



THE CHANGING ECONOMICS OF OUTDOOR RECREATION

Land
Water
People





Brad Garmon

Director of Conservation, MEC

- State Parks and Outdoor Recreation Blue Ribbon Panel
- DNR Managed Public Land Strategy
- Pure Michigan Strategic Plan



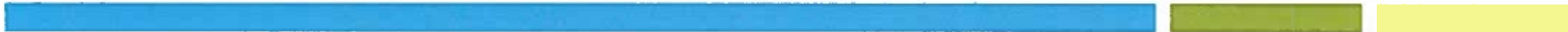
Cara Zurbel

Community Engagement Manager, Gazelle Sports

- Founded in downtown Kalamazoo in 1985 to “actively pursue, encourage and celebrate a healthy lifestyle”
- Locations in Holland, Grand Rapids, Kalamazoo, Northville, and Birmingham
- A Certified Benefit Corporation awarded by B Lab, a non-profit group that promotes sustainable business practices.
- Organizes and/or supports over 200 community events throughout the year.

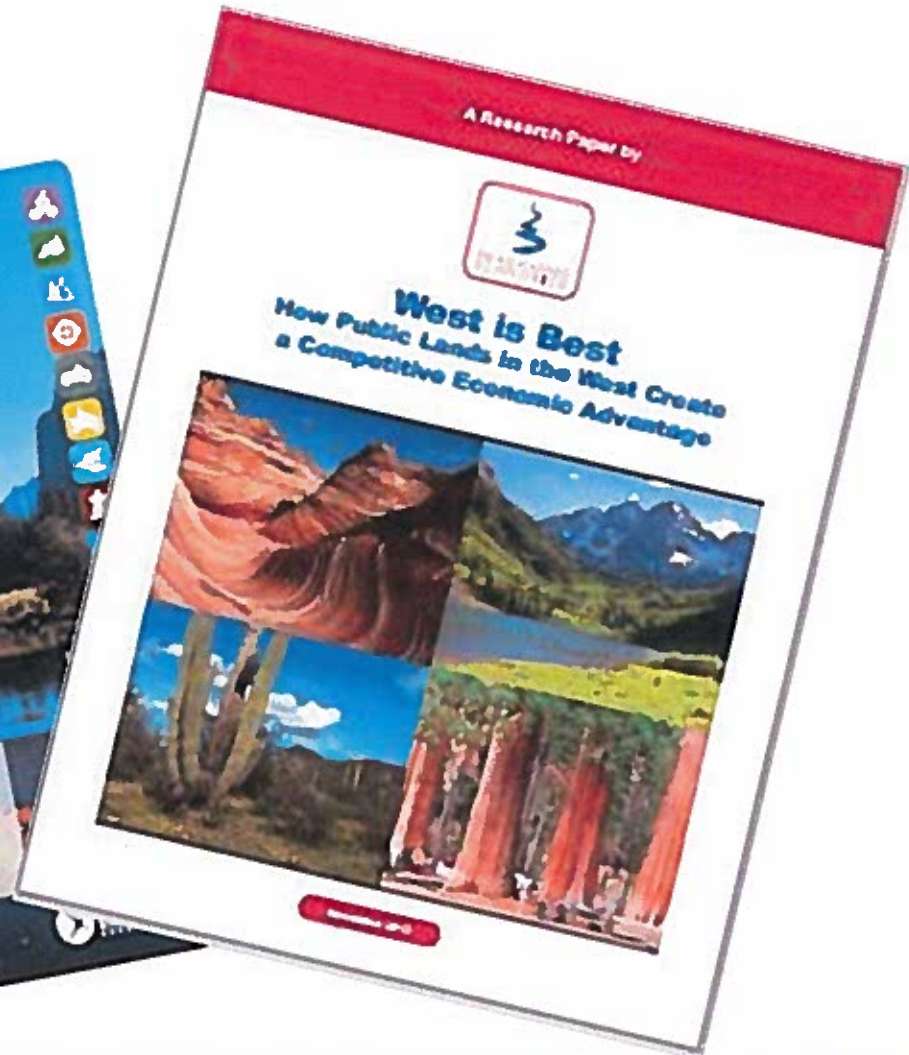
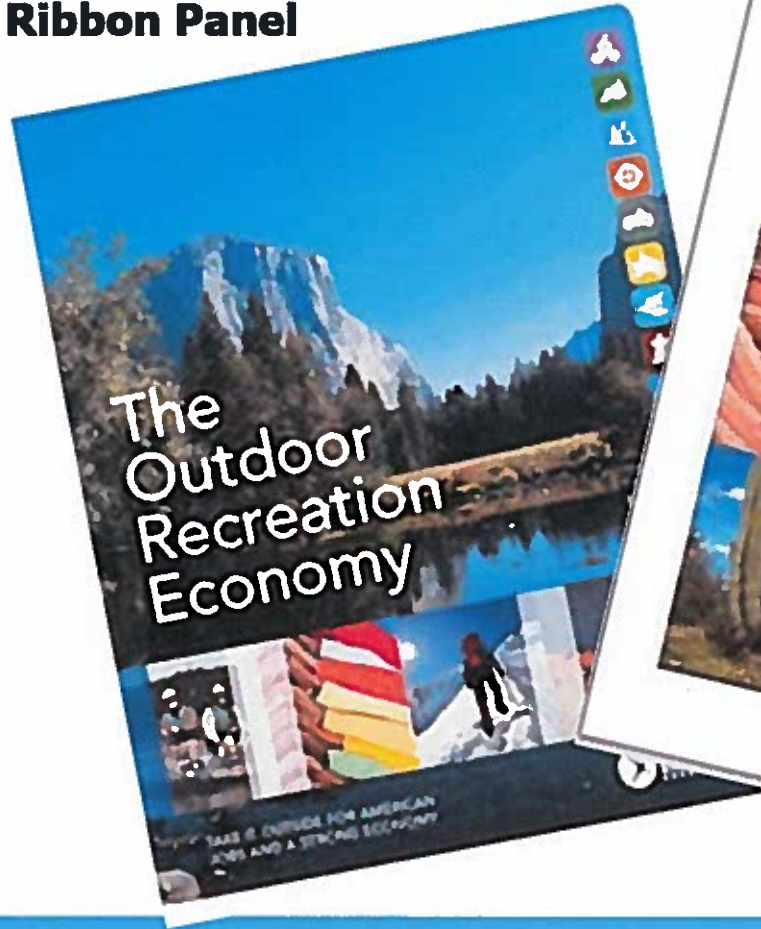
Perspectives on Michigan's Recreational Assets

- Michigan Has a Huge Outdoor Recreation Economy
 - \$26.6 Billion in Consumer Spending -- similar to Colorado, larger than many other states
 - 232,000 Direct Jobs (compared to 35,000 in forestry, 23,000 in oil and gas)
- Outdoor Recreation is important to Michigan in new and different ways
 - Attracting and retaining talent and business
 - Community identity and public health
- Recreation is changing, and Michigan is well-positioned in land and assets
 - Rise in running and fitness-based recreation
 - Rise in paddlesports and year-round activities nearer to home





**Michigan State Parks
& Outdoor Recreation
Blue Ribbon Panel**



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



63%
OF MICHIGAN
RESIDENTS PARTICIPATE
IN OUTDOOR RECREATION
EACH YEAR



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

... compared
to 48.8% of
the US
population in
2016

Outdoor Industry
Association, 2017

Michigan's Recreation Economy

VASA Pathway Economic Impact Study

- Events-based study, including "Mud, Sweat & Beers Fat Tire Fest," the "Remembrance Run," Bell's "Iceman Cometh," and the "North American Vasa Festival of Races."
- Events generate **\$2.6 million** in direct spending to the regional economy on an annual basis.
- Visitors spend more than **\$3,700** per year each on equipment, lodging, clothing, etc.
- Total Michigan direct spending annually of **\$23.5 million**.

Glacial Hills Pathway and Natural Area Economic Impact Study

- Trail system and natural area draw 26,000 daily visitors annually.
- 58% of visitors don't live in Antrim County year round.
- Majority combine their visit with spending in local businesses
- Economic impact on the Bellaire and Antrim County estimated at **\$1.45 million annually**.

MERRELL 

**STORMY
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KL
OUTDOOR
KEEP LIVING





Lansing State Journal

THE POWER OF KNOWING

Nov. 30, 2013

Educated, young talent vital factor for success

“The ‘knowledge economy’ is fueled by young talent — people with four-year-college degrees.

“There are more 25-to 34-year olds with four-year degrees in the Minneapolis metro area than in all of Michigan.”

Doug Stites, retired CEO of Capital Area Michigan Works. Nov. 30, 2013



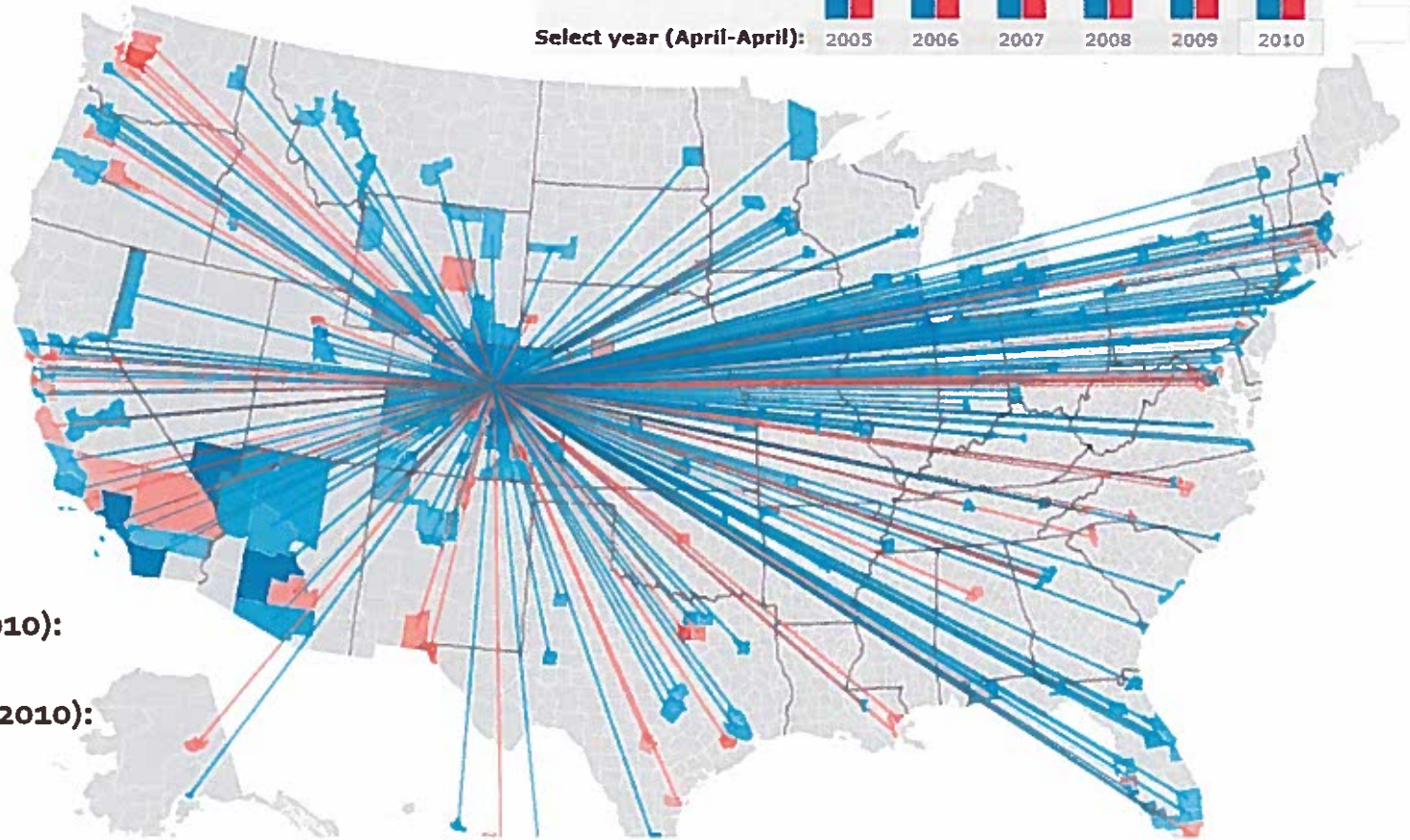
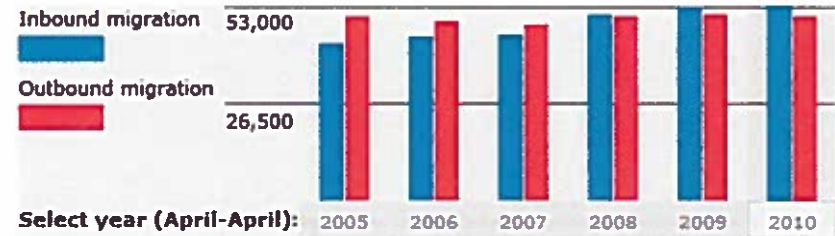
Most Desired Community Assets for recent Michigan college graduates

Ease of commute from home to office	67%
Quality of K12 education system	53%
Variety of outdoor amenities - parks, bike & hiking trails, etc.	52%
Good paying job opportunities	50%
Affordable housing market	46%
Opportunities to advance my career (not just start it)	42%
Variety of social activities - restaurants, bars clubs, shopping	37%
Variety of cultural activities - theaters, galleries, concerts	34%
Public safety, low crime	29%
Close to my family	24%

Michigan Colleges Foundation Study , April 2011

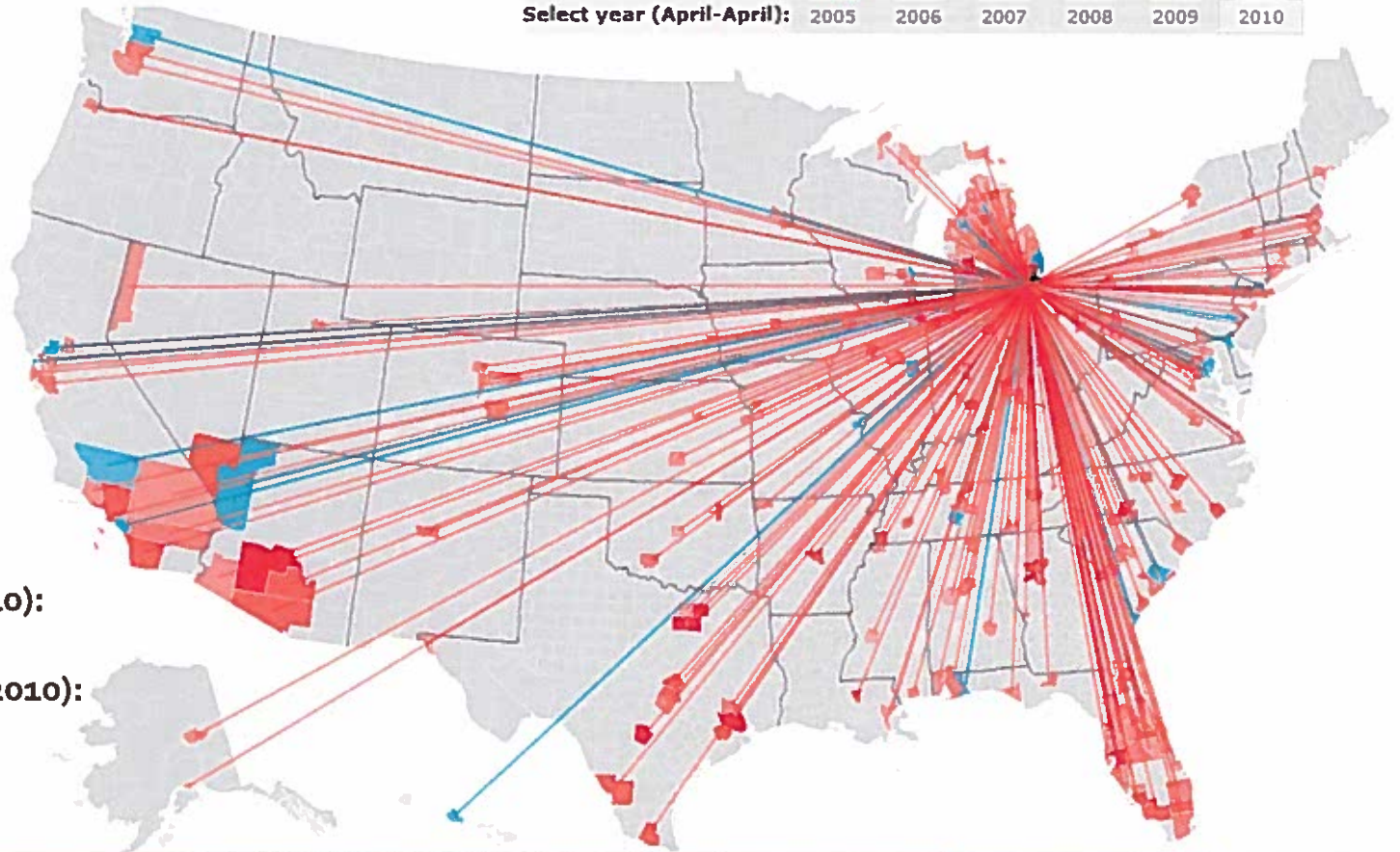
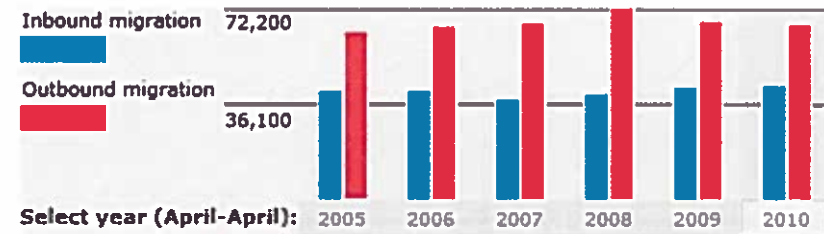
Denver, CO

Population (2010): 600,158
Population (2005): 551,691
Inbound income per cap. (2010):
\$24,400
Outbound income per cap. (2010):
\$29,400



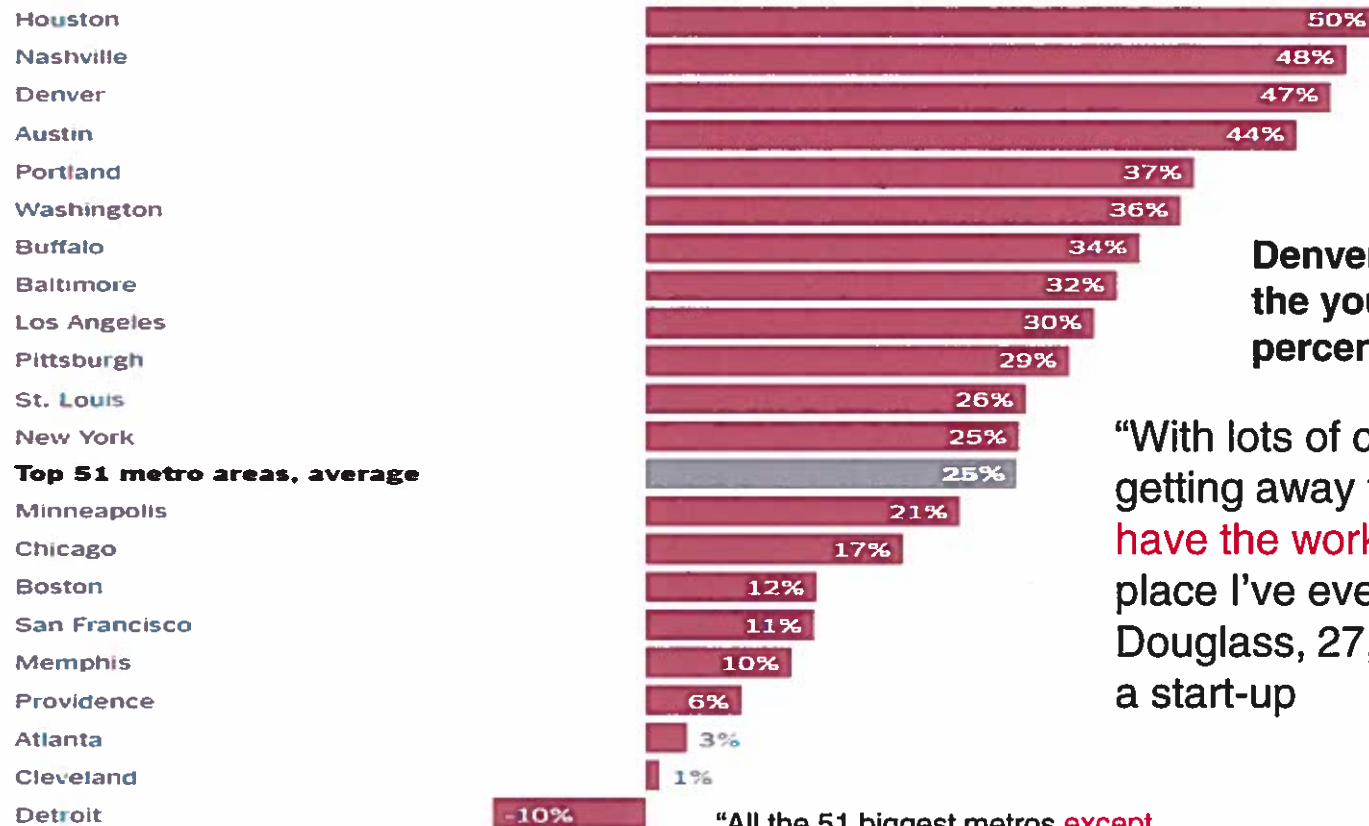
Detroit, MI

Population (2010): 1,820,584
Population (2005): 1,960,263
Inbound income per cap.(2010):
\$17,500
Outbound income per cap. (2010):
\$19,800



“Where Young College Graduates Are Choosing to Live.” NYTimes Oct. 20, 2014

Percent change in the number of college graduates aged 25 to 34, from 2000 to 2012



Denver Colorado's "population of the young and educated is up 47 percent since 2000."

"With lots of cultural things to do and getting away to the mountains, **you can have the work-play balance** more than any place I've ever lived," said Colleen Douglass, 27, a video producer at Craftsby, a start-up

"All the 51 biggest metros **except Detroit** have gained young talent. . ."

Source: Joe Cortright, City Observatory



COLORADO OFFICE OF ECONOMIC
DEVELOPMENT AND INTERNATIONAL
TRADE

WHY ARE SO MANY PEOPLE HAPPY TO WORK FOR THE 100 BEST COMPANIES

December 21, 2016 | Blog

"The 100 Best Companies are the cream of the crop when it comes to their employees. They are the best of the best. They are the ones you want to work for."

Featured 30 Colorado companies in the 2016 list.



People + Place = Possibilities

Then

Cheap place to do business was key.

Attracting companies, any large company.

Industrial sector (manufacturing) focus.

A high-quality physical environment was a luxury.

People followed jobs.

Government led economic development.

Now

Being rich in talent and ideas is key.

Attracting talented and educated people.

Sector diversity and clustering focus.

Physical and cultural amenities are key in attracting knowledge workers.

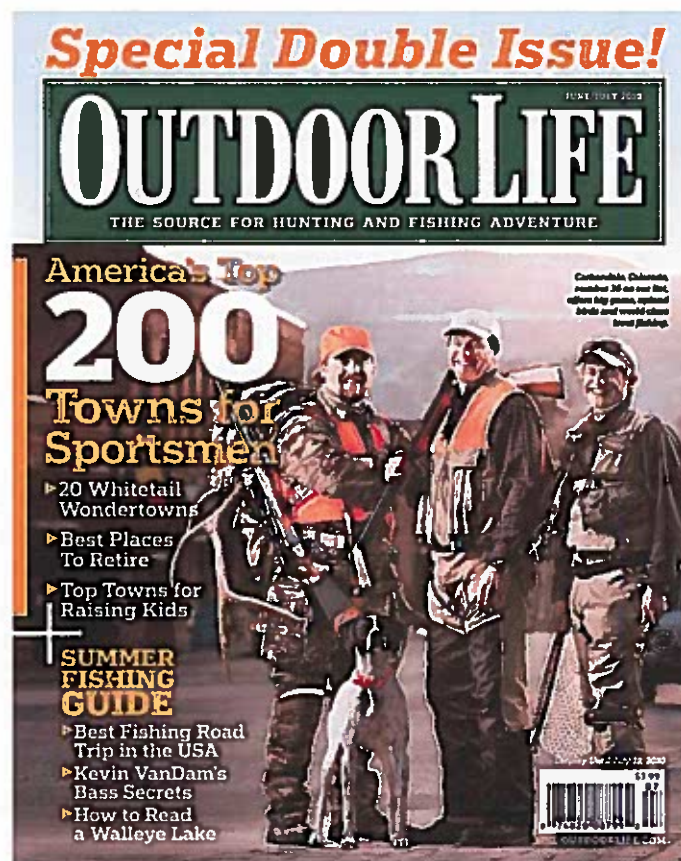
Talented, well-educated people choose location first, then look for a job.

Bold partnerships across sectors.

Outdoor Recreation is Changing

- **Running**, including jogging and trail running, **was the most popular activity** among Americans when measured by both number of participants and by number of total annual outings.
- The **biggest motivator** for outdoor participation **was getting exercise**.
- 144.4 million Americans, or **48.8% of the US population**, participated in an outdoor activity at least once in 2016.





outdoor activities among young adults

Outdoor Participants, ages 18-24

Most Popular Outdoor Activities by Participation Rate

- 1. Running, Jogging and Trail Running**
31% of American young adults / 9.2 million participants
- 2. Hiking**
18% of American young adults / 5.3 million participants
- 3. Car, Backyard, Backpacking and RV Camping**
15% of American young adults / 4.3 million participants
- 4. Road, Mountain and BMX Biking**
14% of American young adults / 4.2 million participants
- 5. Freshwater, Saltwater and Fly Fishing**
14% of American young adults / 4.2 million participants

Outdoor Foundation: 2017 Participation Report





outdoor activities

Outdoor Participants, ages 6+

Most Popular Outdoor Activities by Participation Rate

- 1. Running, Jogging and Trail Running**
18% of Americans / 52.3 million participants
- 2. Freshwater, Saltwater and Fly Fishing**
16% of Americans / 47.2 million participants
- 3. Road Biking, Mountain Biking and BMX**
15% of Americans / 45.8 million participants
- 4. Hiking**
14% of Americans / 42.1 million participants
- 5. Car, Backyard, Backpacking and RV Camping**
14% of Americans / 40.5 million participants

Outdoor Foundation: 2017 Outdoor
Participation Report



outdoor activities among youth

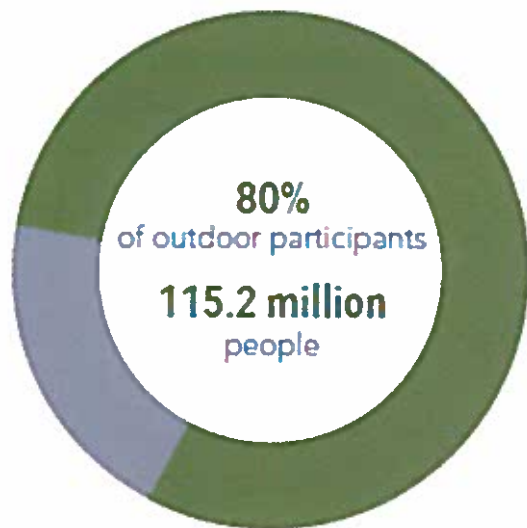
Outdoor Participants, ages 6-17

Most Popular Outdoor Activities by Participation Rate

1. Road, Mountain and BMX Biking
25% of American youth / 12.9 million participants
2. Running, Jogging and Trail Running
21% of American youth / 11.0 million participants
3. Freshwater, Saltwater and Fly Fishing
21% of American youth / 11.0 million participants
4. Car, Backyard, Backpacking and RV Camping
21% of American youth / 10.7 million participants
5. Hiking
15% of American youth / 7.4 million participants

Outdoor Foundation: 2017 Topline Report





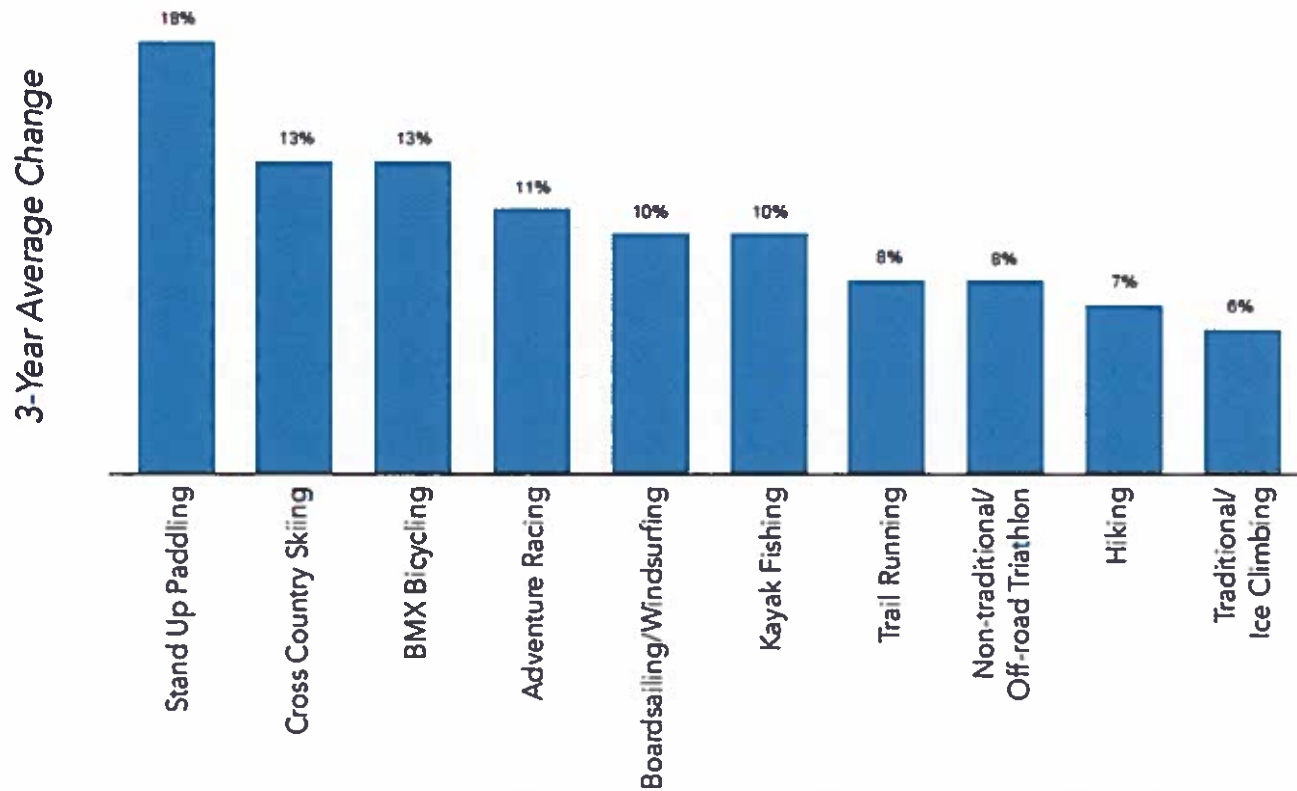
Desire to Participate

In 2016, 80% of outdoor participants wanted to recreate outside more often, while 20% were content they were.



Top Outdoor Activities for Growth

Outdoor Foundation: 2017 Outdoor Recreation Participation Topline Report





WWW.ENVIRONMENTAL
COUNCIL.ORG

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we believe...

movement

can change your life

in giving back

to the communities we call home

moving together

creates healthier, happier
communities

in celebrating

health & fitness

IN EMPOWERING

others to move



We are Gazelle Sports

HOLLAND | GRAND RAPIDS | KALAMAZOO | NORTHVILLE | BIRMINGHAM

Gazelle Sports- Outdoor Retail

Retail Excellence

- Outdoor and Running/Hiking- Active Lifestyle
- Apparel, Shoes, Accessories and Equipment

Community Involvement

- 5k, 10k, Half Marathon and Marathon Training
- Weekly Trail Group Runs
- Community Event Sponsorship

Gazelle Sports Owned Events

- 7 annual events- 100% of proceeds donated to charity partners



Running Event Participation in Total

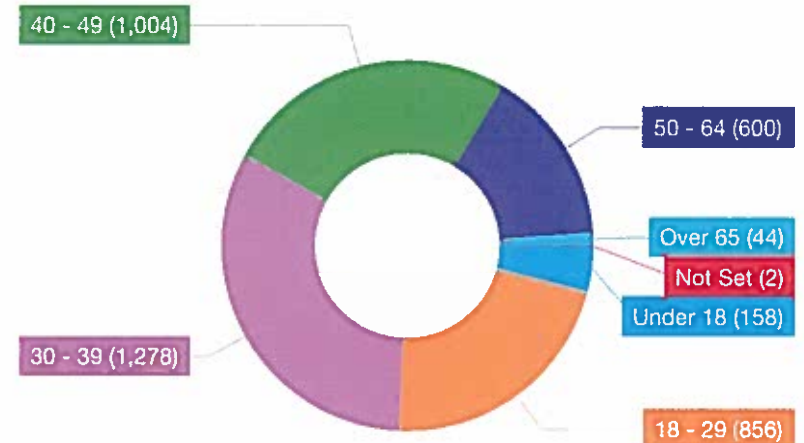
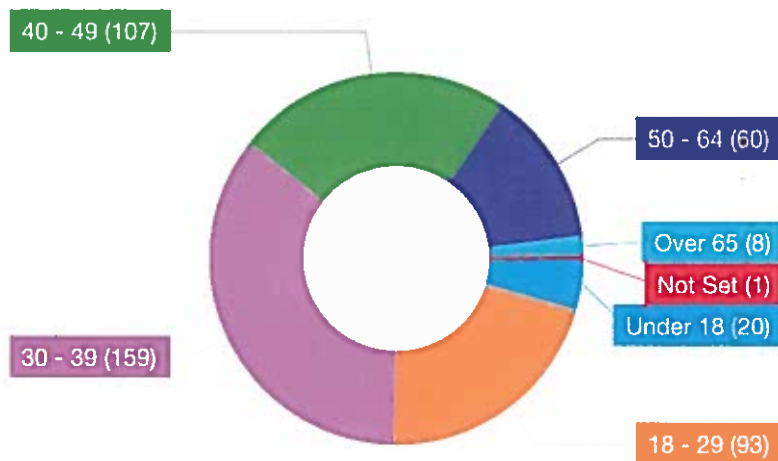
In 2016 & 2017 at Gazelle Sports Alone:

- Over 179 events hosted
- Over 32,523 participants
- Over \$500,000 in revenue generated by registration

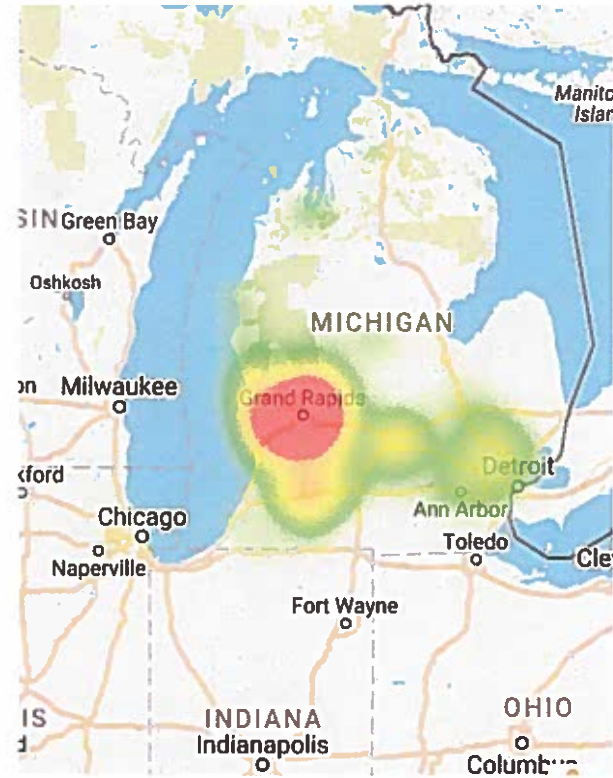
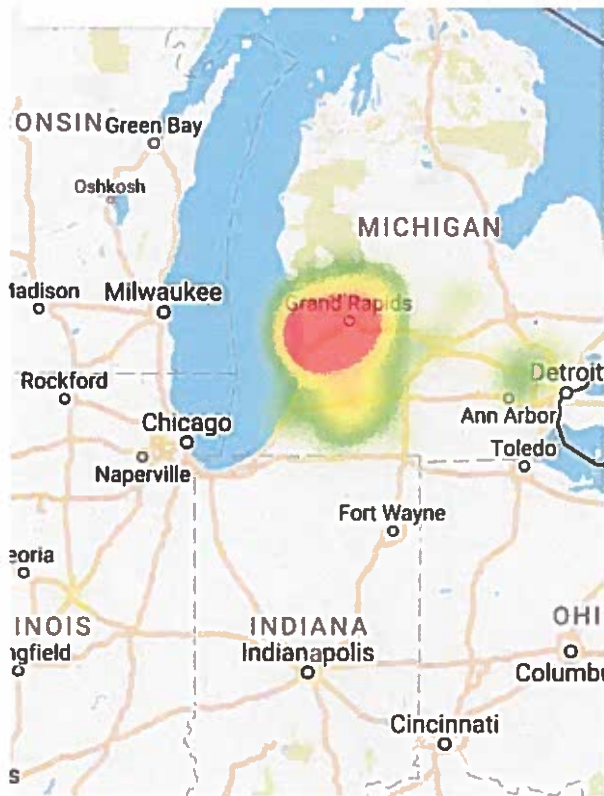


Running Event Demographics- Age

18-39 year olds account for a majority of participants in most running events



Running Event Demographics- Location



Public Lands as Recreational Asset

- Gazelle event at Maybury State Park – 175 people registered
- Yankee Springs Winter Trail Series (sponsor - sells out yearly)
 - Event coordinator Switchback Endurance Events
 - Michigan Adventure Racing also hosts events at Yankee Springs - typically all sell out
- Fred Meijer White Pine Trail Relay
- 70 teams, 6-12 participants each

