The Value of State Offices of Outdoor Recreation (ORECs)
The Outdoor Recreation Economy

Outdoor recreation is an economic driver. The Bureau of Economic Analysis estimates that outdoor recreation (defined as ‘all recreational activities undertaken for pleasure that occur outdoors’) generates **$862 billion in economic output and supports 4.5 million jobs**—many of which are in rural communities. In 2021, outdoor recreation comprised 1.9 percent of the United States GDP. In 2018, over 318 million national park visits led to $20.2 billion in direct spending at hotels, restaurants, outfitters, and other amenities in nearby gateway communities, supporting over 329,000 jobs and generating over $40.1 billion in total economic output.

States that prioritize outdoor recreation create jobs. Nineteen states employ more than 100,000 people in the outdoor recreation economy, and California and Florida each employ more than 500,000 people. Outdoor recreation provides diverse opportunities across the employment spectrum, from guides and outfitters to retail sales and customer service, to sourcing and manufacturing, to business strategy and branding. Importantly, outdoor recreation generates jobs across all sectors, as companies seek to put down roots near outdoor recreation locations that enable a strong work-life balance for their employees.

Investing in outdoor recreation pays off. For instance, in Methow Valley, Washington, every $1 spent to develop and operate the trail system supports economic activity resulting in $6 in direct wages and compensation for local workers. In Montana, $50 million in state investments on fishing access points has generated $900 million per year in spending by anglers. Research from Headwaters Economics demonstrates that outdoor recreation amenities:

- draw visitors who spend money at local businesses
- attract new talent and investment
- increase property values
- improve quality of life and public health, especially in low-income neighborhoods

![State Outdoor Recreation Value Added as a Percent of State GDP, 2021](image)

U.S. Bureau of Economic Analysis Outdoor Recreation Satellite Account
What is a State Office of Outdoor Recreation?

State Offices of Outdoor Recreation (ORECs) serve as central champions for the outdoor recreation economy and its associated benefits within a state.

OREC efforts may include economic development initiatives, stakeholder outreach, conservation and stewardship of public lands and waters, youth engagement, and unifying the business voice to engage diverse public and private stakeholders.

To date, 18 states have created offices of outdoor recreation, or appointed policy advisors:

Arkansas  Montana  Utah
Colorado  New Mexico  Virginia
Maine  Nevada  Vermont
Maryland  New Hampshire  Washington
Massachusetts  North Carolina  Wisconsin
Michigan  Oregon  Wyoming

Katherine Andrews, Arkansas
How are State Offices of Outdoor Recreation Created?

These offices can be created through a variety of pathways, including governor’s announcement, executive order, legislation, insertion into state budget, or some combination of these methods. Some states precede the formation of such an office with a task force of outdoor stakeholders before a formalized office is created.

**Legislative Pathway:** Nevada, New Hampshire, Oregon, Utah, Washington

**Budget Line Item:** North Carolina, Wisconsin

**Executive Order:** Arkansas, Colorado*, Maine, Maryland, Massachusetts, Michigan, Montana, New Mexico, Vermont, Virginia, Wyoming

* Executive Action Authorized Under State Constitution
What Do State Offices of Outdoor Recreation Accomplish? (1 of 2)

**COVID-19 & Economic Recovery**

**Colorado:** Convened and led the Outdoor Recreation Industry Committee of the *Governor's Emergency Council on Economic Stabilization and Growth* to address the impacts of COVID-19 on the State’s outdoor recreation economy.

**Michigan:** Facilitated a workgroup of more than 100 outdoor businesses and stakeholders in May 2020 at the request of the Governor’s Office to develop workplace safety guidelines to safely reopen Outdoor Recreation during the Covid-19 pandemic.

**Wisconsin:** Partnered with state health department and created the *Outdoors COVID-19 Toolkit* of posters and social media graphics to help land managers and communities communicate safe ways to recreate outdoors.

**Nevada:** Successfully built and co-led a state-wide interagency COVID response team of federal and state land managers and stake holders for dealing with the impacts of COVID on public

**New Mexico:** Launched new page on the ORD website to communicate public land closures related to COVID emergency orders, coordinating weekly with federal and state land management agencies.

**Colorado:** Engaged outdoor recreation business partners for urgent manufacturing and distribution of Personal Protective Equipment, including to Search and Rescue teams across the state.

**Economic Development & Marketing**

**Washington:** Produced 2020 Update to "Economic Analysis of Outdoor Recreation in Washington State", finding that outdoor recreation supports $26.5 billion in annual expenditures and 264,000 jobs.

**Wisconsin:** Commissioned study from Headwaters Economics to show that the state’s $7.8 billion outdoor recreation and manufacturing economy grew by 12% compared by 7% by the state’s overall economy. The report also showed that the industry employed 93,000 people and created $3.9 billion in wages.

**Colorado:** Welcomed Edge Brands LLC to Montrose, CO ($14M investment, seven outdoor recreation brands) and Canfield Bikes to Fruita, CO (20 net new jobs) and launched virtual trade missions to increase Colorado outdoor recreation companies international export capacity.

**Michigan:** Engaged more than 30 companies that are in the startup or innovation stage within the outdoor sector to support business development strategies.

**North Carolina:** Welcomed White River Marine Group to Craven County, NC for a boat manufacturing facility that will support 500 jobs, and welcomed Triple Aught Designs to McDowell County to support 40+ jobs in new manufacturing facility.
Conservation/Stewardship

**Utah:** Coordinated Utah Recreation Restoration Infrastructure (RRI) grant funds for the restoration and rehabilitation of existing and developed recreation areas and trails for public access.

**Washington:** Participated in ongoing discussions with sovereign tribal government partners regarding the impact of outdoor recreation on tribal treaty rights.

**Oregon:** Facilitated policy dialogue between state agencies, sheriffs, search and rescue organizations resulting in legislation to create a new SAR card to increase funding.

**North Carolina:** Developed the OutdoorNC statewide stewardship initiative in partnership with Visit NC and Leave No Trace to build a statewide stewardship program that equips participants with sustainable recreation knowledge.

Public Health/Equitable Access

**Oregon:** Helped develop and disseminate statistics on the health savings benefits of outdoor recreation in Oregon.

**New Mexico:** Awarded the groundbreaking Outdoor Equity Fund to 25 applicants, leveraging $35,000 in private funding. Included in that group are three Native organizations/tribal governments that will get 449 Indigenous youth outside within the next year.

**Washington:** Extensively supported the ’21-’23 state budget which passed with historic investments in State Parks, local parks, the Department of Fish and Wildlife, the Washington Wildlife and Recreation grant program ($100M), and the No Child Left Inside Program ($4.5M).

**Utah:** Managed Utah Children’s Outdoor Recreation and Education (UCORE) grant funds programming to provide Utah’s children with outdoor recreation skill-building and nature-focused learning.

Education/Workforce

**Michigan:** Worked with MEDC to undertake a cluster analysis of Michigan outdoor recreation businesses and began interviewing businesses and education institutions to map workforce needs in the outdoor industry against education and skills needs, to develop more employee training pipelines during the Covid-19 pandemic.

**New Mexico:** Launched New Mexico’s first high-school outdoor internship program in June 2021.

**Nevada:** Developed a proposal for EDA technical and planning assistance to create feasibility study and implementation plan/curriculum design for a professional trail building institute in eastern Nevada.

**Colorado:** Ongoing contribution to the creation of workforce development programs and curriculum across Colorado, and advised degree and certificate programs focused on the outdoor recreation industry.

**Utah:** Convened virtual 2020 Utah Outdoor Recreation Summit “Outdoors Together” to inspire and inform participants about outdoor recreation issues.
## How are State Offices of Outdoor Recreation Funded?

ORECs have been placed in various locations in government based on state needs. They may have anywhere from 1-4 full time staff and budgets between $175-400K. Certain states have opted to chair ORECs with existing state employees, thus necessitating no budget or new hires.

<table>
<thead>
<tr>
<th>State</th>
<th>Office Location</th>
<th>Funding Source</th>
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<tbody>
<tr>
<td>Arkansas</td>
<td>Department of Parks, Heritage &amp; Tourism</td>
<td>General Funds</td>
</tr>
<tr>
<td>Colorado</td>
<td>Office of Economic Development and International Trade</td>
<td>General Funds</td>
</tr>
<tr>
<td>Maine</td>
<td>Department of Economic Development</td>
<td>Tourism Marketing Promotion Fund</td>
</tr>
<tr>
<td>Maryland</td>
<td>Chaired by Department of Natural Resources, Department of Commerce</td>
<td>Unbudgeted</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>Department of Energy and Environmental Affairs</td>
<td>General Funds</td>
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<tr>
<td>Michigan</td>
<td>Department of Natural Resources Executive Division</td>
<td>General Funds</td>
</tr>
<tr>
<td>Montana</td>
<td>Office of Economic Development</td>
<td>Big Sky Economic Development Trust Fund</td>
</tr>
<tr>
<td>Nevada</td>
<td>Department of Conservation and Natural Resources</td>
<td>General Funds</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>Department of Business and Economic Affairs</td>
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<td>Oregon</td>
<td>Parks and Recreation Department</td>
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<td>Utah</td>
<td>Office of Economic Development</td>
<td>General Funds and Transient Room Tax for Grant Program</td>
</tr>
<tr>
<td>Vermont</td>
<td>Chaired by Department of Forests, Parks, and Recreation / Agency of Commerce and Community Development</td>
<td>Unbudgeted</td>
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<td>Virginia</td>
<td>Department of Commerce</td>
<td>General Funds</td>
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<td>Washington</td>
<td>Office of the Governor</td>
<td>General Funds</td>
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<tr>
<td>Wisconsin</td>
<td>Department of Tourism</td>
<td>General Funds</td>
</tr>
<tr>
<td>Wyoming</td>
<td>Division of Wyoming State Parks</td>
<td>General Funds</td>
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Conor Hall (R), Colorado
The Confluence of States

The Confluence of States unites state offices of outdoor recreation in a bipartisan coalition to help grow the outdoor recreation industry, protect our nation’s wild places and transform conservation into a driver for economic prosperity. State directors of outdoor recreation sign on to the Confluence Accords to indicate their support for four shared pillars:

- Conservation and Stewardship
- Education and Workforce Training
- Economic Development
- Public Health and Wellness

The Confluence convenes frequently to share best practices and strategies for the sustainable growth of the outdoor recreation economy, and offers education and resources to help other state leaders in outdoor recreation advance their efforts.

Virginia, Maine, and New Mexico signing on to the Confluence Accords in 2019
REI is a specialty outdoor retailer, headquartered near Seattle. The nation’s largest consumer co-op, REI is a growing community of more than 20 million members who expect and love the best quality gear, inspiring expert classes and trips, and outstanding customer service. REI has 168 locations in 39 states and the District of Columbia. To build on the infrastructure that makes life outside possible, REI invests millions annually in hundreds of local and national nonprofits that create access to—and steward—the outdoor places that inspire us all.

VF Corporation is one of the world’s largest apparel, footwear and accessories companies connecting people to the lifestyles, activities and experiences they cherish most through a family of iconic outdoor, active and workwear brands.

Based in Boulder, Colo., with offices in Washington, D.C., Outdoor Industry Association (OIA) is the leading trade association for the outdoor industry. OIA unites and serves 1,200 manufacturer, supplier, sales representative and retailer members through its focus on trade and recreation policy, sustainable business innovation and outdoor participation.