



Our Fight for the Future

NASPD Conference – Custer State Park
September 7, 2011

Ensure the growth and success of the Outdoor Industry

- *Advocating for issues critical to the future of the Outdoor Industry*
- *Building stronger business leaders*
- *Changing the way our world does business*
- *Inspiring and growing the active outdoor community*

Industry Quiz

Try to Summit Mt. Rainier



Base Camp

- What is the single most popular outdoor activity that Americans participate in each year?
 - A. Camping
 - B. Cycling
 - C. Fishing
- X



Most Popular Adult Outdoor Activities

By Participation Rate, Ages 25+

1. Fishing (Fresh, Salt and Fly) 15.1%, 30.9 M
2. Running, Jogging and Trail Running 14.7%, 30.0 M
3. Camping (Car, Backyard and RV) 12.2%, 25.0 M
4. Bicycling (Road, Mountain and BMX) 12.0%, 24.6 M
5. Hiking 11.1%, 22.8 M

Most Popular Youth Outdoor Activities

By Participation Rate, Ages 6 to 24

1. Running, Jogging and Trail Running 25.8%, 20.4 M
2. Bicycling (Road, Mountain and BMX) 22.4%, 17.8 M
3. Camping (Car, Backyard and RV) 18.9%, 15.0 M
4. Fishing (Fresh, Salt and Fly) 18.4%, 14.5 M
5. Hiking 12.3%, 9.7 M

Camp One

- What U.S. age group participated the most in outdoor activities last year?

A. 6-17	62%
B. 18-24	55%
C. 25-44	54%
D. 45+	39%



Camp Two

- How many jobs does the active outdoor recreation economy support in the U.S.?
 - A. 2.1 M jobs
 - B. 4.5 M jobs
 - C. 6.4 M jobs



Camp Three

- Which of these U.S. industries is the largest?
 - A. Spectator Sports (MLB, NFL, NHL & NBA)
 - B. Outdoor Recreation
 - C. Oil and Gas Extraction



How U.S. Industries Stack Up?

- Spectator Sports (NFL, NBA, MLB, NHL) \$ 25 Billion
- Outdoor Retail Sales: (Equip, Apparel, Footwear, Services) \$ 46 Billion
- Motion Pictures and Videos: \$ 80 Billion
- Oil and Gas Extraction: \$187 Billion
- Outdoor Trip Related Expenditures: \$243 Billion
- **Total Outdoor Recreation Industry: \$289 Billion**
- Residential Building & Construction \$291 Billion

Camp Four

- How much growth have outdoor specialty retail stores witnessed in 2011?

- A. 6.3% X
- B. 8.4%
- C. 4.1%



Summit Question!

- Which product category has the highest import duty rate when entering the U.S.?
 - A. Cigarettes & Cigars
 - B. Sterling Silver Spoons
 - C. Outdoor Products ←



Active Outdoor Recreation Economy

\$289 Billion in Retail Sales and Services

NATIONAL TOTALS

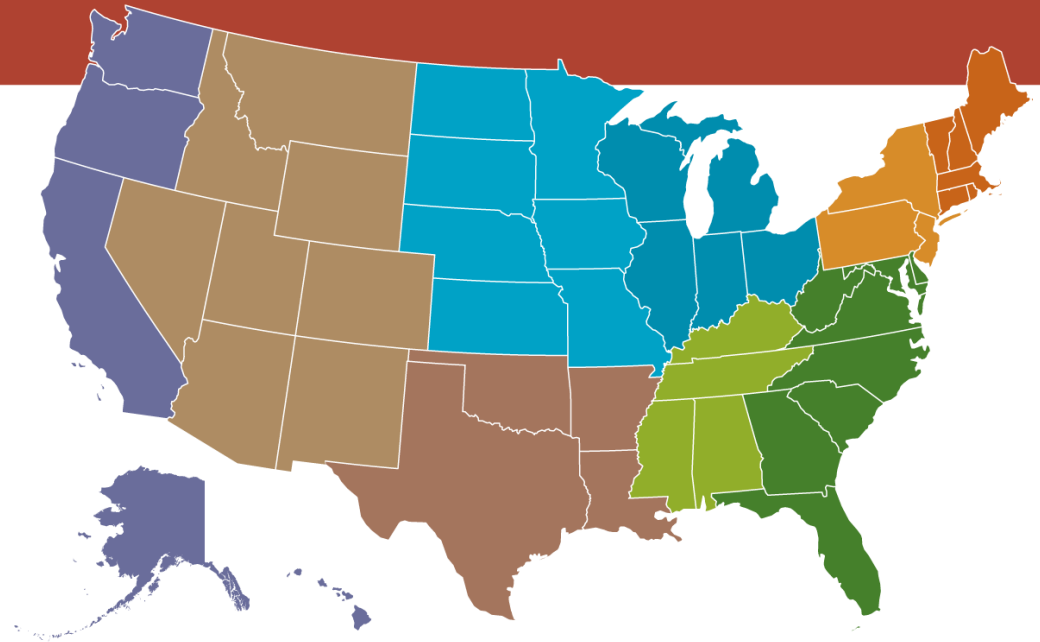
Total Contribution: \$730 billion

Jobs Generated: 6,435,270

Gear Retail Sales: \$46 billion

Trip-related Sales: \$243 billion

Taxes (federal, state): \$88 billion



Consumer Profile – Boomers Stay Active

- 45 yrs. old +
- 75M & active
- Travel & outdoor adventures
- More time & \$\$
- Hard adventure by day, soft adventure by night
 - Done before dinner
 - Activity sampling
 - Cocktail stories
- Get away from it all...



Consumer Profile – The Outdoor Nation

- Under 24 years old
- 100M and growing
- \$176B in annual spending
- Social, lifestyle driven, health conscious, socially responsible, tech savvy
- Gateway & action sports oriented
- Diverse and worldly





The Outdoor Recreation Economy

The Argument for Fiscal Respect

Recreation's Collective Fight For Respect

- What are the challenges?
 - Viewed as a nice-to-have not a must have
 - Extractive and other industries are viewed as real jobs, real money
 - Outdoor recreation jobs are viewed as low wage
 - Alternating political winds at State and Fed level
 - Looming Federal and State deficits
 - Divided industry segments and stakeholders

Recreation's Collective Fight For Respect

- What are the facts?
 - We are a dynamic, innovative economic engine that has outpaced the U.S. economy since 2008
 - We span retail, manufacturing, outfitting, business services, tourism and government sectors
 - We do not boom and bust. We balance communities economically
 - We are healthy and environmentally friendly
 - We attract other industry clusters
 - Communities are fighting to be an industry hub

The Outdoor Recreation Economy Campaign

- Build a unified campaign and amplify the messages that we all support
- Celebrate how connected we all are
- The recreation economy is...
 - As vital as the water, tele-com, technology, transportation and extractive industries
 - Good for jobs, health, quality of life
 - Attracts industry clusters and the top talent
 - Changes lives, builds communities, provides economic diversity and vitality



www.outdoorindustry.org

www.outdoorfoundation.org