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

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# 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.

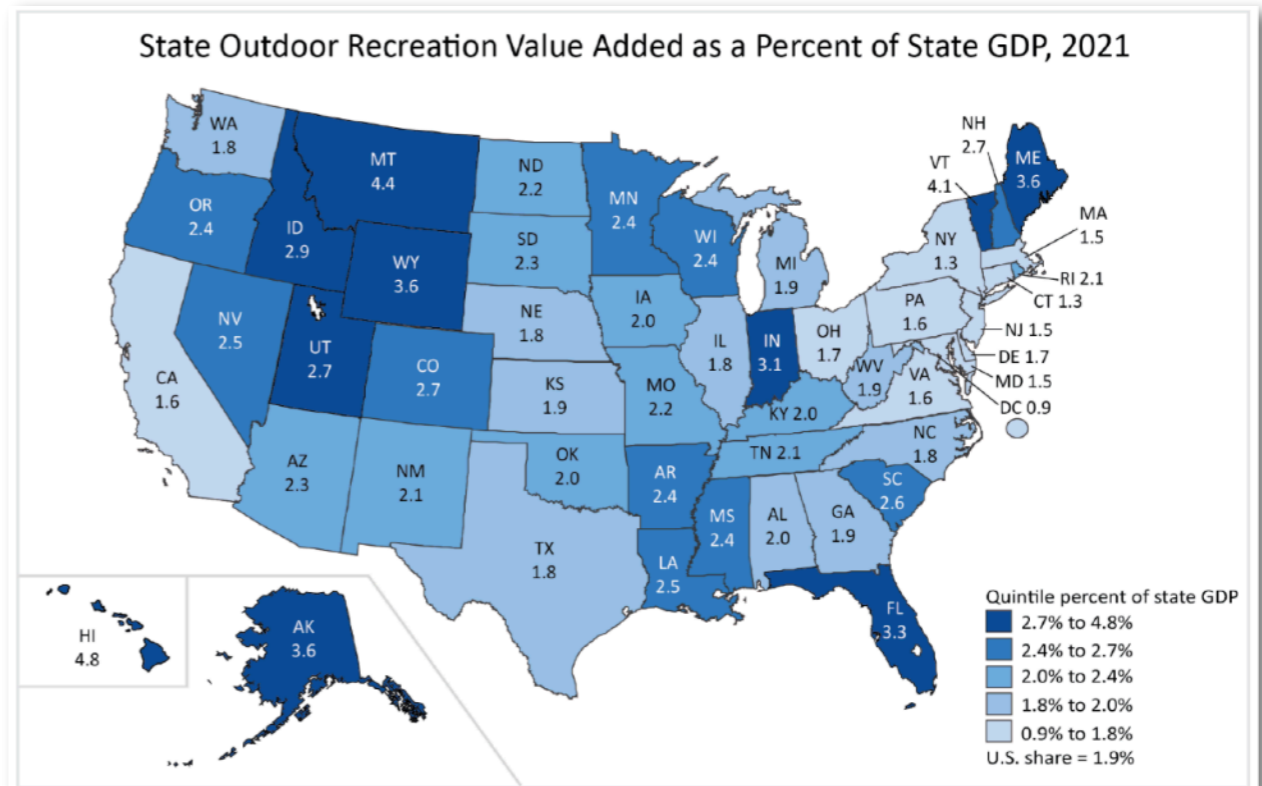
## States that prioritize outdoor recreation create jobs.

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](#)



U.S. Bureau of Economic Analysis Outdoor Recreation Satellite Account

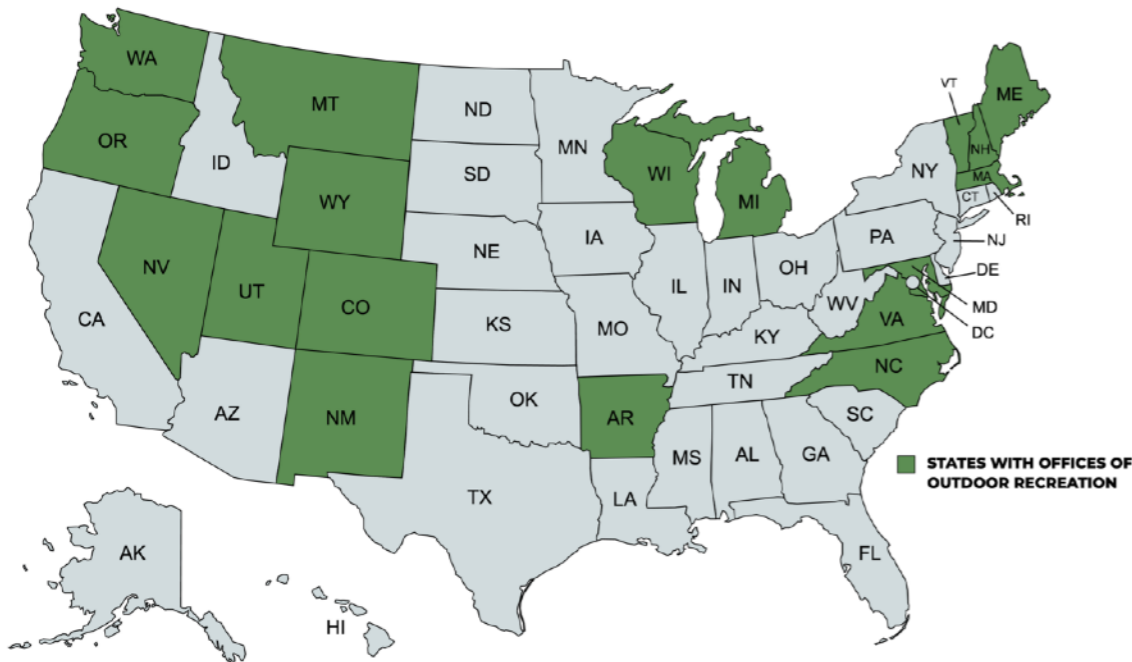


# What is a State Office of Outdoor Recreation?

**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:



- |                      |                       |                   |
|----------------------|-----------------------|-------------------|
| <b>Arkansas</b>      | <b>Montana</b>        | <b>Utah</b>       |
| <b>Colorado</b>      | <b>New Mexico</b>     | <b>Virginia</b>   |
| <b>Maine</b>         | <b>Nevada</b>         | <b>Vermont</b>    |
| <b>Maryland</b>      | <b>New Hampshire</b>  | <b>Washington</b> |
| <b>Massachusetts</b> | <b>North Carolina</b> | <b>Wisconsin</b>  |
| <b>Michigan</b>      | <b>Oregon</b>         | <b>Wyoming</b>    |





# How are State Offices of Outdoor Recreation Created?

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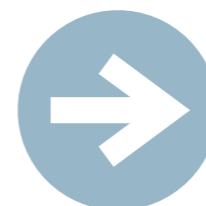
**These offices can be created through a variety of pathways**, including governor's announcement, executive order, legislation, insertion into state budget, or some combination of these methods. Some states precede the formation of such an office with a task force of outdoor stakeholders before a formalized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



## Economic Development & Marketing

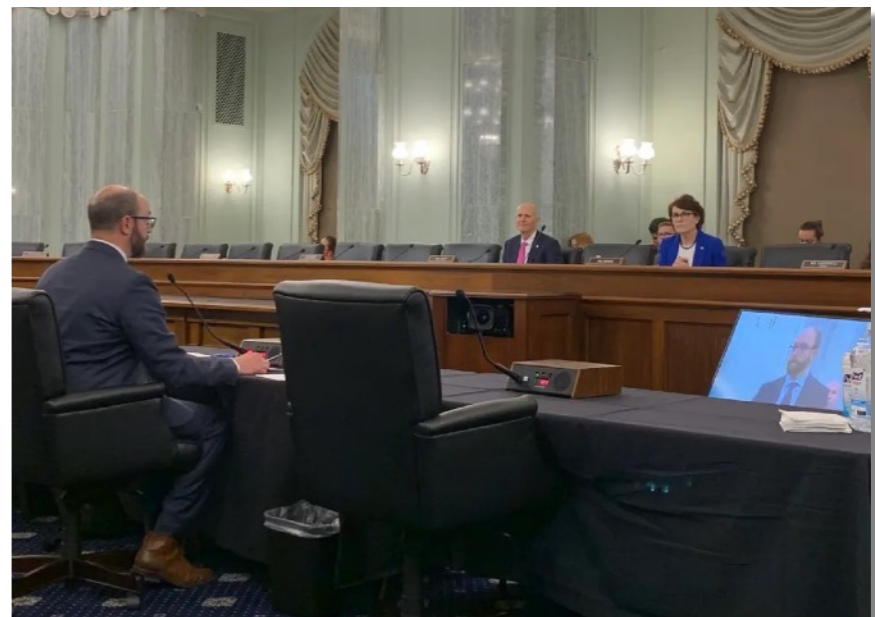
**Washington:** Produced 2020 Update to "Economic Analysis of Outdoor Recreation in Washington State", finding that outdoor recreation supports **\$26.5 billion in annual expenditures** and **264,000 jobs**.

**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.



Colin Robertson, Nevada



## 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.





## 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

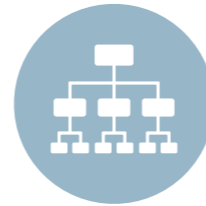
**Oregon:** Helped develop and disseminate statistics on the **health savings benefits** of outdoor recreation in Oregon.

**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.

# What Do State Offices of Outdoor Recreation Accomplish? (2 of 2)



## 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 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.



Brad Garmon, Michigan

**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.

State	Office Location	Funding Source
Arkansas	Department of Parks, Heritage & Tourism	General Funds
Colorado	Office of Economic Development and International Trade	General Funds
Maine	Department of Economic Development	Tourism Marketing Promotion Fund
Maryland	Chaired by Department of Natural Resources, Department of Commerce	Unbudgeted
Massachusetts	Department of Energy and Environmental Affairs	General Funds
Michigan	Department of Natural Resources Executive Division	General Funds
Montana	Office of Economic Development	Big Sky Economic Development Trust Fund
Nevada	Department of Conservation and Natural Resources	General Funds
New Hampshire	Department of Business and Economic Affairs	General Funds
New Mexico	Department of Economic Development	General Funds
North Carolina	Department of Commerce	General Funds
Oregon	Parks and Recreation Department	Parks and Recreation Department
Utah	Office of Economic Development	General Funds and Transient Room Tax for Grant Program
Vermont	Chaired by Department of Forests, Parks, and Recreation / Agency of Commerce and Community Development	Unbudgeted
Virginia	Department of Commerce	General Funds
Washington	Office of the Governor	General Funds
Wisconsin	Department of Tourism	General Funds
Wyoming	Division of Wyoming State Parks	General Funds



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





## **ORR** OUTDOOR RECREATION ROUNDTABLE

**Outdoor Recreation Roundtable (ORR)** promotes the growth of the outdoor recreation economy and

outdoor recreation activities and is the leading recreation coalition of outdoor recreation organizations serving over 110,000 businesses. ORR's members represent America's hunting, fishing, RVing, boating, biking, hiking, camping, ATVing, diving, horseback and skiing communities among many more.

**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.