**Preface:**

**The Significance of Outdoor Recreation to the United States and the American People**

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## Introduction

Outdoor recreation is critical to America’s national interest, and an essential American experience. Outdoor recreation in the United States contributes to our gross domestic product and Americans’ physical and mental health. It brings foreign visitors to our country and families closer together. It connects Americans to their natural heritage and educates them about their past and their world. It inspires young people, offers unique moments for all to enjoy, and encourages conservation of our shared environment. Most fundamentally, outdoor recreation reflects and illustrates the core democratic values for which our nation stands.

The contributions of outdoor recreation to the United States and its people are important and far-reaching. As such, it is vital that the federal government, as well as state governments, actively partner with the outdoor recreation industry to promote and advance the business of American outdoor recreation. This overview discusses the great value that outdoor recreation provides to our country and our people. The papers that follow propose strategies for increasing that value.

## A Critical Contributor to Economic Growth and Job Creation

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Outdoor recreation is a staple of the American economy, and supports the employment of millions of Americans. According to an independent study funded by the Motorcycle Industry Council, National Marine Manufacturers Association, Outdoor Foundation, Outdoor Industry Association, Recreational Off-Highway Vehicle Association, Specialty Vehicle Institute of America, and the Western Governors’ Association, the outdoor recreation industry contributes approximately $646 billion per year to gross domestic product, about 4% of the entire U.S. economy. From 2005 to 2011, the outdoor recreation economy grew approximately 5% annually, despite the Great Recession.[[1]](#endnote-1)

Among the millions of jobs created by outdoor recreation, most cannot be offshored to other countries or replaced with technology. The 2012 outdoor recreation study showed 6.1 million direct jobs in the outdoor recreation industry. This figure represents approximately 4% of the U.S. workforce and is larger than the jobs contributions of the oil, gas, and education industries combined.[[2]](#endnote-2) Large segments of the outdoor recreation sector are labor-intensive, meaning that growth in the sector will lead to the creation of additional jobs. These will include jobs in retail, manufacturing, and government service on public lands and waters.

Yet, even these estimates are conservative and may understate the importance of outdoor recreation to the American economy. The estimates take into account only direct annual spending by Americans across ten activity categories (i.e., bicycling, camping, boating, fishing, hunting, motorcycling, off-roading, snow sports, trail sports, water sports and wildlife viewing). Of course, there are other outdoor recreation activities in which Americans engage, as well as large amounts of money spent by foreign visitors that these data do not capture. In addition, there are indirect economic impacts for local communities and the American economy that are equally important. If indirect effects were included, the fuller estimates would be $1.6 trillion in economic impact and 12 million jobs.[[3]](#endnote-3)

***6.1 million direct jobs in the outdoor recreation industry, representing approximately 4% of the U.S. workforce and exceeding the jobs contributions of the oil, gas, and education industries combined.***

The most popular destinations for outdoor recreation are public lands and waters. A Federal Interagency Council on Outdoor Recreation report examined the economic value of outdoor recreation at federal lands and waterways. According to the report, in 2012, “outdoor recreationists made more than 938 million visits to federal lands and waterways, spending $51 billion and supporting 880,000 jobs.” The report found that, in addition to the aforementioned contributions, outdoor recreation on federal lands and waters added $51 billion to GDP in 2012, including the final value of goods and services produced, wages and salaries, self-employment income, property income, and indirect business taxes. [[4]](#endnote-4)

A 2011 Southwick Associates report, commissioned by the National Fish and Wildlife Foundation, also examined the economic growth and job creation resulting from outdoor recreation. The report found that outdoor recreation gear and trip sales total $325 billion per year - a sum greater than annual returns from pharmaceutical and medicine manufacturing ($162 billion), legal services ($253 billion), and power generation and supply ($283 billion). The report also provides data regarding the economic impact of outdoor recreation on only two categories of federal public lands and waters:

* In 2011, the combined spending effect of hunting, fishing, and wildlife watching associated with U.S. Forest Service lands totaled $9.5 billion in annual retail sales and supported 189,400 jobs.
* Visitors to Army Corp of Engineers-managed lands and waters generated $34 billion in sales, contributing $17.1 billion in direct income, and supported 420,000 jobs at the national level in 1996.

Other data sources disclose additional and significant economic contributions from just a few components of the outdoor recreation industry:

* The recreational boating industry contributes $121.5 billion to the U.S. economy (including direct, indirect, and induced spending) with 95% of boats sold in the U.S. being made in the US; 650,014 total U.S. jobs; 34,833 U.S. businesses;[[5]](#endnote-5) and $1.83 billion in engine and boat exports in 2015.[[6]](#endnote-6)
* The combined hunting and target shooting industries contribute $110 billion to the U.S. economy; $48 billion in annual sales; 866,000 total U.S. jobs; $34 billion in salaries and wages; and $15 billion in combined state, local, and federal taxes.[[7]](#endnote-7)
* The recreation vehicle (RV) industry contributes $49.7 billion to the U.S. economy; 289,852 full-time U.S. jobs; $15.8 billion in wages and benefits; and $5.7 billion in federal, state, and local business taxes.[[8]](#endnote-8)
* The powersports industry contributes $40.9 billion in the economic value of its retail marketplace alone, with 10,062 U.S. powersports retail outlets employing 80,500 people and a $3.2 billion total payroll.[[9]](#endnote-9)
* The snowmobile industry contributes $27 billion to the U.S. economy; over 1,363 licensed snowmobile dealers in the U.S., each maintaining a full-time staff averaging 25 individuals; over 34,000 full-time jobs in the U.S. generated by snowmobile dealers and suppliers; over 2,000 full-time employees and over $1 billion of economic activity generated by snowmobile manufacturers; and 160,000 tourism-related U.S. jobs supported by snowmobiling.

These data illustrate that, collectively and individually, outdoor recreation industries are economic powerhouses, domestic job creators, major tax contributors, and a critical driving force in the American economy. Given the significant and sizable contributions of the outdoor recreation industry, the maintenance and growth of this important economic sector clearly matters to the economy as a whole. And it is equally clear that public lands and waters are critical to the future of this industry.

## Uniquely Positioned to Foster Rural Economic Development

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Outdoor recreation especially contributes to rural economic development. While there are national and state parks in urban areas – like Golden Gate Park in San Francisco and Liberty National Park in New York City – many national parks, national forests, BLM lands, and state parks are located in rural areas with small or no surrounding towns. For over a decade, the federal government has been searching for ways to bring capital and jobs to rural communities, many of which face above-average rates of unemployment. For example, in the second quarter of 2015, the non-metropolitan (rural) unemployment rate was approximately 5.8%, nearly half a percentage point higher than metropolitan unemployment during the same period. Further, this figure does not reflect the significant number of people who stopped actively seeking work in the years following the Great Recession. Accounting for this group would increase the rural unemployment rate to approximately 8.2%.[[10]](#endnote-10)

For America's rural communities, outdoor recreation is a major employment source, as the Department of the Interior’s 2011 Economic Analysis report highlighted. Visits to public lands and waters – including National Parks, Fish and Wildlife refuges, and Bureau of Land Management reserves – counter high unemployment by providing approximately 111,000 jobs across the rural areas of the United States.[[11]](#endnote-11) These jobs include hotel, retail, and concessionaire opportunities resulting from increased visitation to rural communities surrounding publicly-managed lands and waters. Simply, outdoor recreation helps rural communities reduce unemployment and achieve their economic goals.

In many cases, this recreational tourism occurs year-round, with both summer and winter recreation opportunities resulting in significant contributions to local economies. For example, in much of the rural northern U.S., employment supported by snowmobiling enthusiasts helps keep the tourism economy alive throughout the winter and allows for investment in these regions of the country, which also support summer, spring, and fall tourism.

Recreational use of public lands and waters generates a domino effect of economic benefits in surrounding communities. A 2005 paper from the U.S. Department of Agriculture describes the economic chain reaction that occurs from recreational tourism in rural areas:

If tourism and recreational development attracts significant numbers of seasonal and permanent residents, it could change the community for the better. For example, the new residents could spark a housing boom and demand more goods and services, resulting in a more diversified economy with more high-paying jobs. Even low-paid recreation workers could benefit if better employment became available. Income levels could rise, along with levels of education, health, and other measures of community welfare, and poverty rates could be expected to decline.[[12]](#endnote-12)

This increase in relocation to the area enhances local tax revenue, further contributing to the public good. Private property owners can also benefit from local recreational tourism by, for example, selling hunting and fishing licenses.

Critically, federal appropriators and agencies acknowledge the unique economic development opportunities available to communities that neighbor public lands and waters. Historically, the National Park Service has sponsored publication of a guidebook that compiles the opportunities available to communities near public lands and waters.[[13]](#endnote-13) Nonetheless, continued attention to growth remains essential for the foreseeable future.

## Improving America’s Commercial Balance

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Outdoor recreation attracts tourists from around the world, thereby improving America’s commercial balance. In 2015, U.S. imports exceeded exports by over $500 billion; and in June 2016 alone, U.S. imports exceeded exports by almost $45 billion – a significant trade deficit.[[14]](#endnote-14) Every dollar that a foreign tourist spends on U.S. outdoor recreation -- on a national park fee, a train ticket, a room in a lodge, a hamburger at a concession stand, a fishing license, or a boat rental -- is counted as a dollar of exports for the U.S. As U.S. exports increase, our country’s trade deficit narrows. In 2014, there were 19.6 million foreign cultural heritage visitors to the U.S., 60% of whom went to a national park or monument, 11% participated in water sports, 8% participated in camping or hiking, 6% participated in environmental excursions, 2% participated in hunting or fishing, and 2% participated in snow sports.[[15]](#endnote-15) Additionally, in 2014, there were 23.4 million foreign leisure visitors to the U.S., 39% of whom went to a national park or monument, 12% participated in water sports, 5% participated in camping or hiking, 4% participated in environmental excursions, 2% participated in hunting or fishing, and 2% participated in snow sports.[[16]](#endnote-16) For both cultural heritage and leisure foreign tourists, national parks and monuments drew more visitors than amusement parks, or several large states, including New York and Florida.[[17]](#endnote-17) These data do not take into account the additional and sizable economic benefit generated from national forests, BLM lands, and other federal lands and waters that provide for a diverse set of multiple uses, including motorized and other forms of recreation. Clearly, outdoor recreation draws a significant number of foreign visitors to the U.S., which multiplies the contribution of outdoor recreation to our export economy, and helps America maintain a strong global position. Additionally, as described earlier in this paper, the American recreation industry manufactures a large portion of the recreational vehicles and equipment sold and shipped worldwide, typically resulting in a trade surplus within this industry.

## Increasing Tax Revenue for Conservation and Other Purposes

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Money spent on outdoor recreation means tax revenue and user fees for federal, state, local, and tribal governments. According to the outdoor recreation study, in 2012, outdoor recreation resulted in approximately $40 billion in federal tax revenue, and an additional $40 billion in state and local tax revenue.[[18]](#endnote-18) Moreover, the 2011 Southwick Associates report found that hunting, fishing, and wildlife-related activities associated with U.S. Forest Service land alone provided $1.01 billion in annual federal tax revenues.[[19]](#endnote-19) User fees and tax revenues from recreation visitation enable public lands and waters agencies to better care for the natural resources within their purview. These funds can be invested in sustaining our public lands and waters agencies, protecting and conserving our natural resources, and enhancing the recreation infrastructure.

For example, the federal government collects approximately $600 million in user fees and taxes annually on fishing equipment and tackle, motorboat and small engine fuels, and imported boats and fishing equipment, which is deposited into the Sport Fish Restoration and Boating Trust Fund. The money in the Trust Fund is allocated to federal and state programs for boating safety and infrastructure, fishery management, wetlands conservation, and related programs and activities. Thus, increased participation and sales from the recreational angling and boating industries not only directly benefit the businesses and jobs which support such recreation, but also directly improve overall conservation.

## Deepening Americans’ Commitment to Conservation and Environmental Stewardship

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Outdoor recreation fosters both this generation's and the next generation’s commitment to conservation and the stewardship of the environment. Especially for the rising number of Americans who live in urban areas with limited green space, public lands and waters offer their best, and perhaps only, hope of experiencing nature. According to the 2010 Census, approximately 249 million people live in U.S. urban areas, representing 80% of the U.S. population, while the remaining 20% of the population lives in rural areas.[[20]](#endnote-20) Despite the advantages of urban living, it can lack some of the personal wellness benefits derived from experiences in nature.

The more exposure Americans have to their natural legacy, the more committed they will be to preserving and protecting it. According to *Outdoor Recreation in America*:

Leisure offers time for meditation and contemplation about values, and about one’s place and conditions of existence. The highest level of leisure activity is when the participant becomes emotionally involved in a positive way. This often occurs in nature, when one’s involvement provides more than a physical form of recreation. It allows attainment of a spiritual level of oneness with the environment.[[21]](#endnote-21)

Fostering early and consistent experiences with our public lands and waters will lead to a deeper understanding of their value and the need to conserve their unique role in our environmental, economic, and cultural ecosystems. In Congress, state legislatures, and the electoral college, the votes follow the population, so there is a political imperative to increase the number of Americans living in cities and suburbs who strongly support the maintenance, protection, and enhancement of America’s natural legacy. The best strategy is to help all Americans, as well as our foreign guests, to enjoy the experiences that can only be found in a national park, a national forest, or other public lands and waters. The more Americans marvel at the majestic beauty of Old Faithful, the Smoky Mountains, the Grand Canyon, or the Everglades, the more committed they will be to their preservation. Likewise, the more Americans can actively recreate on public lands and waters, the more they will be committed to conserving not only access for recreational opportunities, but the natural resources themselves. As evidenced by the Sport Fish Restoration and Boating Trust Fund described above, individuals make significant financial contributions to participate in their preferred recreation experiences. The knowledge that these contributions are being reinvested to care for the resources and infrastructure that enable these activities encourages greater participation and fosters a deep commitment to conservation.

## America’s Outdoor Classroom and the Educational Benefits It Offers

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Among the world’s 40 leading economies, the U.S. ranks 38th for graduating science majors, and only 35% of these graduates are female.[[22]](#endnote-22) This is problematic from a competitive perspective, given that a country’s supply of scientists and engineers is directly associated with technological progress, industrial performance, and economic growth.[[23]](#endnote-23) Thus, it is vital that America provide opportunities for young people – especially young girls – to develop an interest in science.

In a society in which children are more likely to be found in a dark basement staring at a screen or playing a video game than climbing a mountain or swimming in a lake, our public lands and waters offer the opportunity to teach our children and remind ourselves that learning can be fun, and recreation provides education. Outdoor recreation promotes quality, hands-on, and cost-effective learning for children of all ages, particularly in the fields of science, technology, engineering, and mathematics, as well as American and natural history. “Education in the outdoors provides an exciting and stimulating environment for learning,” which can motivate individuals to want to learn more about subjects like ecology and biology.[[24]](#endnote-24) Because the study of nature is largely based on systems and interrelatedness, this knowledge can be applied to a variety of educational, professional, and personal pursuits.

But outdoor education need not be limited to the hard and social sciences. Painters, authors, and photographers of all ages and all eras have been inspired by the sun rising over Acadia National Park and setting over Glacier National Park. Thousands of stories, pictures, movies, songs, and videos have featured the grandeur and excitement of the Colorado and Columbia Rivers and the Rocky Mountains. Perhaps most important, tens of millions of Americans have told stories about their experiences in nature to their children, friends, and other family, using words and pictures that have become central to family lore and important contributions to America’s oral history. Outdoor recreation inspired it all, and educated in the process.

## Offering Health Benefits in a Sedentary World

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In addition to strengthening the American economy and inspiring more people to become conservationists and scientists, outdoor recreation offers a fun and easy way to develop a more active lifestyle. Communities with access to recreation areas can reduce their screen and sedentary time by walking, hiking, boating, fishing, hunting, swimming, and participating in trail sports. The benefits of aerobic exercise for adults and children are well documented, and outdoor recreation is a cost-conscious option for people interested in becoming healthier.

According to the American Heart Association, approximately 69% of adults in this country are overweight or obese. Adult and childhood obesity rates have increased in recent years, largely due to the difficulties of living an active lifestyle today. Since 1950, sedentary jobs have increased 83%, with physically active jobs occupied by fewer than 20% of American workers in 2015. Individuals are spending more time at work, on average, and are less active in their non-working hours, due in part to technology and mass transportation. Safety concerns and access to technology have reduced children’s outdoor play as well. These lifestyle changes are not without consequences. Not only do obese individuals face an increased risk of heart disease and stroke, but their annual medical spending was estimated to be at least $1,400 higher than that of normal weight individuals.[[25]](#endnote-25) From a health system perspective, the costs of inactivity are significant.

As demographics in the United States have shifted in recent decades, evidence has shown that certain minority groups are disproportionately affected by certain preventable health issues. Many of these issues can be helped, or even avoided, through healthy lifestyle improvements. Research also indicates that members of racial minority groups use public lands and waters significantly less than white individuals. Expanded access to public lands and waters, as well as to outdoor recreation opportunities, can make a meaningful difference in narrowing the health gap in our society.

In addition to superior aerobic fitness, recent research “provides support for the benefits of physical exercise in children and adolescents on executive function, brain activity, and depressive symptoms.” The cognitive benefits of exercise were also seen in children with attention deficit hyperactivity disorder (ADHD).[[26]](#endnote-26) Research also indicates that outdoor programming may be more effective than other therapeutic interventions for behaviorally troubled youth. This evidence points to less recidivism and longer-lasting behavioral and emotional changes.[[27]](#endnote-27)

The mental health benefits of exercise have also been observed in adults, particularly individuals with depression. Several studies have found that urban dwellers with little access to green spaces experience psychological issues at higher rates than people living near parks, and that city dwellers who visit nature have lower levels of stress hormones immediately afterward than people who have not recently been outside.[[28]](#endnote-28) Other key evidence includes:

* a 1999 randomized controlled trial showing that depressed adults who exercised improved as much as those treated with the anti-depressant medication Zoloft;
* a 2006 meta-analysis, which supported the 1999 findings and recommended that physicians advise depressed patients to try exercise; and,
* a 2011 study, which found that 30 percent of the depressed people evaluated found exercise effective when medication had not been.[[29]](#endnote-29)

Recent research has also shown that outdoor recreation experiences can aid in the treatment and recovery of individuals with post-traumatic stress disorder (PTSD) or traumatic brain injury (TBI), including our nation's veterans. For example, a multi-year University of California, Berkeley study is tracking student veterans' psychological and physiological response to the awesomeness of big nature. Preliminary results suggest that nature-inspired curiosity can trigger positive feelings and ease symptoms of PTSD in the most wary and withdrawn personalities.[[30]](#endnote-30) Studies also show that individuals with TBI who participate in regular physical activity tailored to their preferences and abilities are less depressed and report a better quality of life than their more sedentary counterparts.[[31]](#endnote-31)

Further evidence also shows a positive association between recreation resources that are near individuals’ homes, and physical activity and better health. A 2010 report by the National Recreation and Park Association found that “the evidence is clear that the public supports additional spending for park and recreation services and that such additional spending results in higher levels of physical activity health benefits.” The report also indicated that people who engage in low- or no-cost activities commonly provided by park and recreation services were more likely to maintain their exercise habits than those who take part in less enjoyable physical activities: “While many people experiment with forms of physical activity that are good for them but not pleasurable, they tend to stay with activities that they enjoy, often for decades. […] While paid fitness clubs and prescription exercise are valuable, individuals are generally actively involved for only a short time, often only three to six months.”[[32]](#endnote-32)

Given the numerous physical and mental health benefits of exercise, as well as the high cost of physical inactivity, it is imperative that Americans find sustainable ways to be active. Outdoor recreation is one key to expanding interest in and long-term commitment to regular exercise.

## Outdoor Recreation is the Quintessential American Family Activity

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Outdoor recreation invites participation from every age group and presents a rare opportunity for activities that appeal to all members of a family unit. The opportunity for a family to jointly participate in screen-free activities fosters conversation and connections, and recreation activities often result in bonding over a shared goal, a common experience, or a unifying purpose. Outdoor experiences are frequently challenging and exciting, building character and perseverance in children under the guidance of their parents, guardians, or other older relatives, while providing fun for the whole family.

According to *Outdoor Recreation in America,* the most common outdoor recreation participation unit is the family: “more than half of all Americans feel that outdoor recreation opportunities are an important consideration for raising children, and the average American family participates in outdoor recreation at least once per month.”[[33]](#endnote-33) In an age when children face extremely high academic and extracurricular expectations, and technology distracts children and adults from face-to-face interactions, opportunities for families to connect outside their everyday environments are invaluable.

## Opportunities for Innovation and New Technologies

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In addition to providing an opportunity for families and friends to connect directly and in person, outdoor recreation can be enriched by increasing access to certain technological tools, such as fitness peripherals and smartphone apps and games. Challenge games and fitness trackers encourage recreationists to push themselves to derive maximum physical benefits from their activities and to inspire each other through competition, mutual accountability, and encouragement. The recent surge of physical activity caused by the release of Pokemon GO, especially among young people, shows the widespread appeal of combining gaming, GPS technology, and outdoor recreation.

While natural experiences and technology-related experiences may seem incongruent, they can be both complementary and mutually reinforcing. Cellular reception and internet access can be critical to enhancing safety for recreationists by assisting with navigation and communication, as necessary. Trail maps can be downloaded to smartphones and GPS technology can allow boaters to identify navigation channels and avoid sensitive habitats, or help hikers find their next campsite. Mapping technologies could also be used to identify new routes in case of an unexpected physical obstacle or weather condition, or just a sense of curiosity that leads to a new trail. Additionally, useful weather information can be obtained through real-time updates on approaching storms and temperature changes.

Access to the internet can also enable those interested in wildlife and plant-life to maximize the learning opportunities provided by nature experiences. For instance, some new technologies employ visual recognition software to identify various species and their respective characteristics. These types of technologies can augment the hands-on experiences that inspire recreationists to pursue science education or outdoor hobbies, such as bird-watching and gardening.

Of course, the advent of digital technology has made every public lands and waters visitor with a cell phone a narrator of nature using high-quality photos and videos, as well as social media applications like Snapchat, Facebook, Instagram, and Twitter. These applications inspire more visitors to explore public lands and waters, particularly younger individuals who are accustomed to sharing their stories with friends near and far.

## America’s Democratic Pastime/A Unifying Force

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Outdoor recreation is a shared activity available and relevant to every American, in which people of all backgrounds can come together. In most cases, it is affordable and readily accessible in some form to the large majority of Americans. Perhaps most important, America’s public lands and waters belong to all of us. These are our shared natural resources and our common national heritage. Outdoor recreation in America may be our most democratic pursuit.

Recreation provides significant value for developing communities by bringing diverse people together to accomplish common goals. Polarization and divisiveness can only be reduced by establishing a sense of common ownership of our natural resources among all Americans, thereby fostering a sense of national belonging and pride. Outdoor recreation, by exposing Americans to these resources, is the surest path to this desirable result.

Our public lands and waters are part of the national identity and enable all Americans, regardless of ethnicity, wealth, or social status, to access and enjoy the outdoors. Given the benefits of outdoor recreation outlined above, it is critical to ensure that access and education about natural resources are equitably distributed going forward. To this end, in 2015 an "Every Kid in a Park" initiative was launched, which provides all fourth grade students and their families with free admission to the National Parks and other federal lands and waters for a

full year.

## Conclusion

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The outdoor recreation economy is strong and continues to grow. Americans reap numerous benefits from participation in outdoor recreation activities. Those benefits are both large – such as economic growth and job creation, advancing conservation efforts – and more personal – such as building active healthier lives and stronger families. Policy-makers, the recreation industry, conservationists, and recreationists must collaborate to advance the recreation economy, promote managed, responsible outdoor recreation, and protect the public lands and waters that provide access to so many of these opportunities for generations to come.

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