



MEMORANDUM

To: OutdoorRecreation@bea.gov [Bureau of Economic Analysis (BEA)]
 From: Outdoor Recreation Industry Roundtable
 Date: May 23, 2017

The Outdoor Recreation Industry Roundtable (ORIR) is pleased to respond to the Federal Recreation Council/Bureau of Economic Analysis invitation to share suggestions regarding the development of the Outdoor Recreation Satellite Account (ORSA). We are including information on each of the four topics raised in your solicitation.

Outdoor Recreation Industry Roundtable is a coalition of America’s leading outdoor recreation trade associations working to promote the policy and legislative reforms needed to grow the outdoor recreation economy. Roundtable organizations represent thousands of U.S. businesses that produce vehicles, equipment, gear, apparel and services for the millions of Americans who enjoy our nation’s parks, waterways, byways, trails and outdoor spaces. ORIR Includes the following organizations:

- American Horse Council
- American Recreation Coalition
- American Sportfishing Association
- Archery Trade Association
- BoatU.S.
- International Snowmobile Manufacturers Association
- Marine Retailers Association of America
- Motorcycle Industry Council
- National Association of RV Parks & Campgrounds (ARVC)
- National Marine Manufacturers Association
- National Shooting Sports Foundation
- Outdoor Industry Association
- Recreation Vehicle Dealers Association
- Recreation Vehicle Industry Association
- Recreational Off-Highway Vehicle Association
- SnowSports Industries America
- Specialty Equipment Market Association
- Specialty Vehicle Institute of America
- Sports & Fitness Industry Association

We define outdoor recreation as participation in the following activities:

- **RVing and Camping** (RV, tent, cabin at developed campsite; tent or RV used in backcountry; group camping, rental of RVs and camping equipment)
- **Sportfishing**
- **Hunting** (shotgun, rifle, bow)
- **Trapping**
- **Motorcycling** (recreational on-road, including 3-wheel)
- **Off-roading driving/riding** (ATV, ROV, dune buggy, 4X4/Jeep and off-road motorcycling)
- **Snow sports** (cross-country skiing, downhill skiing, snowboarding, snowmobiling, snowshoeing, tubing)
- **Trail sports** (hiking, backpacking, running 3+ miles, horseback riding, mountaineering)
- **Boating and water sports** (kayaking, rafting, canoeing, surfing, SCUBA diving, snorkeling sailing, stand-up paddling, kite surfing, boating (cruising, sightseeing, wakeboarding, tubing, knee boarding, water skiing))
- **Wheel sports** (bicycling on paved road, bicycling off road, skateboarding, off-road Ebiking)
- **Wildlife viewing, birdwatching and nature photography**
- **Recreational shooting** (archery and guns, competitive and recreational)
- **Adventure sports** (ropes courses, gravity coasters, ziplines, rock or ice climbing)
- **Augmented reality/games** (Pokemon Go, Discovery Agents and other games/apps played outdoors)
- **Outdoor learning activities** (Outward Bound, NatureBridge, NOLS and “Learn to ...” activities offered by state and county park agencies and concessioners)
- **Use of outfitters and guides** (not otherwise included)
- **Volunteerism** (in support of public lands and waters)

We appreciate the opportunity to define the statistics ORSA should seek to provide. We would note that the BEA reference to “OUTPUT” is not a term that has been historically utilized in recreation industry measurements, and thus want to ensure that this term will capture the following:

- 1) expenditures by the public on those activities defined as outdoor recreation. Further, we are interested in expenditures by corporations (sponsored outdoor recreation activities), recreation-related expenditures by non-profit organizations including youth organizations and churches, by schools and other educational institutions and by federal/state/local government agencies.
- 2) We also are interested in measuring capital investments in recreation-related infrastructure – for example, construction/reconstruction of campgrounds. This is vital since we have seen major public debate develop over inadequate maintenance of recreation capital infrastructure – for example, the estimated \$12+ billion in deferred maintenance associated with the National Park Service.
- 3) ORIR also urges BEA to assess tax revenues generated directly from recreational activity, including but not limited to targeted federal and state excise taxes, state and local sales taxes on recreation-related food, services and equipment; the volume of fuel usage in recreational activities and in travels to and from areas specifically to access recreational activities. We note that BEA can and should gather information on existing federal excise taxes on firearms, ammunition, archery equipment, fishing supplies and certain boating items and returned for certain public recreation program expenditures.

There are many useful datasets which BEA should access and use as supplements to traditional economic data sources. These should include the federal and state tax revenues outlined above as well as data collected from Destination Marketing Organizations (DMOs) for federal lands gateway communities. This data would include sales tax receipts and collections of lodging and other visitor taxes.

Finally, as BEA looks to regionalize ORSA reports, it should assess and reflect dataset including state registration of boats, OHVs and RVs; state sales of fishing and hunting licenses; and estimated leisure driving estimates developed by state DOTs.

Thank you for this opportunity to help guide the development of ORSA. We would welcome on-going discussions and involvement in this effort. **Specifically, we are interested in a meeting to discuss next steps this summer.** Please keep ORIR informed of progress and seek our assistance through Derrick Crandall at 202-682-9530, dcrandall@funoutdoors.com and 1200 G Street, NW, Suite 650, Washington, DC 20005. We are also enclosing the description of the Outdoor Recreation Industry Roundtable as well as key contacts for the organizations it represents.

Attachments (2)