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Measuring the Economic Impact of Outdoor Recreation

Via email

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Bureau of Economic Analysis

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The Recreation Vehicle Industry Association (RVIA) welcomes the opportunity provided by the Federal Recreation Council (FRC) and Bureau of Economic Analysis (BEA) to offer input on the development of the Outdoor Recreation Satellite Account (ORSA). RVIA commends the FRC and BEA on its effort to provide a first-of-its-kind look at the outdoor recreation economy.

RVIA is the national trade association representing nearly 300 manufacturers and component parts suppliers of family camping vehicles, including motorhomes, travel trailers, fifth wheel trailers, folding camping trailers, park model RVs and truck campers, collectively known as recreation vehicles (RVs). RVIA members, most of which are small business entities, manufacture approximately 98 percent of all RVs produced in the United States. The RV industry is a vital component of the outdoor recreation economy, with 89 percent of RV consumers purchasing their RVs to go camping and experience the outdoors. RV travel and camping often include complementary outdoor activities, such as hunting, fishing, and outdoor sports. Additionally, some RVs are designed to transport motorcycles, ATVs, and other off-highway recreational vehicles for camping and outdoor recreation purposes.

Identifying the Scope of Outdoor Recreation

Outdoor recreation encompasses a wide range of activities. RVIA supports the Outdoor Recreation Industry Roundtable's (ORIR) definition of outdoor recreation, and builds upon it by defining outdoor recreation as participation in the following activities:

- ◆ **RVing and Camping:** Using an RV, tent, or cabin at developed campsites; tents or RVs used in backcountry; group camping; rental of RVs and camping equipment; scenic RV driving and sightseeing; recreational tailgating activities
- ◆ **Sportfishing**
- ◆ **Hunting:** Shotgun, rifle, bow
- ◆ **Trapping**
- ◆ **Motorcycling:** Recreational on-road, including 3-wheel
- ◆ **Off-Road driving/riding:** ATV, ROV, dune buggy, 4x4/Jeep and off-road motorcycling
- ◆ **Snow/Winter sports:** Cross-country skiing, downhill skiing, snowboarding, snowmobiling, snowshoeing, tubing, ice skating
- ◆ **Trail sports:** Hiking, backpacking, running 3+ miles, horseback riding, mountaineering

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- ◆ **Boating and water sports:** Kayaking, rafting, canoeing, surfing, SCUBA diving, snorkeling, sailing, stand-up paddling, kite surfing, boating (cruising, sightseeing, etc.) wakeboarding, tubing, knee boarding, waterskiing
- ◆ **Wheel sports:** Bicycling on paved road, bicycling off road, skateboarding, off-road Ebiking, inline skating
- ◆ **Wildlife viewing, birdwatching, and nature photography**
- ◆ **Recreational Shooting:** Archery and guns, competitive and recreational; paintballing
- ◆ **Adventure sports:** Ropes courses, gravity coasters, ziplines, rock or ice climbing
- ◆ **Augmented reality/games:** Pokémon Go, Discovery Agents, and other games/apps played outdoors
- ◆ **Outdoor learning activities:** Outward Bound, NatureBridge, NOLS, and “Learn to...” activities offered by state and county park agencies and concessioners
- ◆ **Use of outfitters and guides** not otherwise included
- ◆ **Volunteerism** in support of public lands and waters

Types of Statistics

RVIA appreciates the opportunity to help define the statistics that should be presented in the ORSA. The BEA reference to “OUTPUT” is not a term that has been historically utilized in recreation industry measurements, and wants to ensure that this term captures the following:

1. **Expenditures by the public on those activities defined as outdoor recreation.** Additionally, expenditures by corporations (sponsored outdoor recreation activities), recreation-related expenditures by non-profit organizations including youth organizations and churches, by schools and other educational institutions and by federal/state/local government agencies.
2. **Capital investments in recreation-related infrastructure, such as construction and reconstruction of campgrounds.** Measuring these investments is critical given the extensive public debate developing over inadequate maintenance of recreation capital infrastructure—for example, the estimated \$12+ billion in deferred maintenance associated with the National Park Service. Such investments are critical to the RV industry, as many older campgrounds are not equipped to handle larger, more modern RVs. Nearly 450,000 RVs were shipped in 2016, and most RV buyers purchase their unit to go camping. Campground modernization and expansion, therefore, is paramount to the RV industry and entire outdoor recreation economy.
3. **Tax revenues generated directly from recreational activity.** This includes, but is not limited to, targeted federal and state excise taxes; state and local sales taxes on recreation-related food, services, and equipment; the volume of fuel usage in recreational activities and in travels to and from areas specifically to access recreation activities. BEA can and should gather information on existing federal excise taxes collected on firearms, ammunition, archery equipment, fishing supplies and certain boating items and the percentage returned for certain public recreation program expenditures.



Supplemental Datasets and Future Regionalization

BEA should consider many existing useful datasets to supplement BEA's core statistics. These should include the federal and state tax revenues outlined above and data collected from Destination Marketing Organizations (DMOs) for federal lands gateway communities. This data includes sales tax receipts and collections of lodging and other visitor taxes.

Additionally, RVIA encourages BEA to engage with the outdoor recreation industry and view its stakeholders as partners during this process. RVIA, the Outdoor Recreation Industry Roundtable, and other segments of the industry have access to statistics and datasets. Specifically, RVIA has undertaken a study detailing the economic impact of the RV industry down to individual districts—data that could be used for the overall study and any future regionalization of the account.

As BEA looks to regionalize ORSA reports, it should assess and ensure the account reflects datasets including state registration and additional fees paid on outdoor recreation products such as, RVs, boats, and OHVs; state sales of fishing and hunting licenses; and estimated leisure driving estimates developed by state DOTs.

Additional Comments

Finally, RVIA emphasizes our desire to work as a partner with BEA in developing an ORSA that encompasses the entire RV and outdoor recreation ecosystem on both public and private lands. Outdoor recreation is a broad segment of the United States economy, and we hope the ORSA will encompass its entirety, including potential overlap with other segments such as tourism and travel.

We welcome on-going discussions and involvement in this effort, and hope BEA will use RVIA and ORIR as both a resource and partner throughout this effort. Please keep RVIA informed of progress, and do not hesitate to contact Chris Bornemann at cbornemann@rvia.org or 571-665-5843 with any questions or information requests.

Respectfully submitted,

A handwritten signature in black ink, reading "Jay Landers". The signature is written in a cursive, flowing style.

Jay Landers
Vice President, Government Affairs