

# The Active Outdoor Recreation Economy

## A \$730 BILLION CONTRIBUTION TO THE U.S. ECONOMY



**MONTANA**

## Active Outdoor Recreation Creates Economic Growth

More than three out of every four Americans participate in active outdoor recreation each year. Americans spend money, generate jobs, and support local communities when they get outdoors. Simple, healthy outdoor activities such as hiking, biking, camping, or wildlife viewing generate enormous economic power.

### THE NATIONAL ACTIVE OUTDOOR RECREATION ECONOMY:

- Contributes \$730 billion annually to the U.S. economy<sup>1</sup>
- Supports nearly 6.5 million jobs across the U.S.
- Generates \$49 billion in annual national tax revenue
- Produces \$289 billion annually in retail sales and services across the U.S.
  - \$46 billion in active outdoor recreation gear sales and services<sup>2</sup>
  - \$243 billion in active outdoor recreation trip-related expenditures<sup>3</sup>
- Provides sustainable growth in rural communities

## Active Outdoor Recreation Fuels Economic Growth In Montana

Montana offers spectacular recreation — including Big Sky and Glacier National Park — and other treasured destinations that bring in tourist dollars from out-of-state active outdoor recreation participants. Montanans also recreate close-to-home in local parks and venues.

### THE MONTANA ACTIVE OUTDOOR RECREATION ECONOMY:

- Contributes over \$2.5 billion annually to Montana's economy
- Supports 34,000 jobs across Montana
- Generates \$118 million in annual state tax revenue
- Produces nearly \$2 billion annually in retail sales and services across Montana
  - accounting for 7.5% of gross state product

Active outdoor recreation creates sustainable long-term economic growth and community development throughout Montana.

*The Active Outdoor Recreation Economy: a \$730 billion annual contribution to the U.S. Economy* produced by OUTDOOR INDUSTRY FOUNDATION in fall 2006 is available for free download: [www.outdoorindustryfoundation.org](http://www.outdoorindustryfoundation.org)

<sup>1</sup> The report used multipliers ("ripple effect") from the IMPLAN model. The IMPLAN input/output model is a commonly used economic tool with over 1,500 active users including federal government, state government, academic, and private clients. The ripple effect is a common economic tool that considers the economic process of bringing final product to market and the circulation of wages and salaries through the economy to determine total economic contribution. The economic contribution is a conservative estimate in that it does not include the bulk of large durable good purchases such as boats and RVs. State economic contribution and job creation should not be compared to the national and regional figure because of greater economic leakages at the state level. Individual state economic contribution and job creation can be compared against other individual state economic contribution and job creation.

<sup>2</sup> Active outdoor recreation gear retail sales include apparel, footwear, equipment, accessories, and services.

<sup>3</sup> Trip-related expenditures include the IMPLAN expense categories: food/drink, transportation, entertainment/activities, lodging, souvenirs/gifts/miscellaneous.

\*Outdoor Industry Foundation conducted a survey for bicycling, camping, paddling, snow sports, and trail activities in October of 2005. 13,907 respondents completed the survey. 5,150 respondents were considered "qualified respondents" - by both participating in one of the activities and making a purchase related to the activity within the past year. 349 respondents from Montana completed the survey. 89 of the Montana respondents were "qualified".

Existing data from the "2001 National Survey of Fishing, Hunting and Wildlife-Associated Recreation" commissioned by the U.S. Fish and Wildlife Service was used to create the economic and participation data for fishing, hunting, and wildlife viewing.

# MONTANANS PARTICIPATE IN ACTIVE OUTDOOR RECREATION

	ACTIVITY CATEGORY	# OF PARTICIPANTS*	% OF POPULATION*
	<b>BICYCLING</b> <ul style="list-style-type: none"> <li>Paved-road bicycling</li> <li>Off-road bicycling</li> </ul>	239,448	33%
	<b>CAMPING</b> <ul style="list-style-type: none"> <li>RV camping at a campsite</li> <li>Tent camping at a campsite</li> <li>Rustic lodging</li> </ul>	329,205	46%
	<b>FISHING</b> <ul style="list-style-type: none"> <li>Recreational fly</li> <li>Recreational non-fly</li> </ul>	205,004	27%
	<b>HUNTING</b> <ul style="list-style-type: none"> <li>Shotgun</li> <li>Rifle</li> <li>Bow</li> </ul>	167,110	22%
	<b>PADDLING</b> <ul style="list-style-type: none"> <li>Kayaking (recreational, sea, or whitewater)</li> <li>Rafting</li> <li>Canoeing</li> </ul>	171,387	24%
	<b>SNOW SPORTS</b> <ul style="list-style-type: none"> <li>Downhill skiing, including telemark</li> <li>Snowboarding</li> <li>Cross-country or Nordic skiing</li> <li>Snowshoeing</li> </ul>	133,293	19%
	<b>TRAIL</b> <ul style="list-style-type: none"> <li>Trail running on an unpaved trail</li> <li>Day hiking on an unpaved trail</li> <li>Backpacking</li> <li>Rock climbing (natural rock or ice)</li> </ul>	352,206	49%
	<b>WILDLIFE VIEWING</b> <ul style="list-style-type: none"> <li>Bird watching</li> <li>Other wildlife watching</li> </ul>	362,000	48%

\*Wildlife-based participation is based on adult population 16 years of age and older living in Montana in 2005: 756,877 (US Census). Non wildlife-based participation is based on adult population 18 years of age and older living in Montana in 2005: 717,654 (US Census). Detailed activity definitions and participation calculations are available in the technical report.

Montana not only attracts those from out-of-state to take part in active outdoor recreation but also, with exceptional close-to-home recreation, generates economic activity from active Montanans.

The economic analysis was conducted by Southwick Associates, Inc. The consumer survey was developed and executed by Harris Interactive@.

SOUTHWICK ASSOCIATES, INC. specializes in quantifying the economics of fish, wildlife, and outdoor-related activities for government agencies and industry.  
www.southwickassociates.com

OUTDOOR INDUSTRY FOUNDATION (OIF) is a not-for-profit organization whose mission is to inspire and grow future generations of outdoor enthusiasts.

Additional national, regional, and state Recreation Economy reports and technical background are available for free download:  
www.outdoorindustryfoundation.org

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