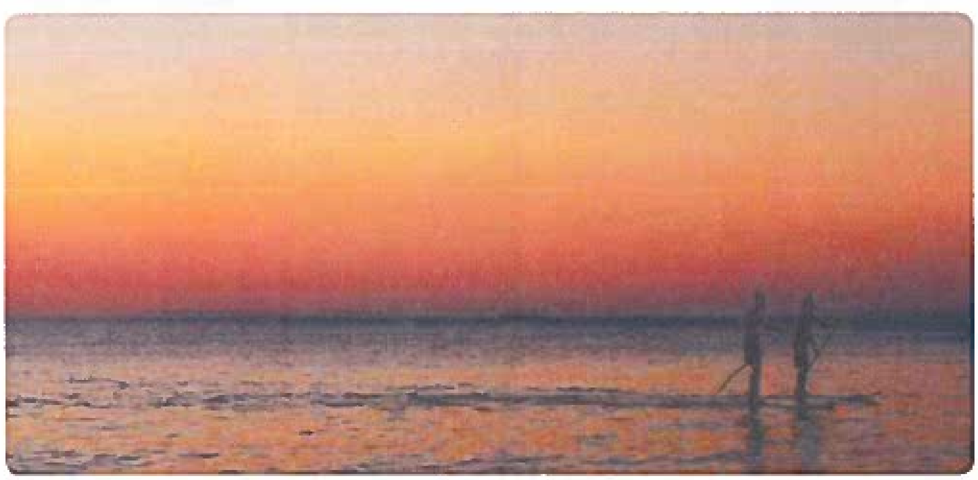
TOPLINE REPORT 2017



OUTDOOR FOUNDATION

Photo credit: Pogo Park, an Outdoor Foundation-supported organization that teaches environmental education to a park poor neighborhood in Northern California.





Ages 6+

2016 Outdoor Participation

11.0 Billion Outdoor Outings
76.5 Average Outings Per Participant

In 2016, nearly half of all Americans — 48.6% — reported participating in at least one outdoor activity. That equates to 144 million participants, who went on a total of 11 billion outdoor outings. The participation rate and number of participants slightly increased, while the number of total outings decreased. The decline in outings was a result of the decline in core participation. In other words, in 2016, Americans participated in outdoor activities, such as traditional and non-traditional triathlons, mountain and road biking, boardsailing and others, less often than they did the year before.

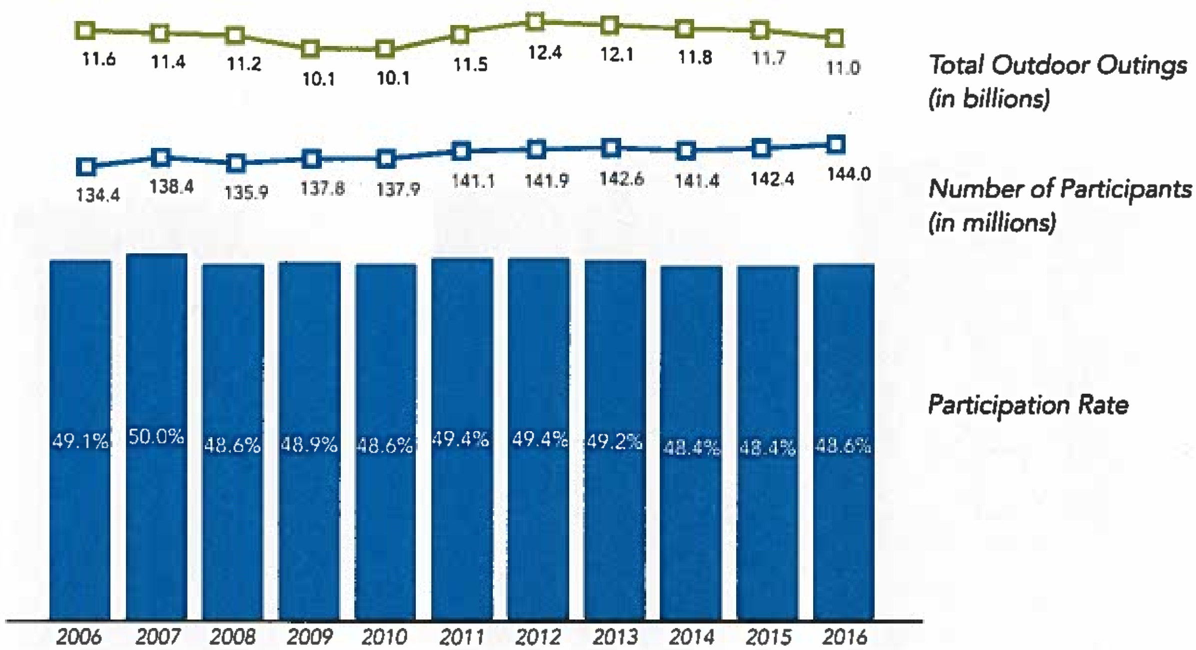
Running, jogging and trail running remained the most popular outdoor activity, but BMX biking saw the largest growth in participants from 2015 to 2016. Over the past three years, stand up paddling was the top outdoor activity for growth, increasing participation an average of 18 percent.

Outdoor participation for youth and young adults skewed heavily Caucasian, with Hispanics coming in a distant second. Among the genders, however, participation was almost evenly split.

Aspirational participation, which measures the physical activities that interest non-participants, showed that many Americans were drawn to outdoor recreation over sports, fitness and leisure activities. In fact, all aspirational participants — regardless of age — reported camping in their top three most appealing activities.

The Outdoor Foundation® has produced the *Outdoor Recreation Participation Topline Report* to provide a snapshot of American participation in outdoor activities with a focus on youth and young adults. The report is based on an online survey of 24,134 Americans ages six and older. A more in-depth look at outdoor participation in America is forthcoming.

Outdoor Participation, 2006 to 2016



Ages 6 to 24 Youth & Young Adult Participation

4.1 Billion Outdoor Outings
83.8 Average Outings Per Participant

Most Popular Youth Outdoor Activities
By Participation Rate, Ages 6 to 24

1. Running, Jogging and Trail Running
25.3% of youth, 20.3 million participants

2. Bicycling (Road, Mountain and BMX)
22.6% of youth, 18.2 million participants

3. Fishing (Fresh, Salt and Fly)
19.5% of youth, 15.6 million participants

4. Camping (Car, Backyard and RV)
19.0% of youth, 15.3 million participants

5. Hiking
15.5% of youth, 12.5 million participants

Favorite Youth Outdoor Activities
By Frequency of Participation, Ages 6 to 24

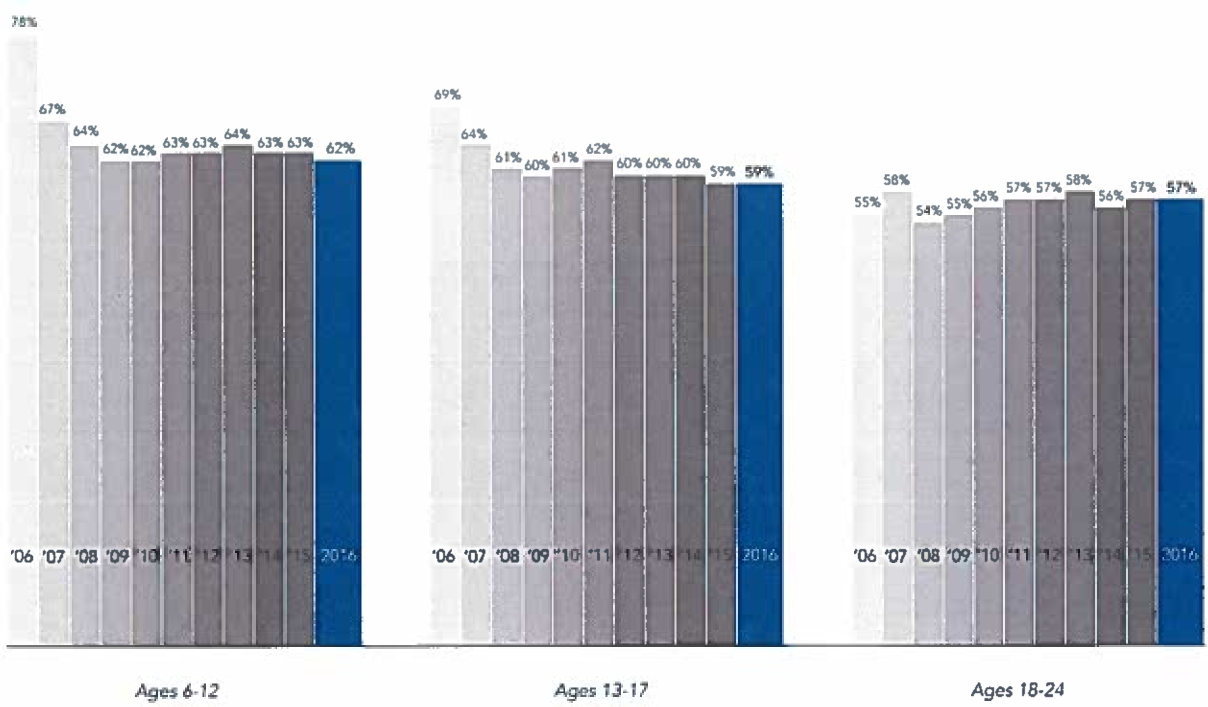
1. Running, Jogging and Trail Running
81.3 average outings per runner,
1.7 billion total outings

2. Bicycling (Road, Mountain and BMX)
58.0 average outings per cyclist,
1.1 billion total outings

3. Fishing (Fresh, Salt and Fly)
16.1 average outings per fishing participant,
251.4 million total outings

4. Skateboarding
46.8 average outings per skateboarder,
212.2 million total outings

5. Camping (Car, Backyard and RV)
12.4 average outings per camper,
189.0 million total outings



Ages 6 to 24

Youth & Young Adult Participant Demographics

		2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Gender	Male	52%	50%	57%	53%	53%	52%	50%	50%	51%	51%
	Female	48%	50%	43%	47%	47%	49%	50%	50%	49%	49%

		2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Age	6 to 12	33%	29%	37%	36%	36%	38%	38%	38%	39%	39%
	13 to 17	24%	25%	30%	30%	30%	26%	26%	27%	28%	28%
	18 to 24	44%	46%	34%	34%	34%	36%	36%	34%	33%	33%

		2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Race/ Ethnicity	African American/Black	8%	8%	8%	11%	7%	11%	11%	10%	8%	9%
	Asian/Pacific Islander	4%	6%	5%	6%	6%	7%	7%	7%	7%	7%
	Caucasian/ White, non-Hispanic	77%	75%	78%	71%	76%	71%	68%	70%	71%	70%
	Hispanic	7%	7%	7%	9%	8%	8%	10%	10%	12%	12%
	Other	4%	4%	3%	4%	4%	4%	3%	3%	2%	2%

		2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Census Region	New England	5%	5%	5%	5%	4%	5%	5%	4%	4%	4%
	Middle Atlantic	15%	14%	12%	13%	13%	13%	13%	13%	13%	14%
	East North Central	17%	17%	17%	17%	17%	16%	17%	17%	17%	16%
	West North Central	7%	7%	8%	7%	7%	8%	7%	7%	7%	7%
	South Atlantic	18%	19%	18%	17%	18%	18%	18%	19%	19%	19%
	East South Central	5%	6%	7%	6%	6%	6%	6%	6%	6%	6%
	West South Central	9%	9%	10%	10%	11%	10%	11%	11%	10%	11%
	Mountain	8%	8%	8%	9%	9%	8%	8%	9%	8%	8%
	Pacific	16%	15%	15%	16%	16%	16%	15%	14%	15%	16%

Ages 6 to 24 Aspirational Youth & Young Adult Participation

Aspirational participation measures non-participants' interest in specific outdoor recreation, sports, fitness and leisure activities. When comparing the types of activities that appeal to non-participants, many aspirational participants reported being drawn to outdoor activities. In fact, youth and young adults in every age group reported camping as their top interest. Bicycling was another outdoor activity that non-participants in each age cohort were interested in trying.

Aspirational Participants, Ages 6-12

Physical Activity	*Interest Rate*
1. Camping	16%
2. Basketball	14%
3. Fishing	13%
4. Soccer	13%
5. Swimming for Fitness	12%
6. Bicycling	12%
7. Running/Jogging	11%
8. Football	11%
9. Swimming on a Team	10%
10. Martial Arts	10%

Aspirational Participants, Ages 13-17

Physical Activity	*Interest Rate*
1. Camping	13%
2. Swimming for Fitness	10%
3. Running/Jogging	9%
4. Fishing	9%
5. Bicycling	9%
6. Working Out with Machines	8%
7. Hiking	7%
8. Basketball	7%
9. Football	7%
10. Martial Arts	7%

Aspirational Participants, Ages 18-24

Physical Activity	*Interest Rate*
1. Camping	18%
2. Bicycling	16%
3. Backpacking	14%
4. Martial Arts	14%
5. Climbing	12%
6. Working Out with Weights	12%
7. Hiking	11%
8. Swimming for Fitness	11%
9. Working Out with Machines	11%
10. Kayaking	10%

Ages 25+ Adult Participation

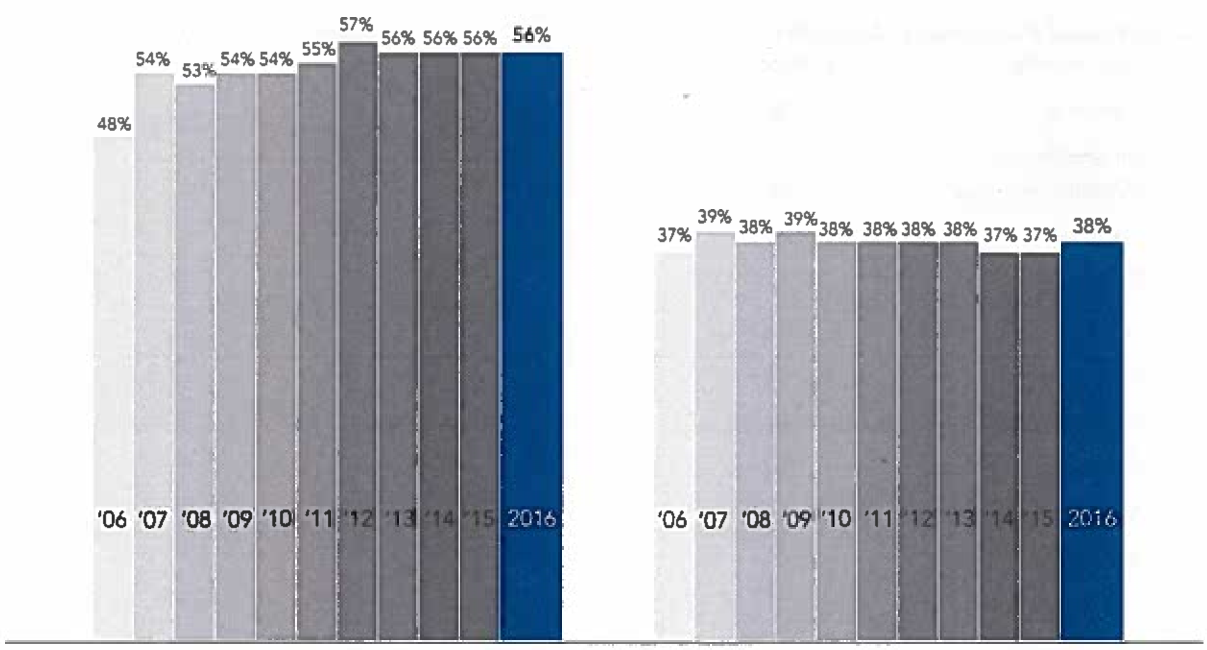
6.9 Billion Outdoor Outings
72.8 Average Outings Per Participant

Most Popular Adult Outdoor Activities
By Participation Rate, Ages 25+

1. Running, Jogging and Trail Running
14.8% of adults, 32.0 million participants
2. Fishing (Fresh, Salt and Fly)
14.6% of adults, 31.5 million participants
3. Hiking
13.7% of adults, 29.7 million participants
4. Bicycling (Road, Mountain and BMX)
12.8% of adults, 27.7 million participants
5. Camping (Car, Backyard, Backpacking and RV)
11.7% of adults, 25.2 million participants

Favorite Adult Outdoor Activities
By Frequency of Participation, Ages 25+

1. Running, Jogging and Trail Running
81.0 average outings per runner,
2.6 billion total outings
2. Bicycling (Road, Mountain and BMX)
76.0 average outings per cyclist,
1.4 billion total outings
3. Fishing
40.1 average outings per fishing participant,
627.9 million total outings
3. Hiking
98.2 average outings per hiker,
445.3 million total outings
4. Wildlife Viewing
25.2 average outings per wildlife viewer,
384.6 million total outings



Ages 25-44 *Ages 45+*

Ages 25+ Aspirational Adult Participation

Like youth and young adult aspirational participants, adult aspirational participants were also particularly interested in outdoor activities. Camping ranked as the number one or two most popular activity out of a range of outdoor, sports, fitness and leisure activities. Running/jogging, hiking, backpacking, canoeing and fishing also rated in the top ten most appealing activities among every age group, signaling that there is a significant opportunity for the outdoor industry to engage these non-participants.

Aspirational Participants, Ages 25-34

Physical Activity	*Interest Rate*
1. Swimming For Fitness	16%
2. Camping	15%
3. Bicycling	13%
4. Running/Jogging	11%
5. Hiking	11%
6. Backpacking	11%
7. Canoeing	11%
8. Fishing	10%
9. Working Out with Machines	10%
10. Working Out with Weights	9%

Aspirational Participants, Ages 35-44

Physical Activity	*Interest Rate*
1. Camping	14%
2. Bicycling	13%
3. Swimming for Fitness	13%
4. Hiking	11%
5. Working Out with Weights	10%
6. Fishing	9%
7. Running/Jogging	9%
8. Working Out with Machines	9%
9. Canoeing	9%
10. Backpacking	8%

Aspirational Participants, Ages 45+

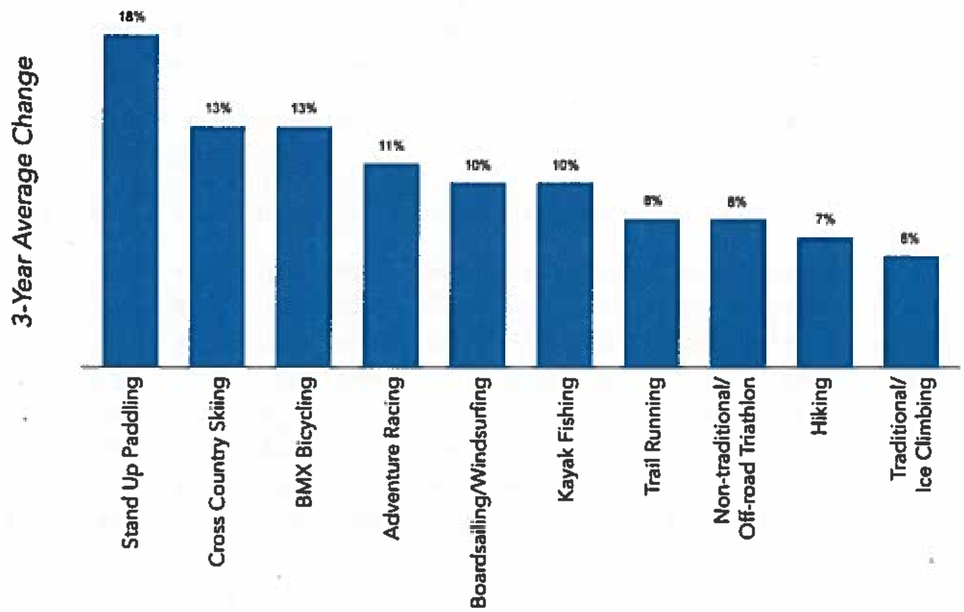
Physical Activity	*Interest Rate*
1. Camping	11%
2. Birdwatching /Wildlife Viewing	11%
3. Fishing	10%
4. Bicycling	10%
5. Swimming for Fitness	10%
6. Hiking	9%
7. Working Out with Machines	8%
8. Canoeing	7%
9. Working Out with Weights	7%
10. Backpacking	5%

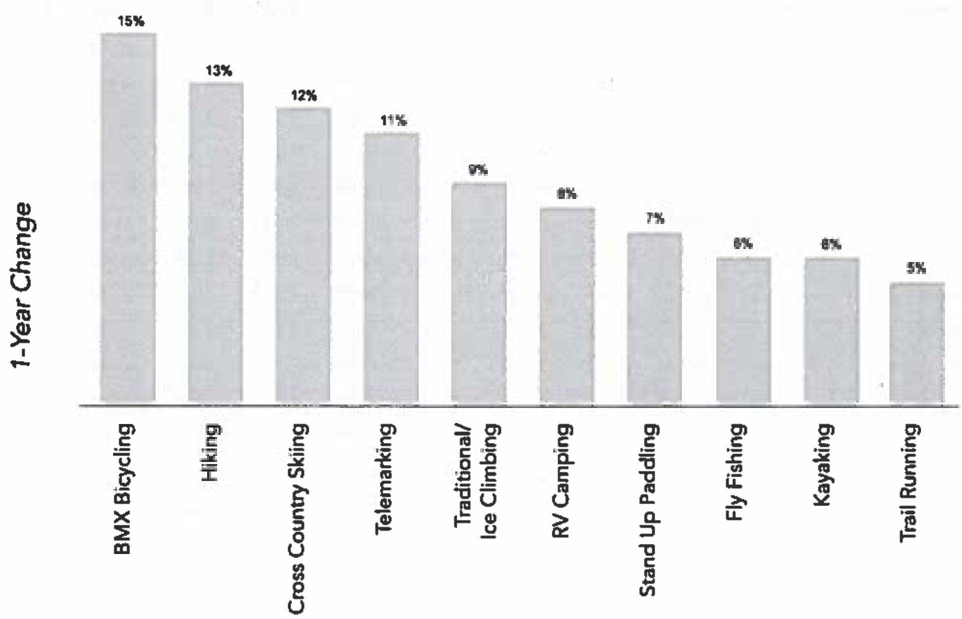
Ages 6+

2016 Positive Outdoor Trends

Positive outdoor trends details the activities that saw the most growth in participation. Over the past three years, stand up paddling was the top outdoor activity for growth, increasing participation an average of 18 percent from 2013 to 2016. Although still adding new participants, growth for the activitiy slowed compared to previous years. From 2015 to 2016, BMX biking saw the most growth in participation. This activity, along with cross country skiing, were among the top activities for growth over a one year- and three-year period.

Top Outdoor Activities for Growth





Ages 6+ Outdoor Participation by Activity

*** All participation numbers in this table are in the thousands (000).*

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	3-Year Change
Adventure Racing	725	698	920	1,089	1,339	1,065	2,170	2,213	2,368	2,864	2,999	35.5%
Backpacking Overnight - More Than 1/4 Mile From Vehicle/ Home	7,067	6,637	7,867	7,647	8,349	7,095	8,771	9,069	10,101	10,100	10,151	11.9%
Bicycling (BMX)	1,655	1,887	1,904	1,811	2,369	1,547	2,175	2,168	2,350	2,690	3,104	43.2%
Bicycling (Mountain/Non-Paved Surface)	6,751	6,892	7,592	7,142	7,161	6,816	7,714	8,542	8,044	8,316	8,615	0.9%
Bicycling (Road/Paved Surface)	38,457	38,940	38,114	40,140	39,320	40,349	39,232	40,888	39,725	38,280	38,365	-6.2%
Birdwatching More Than 1/4 Mile From Home/Vehicle	11,070	13,476	14,399	13,294	13,339	12,794	14,275	14,152	13,179	13,093	11,589	-18.1%
Boardsailing/Windsurfing	938	1,118	1,307	1,128	1,617	1,151	1,593	1,324	1,562	1,766	1,737	31.2%
Camping (RV)	16,946	16,168	16,517	17,436	15,865	16,698	15,108	14,556	14,633	14,699	15,855	8.9%
Camping (Within 1/4 Mile of Vehicle/Home)	35,618	31,375	33,686	34,338	30,996	32,925	29,982	29,269	28,660	27,742	26,467	-9.6%
Canoeing	9,154	9,797	9,935	10,058	10,553	9,787	9,839	10,153	10,044	10,236	10,046	-1.1%
Climbing (Sport/Indoor/ Boulder)	4,728	4,514	4,769	4,313	4,770	4,119	4,592	4,745	4,536	4,684	4,905	3.4%
Climbing (Traditional/Ice/ Mountaineering)	1,586	2,062	2,288	1,835	2,198	1,609	2,189	2,319	2,457	2,571	2,790	20.3%
Fishing (Fly)	6,071	5,756	5,941	5,568	5,478	5,683	6,012	5,878	5,842	6,089	6,456	9.8%
Fishing (Freshwater/Other)	43,100	43,859	40,331	40,961	38,860	38,868	39,135	37,796	37,821	37,682	38,121	0.9%
Fishing (Saltwater)	12,466	14,437	13,804	12,303	11,809	11,983	12,017	11,790	11,817	11,975	12,266	4.0%
Hiking (Day)	29,863	29,965	32,511	32,572	32,496	34,491	34,545	34,378	36,222	37,232	42,128	22.5%
Hunting (Bow)	3,875	3,818	3,722	4,226	3,908	4,633	4,075	4,079	4,411	4,564	4,427	8.5%
Hunting (Handgun)	2,525	2,595	2,873	2,276	2,709	2,671	3,553	3,198	3,091	3,400	3,512	9.8%
Hunting (Rifle)	11,242	10,635	10,344	11,114	10,150	10,807	10,164	9,792	10,081	10,778	10,797	10.3%
Hunting (Shotgun)	8,987	8,545	8,731	8,490	8,062	8,678	8,174	7,894	8,220	8,438	8,271	4.8%
Kayak Fishing	n/a	n/a	n/a	n/a	1,044	1,201	1,409	1,798	2,074	2,265	2,371	31.8%
Kayaking (Recreational)	4,134	5,070	6,240	6,212	6,465	8,229	8,144	8,716	8,855	9,499	10,017	14.9%
Kayaking (Sea/Touring)	1,136	1,485	1,780	1,771	2,144	2,029	2,446	2,694	2,912	3,079	3,124	16.0%
Kayaking (White Water)	828	1,207	1,242	1,369	1,842	1,546	1,878	2,146	2,351	2,518	2,552	18.9%
Rafting	3,609	4,340	4,651	4,318	4,460	3,821	3,690	3,836	3,781	3,883	3,428	-10.6%
Running/Jogging	38,559	41,064	41,130	43,892	49,408	50,713	52,187	54,188	51,127	48,496	47,384	-12.6%
Sailing	3,390	3,786	4,226	4,342	3,869	3,725	3,958	3,915	3,924	4,099	4,095	4.6%
Scuba Diving	2,965	2,965	3,216	2,723	3,153	2,579	2,982	3,174	3,145	3,274	3,111	-2.0%
Skateboarding	10,130	8,429	7,807	7,352	6,808	5,827	6,627	6,350	6,582	6,436	6,442	1.5%
Skiing (Alpine/Downhill)	n/a	10,362	10,346	10,919	11,504	10,201	8,243	8,044	8,649	9,378	9,267	12.4%
Skiing (Cross-Country)	n/a	3,530	3,848	4,157	4,530	3,641	3,307	3,377	3,820	4,146	4,640	40.3%
Skiing (Freestyle)	n/a	2,817	2,711	2,950	3,647	4,318	5,357	4,007	4,564	4,465	4,640	2.7%
Snorkeling	8,395	9,294	10,296	9,358	9,305	9,318	8,011	8,700	8,752	8,874	8,717	0.2%
Snowboarding	n/a	6,841	7,159	7,421	8,196	7,579	7,351	6,418	6,785	7,676	7,602	3.4%
Snowshoeing	n/a	2,400	2,922	3,431	3,823	4,111	4,029	3,012	3,501	3,885	3,533	-12.3%
Stand Up Paddling	n/a	n/a	n/a	n/a	1,050	1,242	1,542	1,993	2,751	3,020	3,220	61.6%
Surfing	2,170	2,206	2,607	2,403	2,767	2,195	2,895	2,658	2,721	2,701	2,793	5.1%
Telemarking (Downhill)	n/a	1,173	1,435	1,482	1,821	2,099	2,766	1,732	2,188	2,569	2,848	3.0%
Trail Running	4,558	4,216	4,857	4,833	5,136	5,610	6,003	6,792	7,531	8,139	8,582	26.4%

Triathlon (Non-Traditional/ Off-Road)	*281*	*483*	*543*	*634*	*798*	*819*	*1,075*	*1,390*	*1,411*	*1,744*	*1,705*	*5.0%*
Triathlon (Traditional/Road)	*640*	*798*	*943*	*1,148*	*1,593*	*1,686*	*1,789*	*2,262*	*2,203*	*2,498*	*2,374*	*22.6%*
Wakeboarding	*3,046*	*3,521*	*3,544*	*3,577*	*3,645*	*3,389*	*3,348*	*3,316*	*3,125*	*3,226*	*2,912*	*-12.2%*
Wildlife Viewing More Than 1/4 Mile From Home/Vehicle	*20,294*	*22,974*	*24,113*	*21,291*	*21,025*	*21,964*	*22,999*	*21,359*	*21,110*	*20,718*	*20,746*	*-2.9%*

Method

During the 2016 calendar year, a total of 24,134 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over one million people operated by Synovate/IPSOS. A total of 11,453 individual and 12,681 household surveys were completed. The total panel is maintained to be representative of the US population for people ages six and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2016 participation survey sample size of 24,134 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error — that is, the degree to which the results might differ from those obtained by a complete census of every person in the US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.31 percentage points at the 95 percent confidence level.

A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, household size, region, population density and panel join date. The total population figure used was 296,251,344 people ages six and older.

About the Physical Activity Council (PAC)

The survey that forms the basis of the Topline Report is produced by the Physical Activity Council (PAC), which is a partnership of leading organizations in the US sports, fitness and leisure industries. While the overall aim of the survey is to establish levels of activity and identify key trends in sports, fitness and recreation participation, each partner produces detailed reports on their specific areas of interest. Partners include: the Outdoor Foundation (OF); National Golf Foundation (NGF); Snowsports Industries America (SIA); Tennis Industry Association (TIA); USA Football; United States Tennis Association (USTA), International Health, Racquet and Sportsclub Association (IHRSA); Sports and Fitness Industry Association (SFIA); and USA Football.

About The Outdoor Foundation

Founded in 2000, the Outdoor Foundation is a national not-for-profit organization dedicated to inspiring and growing future generations of outdoor leaders and enthusiasts. Through youth engagement, community grant-making and groundbreaking research, the Foundation works with young leaders and partners to mobilize a major cultural shift that leads all Americans to the great outdoors. Visit us at outdoorfoundation.org.

The Outdoor Foundation
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S. | Oboz Footwear | Opinel USA | OPR | OpSec Security | Optic Nerve / Mountain Shades | Origin Design & Communications | OROS | Ortlieb USA LLC | Osprey Packs | Outdoor Sports Marketing | Outdoor Specialty Group LLC | Paceline Products Inc | Pacific Edge Indoor Climbing Facility | Pau Hana Surf Supply | Pertex | Pelican International | Perkins Coie LLP | Pigeon Mountain Industries Inc | Pinneco Research Limited | PlumRiver LLC | Point 6 LLC | Police Security Flashlights | Polartec, LLC | prAna | Primus | PrimaLoft Inc. | The Printed Image | Prism Designs, Inc | Prolific Business Solutions | Pro-Tec Athletics | Purple Orange Brand Communications | Rab USA | Rad Roller LLC | Redington | Red Paddle Co North America | RedRoller, Inc. | REI | RepSpark | Rinsekit | Robert W. 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Sports | Wow Sports LLC. | WSI-Sales LLC | Yaleet Inc/Naot | Yeti Coolers | Zamst | Zamberlan USA | ZANheadgear & Bobster Eyewear | ZEAL Optics

OUTDOOR FOUNDATION

BRIDGE Magazine: News and analysis from **The Center for Michigan**

As hunting wanes, selling Michigan to a new outdoors generation

July 19, 2016 **Ted Roelofs**

Bikers can ride a hundred miles of single-track mountain trail in and around Marquette. (Photo by Aaron Peterson, courtesy Travel Marquette)

For decades, the story of Alpena was pretty much tied to its massive cement operation – at one time the largest in the world.

But offshore and beneath the waves, another resource lay dormant for decades: Some of the best freshwater diving in the world beckoned in this remote corner of northeast Michigan. Established in 2000, the Thunder Bay National Marine Sanctuary and Underwater Preserve holds more than 100 shipwrecks within its 4,300-square-mile boundary, some visible through glass-bottom boats just 17 feet down in crystalline waters.

Tourists, researchers and divers – some from around the the United States – followed. The Great Lakes Maritime Heritage Center – a museum constructed as part of the Marine Sanctuary – now draws about 90,000 visitors a year. That's a big deal for a community of just over 10,000 people.

“It has certainly had an impact,” said Mary Beth Stutzman, president and CEO of the Alpena Area Convention & Visitors Bureau.

Stutzman said that's been just one part of Alpena's reinvention. Billing itself “Sanctuary of the Great Lakes,” Alpena also promotes stand-up paddleboarding, kayaking, hiking, biking as well as hunting for 300-million-year-old fossils from an ancient sea.

“What really has had an impact is people who come for a multitude of reasons. They stay longer,” she said.

There could be a lesson here for much of Michigan, which seems to be playing catch-up with states out west and even a place like Duluth, Minnesota, in aggressively promoting outdoor assets that speak to a new generation: Think REI instead of Cabela's.

But it's more than ecotourism luring visitors and their credit cards to town. Analysts say that communities and states that adjust their outdoor marketing efforts make themselves more attractive to young talent and better positioned for economic development.

“It's about making the kind of identity in how we sell the state,” said Brad Garmon of the Michigan Environmental Council, a Lansing-based nonprofit advocacy organization.

“We have a great up-north experience,” he said. “We have vital urban areas. Those two things need to be tied together.”

Garmon said stakes are huge in Michigan, given that outdoor recreation in the state is calculated by the Colorado-based Outdoor Industry Association to be a $19 billion-a-year industry.

Attracting young people

Michigan State University economist Charles Ballard has come to similar conclusions. He said he sees three pillars to attracting and keeping talent in Michigan:

- Improving education to deepen the state's talent pool,
- Businesses that can offer jobs to that talent, and
- Building more places where young professionals want to live and play.

“It appears that today's young people are different from every previous generation in their desire for amenities—restaurants, bars, theater, sporting events, and recreational activities. Many young people are now willing to go to a cool place first, and worry about the job later,” Ballard said.

Western states like Utah, Colorado and Montana are ahead of Michigan in that regard. They have created government offices solely dedicated to promoting outdoor recreation. Oregon and Idaho are reportedly considering the same. Thus far, no state east of the Mississippi has created such an office.

Utah became the first, when Gov. Gary Herbert created the Office of Outdoor Recreation in January 2013. It is dedicated to all aspects of outdoor recreation, in concert with nonprofit groups and the business community.

In January, Herbert named Tom Adams, sales director for Petzl, a manufacturer of high-end climbing equipment, as second head of the Utah office. Beyond his business background, Adams is also known for expertise as a rock and ice climber, downhill skier and as a competitive cyclist.

"The reason so many people come to college here and never leave is because of their access to all of the things they can do that are just 15 minutes away," Adams said.

He pointed to Park City, a community known as a downhill ski mecca but also for access to 400 miles of mountain bike trails.

"You can mountain bike from almost every corner in the city. In downtown Park City, you can walk across the street and be five minutes from a chairlift."

As an example of public-private models he hopes to spread, he cited Grand County and the city of Moab, which has a reputation for world-class mountain biking. Adams said the county has folded a volunteer trail-building organization called Trail Mix into its government functions, lending it funding stability and a greater presence in the community.

In Utah, expert mountaineer, skier and biker Tom Adams heads the Office of Outdoor Recreation. Some want Michigan to create a similar office. (Courtesy photo)

"That model is ahead of its time. I am trying to share that with other communities."

A spokesman for the Outdoor Industry Association, a nonprofit advocacy group, said states like Utah have laid down a template others should follow.

Cailin O'Brien-Feeney said a state office for outdoor activities can help connect local, state and national outdoor initiatives in a given state, while focusing "on both economic development and outdoor participation."

A generational shift

Outdoor Michigan has long been associated with hunting and fishing, which still account for more than 70,000 jobs and nearly $5 billion -- about a fourth of the state's outdoor industry in annual economic impact, according to a 2016 state report.

But like the rest of the nation, Michigan has seen a steady decline in the numbers of hunters and anglers, a trend that goes back a decade or more.

From 2009 to 2015, the number of resident hunters in in Michigan dropped 10 percent, from 769,875 to 695,747. From the mid-1980s to 2015, the number of fishing licenses fell by a third, from 1.64 million in 1985 to 1.1 million in 2015.

"It is a different mentality," Garmon of MEC said. "The hunting and fishing generation was a lot about family, going away to deer camp together. The millennial generation is much more about weaving activities into their daily life."

So too, the millennial generation seems less drawn to golf, as well. Michigan's golf industry - which boomed with new development in the 1980s and 1990s - has gone through a painful retrenchment in recent years as would-be young golfers found other interests. The reasons could be this simple: Takes too long. Boring.

The Detroit Free Press reported in April that about 200 golf courses have closed across the state over the past 15 years.

State says it's evolving

Michigan Department of Natural Resources spokesman Ed Golder said the agency "does a great deal to support and promote outdoor recreation users of all interests," including state park and recreation area activities like mountain biking, geocaching, paddleboarding and yoga on the beach.

Golder notes that the Natural Resources Trust Fund – endowed by royalties from the sale and lease of state-owned mineral rights - has provided more than $1 billion since 1976 for outdoor recreation of all types, naming park development, trails and kayak launches in addition to support for hunting and fishing. He added that the fund now prioritizes recreation projects in urban areas.

Outside of the the DNR, Golder said, the Michigan Department of Transportation projects investment of $83 million in non-motorized trails around the state from 2015 to 2017, including state funds, grants and local matches.

But Golder also noted that new trends in outdoor activities are prompting the state to find new ways to support conservation efforts.

"Traditional sources of funding for conservation – hunting and fishing license dollars – are challenged by a declining user base," he said. "That's an important conversation for our conservation community and for everybody who cares about the outdoors in Michigan."

Michelle Grinnell, spokesperson for the Pure Michigan travel campaign, said her office is looking to shine a brighter light on outdoor assets that might not be so well-known outside the state. Pure

Michigan is budgeting $34 million for its 2017 campaign, much of that for radio and TV ads that run in all 50 states. Viewers are likely to see more, iconic images of Great Lakes shoreline, lighthouses and the Mackinac Bridge.

But Grinnell also noted its promotion of mountain bike trails at Copper Harbor in the Keweenaw Peninsula, named by the International Mountain Bicycling Association as a "silver-level" ride destination - one of only 10 such places in the world. Grinnell said Pure Michigan is planning an ad campaign for the trails there and at Marquette through Freehub Magazine, a mountain bike publication.

"We are looking at mountain biking and our trail system," Grinnell said. "All states have trails, but the diversity and quantity and quality of trails that we have is really a big thing. We know we have a great product to offer.

"Things like kayaking and stand-up paddleboarding – we are seeing increased interest in those as well. We are incorporating those more and more into our campaign."

For bikers, nowhere to go but U.P.

In the Upper Peninsula, Marquette is making a name for itself as a mountain bike destination, even as it draws other adventurists. The latter includes an active surfing community, especially in the sometimes-wild months of October through March, when waves near shore can reach 12 feet.

Bikers from around Michigan but also Wisconsin, Illinois and Minnesota – and even states like Utah and Colorado – converge in Marquette to sample a hundred miles of single-track trails in Marquette County through a challenging mix of rugged north woods terrain. In 2013, Marquette earned a spot in USA Today's "Top 10 Mountain Biking Towns," taking a place alongside Park City, Utah, and Santa Fe, N.M, among others.

A crew from Bike Magazine spent 10 days in June shooting photos and video of trails from Marquette to Copper Harbor. It is expected to be released as web video within a couple of months.

"It's going to be amazing," said Candy Fletcher Kozeluh, recreation director for the Marquette County Convention and Visitors Bureau, who accompanied the crew on the trip.

That probably won't hurt her outreach efforts to Chicago, where die-hard mountain bikers are more and more apt to make the six-hour drive north. When they do, Kozeluh said, they're likely to stay at least several days.

She said a group of 60 from Chicago booked a visit over July 4th.

A lot of this has happened with little help from government. Over the past 20 years, the Noquemanon Trail Network – an expansive mix of cross-country ski and single-tracking mountain bike trails – has grown through backing from a nonprofit organization, membership donations and contributions from community businesses.

Bikers beget bike shops, which is why a city of just over 20,000 people has four bike shops. They stay relatively busy even in winter, when fat-tire bikers ride the snow on 60 miles of groomed trails. With all these riders, it's not surprising Marquette County has six microbreweries.

Scott Jordan, assistant professor of Outdoor Recreation Leadership and Management at Northern Michigan University, said anecdotal evidence tells him Marquette's outdoor cache is attracting new talent to the region.

Divers come from around the nation to explore shipwrecks offshore from Alpena. (Photo by NOAA, Thunder Bay National Marine Sanctuary)

"It's highly likely that people want to live here because we have things like very nice mountain biking trails," he said.

He noted, for instance, that faculty positions at NMU might not pay as well as Michigan State University or the University of Michigan.

"But we have the opportunity to go out and ride right from our offices," Jordan said.

Jordan authored a 2015 study of Marquette's mountain bike community, noting that industries like forestry and mining have a limited future. Earlier this year, Cleveland-based Cliffs Natural Resources announced it would lay off 400 workers at its Empire iron ore mine west of Marquette, with plans to close the mine within months.

“Mining and forestry, though lucrative, are not sustainable industries...” the report concluded. “The ecotourism economy of mountain biking is sustainable. The effects that is has on the area are yet to be measured but indications are that it has a positive economic and cultural impact.”

Lyle VanderSchaaf, 45, an emergency room physician who grew up in Iowa, said he settled in Marquette largely because of its outdoors. A father of three, he's an avid mountain biker, logging anywhere from 25 to 100 miles a week.

“Marquette to me is the perfect fit,” he said. “Comfortable, like a well-broken-in pair of boots. It's got everything I was looking for.

“I can bike very easy trails with my kids or I can go ride double black diamond trails that are going to take every bit of skill I have. Or to vary it up, I can go to the beach for paddle boarding or go camping. The nature of it, it's part of my everyday life.”

Shift required in DNR strategy

But Kozeluh, of the county's visitor's bureau, said the DNR can be slow to appreciate the economic impact of “non-motorized” activities like mountain biking, in part because it is hard to count everyone engaged in the sport. Unlike hunting or fishing, it takes no license or registration to hop on a mountain bike and ride.

“They don't get it,” she said of the DNR.

“These are people with a $10,000 mountain bike and a $60,000 SUV. They are staying in hotels and they are staying for a week or they are staying longer.”

Alone the coast just above Michigan's thumb, a new generation of outdoor thrill-seeker has found kiteboard Nirvana on a sandy spit of land called Tawas Point.

It projects like a southward-curving hook into shallow waters of Lake Huron, as rising afternoon thermal winds often afford ideal kiteboarding conditions on either side of the spit. Dozens of kiteboarders soar over the waves when conditions are right, as online message boards suggest some come from Chicago and beyond.

That in turn has spawned three area kiteboard venues, including Great Lakes Kiteboarding. Operating out of a tent on the beach, it offers lessons in both kiteboarding and paddleboarding. The business also has a brick-and-mortar shop in St. Clair Shores.

“It has certainly grown significantly since we started in 2002,” said manager Melanie Lefeve.

“We see people from Chicago, Cleveland. They come in here. They camp. They stay in hotels and they shop and dine in the restaurants in the area.”

Across the state, about 30 miles south of Grand Rapids, the community of Hastings is growing into its role as host to a grueling spring event billed as “largest gravel road bicycle race in the world.”

It's called Barry-Roubaix, a nod to the Paris-Roubaix, an even more torturous annual French road race over ancient cobble roads known to bend wheels and crack frames. But all that pain has been good for Hastings, a community of about 7,000 people.

Launched in 2009, it had 274 entrants its first year. In 2016, 3,200 riders competed in races of 22 miles, 36 miles or 62 miles, most of it on gravel roads in Barry County.

"It's having a huge impact on the community," said Alan Klein, Hasting's community development director. "We see racers here all year long."

Tapping into that, the city earlier this year installed 65 permanent signs marking the race route, paid for by a $5,000 local foundation grant, $2,500 from the city's Downtown Development Authority and $2,500 from race organizer, Kisscross Events.

Klein said the city is also planning to install a trailhead for the race start, somewhere in the downtown area.

It's easy to see why Hastings is eager to embrace this event. An economic impact report on the 2016 race calculated that participants and friends and family spent $565,250 on food, beverages, lodging and fuel for the event. Participants from 32 states, Canada and the United Kingdom traveled to Hastings.

Community director Klein said the hope one day is to convince some of these bikers to take a second look at Hastings and its nearby lakes, camping, annual jazz festival and small-town friendliness.

"We'd like see people say, 'Hastings is a great place to visit and I would like to live there.' We're not there yet but we'd like to get there in the near future."

In Grand Rapids, local officials are pushing an ambitious plan to restore rapids to the Grand River through the heart of downtown. A $30 million project, it will likely depend on a mix of community, philanthropic and state and federal funding sources. It also faces an array of federal permitting hurdles if it is to gain approval to remove five existing dams and improve the river bottom.

But a 2014 study showed the potential: An estimated $16 million to $19 million in annual economic impact tied to water tourism including kayaking, fishing and rafting. It would surely further the transformation over the past couple decades of the city's once-moribund downtown into a thriving entertainment and residential center.

Matt Chapman, of Grand Rapids Whitewater, the group backing the project, said it would tap into new ways for residents to enjoy the river, which shaped the city's earliest days as a center for logging and trapping.

"In the years past, the city turned its back on the river and now we are turning toward it and seeing its potential," Chapman said. "Looking back on the history of the river, it's made Grand Rapids what it is."

BRIDGE Magazine: News and analysis from **The Center for Michigan**

Blue-collar Duluth transformed by outdoor tourism economy

July 19, 2016 Ted Roelofs

Outdoor adventurers in Duluth capitalize on everything from Great Lakes surfing to mountain biking to whitewater kayaking, as pictured here. (Photo by Hansi Johnson)

In the early 1980s, someone hung a billboard outside downtown Duluth, with a bleak request: "Will the last one leaving Duluth please turn out the light."

The dark humor was understandable, given how far this Minnesota community had fallen.

Built on the west shore of Lake Superior on the shoulders of timber, shipping and steel production, blue-collar Duluth began to slide in the 1950s as high-grade iron ore gave out on Minnesota's Iron Range. In 1981, U.S. Steel Duluth Works shut down, as unemployment approached 20 percent. Other factory closings followed.

But as it turned out, the seeds for a new Duluth were always there – naturally.

Perched on steep hills that rise 800 feet above Lake Superior, Duluth is home to more than a dozen trout streams, waterfalls, nearly 7,000 acres of park land and terrain perfectly matched for hiking, trail running and mountain biking. Locals have skied at 700-foot vertical Spirit Mountain since 1974. And hard-core adventurers have long surfed the waves of Lake Superior – even in the dead of winter.

"Duluth is a traditional Rust Belt city," said former Duluth Mayor Don Ness, who served this city of 86,000 residents from 2008 to this year.

"We were built on heavy industry and shipping," said Ness. "But in comparing ourselves to other cities, what we have is a unique sense of place and we have unique natural assets. The thinking was, 'What can we do to start developing those and promoting those?'"

In 2011, voters approved a property tax that raises $2.6 million a year to support parks and recreation development. It cost the owner of an average-priced home of $158,000 about $60 a year.

In 2014, the city council passed a 0.5 percent tax on lodging, restaurants and bars that will generate $18 million over 15 years to add trails for hiking, mountain biking, cross country skiing and horseback riding. The revenue will also establish a launch center for canoes and kayaks and add further park improvements. Officials expect another $32 million from state, federal and private sources.

RELATED: As hunting wanes, selling Michigan to a new outdoors generation

If there is a lesson for Michigan, it is that significant public investment in outdoor recreation can pay dividends in long-term development.

Today, within Duluth's city limits are 40 miles of cross country ski trails and more than 60 miles of mountain bike trails, the latter expected to reach 100 miles by next year. Plans are in the works to develop an old quarry into a rock and ice climbing venue.

Publications took notice, with Outdoor Magazine naming Duluth number one in its 2014 list of "Best Places to Live."

These investments have come alongside an economic turnaround, as Duluth unemployment dipped as low as 3 percent in October 2015 before climbing to 4.1 percent in April.

Laura Mullen, co-owner of Bent Paddle Brewing Company in Duluth, said the city's outdoor lifestyle was a primary reason the craft beer firm located there. (Courtesy photo)

Firms like Ikonics Corp. are writing a new economic future. The high-tech imaging firm broke ground in 2015 on a $4.3 million expansionto accommodate its growth into aerospace. Completed earlier this year, the expansion was built on remnants of Duluth's industrial past, the former site of the Universal Atlas Cement Company, a subsidiary of U.S. Steel.

West of downtown, Bent Paddle Brewing Co. is seeing growth of another kind. It's on target to churn out 20,000 barrels of craft beer in 2016 – nearly three times what it produced in 2014, its first full year of operation.

The founders – two couples with a fondness for beer and wilderness canoeing - chose Duluth for a couple reasons: The brewery could tap Lake Superior as a pure source of water. But Laura Mullen, one of Bent Paddle's four co-owners, said they also saw a community of like-minded inhabitants.

"Duluth is the gateway to the north shore and the north woods," Mullen said. "We wanted to live here and raise our families here.

"We are seeing a lot of young professionals attracted to the city, who are just over the congestion and traffic of the larger urban areas. They just like it that when they are done working, they can go out their back door and enjoy the lifestyle."

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HEADWATERS ECONOMICS

West is Best

How Public Lands in the West Create a Competitive Economic Advantage

November 2012

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Cover photos clockwise starting upper left: Lower Antelope Canyon, near Page, Arizona; Maroon Bells in Summer, Aspen, Colorado; Sequoia National Park, California; Ironwood Forest National Monument, Arizona

TABLE OF CONTENTS

I. Executive Summary . . . 1
II. Introduction . . . 2
III. The West Outpaces the Rest of the U.S. . . . 3
IV. Public Lands Are Abundant in the West . . . 4
V. The West's Rise Is Driven by Expanding Services Industries . . . 6
VI. Services Industries Predominate in Most Western Counties . . . 10
VII. Non-Labor Income Is a Major Driver of Growth . . . 12
VIII. The West Is Growing and Attracting New Residents . . . 14
IX. A New Competitive Advantage in the West . . . 15
X. Business Location Decisions Are Tied to Quality of Life . . . 16
XI. Protected Public Lands Are an Economic Advantage . . . 19
XII. References . . . 21

TABLE OF FIGURES

Figure 1: West vs. Non-West, Employment Growth, Indexed, 1970 to 2010 . . . 3
Figure 2: West vs. Non-West, Growth Measures, 1970 to 2010 . . . 3
Figure 3: Percent Land in Federal Ownership, West vs. Non-West . . . 4
Map 1: Federal Lands and Protected Federal Lands, United States . . . 4
Map 2: Metro and Non-Metro Counties, The West . . . 5
Figure 4: Services vs. Non-Services Employment Growth, West, 1970 to 2010 . . . 7
Figure 5: Change in Employment by Industry, West, 2001 to 2010 . . . 7
Figure 6: Employment by Industry Percent of Total, West, 2010 . . . 8
Figure 7: Services vs. Non-Services Employment Growth, Non-Metro West, 1970 to 2010 . . . 8
Figure 8: Change in Employment by Industry, Non-Metro West, 2001 to 2010 . . . 9
Figure 9: Employment by Industry Percent of Total, Non-Metro West, 2010 . . . 9
Figure 10: Number and Share of Western Counties Reliant on Services and High Wage Services Sectors, 2010 . . . 10
Figure 11: High-Wage Services, Average Earnings per Job, West, 2010 . . . 11
Figure 12: Labor Earnings and Non-Labor Income Trends, West, 1970 to 2010 . . . 12
Figure 13: Number and Share of Western Counties Reliant on Non-Labor Income, 2010 . . . 12
Figure 14: Per Capita Income Trends, West, 1970 to 2010 . . . 13
Figure 15: Population Trends, West, 1970 to 2010 . . . 14
Figure 16: Number and Share of Western Counties Reliant on In-Migration, 2000 to 2010 . . . 14
Figure 17: Percent Change in Employment, Non-Metro West, 1970 to 2010 . . . 19
Figure 18: Avg. Increase in Per Capita Income from Protected Public Lands, Non-Metro West, 2010 . . . 20

I. EXECUTIVE SUMMARY

This report finds that the West's popular national parks, monuments, wilderness areas and other public lands offer its growing high-tech and services industries a competitive advantage, which is a major reason why the western economy has outperformed the rest of the U.S. economy in key measures of growth—employment, population, and personal income—during the last four decades.

In addition, as the West's economy shifts toward a knowledge-based economy, new research shows that protected federal public lands support faster rates of job growth and are correlated with higher levels of per capita income.

General findings:

- Higher-wage services industries, such as high-tech and health care, are leading the West's job growth and diversifying the economy.
- Entrepreneurs and talented workers are choosing to work where they can enjoy outdoor recreation and natural landscapes.
- Increasingly, chambers of commerce and economic development associations in every western state are using the region's national parks, monuments, wilderness areas and other public lands as a tool to lure companies to relocate.
- High-wage services industries also are using the West's national parks, monuments, wilderness areas and other public lands as a tool to recruit and retain innovative, high-performing talent.

Specific points:

- From 1970 to 2010, the West's employment grew by 152 percent compared to 78 percent for the rest of the country.
- This western job growth was almost entirely in services industries such as health care, real estate, high-tech, and finance and insurance, which created 19.3 million net new jobs, many of them high-paying.
- Western non-metropolitan counties with more than 30 percent of the county's land base in federal protected status such as national parks, monuments, wilderness, and other similar designations increased jobs by 345 percent over the last 40 years. By comparison, similar counties with no protected federal public lands increased employment by 83 percent.
- In 2010, per capita income in western non-metropolitan counties with 100,000 acres of protected public lands is on average $4,360 higher than per capita income in similar counties with no protected public lands.

Additional Resources

For information on the economic role of protected public lands:
http://headwaterseconomics.org/land/reports/protected-lands-value/

For information on the economics of national parks:
http://headwaterseconomics.org/headwaters/economic-impact-of-national-parks/

For information on the economics of national monuments:
http://headwaterseconomics.org/land/reports/national-monuments/

For a letter from more than 100 economists and academics to the President on the importance of protected public lands:
http://headwaterseconomics.org/land/economists-president-public-lands/

II. INTRODUCTION

In this report the "West" is defined as the eleven western public lands states in the continental U.S.: Arizona, Colorado, California, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming.

The western economy has outperformed the rest of U.S. economy in key measures of growth—employment, population, and personal income—during the last four decades. The region has prospered by successfully diversifying its economy to include fast-growing and higher-paying services industries—such as high-tech, finance, and health care jobs—and attracting talent and entrepreneurs who incubate tomorrow's companies.

As the West continues to shift from a natural resource-based economy to a knowledge-based economy, the key to the region's competitiveness is increasingly the ability to cultivate and attract innovative companies and an educated workforce. Research shows that these companies and individuals are increasingly "footloose" and are drawn to the West's high quality of life, which includes outdoor recreational opportunities and attractive natural landscapes.

> *"In the ebb and flow of the global economy, states can no longer rely solely on strategies of keeping costs low and providing incentives.... Instead, states must create the right business climate that allows companies and entrepreneurs to create 21st century jobs."* [1]
> *—U.S. Chamber of Commerce, Enterprising States 2012*

In the fierce global competition for business and talent today, the West has a clear competitive advantage in its public lands. The West has more federal public lands, and protected public lands such as national parks and monuments, than any other region of the country. These lands offer access to hiking, fishing, hunting, skiing, boating, and other forms of recreation, and provide a scenic backdrop to the region's communities.

Not surprisingly, economists have found that western national parks, monuments, and other protected federal public lands support faster rates of job growth and are correlated with higher levels of per capita income.

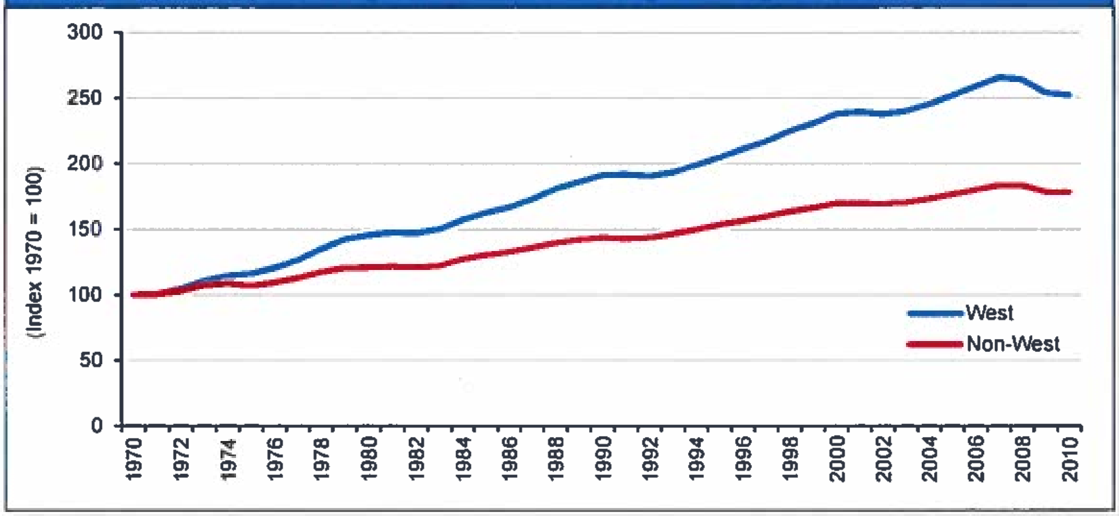
This report reviews the West's increasing economic diversity, the growth of the region's modern services economy, and the economic role of public lands in the West. It examines the West as a whole, including large metropolitan areas where most economic activity takes place, as well as the non-metropolitan West where small to mid-sized communities also are successfully competing for businesses and talent, and creating new jobs by leveraging nearby public lands.

III. THE WEST OUTPACES THE REST OF THE U.S.

During the last four decades, the western economy outpaced the rest of nation. This can be seen in employment, where from 1970 to 2010 western jobs grew by 152 percent compared to 78 percent job growth for the rest of the country.[2]

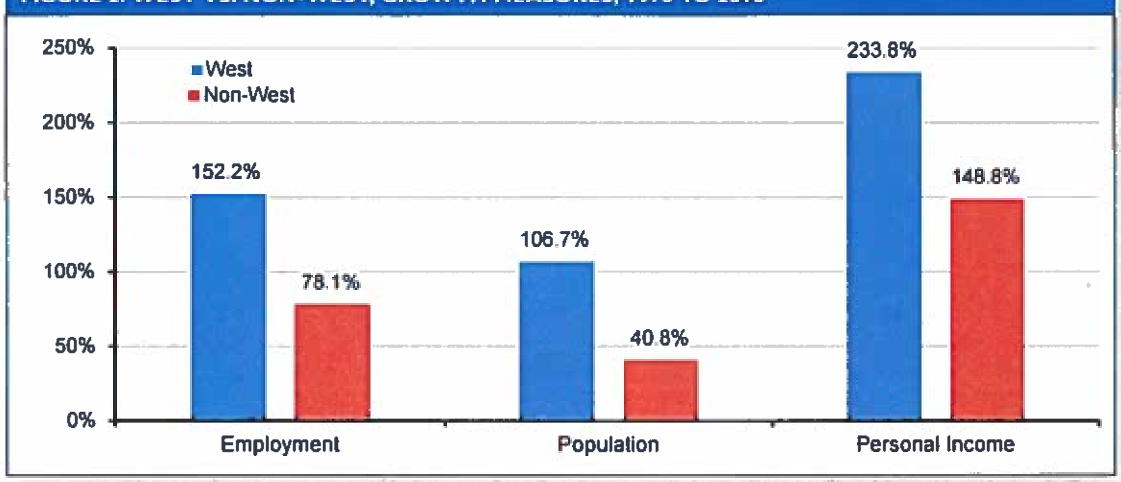
We show data through 2010 because this is the latest year the U.S. Department of Commerce has reported economic data at the county level—see accompanying western state fact sheets for state-level data through 2011 here: http://headwaterseconomics.org/land/west-is-best-value-of-public-lands.

FIGURE 1: WEST VS. NON-WEST, EMPLOYMENT GROWTH, INDEXED, 1970 TO 2010



Population and personal income growth (adjusted for inflation) in the West also have outpaced the rest of the country. From 1970 to 2010, the West's population grew by 107 percent compared to 41 percent for the rest of the country, and real personal income in the West grew by 234 percent compared to 149 percent for the rest of the country.[3]

FIGURE 2: WEST VS. NON-WEST, GROWTH MEASURES, 1970 TO 2010

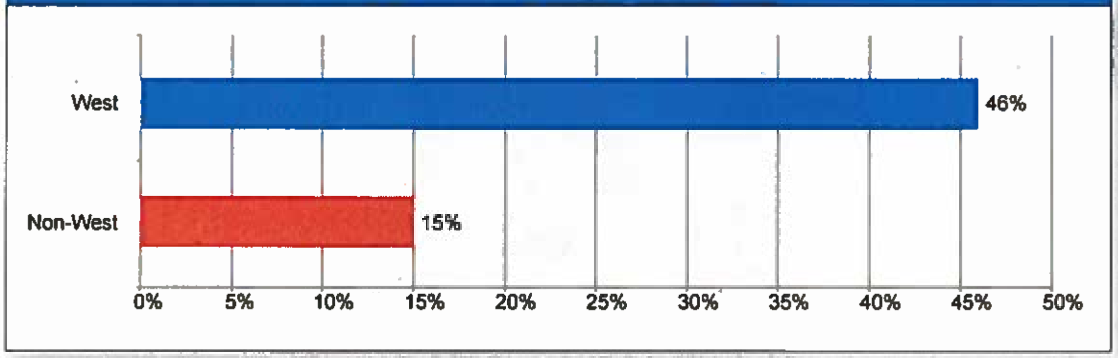


IV. PUBLIC LANDS ARE ABUNDANT IN THE WEST

To begin to understand why the West is outperforming the rest of the country, it is important to recognize two major differences. First, the West has significantly more federal public lands. Second, the West has a population that is more concentrated in urban areas. The region is also characterized by an expansive geography that is more sparsely populated than other parts of the country.

Federal public lands are a defining feature of the West. The federal government manages 355 million acres in the West, or 46 percent of all land in the region. By contrast, the federal government manages 15 percent of all land in the rest of the country.[4]

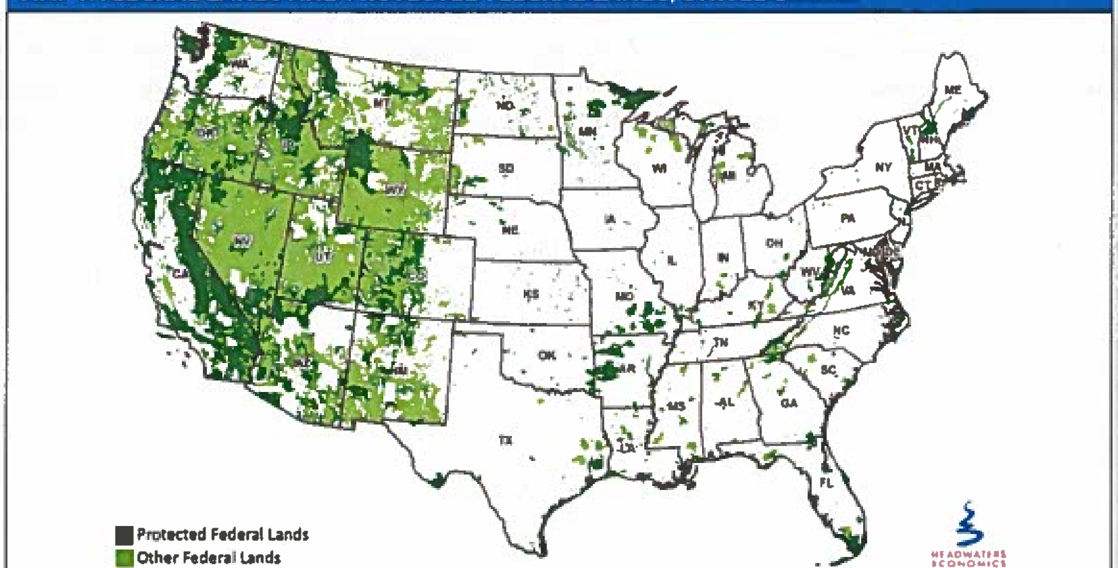
FIGURE 3: PERCENT LAND IN FEDERAL OWNERSHIP, WEST VS. NON-WEST



The map below shows federal public lands that are managed by the U.S. Forest Service, Bureau of Land Management, National Park Service, and U.S. Fish and Wildlife Service—which together constitute the large majority of federal lands in the West. They are managed for multiple-use objectives, such as resource extraction and recreation, and also for the protection of natural, cultural and historical resources.

Multiple-use public lands are shown in light green and protected public lands in dark green. Twenty-one percent of federal public lands in the West are permanently protected as national parks, national monuments, wilderness, national wildlife refuges, and other designations.[5]

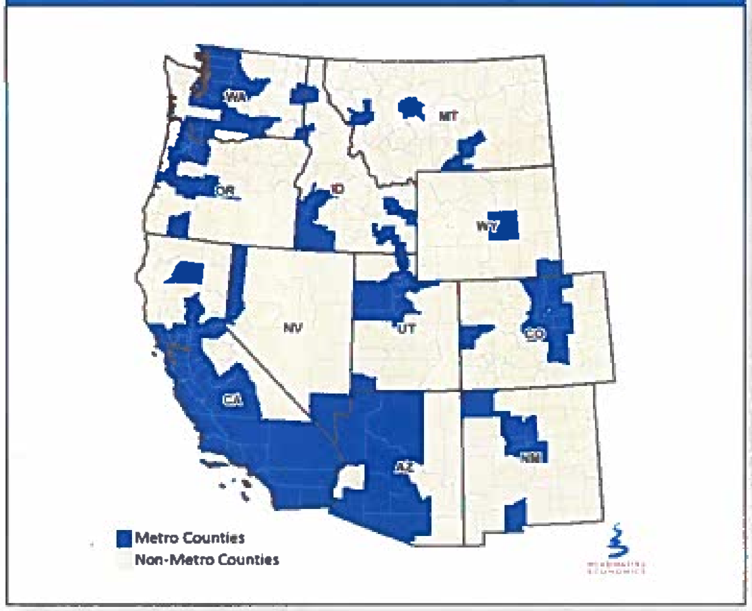
MAP 1: FEDERAL LANDS AND PROTECTED FEDERAL LANDS, UNITED STATES



The West's population and economy are located largely in metropolitan (metro) counties. Eighty-nine percent of the population and 90 percent of the jobs in the region are found in these counties. Yet the majority of the land base in the West is covered by non-metropolitan (non-metro) counties and is characterized by smaller communities and wide-open spaces.[6]

The map below shows western metro and non-metro counties. There are 128 metro counties (31% of total) and 286 non-metro counties (69% of total) in the West.

MAP 2: METRO AND NON-METRO COUNTIES, THE WEST



Public lands are important to both metro and non-metro western counties, though they are a larger share of the land base in the non-metro West. Thirty-nine percent of the land area in metro counties and 46 percent of the land in non-metro counties in the West are administered by the U.S. Forest Service, Bureau of Land Management, National Park Service, or U.S. Fish and Wildlife Service.

Historically, metro and non-metro counties had closely tied but distinct economic activities and roles.[7] As we will see below, a growing number of non-metro counties are now successfully competing for higher-paying jobs in growing industries—in part by leveraging the presence of public lands to attract companies and talent—that have traditionally been found only in metro economies.

V. THE WEST'S RISE IS DRIVEN BY EXPANDING SERVICES INDUSTRIES

The meteoric rise of the West in recent decades is largely explained by the region's success in developing and attracting a diverse services economy. Services encompass an array of sectors ranging from low-wage industries such as accommodation and food services to high-wage industries such as professional and technical services, including architects, engineers, and computer programmers.[8]

Sitel, Las Cruces, NM

We operate a contact center in Las Cruces, New Mexico. Sitel originally decided to open the operation here because of a favorable labor market and strong educational institutions as well as easy access to a major airport.

Our initial team found the location extremely attractive. Let's face it, Las Cruces is the jewel of the southwest—this attractive city is surrounded by accessible public lands and has incredible views of the mountains and high desert.

Because of the nature of our work, we are indoors and plugged into technology most of every working day. So the ability to disconnect and get outdoors before and after work is crucial to everyone's sense of well being.

The outdoor amenities and quality of life here are a big part of what keeps us productive and how employees relate to each other—it's often what we talk about in break areas and over lunch or before meetings. I am proud of the work-life balance we can offer in southern New Mexico.

Initially, we hired people from outside the area to fill positions. Now we mainly hire regionally and have seen many advance their careers through the ranks. We are not just providing jobs; we are offering life-changing careers with advanced placement opportunities.

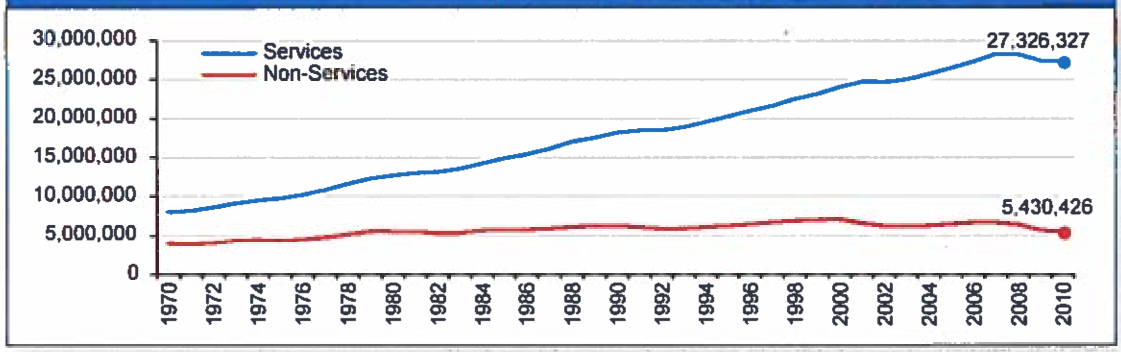
—John Munoz, Director

We first examine the growth of services sectors in the West as a whole, which from an economic standpoint is dominated by large metro areas, followed by a look at the non-metro West. Both regions have undergone significant transformations toward a services economy in recent decades.

The West as a Whole

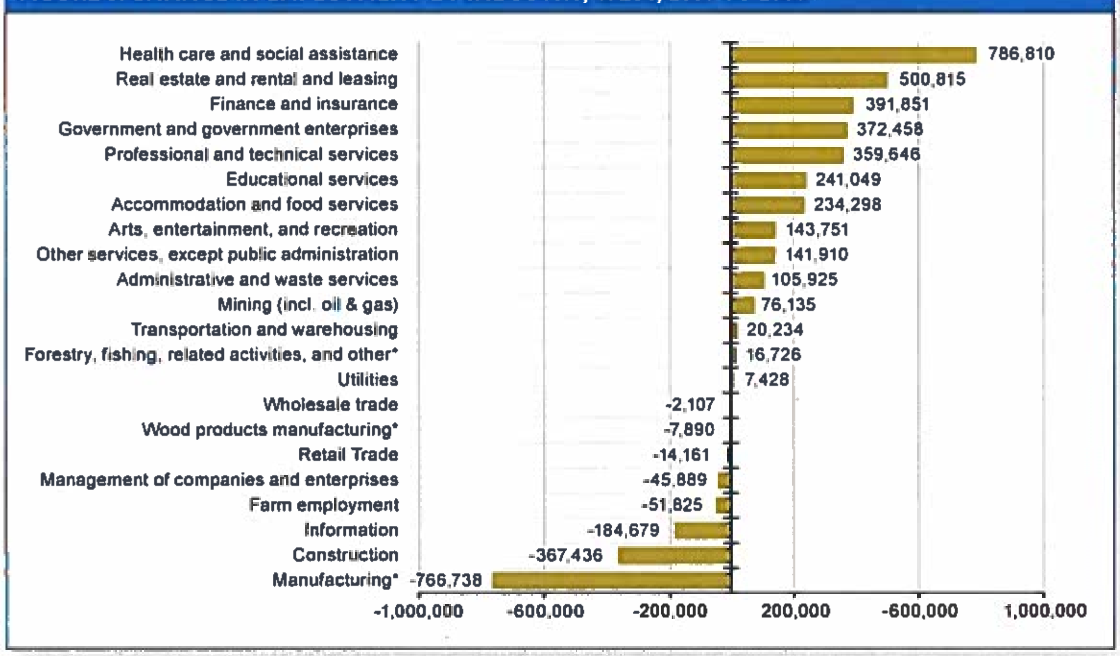
As the line graph below shows, across the West services sectors created 19.3 million net new jobs, or almost 100 percent of net new jobs in the West, during the last four decades. Non-services sectors as a whole are holding steady from an employment standpoint as the broader economy expands.[9]

FIGURE 4: SERVICES VS. NON-SERVICES EMPLOYMENT GROWTH, WEST, 1970 TO 2010



To better understand services sectors, the figures below show recent growth and share of total employment at a more detailed industry level.

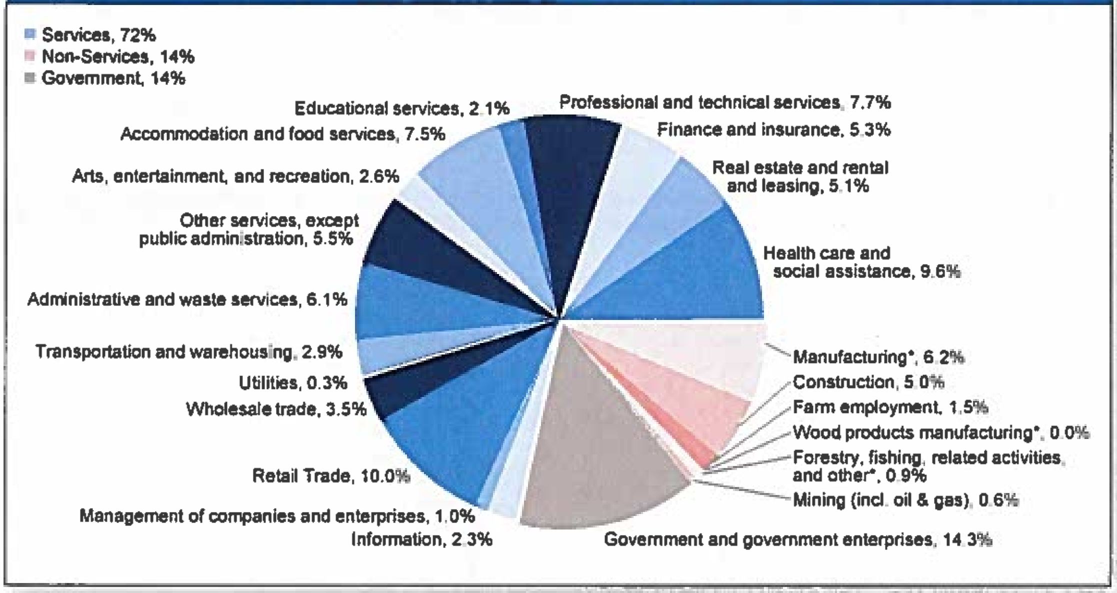
FIGURE 5: CHANGE IN EMPLOYMENT BY INDUSTRY, WEST, 2001 TO 2010[10]



In the West, the top job creators in the last decade were all services sectors, many of them relatively high-paying: health care (+786,810 jobs), real estate (+500,815 jobs), and finance and insurance (+391,851 jobs). By contrast, non-services industries such as manufacturing (-407,192 jobs) and construction (-367,436 jobs) were the leading source of job losses in the West during the last decade.

In 2010, services sectors as a whole accounted for 72 percent and non-services for 14 percent of total employment in the West. Government jobs also are important in the region and made up 14 percent of total employment in the same year.[11]

FIGURE 6: EMPLOYMENT BY INDUSTRY PERCENT OF TOTAL, WEST, 2010

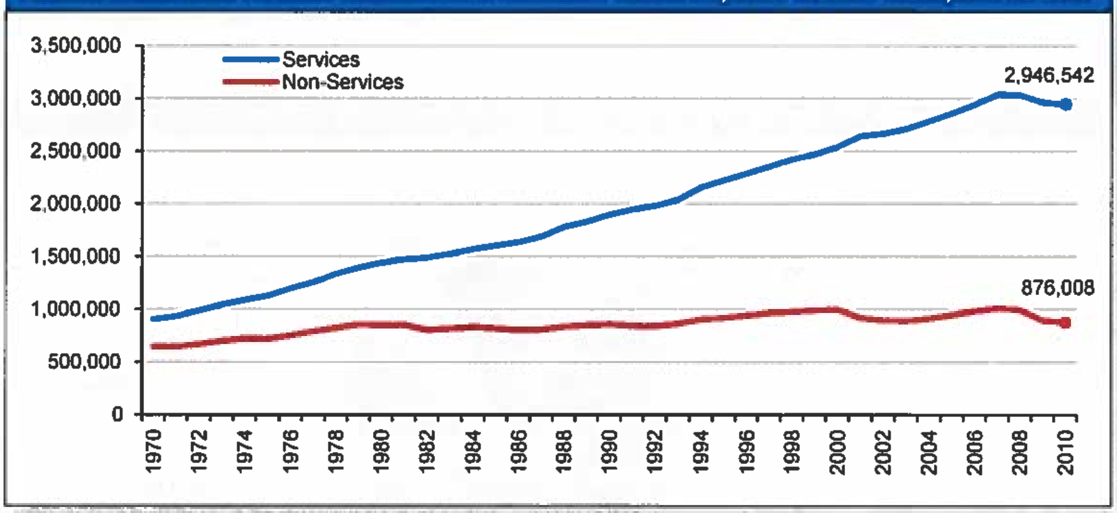


Non-Metro West

While the economies of non-metro areas in the West are smaller in scale and often face challenges related to sector diversity and access to larger markets, here too services sectors lead growth.

From 1970 to 2010, services sectors created more than two million net new jobs, or nearly 100 percent of net new job growth in the non-metro West. Non-services have been roughly flat over this same period.[12]

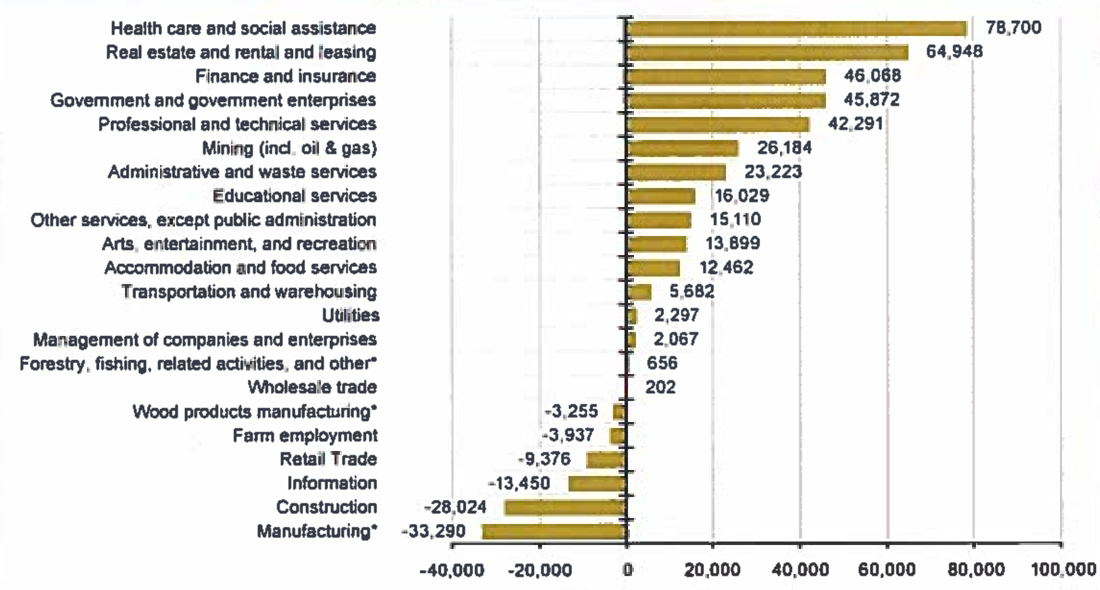
FIGURE 7: SERVICES VS. NON-SERVICES EMPLOYMENT GROWTH, NON-METRO WEST, 1970 TO 2010



During the last decade, the leading job creators in the non-metro West were all services sectors, many of them higher-paying. In fact, they are the same industries posting top job gains in the West as a whole. Health care added 78,700 new jobs, real estate 64,948 new jobs, and finance and insurance 46,068 new jobs from 2001 to 2010.

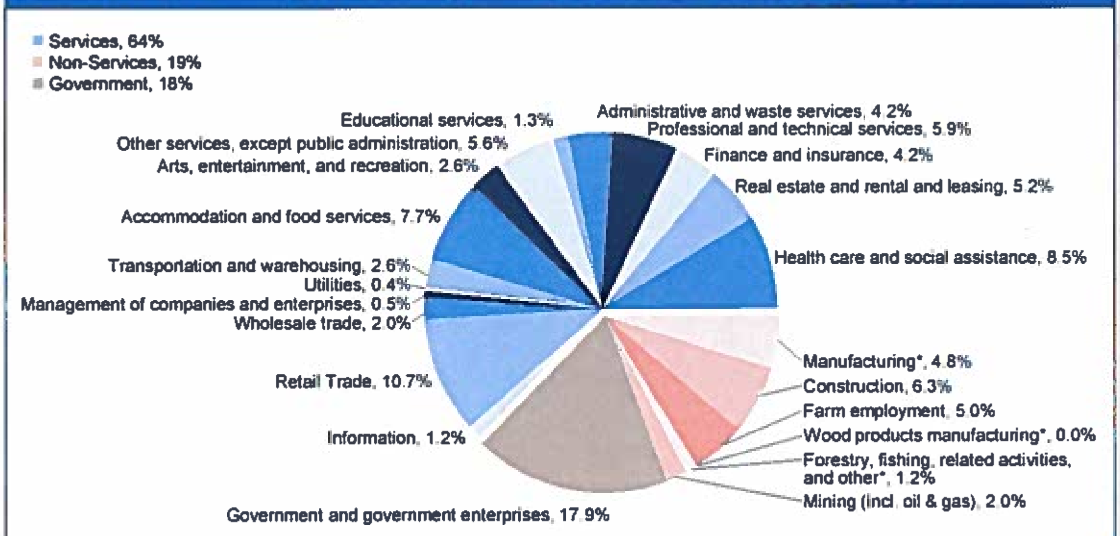
By contrast, non-services industries such as manufacturing (-32,607 jobs) and construction (-28,025 jobs) were the leading source of job losses in the non-metro West in the last decade.

FIGURE 8: CHANGE IN EMPLOYMENT BY INDUSTRY, NON-METRO WEST, 2001 TO 2010



In 2010, services sectors as a whole accounted for 64 percent and non-services for 19 percent of total employment in the non-metro West. Government jobs also are important in the region and made up 18 percent of total employment in the same year.[13]

FIGURE 9: EMPLOYMENT BY INDUSTRY PERCENT OF TOTAL, NON-METRO WEST, 2010



VI. SERVICES INDUSTRIES PREDOMINATE IN MOST WESTERN COUNTIES

As the previous pages show, services employment is driving job growth and is now the dominant form of economic activity in the West, including the non-metro West.

Not surprisingly, services sectors are widespread across western communities and higher-paying services are a key ingredient of many local economies.

FIGURE 10: NUMBER AND SHARE OF WESTERN COUNTIES RELIANT ON SERVICES AND HIGH WAGE SERVICES SECTORS, 2010[4]

	Threshold	# of Counties	% Western Counties
Services	≥ 70% Total Private Jobs	203	49%
High-Wage Services	≥ 15% Total Private Jobs	165	40%

In 2010, services sectors were 70+ percent of total private employment in 203 of 414 western counties, or 49 percent of total. These services-reliant economies are evenly distributed between metro and non-metro counties, though they are represented in a greater share of metro counties. In 2010, 101 metro counties (79% of total metro) and 102 non-metro counties (36% of total non-metro) were significantly reliant on services sectors.

High-wage services sectors are of particular interest to communities seeking economic growth because they indicate greater success developing and attracting the higher-skill aspects of the broader services economy.

Roambi, Solana Beach, CA

We work in a very competitive industry – software development for mobile platforms. You have to be creative to succeed here. You have to be a company where talented people want to work to succeed.

We actively leverage our location and the outdoors to attract and retain our employees. Our engineers love the outdoors and water sports in particular. A lot of them are athletes –about 85 percent. They bring their passion for sports and competition to their work. They are also risk takers and this is a core part of our entrepreneurial culture.

For our employees, taking time to get outdoors is re-energizing. It builds passion and commitment, and is critical to creativity and innovation—this is where the best work happens. It's also a competitive edge for us since not all companies work this way.

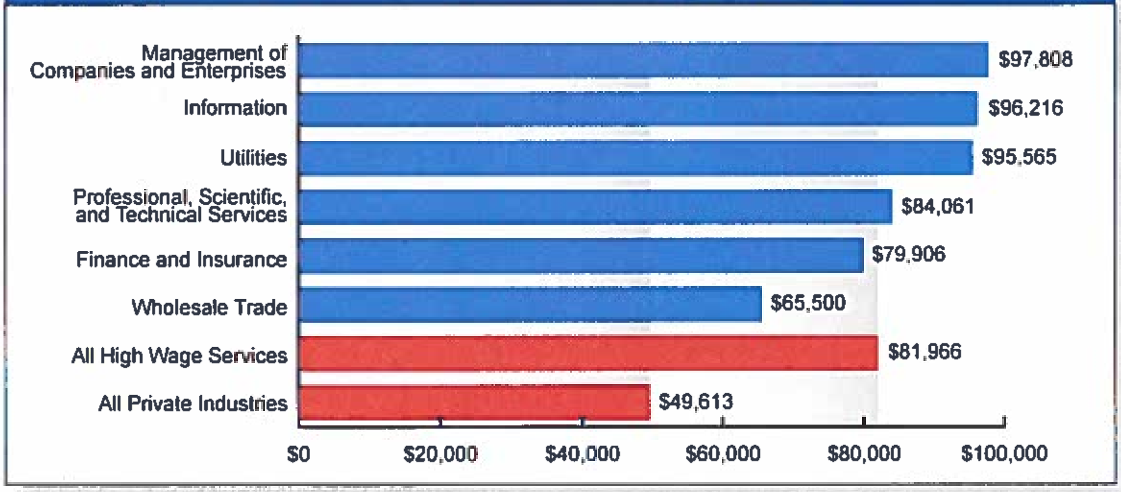
We try to integrate quality of life with the quality of work at our company. We have created a culture where our employees can pursue their passions. This leads to more successful teamwork and a more successful company.

As a result of the type of company we are, we have experienced very minimal turnover in our development team in the last 5 years. This is unusual in our industry, and a great benefit because turnover is expensive and hurts productivity.

—Santiago Becerra, CEO

Six services sectors pay on average better than overall earnings per job for all private industries in the West. They are: information; finance and insurance; management of companies and enterprises; professional, scientific, and technical services; wholesale trade; and utilities. Other broad sectors, such as health care and social assistance, are not considered here because they mix higher- and lower-paying occupations.[15]

FIGURE 11: HIGH-WAGE SERVICES, AVERAGE EARNINGS PER JOB, WEST, 2010[16]



In 2010, average earnings per job in the West for high-wage services as a group were $81,966, compared to $49,613 for all private industries.

In 2010, high-wage services jobs accounted for 15+ percent of total private employment in 165 of 414 western counties, or 40 percent of all western counties. High-wage services are more important to metro than non-metro counties. In 2010, 88 metro counties (69% of total metro) and 77 non-metro counties (27% of total non-metro) were reliant on high-wage services at this level.[17]

VII. NON-LABOR INCOME IS A MAJOR DRIVER OF GROWTH

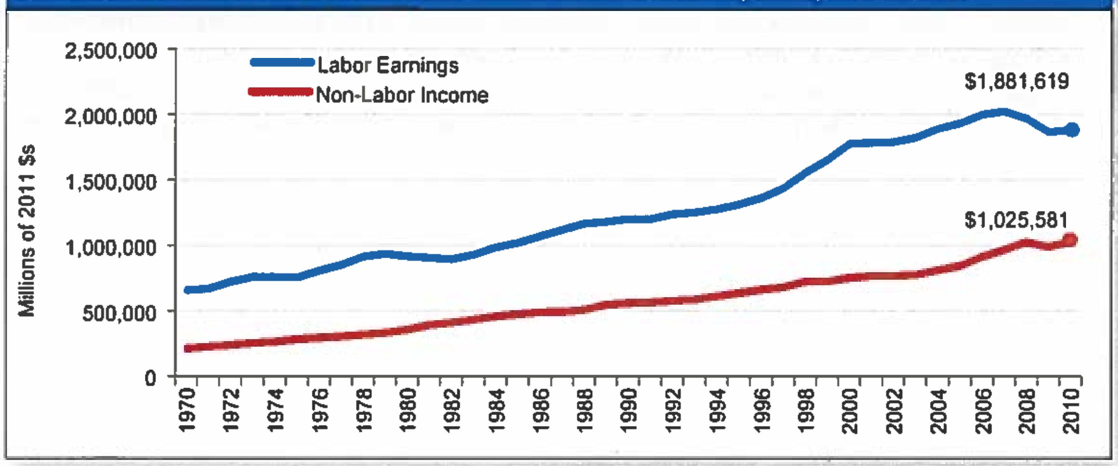
While services have come to define the economy of most western communities, an equally significant factor in local western economies is non-labor income.

Non-labor income consists of dividends, interest, rent (money earned from investments) and government transfer payments to individuals (Social Security, Medicare, etc.).[18]

Both investment income and transfer payments have a significant age-related aspect, and much of their growth and significance is tied to the aging of the U.S. population, accumulated wealth, and entitlements. Only a small portion of transfer payments (6% in the West) covers things like Income Maintenance Benefits ("welfare").[19]

From 1970 to 2010, non-labor income in the West grew from $211 billion to $1 trillion, in real terms, a 385 percent increase. This represents the fastest growing source of new personal income and 35 cents of every dollar of personal income in the West in 2010.[20]

FIGURE 12: LABOR EARNINGS AND NON-LABOR INCOME TRENDS, WEST, 1970 TO 2010



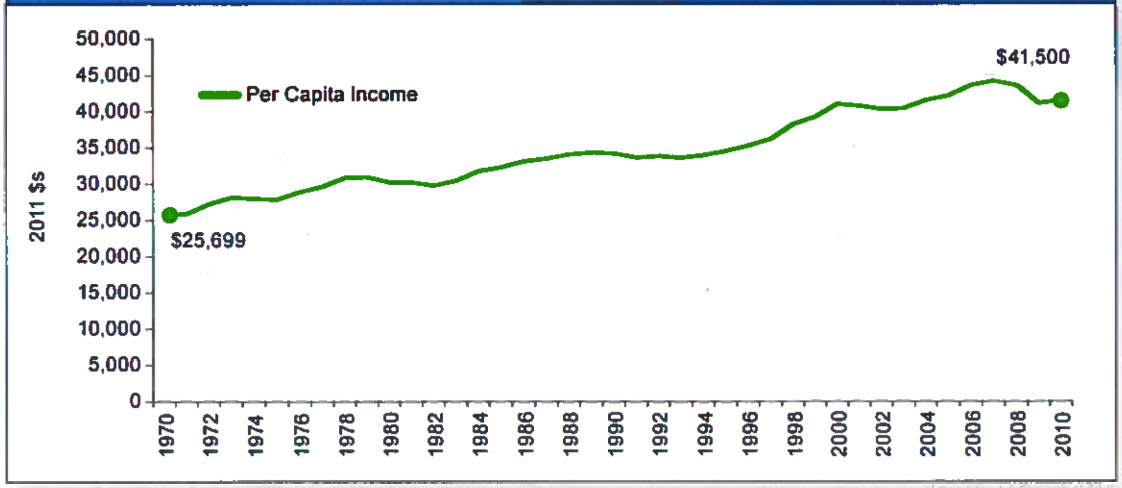
Non-labor income is both significant and widely distributed across the West. All 414 western counties derive 15+ percent of their total personal income from non-labor income sources. Even using a higher threshold of 30+ percent, 382 western counties, or 92 percent of total, relied significantly on non-labor income in 2010.

FIGURE 13: NUMBER AND SHARE OF WESTERN COUNTIES RELIANT ON NON-LABOR INCOME, 2010[21]

	Threshold	# of Counties	% Western Counties
Non-Labor Income	≥ 15% Total Personal Income	414	100%
Non-Labor Income	≥ 30% Total Personal Income	382	92%

Metro and non-metro western counties both depend significantly on non-labor income. In 2010, 113 metro counties (88% of total metro) and 269 non-metro counties (94% of total non-metro) derived 30+ percent of total personal income from non-labor income sources.

FIGURE 14: PER CAPITA INCOME TRENDS, WEST, 1970 TO 2010



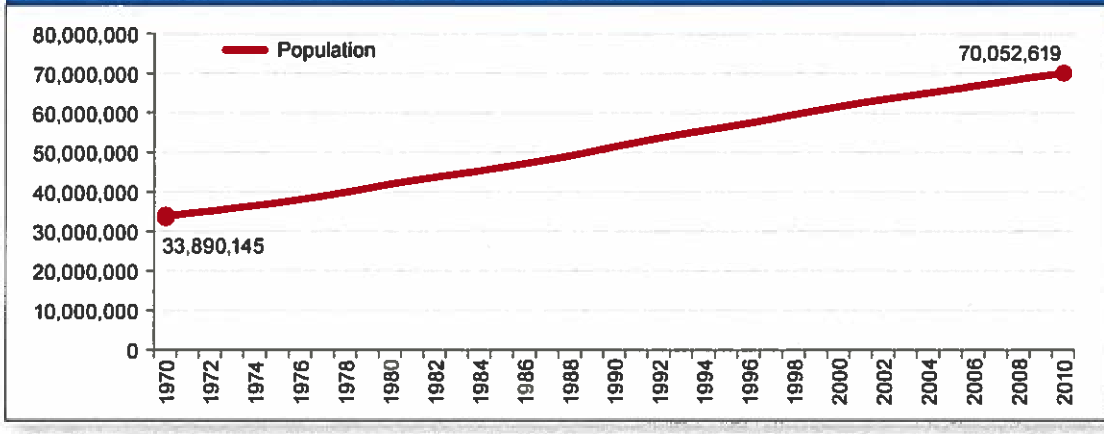
Non-labor income is doubly important: as a source of personal income that is spent in local communities across the West, and because it boosts per capita income, a widely recognized measure of economic well-being. In addition to higher-paying jobs, non-labor income contributed to raising per capita income in the West, in real terms, from $25,699 in 1970 to $41,500 in 2010, a 61 percent increase, enhancing wealth significantly in the region.[22]

VIII. THE WEST IS GROWING AND ATTRACTING NEW RESIDENTS

The ability to attract new people is essential to the vibrancy and long-term health of the West's economy. It is even more important today as companies and individuals are freer to choose where they will locate, and competition is fierce for talented workers who are fueling some the region's fastest growing industries.

The West has the fastest-growing population of any region in the country. An expanding population and the ability to draw people are measures of the West's attractiveness.

FIGURE 15: POPULATION TRENDS, WEST, 1970 TO 2010



During the last four decades the West added 36 million people, more than doubling its population. In 2010, the region's population was more than 70 million people.[23]

Net migration has been an important part of the West's ability to grow. From 2000 to 2010, the West as a whole attracted on average more than 324,000 net new people per year, contributing 39 percent of all regional population growth.[24] In-migration is even more important to the non-metro West, where 49 percent of all population growth resulted from net in-migration during the same time period.

FIGURE 16: NUMBER AND SHARE OF WESTERN COUNTIES RELIANT ON IN-MIGRATION, 2000 TO 2010[25]

	Threshold	# of Counties	% Western Counties
Net In-Migration	≥ 30% Net Population Growth	208	50%
Net In-Migration	≥ 50% Net Population Growth	161	39%

Overall, in-migration accounted for 30+ percent of all net new population growth in the last decade in 208 of 414 western counties, or 50 percent of total. During the same time period, in-migration accounted for 50+ percent of all net new population growth in 161 of 414 western counties, or 39 percent of total.

> *"Fully 87 percent of American voters agree that their 'state and national parks, forests, monuments, and wildlife areas are an essential part of [their] state's quality of life.' A near-unanimous 96 percent of those we polled in six inner West states likewise agreed.... Seven in ten Americans and nine in ten Westerners agree that these public lands are 'an essential part' of their state's economy."* [26]
>
> *—Pollsters David Metz and Lori Weigel*

IX. A NEW COMPETITIVE ADVANTAGE IN THE WEST

The economy of the West, like that of the U.S. and other industrialized economies, has shifted over time from a primary reliance on the extraction and processing of raw materials to the deployment of human skills, technology, and innovation.

In today's economy, the West's largest economic drivers are not directly tied to wood, gold, cattle, or other basic commodities, but rather stem from the growing value-added contributions of knowledge-based sectors across the region.

"Over the past century, the United States has shifted from an economy centered on producing physical goods to one centered on innovation and technology."

"In the twentieth century, competition was about accumulating physical capital. Today it is about attracting the best human capital." [27]

—Enrico Moretti, The New Geography of Jobs

Many of the West's growing industries, such as entertainment, financial services, biotechnology, engineering, and software development, use few if any raw materials. The real economic value—and what is required to be competitive—lies in the knowledge-based occupations that demand specialized training and education.

In the transition from a primarily natural resource-based economy to a knowledge-based economy, the key to being competitive is the ability to cultivate and attract the most educated and talented workforce, and the businesses that employ them. Communities across the West have realized that they can do this by marketing the outdoor quality of life provided by public lands.

Waldron & Co., Seattle, WA

I help enterprises recruit talent to fill key senior level leadership positions.

Increasingly over the years, amenities have become more a part of the discussion with our clients and more important to candidates' decisions about taking a job. It's not just what the job is any longer, but where the job is that matters.

Outdoor recreation is a common topic of conversation in our recruitment efforts. In the West, people make the most of the outdoors—they love to get outside and recreate. It's part of the culture here.

When I ask what the selling points are for a position, ninety percent of the time clients talk about the location. People live in the West because they want to live here. And they expect those they work with will feel the same way.

—Ed Rogan, Vice President

X. BUSINESS LOCATION DECISIONS ARE TIED TO QUALITY OF LIFE

What do communities need to attract the best and the brightest? They require good schools and transportation infrastructure, and high-speed Internet. Increasingly, they also need a high quality of life, with clean air and water, ample recreation opportunities, scenic vistas, and other amenities that draw entrepreneurs and a skilled workforce.

This is precisely where the West excels. The region's wide-open spaces, mountains, canyons, and other spectacular natural features set the West apart from the rest of the country. Because significant portions of these lands are public, and protected as national parks and monuments for example, they are accessible and enjoyed by the West's residents at higher rates than in the rest of the country.[28]

DaVita, Inc., Denver, CO

DaVita is a large and growing health care company. We recently moved to Denver, Colorado, and access to a high-quality outdoors experience was an important part of our decision.

There are several powerful advantages to locating our headquarters in a community with high quality access to the outdoors.

First, a lot of our best people care about the outdoors and so it was just common sense to put people in a place like Denver that provides such easy access to the outdoors.

Second, when it comes to recruiting new teammates, we've found that the type of people who care about the outdoors are generally the ones who will help you create a healthier and more productive culture at work.

And third, we believe that places that care about preserving the outdoors tend to be more community- minded. Quality of land conservation in urban and suburban environments, and in the open West, correlate almost perfectly to having the populations, electorates, and elected officials that make other healthy long-term decisions that focus on overall quality of life.

When we fly people to Denver for an interview, the fact that we can so easily get them up in mountains, take them out on trails and rivers, and show them beautiful outdoor vistas makes it so much easier for us to get them interested in moving here compared to someplace without access to the outdoors.

We also do a number of things directly with the outdoors to help our people become a part of our team. For example, we send teams of employees through our DaVita Outdoor Program right here in Colorado's Rocky Mountains. These outings have become an important way for us to enjoy ourselves, test our limits, and reflect on leadership and DaVita values. They change lives and improve our company's performance.

For DaVita, the outdoors is an unambiguous and fundamental competitive advantage. The kind of people with a passion for the outdoors are likely to succeeded at our company, and our company is likely to succeed when staffed by people with a passion for the outdoors. Another big pick up for us: we are able to hire a lot of talented individuals that other companies want.

—Kent Thiry, CEO

A high-quality outdoor environment along with a culture of innovation gives the West a unique competitive advantage that helps explain why the region's economy is the fastest-growing in the country. As the structure of the U.S. economy and new growth opportunities have shifted to knowledge-based occupations and industries, the factors that determine the location of companies are shifting.

Traditional location factors are relatively less important to firms in knowledge-based enterprises. Thanks to advances in transportation and communication, these companies now have far fewer constraints on where they conduct business. As "footloose" businesses, whose success is relatively independent of location, such companies are less focused on traditional cost factors and more sensitive to the preferences of CEOs and recruitment and retention factors such as access to outdoor recreation and natural landscapes.[29]

Quality of life variables are shifting from "would like" to "must have" location factors. A growing body of research developed over the last 30 years has documented this shift. According to a recent survey, "Quality of life consistently ranks near the top of locational criteria for high-technology, R&D labs and other facilities that are more footloose in relation to traditional cost–sensitive location factors and place a greater emphasis on attracting and retaining skilled labor."[30]

For footloose firms, quality of life factors, ranging from civic pride and public health to the environment and recreation, are more important because these amenities attract businesses, and also make the recruitment and retention of employees easier and more cost effective.[31] For industries where skilled labor is in high demand, quality of life factors can make the difference between hiring, or failing to hire, new workers.[32]

TicketPrinting.com, Bozeman, MT

TicketPrinting.com started in Big Fork, Montana and then moved to Bozeman because it's an incredible place to live and also to tap into the talent coming out of Montana State University.

Our company and others are part of an emerging technology cluster that's thriving, despite our remoteness and small population base, because of the great place this is to live and work.

All of us at TicketPrinting.com are passionate about the outdoors, whether it's fishing, hunting, hiking, or some other activity. We have a strong outdoor ethic, which has become a part of our company culture.

Our quality of life is defined by our public lands and access to them. This gives us and other tech companies in Montana a distinct competitive advantage. We can recruit and retain top talent successfully within and outside the state because of the world-class landscape that surrounds us. And we benefit from a staff that is passionate about where they live and what they do.

I have had customers call just to tell me that my employees are genuinely nice and want to help—that is because of where we live and work, and the kind of culture we have been able to foster here in Montana. In this sense, quality of life makes for a better company.

—Lance Trebesch, CEO

While quality of life factors have grown in importance, many of today's innovative firms also prefer locations that are close to markets, suppliers, competitors, collaborators, and a skilled workforce—what is now often referred to as an attractive business "cluster."[33]

Smaller cities and rural areas that lack scale and depth in specialized areas can still compete for more innovative and growing business sectors, though they may face additional challenges attracting and retaining larger companies. There is evidence that the combination of outdoor amenities, a talented pool of workers, and an entrepreneurial context are stimulating significant economic growth in non-metro areas.[34]

Researchers also have pointed out that public lands in the West, along with rivers, lakes, mountains, and plentiful recreational opportunities, serve as attractants to both business owners and retirees.[35] A recent review of the amenity migration research from around the world noted, "the American West is perhaps the most often-cited example of a region experiencing high rates of population growth related to amenity migration."[36]

XI. PROTECTED PUBLIC LANDS ARE AN ECONOMIC ADVANTAGE

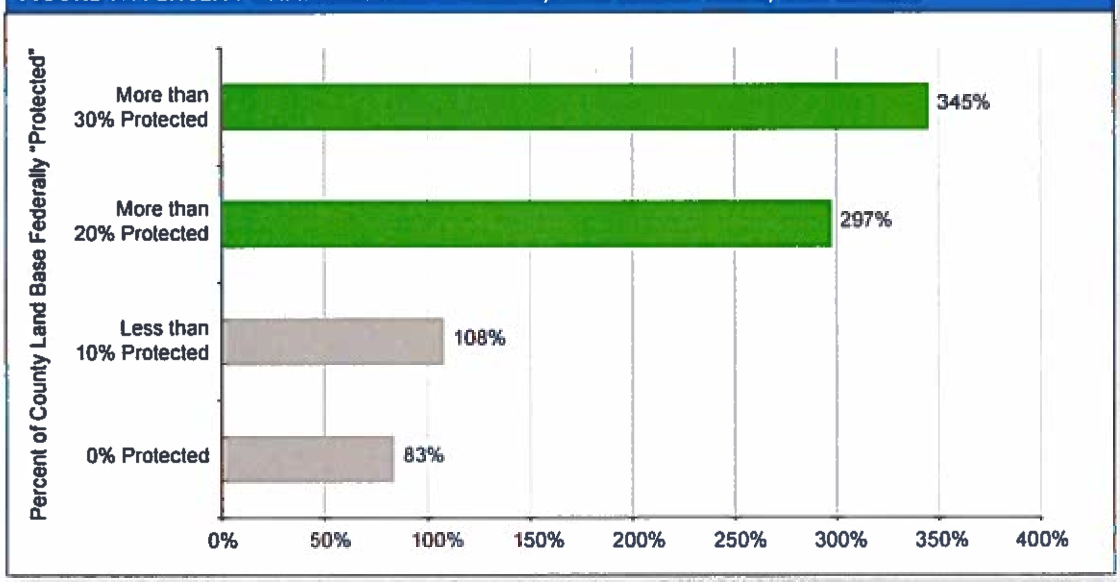
A large and growing body of research has analyzed the economic role of federal public lands and more specifically the economic role of protected federal public lands. The research shows that communities and counties with protected federal public lands generally outperform those without public lands in economic performance measures.[37]

> *In 2011, more than 100 U.S. economists and related academics—including three Nobel Laureates—signed a letter urging the President to "create jobs and support businesses by investing in our public lands infrastructure and establishing new protected areas such as parks, wilderness, and monuments." The letter states that federal protected public lands are essential to the West's economic future, attracting innovative companies and workers, and contributing a vital component of the region's competitive advantage.*[38]
> *—Economist Letter on Value of Public Lands*

Recent research by Headwaters Economics found that for the non-metro West there are important employment and personal income benefits associated with the presence in a county of protected federal public lands.

From 1970 to 2010, western non-metro counties with more than 30 percent of the county's land base in federal protected status increased jobs by 345 percent. As the share of federal lands in protected status goes down, the rate of job growth declines as well. Non-metro counties with no protected federal land increased jobs by 83 percent.[39]

FIGURE 17: PERCENT CHANGE IN EMPLOYMENT, NON-METRO WEST, 1970 TO 2010



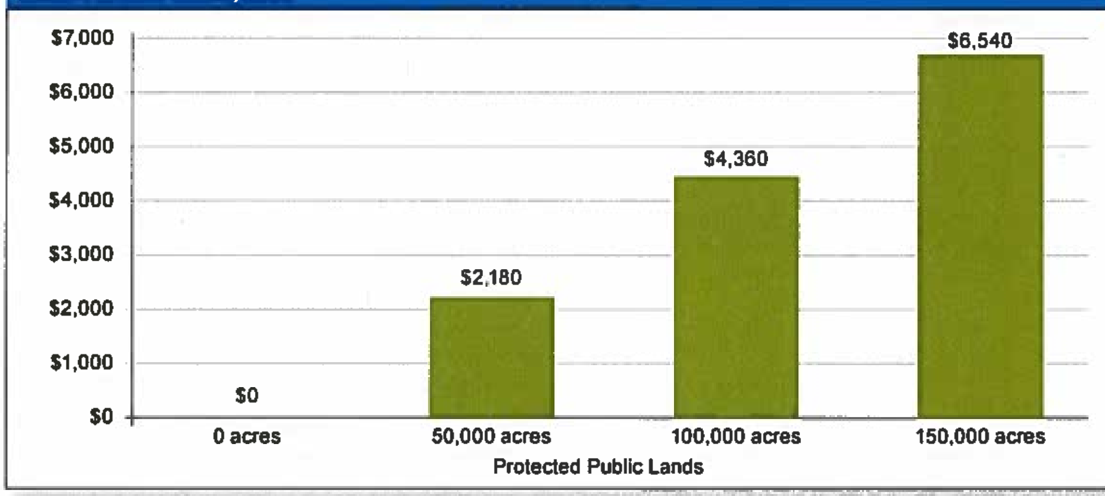
> *"Small business owners believe protecting public lands would positively impact small business opportunities, local job growth, state economies and more: 65 percent of owners believe designating new national parks and monuments would enhance local jobs and the economy... and 52 percent agree it would help their state attract and retain new business and entrepreneurs."* [40]
>
> *—Small Business Majority Poll Conducted in Arizona, Colorado, Nevada, and New Mexico*

There is also evidence that people are better off economically when they live near protected public lands. In addition to employment benefits, there are personal income rewards—in particular higher per capita income.

Looking at the West's 286 non-metro-counties, a statistical analysis found a meaningful relationship between the amount of protected public land and higher per capita income levels in 2010.[41]

The effect protected federal lands have on per capita income can be most easily described in this way: on average, western non-metro counties have a per capita income that is $436 higher for every 10,000 acres of protected federal lands within their boundaries.

FIGURE 18: AVG. INCREASE IN PER CAPITA INCOME FROM PROTECTED PUBLIC LANDS, NON-METRO WEST, 2010



The chart above shows four scenarios, ranging from 0 to 150,000 acres of protected public lands in non-metro western counties. The increase in per capita income explained by protected public lands ranges from $2,180 to $6,540. For example, a non-metro western county with 100,000 acres of protected public lands will have on average a per capita income that is $4,360 higher than a county with no protected public lands. To put this premium in perspective, the average per capita income for all non-metro western counties was $34,870 in 2010.[42]

Our research and that of others clearly show that protected public lands are a competitive economic advantage in the West, supporting faster rates of job growth and higher levels of per capita income. These benefits should increase as the region, including non-metro counties, continues to shift toward a knowledge-based economy. This raises the important question of what federal, state, and private policies and investments will maximize the value of protected public lands for western businesses and communities.

XII. REFERENCES

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5 Protected Federal Lands: We adopted the definition of "protected public lands" from: Rasker, R., P.H. Gude, J.A. Gude, and J. van den Noort. 2009. The economic importance of air travel in high-amenity rural areas. Journal of Rural Studies 25: 343–353. Here specific federal land designations of the National Park Service (NPS), the Forest Service (FS), the Bureau of Land Management (BLM), or the Fish and Wildlife Service (FWS) were considered protected. These designations are: National Parks and Preserves (NPS), Wilderness (NPS, FWS, FS, BLM), National Conservation Areas (BLM), National Monuments (NPS, FS, BLM), National Recreation Areas (NPS, FS, BLM), National Wild and Scenic Rivers (NPS, FS, BLM), Waterfowl Production Areas (FWS), Wildlife Management Areas (FWS), Research Natural Areas (FS, BLM), Areas of Critical Environmental Concern (BLM), and National Wildlife Refuges (FWS). Lands administered by other federal agencies (including the Army Corps of Engineers, Bureau of Reclamation, other Department of Agriculture, Department of Defense, Department of Energy, and Department of Transportation) were not included, nor were state, local, or private lands. This definition of protected public lands attempts to include areas that have a higher level of managerial and commercial use restrictions than other federal lands and a less changeable status than other designations (for example, Wilderness Study Areas and Inventoried Roadless Areas).

Other Federal Lands: NPS, FS, BLM, FWS lands with designations other than those listed above.

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7 See, for example, Cronon, William. Nature's metropolis: Chicago and the Great West. WW Norton & Company, 1992.

8 For details on services industries, see North American Industry Classification System (NAICS) definitions, available here: http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007.

9 U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA25 and CA25N.

10 Some industry categories have been modified from the original source to better illustrate employment in sub-sectors that are important to the western economy. The asterisks in these charts indicate the following. Wood Products Manufacturing is a sub-set of total Manufacturing and consists of the wood product (NAICS 511) and paper (NAICS 537) manufacturing sectors. The Bureau of Economic Analysis does not report employment at this NAICS level (i.e., the 3-digit level), but does provide personal income at this level. To estimate employment for these sectors at the 3-digit level, we calculated a ratio consisting of personal income earned in these sectors divided by personal income earned in all manufacturing. We multiplied this ratio by total manufacturing employment to estimate the number of jobs in wood products and paper manufacturing. Manufacturing consists of total manufacturing minus Woods Products Manufacturing. Forestry is part of Forestry, Fishing, Related Activities, and Other and consists of the non-manufacturing components of the timber industry, such as growing and harvesting.

11 U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA25N.

12 U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA25 and CA25N.

13 U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA25N. Because this employment aggregation consists of county-level data, some underlying values at the industry level have been withheld by the U.S. Department of Commerce in accordance with federal data reporting guidelines and totals do not add to 100%.

14 U.S. Department of Commerce. 2012. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table CA25N.

15 The 2-digit NAICS codes for high-wage services used in this report are: Information (51); Finance and Insurance (52); Management of Companies and Enterprises (55); Professional, Scientific, and Technical Services (54); Wholesale Trade (42); and Utilities (22).

16 See previous reference for NAICS codes. Average wage data are from: U.S. Department of Labor. 2012. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

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MICHIGAN

OUTDOOR INDUSTRY ASSOCIATION

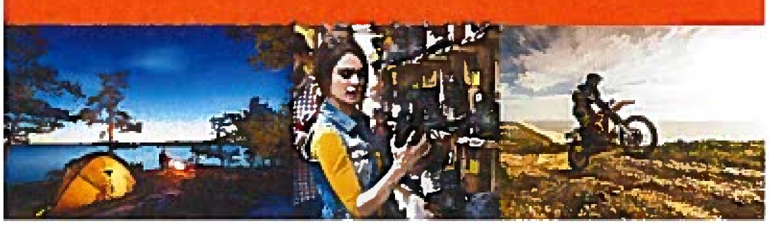
63% OF MICHIGAN

RESIDENTS PARTICIPATE IN OUTDOOR RECREATION EACH YEAR

Communities across Michigan recognize that outdoor recreation supports health, contributes to a high quality of life and—perhaps most importantly—attracts and sustains employers and families. Investing in outdoor infrastructure attracts employers and active workforces, ensuring those communities thrive economically and socially.

More than twice as many direct Jobs in Michigan **DEPEND ON OUTDOOR RECREATION** (232,000) as on the aerospace industry (105,000)[1]

Michigan residents are more likely to **PARTICIPATE IN KAYAKING AND CAMPING** than the average American



IN MICHIGAN OUTDOOR RECREATION GENERATES:

$26.6 BILLION
IN CONSUMER SPENDING ANNUALLY

232,000
DIRECT JOBS

$7.5 BILLION
IN WAGES AND SALARIES

$2.1 BILLION
IN STATE AND LOCAL TAX REVENUE

[1] Aerospace Industries Association

OUTDOOR RECREATION IS A POWERFUL ECONOMIC ENGINE

Outdoor recreation is among our nation's largest economic sectors, representing the lifeblood of thousands of American communities and providing livelihoods for millions of American workers.

THE NATION'S OUTDOOR RECREATION ECONOMY GENERATES:

$887 BILLION
IN CONSUMER SPENDING ANNUALLY

7.6 MILLION
AMERICAN JOBS

$65.3 BILLION
IN FEDERAL TAX REVENUE

$59.2 BILLION
IN STATE AND LOCAL TAX REVENUE

GET INVOLVED

1. Visit the OIA Advocacy Center at **outdoorindustry.org/advocacy** to learn more about the issues and actions affecting outdoor recreation.
2. Educate your elected officials about the outdoor recreation economy, how it can support healthy economies and healthy communities in your neighborhood and encourage policies that promote it.
3. Go outside and enjoy the public lands and waters that are our nation's treasures. They belong to you.

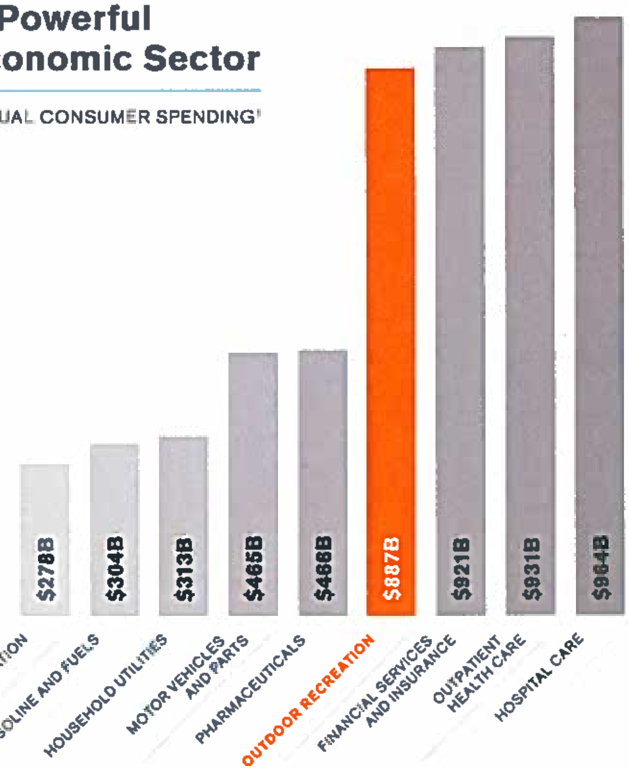
OUTDOOR INDUSTRY ASSOCIATION
TOGETHER WE ARE A FORCE

2580 55TH STREET
SUITE 101
BOULDER, CO 80301

OUTDOORINDUSTRY.ORG

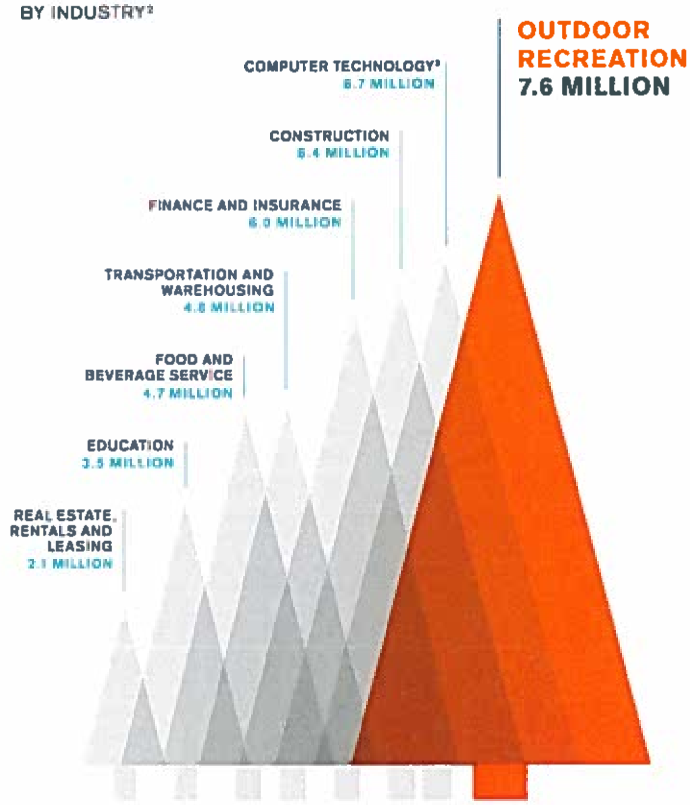
A Powerful Economic Sector

ANNUAL CONSUMER SPENDING[1]



Job Comparison

BY INDUSTRY[2]



[1] Bureau of Economic Analysis
[2] Bureau of Labor Statistics
[3] Computing Technology Industry Association

OUTDOOR RECREATION IS A BELOVED AMERICAN PASTIME

Americans are passionate about and loyal to their outdoor pursuits. The continued dynamic growth of the outdoor recreation economy is inarguable evidence of its contribution to the nation's social and financial growth.

Few other sectors of the American economy generate or maintain the same level of enthusiasm over time and across generations as outdoor recreation. It is America's pastime.

EACH YEAR AMERICANS SPEND MORE ON

TRAIL SPORTS GEAR ($20 BILLION)	THAN ON	**HOME ENTERTAINMENT** ($18 BILLION)[17]
WATER SPORTS GEAR ($14 BILLION)	THAN ON	**MOVIE TICKETS** ($11 BILLION)[18]
CYCLING AND SKATEBOARDING ($97 BILLION)	THAN ON	**VIDEO GAMES** ($61 BILLION)[19]

MORE AMERICANS PARTICIPATE IN OUTDOOR RECREATION EACH YEAR

145 MILLION

THAN ATTEND NFL, NBA, MLB AND NHL GAMES COMBINED (134 MILLION)[20]

SPENDING ON **SNOW SPORTS RESULTS IN MORE AMERICAN JOBS**

695,000

THAN THE EXTRACTIVE INDUSTRIES IN THE UNITED STATES (627,000)[21]

SPENDING ON **HUNTING SUSTAINS MORE AMERICAN JOBS**

195,000

THAN THE COMBINED U.S. WORKFORCES OF APPLE (66,000) AND MICROSOFT (64,000)[22]

[17] The Digital Entertainment Group.
[18] Motion Picture Association of America.
[19] SuperData LLC Games & Interactive Media Intelligence.
[20] Combined attendance at National Football League, Major League Baseball, National Basketball Association and National Hockey League games.
[21] Bureau of Labor Statistics.
[22] Apple Job Creation Report. Microsoft Workforce Demographics Report.