

COLORADO BUSINESS REVIEW

A publication of the Business Research Division
Volume 84, Number 2, 2018

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The Outdoor Industry as Change Agent

Luis Benitez and Samantha Albert



Luis Benitez and Governor John Hickenlooper stop by Scarpa during the first Denver Outdoor Retailer tradeshow in January.

For those of us who regularly recreate in outdoor spaces, we know the importance of the outdoor recreation economy. From the gear that gets us to where we need to go to the apps that tell us how far we've gone, we rely on a healthy outdoor economy to fuel our passion. In fact, the national outdoor recreation industry has grown to such heights that it recently earned its place in the calculus of our national gross domestic product—\$373.7 billion in 2016 (Bureau of Economic

Analysis, February 14, 2018. Outdoor Recreation Satellite Account: Prototype Statistics for 2012-2016, <https://www.bea.gov/newsreleases/industry/orsa/2018/pdf/orsa0218.pdf>). This is the first time the outdoor recreation economy has been quantified at a federal level, and other reports indicate it has an even greater impact. The Outdoor Industry Association estimates that the outdoor recreation economy generates \$887 billion annually in consumer spending

(The Outdoor Recreation Economy, 2017, https://outdoorindustry.org/wp-content/uploads/2017/04/OIA_RecEconomy_FINAL_Single.pdf). Either way, now there's proof. The outdoor recreation economy is booming and here to stay.

The state of Colorado is a significant piece of the national outdoor economy. With the density of outdoor companies and a workforce emboldened by the outdoors, it made perfect sense for Governor Hickenlooper to launch the Colorado Outdoor Recreation Industry Office (OREC) to capitalize on the state's assets. OREC is one of only several offices in the nation that provides a central point of contact, advocacy, and resources at the state level for the diverse constituents, businesses, and communities that rely on the continued health of the outdoor recreation economy.

The outdoor recreation economy in Colorado is responsible for \$28 billion in consumer spending and \$2 billion in taxes annually. The economy also contributes over 200,000 direct jobs and \$9.7 billion in wages and salaries (Outdoor Industry Association, <https://outdoorindustry.org/state/colorado/>). So, the next time you purchase new skis, fishing poles, or a

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backpack, let the numbers sink in. You, a passionate user of the outdoors, are contributing to a thriving and innovative economy.

Yet, today we're seeing the industry reach beyond traditional ideas of supporting the health of our industry. We've realized we're more than just sales of skis, fishing poles, and backpacks. A major shift is taking place—one in which OREC hopes to capitalize on and use to transform the outdoor industry into a powerful force for economic development, conservation, education, and wellness. Through OREC, communities across Colorado are uniting and becoming empowered to advocate for and steward the resources that enable our passions. After all, our lands and waters are the backbone of our outdoor experiences, and thus, our outdoor economy.

Across the nation, we are beginning (and continuing) important conversations about access to, diversity in, and (over) use of our outdoor spaces. We're tackling tough conversations about public lands, and the role of people and outdoor organizations in promoting and protecting these spaces. Recently, the State of the Rockies Project's 2018 Conservation in the West poll, released at the first Outdoor Retailer tradeshow in Denver, shows that 96% of Coloradans believe the industry is essential to the economic future of our state, and a majority think our public lands give us an advantage over other states (Conservation in the West, 2018 State Fact Sheet, https://www.coloradocollege.edu/other/stateoftherockies/conservationinthewest/2018/reports/ConservationintheWest_2018_StateFactSheet_Colorado.pdf). This is not insignificant.

As we seek solutions for the issues we're facing, our conversations have ranged from pay-to-play models for traditionally underfunded recreation, to

better promoting concepts like Leave No Trace for those who live in or visit our beautiful state. Our continued use of these spaces relies on shifting the mindsets of all residents and visitors to supporting and stewarding these spaces we use and love. We're also encouraging outdoor users to look beyond traditional modes

will allow future generations of Coloradans to explore and benefit from the outdoor spaces that make our state a beautiful place to live, work, and play. 

Luis Benitez, Director, Colorado Outdoor Recreation Industry Office, stepped into his current role with the Outdoor

Recreation Industry Office (OREC) when the agency was established in 2015 by Governor Hickenlooper. His early career was spent conducting mountaineering, climbing, and skiing courses for the Outward Bound. While Luis still guides for Outward Bound through his Endeavor Consulting Company, an even more intense occupation captured his imagination: high altitude mountaineering. Through Endeavor Consulting and other organizations, Luis has led parties of climbers to the summit of some of Earth's most imposing peaks.

Luis' climbing achievements are only one of many reasons why he is

where he is today. He's fortunate to have been able to transfer the fearless passion and leadership he honed in the mountains to our state's flourishing outdoor recreation industry. Through OREC, Luis is able to support the booming outdoor economy while also watching communities become empowered to advocate for and steward the resources that enable all of our adventurous pursuits and passions. He may be contacted at luis.benitez@state.co.us. For more information on OREC, visit <https://choosecolorado.com/programs-initiatives/outdoor-recreation-industry-office>.

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of recreation. New product trends like e-bikes and stand up paddle boards are innovative recreation experiences that merge with traditional user experiences. Moving forward, we'll need to find a way to support this type of innovation in our industry.

This is the beauty of the outdoor recreation industry. We're constantly innovating and evolving to support growing needs. We're inspired by our environments to create beautiful and effective products, and we're also inspired to support the outdoor spaces that support our livelihoods. Our mission at OREC is just this—to inspire industries and communities to thrive in Colorado's great outdoors. We want to enhance the outdoor experience for all, and we do this by supporting economic development and also by focusing on conservation and stewardship, education and workforce training, and health and wellness. We hope this holistic approach to outdoor recreation

Big Agnes: Doing It Our Way Since 2000

Len Zanni

We're often asked, "Is there something in the water up there in Steamboat?" Folks from out of town wonder why there seem to be so many successful outdoor industry brands and organizations based in Steamboat Springs, Colorado. Big Agnes was founded in 2000 in Steamboat Springs so the location's a part of our brand's DNA. When our co-founder and president Bill Gamber took his first sleeping bag with an integrated pad sleeve to the Outdoor Retailer tradeshow, he was told by a respected industry business editor, "Sleeping bags? The market is too saturated, you'll never survive and be profitable against the big brands that already own the category."

That's when Bill really started to believe what he already knew: it's going to take a scrappy, innovative approach, a commitment to the outdoors he loved, and never forgetting the "advice" of the naysayers.

Fast forward 18 years and Big Agnes has remained anchored to the values of being outdoors; creative, innovative thinkers; comradery driven; and committed to the adventurous lifestyle that comes along with it all. Steamboat is special because it allows that business model and focus to be kept in perspective right outside our office doors. We are minutes away from endless trails and campsites that offer optimal product-

testing grounds. Our staff of eager volunteers is ready to take on the task of a night out to make sure a prototype tent has adequate vestibule space to store their bikes, dogs, and fishing gear. It's a tough job but one that's actually pertinent to our product development team. Our brand needs this type of real-world application at a moment's notice, and Steamboat Springs fits the bill. This outdoors-centric lifestyle is also a big reason why we've retained such great staff, but the cost of real estate and distance from a major airport and city can also be hurdles for others. Those things that make living in Steamboat financially

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Photo: Noah Wetzel




Photo: Noah Wetzel

and logistically challenging are realities of operating a global business in the city, too.

We've spent a great deal of time and resources over the past few years to work on improving our structure and logistics. This includes consolidating, along with sister company Honey Stinger, various offices spread across town to one headquarters building less than a mile from the base of Steamboat Ski Area. This winter saw a lot more of us skin up the mountain in the morning before work or ski at lunch more than time used to allow. Our new facility houses

over 60 of our 110 employees working across a variety of disciplines, like product development, marketing, sales, warranty/repair, and customer service, most of whom are here in northwest Colorado. In addition, we opened a fulfillment center in Utah and third-party fulfillment centers in Canada and Rotterdam in the Netherlands to help meet the growing international demand for our products. These projects were challenging but like any good adventure, we were pushed out of our comfort zone and ended up with positive results that should help us continue to grow.

It's not just our hometown location that has kept us going all these years. It's also being located in a great state like Colorado—from the access to a diverse landscape; to long-standing retail partners; to nonprofits that we work with like Colorado Fourteeners' Initiative, SOS Outreach, and the Continental Divide Trail Coalition; to the Governor-appointed Outdoor Recreation Advisory Group that Gamber is a part of with Luis Benitez. Colorado is a forward-thinking state that has the outdoor industry, public lands, and growing businesses to help push us all to be better, do more, and contribute to in ways we have maybe always wanted but didn't know how or did not have the resources to do it.

If you ask where we'll be in another 5 or 10 years, you'd likely get a shrug and an answer something like "still having fun and testing product in Steamboat." While that is true, I'd like to also think we'll still be fired up, keeping the outdoor industry and our competitors on their toes. We've made it this far doing it our way, and we have no plans to change anytime soon. 

Len Zanni is the Co-Owner and Head of Marketing for Big Agnes and Honey Stinger. Learn more about the brand at bigagnes.com.



Photo: Noah Wetzel

Rural Colorado: The Perfect Place to Grow a Business

Sarah Shrader



Terra-Flight Broadmoor Bridge Platform

Almost 15 years ago, we started our company, Bonsai Design, in Grand Junction, Colorado. Initially, we operated out of our basement, with me managing field crew logistics and running payroll while our three boys napped and played in the backyard, and my brother and husband leading a small crew in the field building aerial adventures—from ziplines to challenge courses—all over North America. To date, we've installed more than 500 ziplines, some as long as 3,600 feet, and designed tours that last as long as four hours, drawing tens of thousands of adventure seekers a year. Our company continues to grow, now with over 50 employees, designing and constructing projects across the country, manufacturing components to sell worldwide, training guides and inspecting courses, and creating standards and efficiencies within the industry.

Luckily, our business has prospered

tremendously in the Grand Valley. Most of our employees are hired locally, with a talent pool of outdoor enthusiasts, as well as energy and construction workers. We are also fortunate to work with an incredible group of subcontractors—local fabricators, machinists, and engineers—to create innovative adventures for participants. These hard-working, tough people are the lifeblood of our company and an example of the kind of folks who live in Mesa County.

Our family and our employees have also thrived by making this community Bonsai's home. Being a "Western-Sloper" means that no matter what our politics or religion may be, we all agree that the natural landscape—the Colorado National Monument, the Grand Mesa, and the rivers that give us the name of our town, to name a few—are a defining part of our heritage and identity. No matter what our differences, we are all connected by

these natural assets that make up who we are on the Western Slope. With 75% of Mesa County made up of public lands, you can fish, climb, hunt, trail run, ski, hike, mountain bike, OHV, and paddle the Colorado River on a regular basis with little to no traffic. At Bonsai, we are lucky enough to grow our families in a place where they have direct access to wild spaces.

Rural communities all over the United States have suffered tremendously over the last few decades. A combination of factors have contributed to this economic downturn in rural America. First, many of these rural communities have been dependent on one industry for their economic sustainability. Whether it be rail, mining, agriculture, or oil and gas extraction, these communities didn't diversify their income, so when those industries became either obsolete or

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were subject to fluctuations in commodity pricing, they had nothing to fall back on. Furthermore, most states incentivize companies to relocate or grow in urban and suburban areas, because the infrastructure—including broadband—is already in place for businesses to be successful. This economic development in urban and suburban areas has inadvertently hurt rural economies. In Colorado, our rural communities have especially been hit hard because of TABOR. We haven't been able to offset the decimation to funding in our schools and roads because our communities haven't had the local dollars to raise taxes.

Yet, as a business owner of a company going through second-stage growth, I am a strong believer that rural communities like Grand Junction are the perfect places to grow strong, sustainable companies. Quality of life, like what we have here in Mesa County, is a driving force in the economy. The outdoor recreation industry in Colorado contributes \$28 billion in consumer spending and accounts for 229,000 jobs in the state, making it a key industry for the state. According to the Outdoor Recreation Coalition, the outdoor industry in the Grand Valley contributes more than \$300 million to the local economy. We know that the key to wealth is diversifying our economic drivers. Rural Colorado communities need strong, diverse local economies that will provide secure, long-term jobs. The outdoor recreation industry is a key component in economic vibrancy—it attracts businesses to grow here because of the recreation and beauty we have to offer to employees and business owners. From the farms and wineries that produce delicious food and drink on the east end of the valley in Palisade, to the mountain bike trails and festivals on the west end of the valley in Fruita, our valley is a rich place for employees to explore and enjoy. Tech, aviation, manufacturing, and health care companies provide high-paying jobs and have an opportunity to grow in this valley. With affordable office space, a plethora of supportive infrastructure, and inexpensive housing, as well




Aspen Snowmass Challenge Course

as unsurpassed outdoor recreation opportunities for employees, this is the ideal place to grow a business.

Furthermore, rural economies are rife with hard-working people who want to collaborate and work together to help their communities move forward. Recently, a group of business owners founded the Outdoor Recreation Coalition of the Grand Valley (ORC) in order to expand and enhance the economy of through collaborative support and promotion of outdoor recreation businesses and resources. Since then, we've worked on efforts to increase world-class mountain bike trails from Fruita to Palisade. We've created alliances with the energy industry in a joint effort to diversify our economy. We're working with Colorado Mesa University to promote our community as an outdoor recreation hub for college students in the state. We worked hard to pass a \$140 million school funding measure with overwhelming community support.

And a new outdoor recreation-based business park broke ground this spring, with a beautiful campus on the shores of the Colorado River designed to attract emerging businesses to our community.

Those of us who are raising kids and growing businesses here in Mesa County often talk about how lucky we are. After all, being on a trail five minutes from your front door is pretty sweet. No lines, no traffic, a great downtown, a growing university, outdoor opportunities at your fingertips, and a tough and resilient community: We are the Colorado everyone was promised when they moved to our great state. Come see us on the Western Slope, or as we call it: the #westslopebestslope. 

Sarah Shrader is Owner and Co-Founder of Bonsai Design in Grand Junction, Colorado. She may be contacted at sshrader@bonsai-design.com. Visit <http://bonsai-design.com> to learn more about the company.

The Outdoor Industry and Higher Education: A Confluence of Knowledge

Joel Hartter and Ian Stafford



MENV Faculty Director Joel Hartter and Rocky Mountain National Park rangers discussing collaborative management at Rocky Mountain National Park with MENV graduate students, August 2017.

As the first streaks of light touch a snowcapped Mt. Princeton in the Sawatch Range, the Arkansas River continues to churn on its eastward quest to eventually meet with the mighty Mississippi. Rafting guides can be heard rolling out of their tents, anglers are already wading their way into her rolling waters, and tourists are anxiously anticipating their “Colorado” experience. The Arkansas Valley is just one example of many areas throughout Colorado that thrives, due in large part to the outdoor industry, by leveraging wild places and open spaces to bolster and diversify local economies. With President

Obama signing the Outdoor Recreation Jobs and Economic Impact Act (Rec Act) in November 2016, the industry’s economic impact is now included in the national GDP. According to the Bureau of Economic Analysis, the outdoor industry generated \$374 billion in economic activity, 2% of the country’s GDP, and a total gross output of \$673 billion in 2016 (U.S. Department of Commerce, and Bureau of Economic Analysis. News Release: Outdoor Recreation Satellite Account, February 14, 2018, www.bea.gov/newsreleases/industry/orsa/orsanewsrelease.htm). In Colorado alone, according to the Outdoor Industry

Association, the outdoor economy generates \$28 billion in consumer spending and provides over 229,000 direct jobs (Outdoor Industry Association. “Colorado’s Outdoor Economy,” outdoorindustry.org/state/colorado/).

New leaders are needed to ensure that wild lands and open space remain accessible, conserved, and managed in a sustainable way. The Masters of the Environment (MENV) Graduate Program at the University of Colorado Boulder is positioned to do just that. The MENV Graduate Program is a 17-month intensive professional master’s program

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that equips students with the knowledge, skills, and experience necessary to address complex environmental challenges of the 21st century. Through this comprehensive approach to professional education, MENV students receive a graduate degree from one of the world's preeminent universities in environmental and natural sciences, while simultaneously gaining valuable professional experience through project-based learning, professional development workshops, and the Capstone Project.

The MENV Graduate Program prepares leaders today to help shape the conversation on use of wild and open spaces that support the outdoor industry as it continues to grow. Students take courses in environmental science, leadership, ethics, and systems thinking, and then they track into specializations in environmental policy, sustainability planning, sustainable food systems, or renewable energy. Project-based learning

provides an important opportunity for student inquiry in real-life situations. For example, the Sustainable Communities and Sustainable Livelihoods course focuses on Colorado communities whose futures are intertwined with wild places and the connection to recreation economies. Solving complex problems in rural communities means that students must understand cultural, economic, and political underpinnings. This project-based course partners with Colorado Blueprint and the Colorado Office of Economic Development and International Trade. Students spend the semester paired with a rural Colorado community, assisting in identifying growth opportunities in the outdoor recreation landscape and positioning communities to improve reach and impact in the marketplace that will be sustainable.

Last fall MENV students were partnered with the town of Craig, a town that is currently going the process of shutting

down a major coal plant and needs to find new ways to generate income. With the pristine Yampa River running at the edge of town, the community is hoping to start development of infrastructure to support commercial river rafting operations. Students also worked with Summit County, the USDA Forest Service, and other stakeholders to explore possible managing solutions to the overcrowding at Quandary Peak near Breckenridge. Working hand-in-hand with the people in the community and local leaders in industry and government, students co-developed a vision for new recreation opportunities for the town of Craig and a strategy to manage Quandary Peak's visitors, access, and resource impact that accounts for the growing popularity of Colorado's fourteeners.

A hallmark of the program is the Capstone Project—a full calendar-year immersive project where students serve



MENV students learning about wildfire management in the wildland urban interface from The Nature Conservancy staff at the site of the Cold Springs Fire, a 528-acre fire that burned near the town of Nederland, August 2017.



MENV students learning about the complexities of a record-number of visitors to America's national parks and managing the impacts to wildlife and the natural environment, Rocky Mountain National Park, August 2017.


as consultants and staff in companies, organizations, or government offices. Capstone partners span a broad spectrum of organizations involved in environment, energy, and planning. Many MENV students choose to work with leading organizations in the outdoor industry and those focused on land management in the U.S. West. Over the last two years, these partners include the Outdoor Industry Association, Western Resource Advocates, the National Parks Conservation Association, Aspen Skiing Company, Vail Resorts, and The Nature Conservancy, among others. Lindsay Bourgoine of Protect Our Winters says, "Protect Our Winters really valued serving as a Capstone partner and hosting an MENV student in 2017. As a small non-profit, capacity challenges are very real, and it was an incredible opportunity for us to add significant capacity all while giving back and mentoring a student in the entrepreneurial environment of a young non-profit." Being able to provide students with this type of first-hand knowledge is important and a positive experience for both students and sponsoring organizations.

Altogether, the MENV Graduate Program will hone students' professional

skills, such as project management, stakeholder engagement, analysis, collaboration, and financial planning, which will be essential for students to hit the ground running from day one with their clients. MENV students are highly motivated graduate students, equipped with prior professional experience, who will provide innovative solutions and actionable recommendations to Capstone client organizations.

The United States is globally recognized as a leader in outdoor recreation. As a multidimensional economic sector, outdoor recreation fuels employment in other sectors, such as manufacturing, finance, retail, transportation, food service, tourism, travel, and more. In 2017, over 144 million Americans recreated in the outdoors, national parks attendance reached over 300 million visitors, and the outdoor industry showed growth at a staggering level (Outdoor Industry Association. 2017 Participation Report, www.outdoorindustry.org/wp-content/uploads/2017/04/2017-Topline-Report_FINAL.pdf). The national outdoor industry grew at 3.8% rate, compared to the overall U.S. economy's 2.8% growth, in 2016. Further, the industry accounted for 7.6 million jobs and an estimated

\$65.3 billion in federal tax revenue, as well as \$59.2 billion in state and local tax revenue (Outdoor Industry Association. The Outdoor Recreation Economy, 2017 report, https://outdoorindustry.org/wp-content/uploads/2017/04/OIA_RecEconomy_FINAL_Single.pdf).

The outdoor industry is not just for guides and outfitters. It is an industry that blends the worlds of product development, tech, land management, billion-dollar retailers, and the list goes on. In order for this industry to grow to its potential, it needs leaders that understand how to talk-the-talk and walk-the-walk. As communities invest in outdoor infrastructure that attracts employers and active workforces, those communities may thrive economically and socially, but new economies bring challenges and changes to the places where we love to play and the brands that we associate with recreation. We need leaders who are ready and willing to tackle issues that cut across business, policy, and stewardship. The MENV Graduate Program at the University of Colorado is helping blaze that trail to develop the next generation of leaders in the outdoor industry. 

Joel Hartter is an Associate Professor and Faculty Director of the Masters of the Environment Graduate Program at the University of Colorado Boulder. He may be contacted at joel.hartter@colorado.edu.

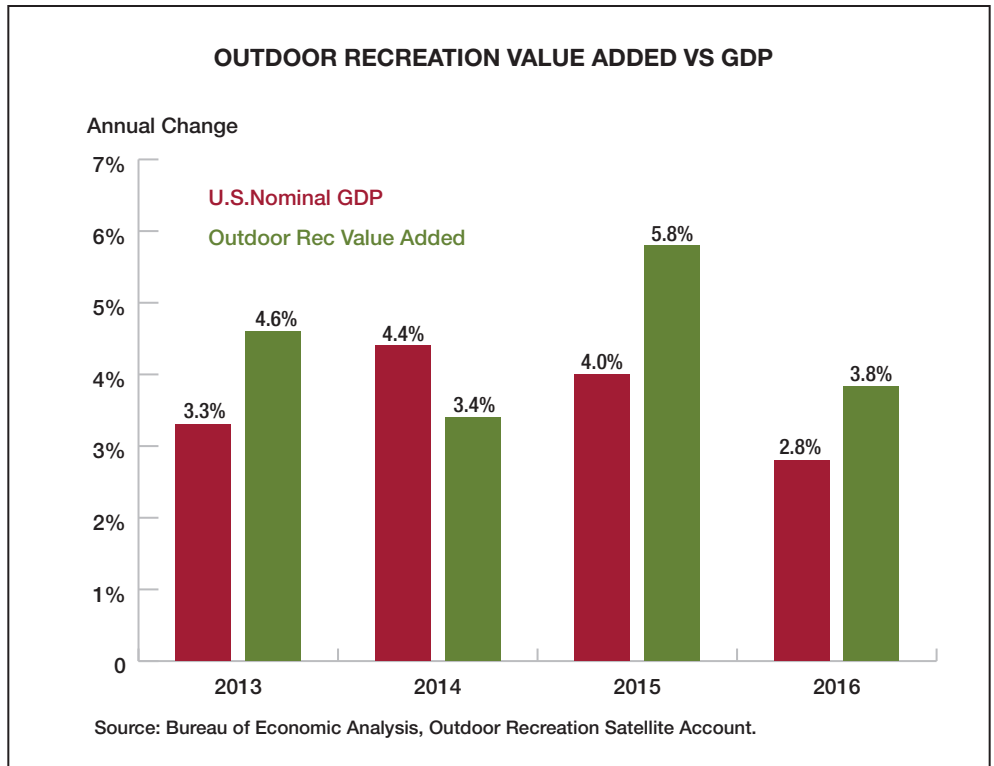
Ian Stafford is an environmental policy student in the Masters of the Environment Graduate Program. He may be reached at ian.stafford@colorado.edu.

Measuring the Economic Impact of Outdoor Recreation

Michael Hansen

While outdoor-related activities provide Americans with countless health, recreation, and entertainment leisure benefits, they also make a substantial economic impact. In February 2018, the Bureau of Economic Analysis (BEA) released its first-ever estimates of the economic contribution of outdoor recreation to the U.S. economy. According to the BEA's early prototype statistics, outdoor activities added \$373.7 billion to the national economy in 2016, making up 2% of the entire U.S. GDP. The BEA analyzed the impact of outdoor recreation over a five-year period from 2012 to 2016, measuring the gross output for a wide array of outdoor-related activities and the value added by industries interacting with outdoor recreation. Growth in the outdoor recreation economy outpaced the overall U.S. economy in 2016—value added by outdoor recreation grew by 3.8% while the U.S. GDP grew by just 2.6%. The outdoor industry grew faster than the domestic economy for three out of the four years between 2013 and 2016.

Outdoor recreation activities defined by the BEA are divided into three categories: conventional outdoor activities, other outdoor activities, and activities supporting outdoor recreation. Conventional activities include typical outdoor activities such as camping, hiking, skiing, hunting, boating, and motorized activities. The other activities category includes activities that involve the outdoors, such as amusement parks, agricultural tourism, and outdoor festivals. Finally, supporting activities comprise construction, travel, and government expenditures that support all of these activities. These supporting activities could include the construction of new hiking trails or improvements to National Park Service infrastructure.



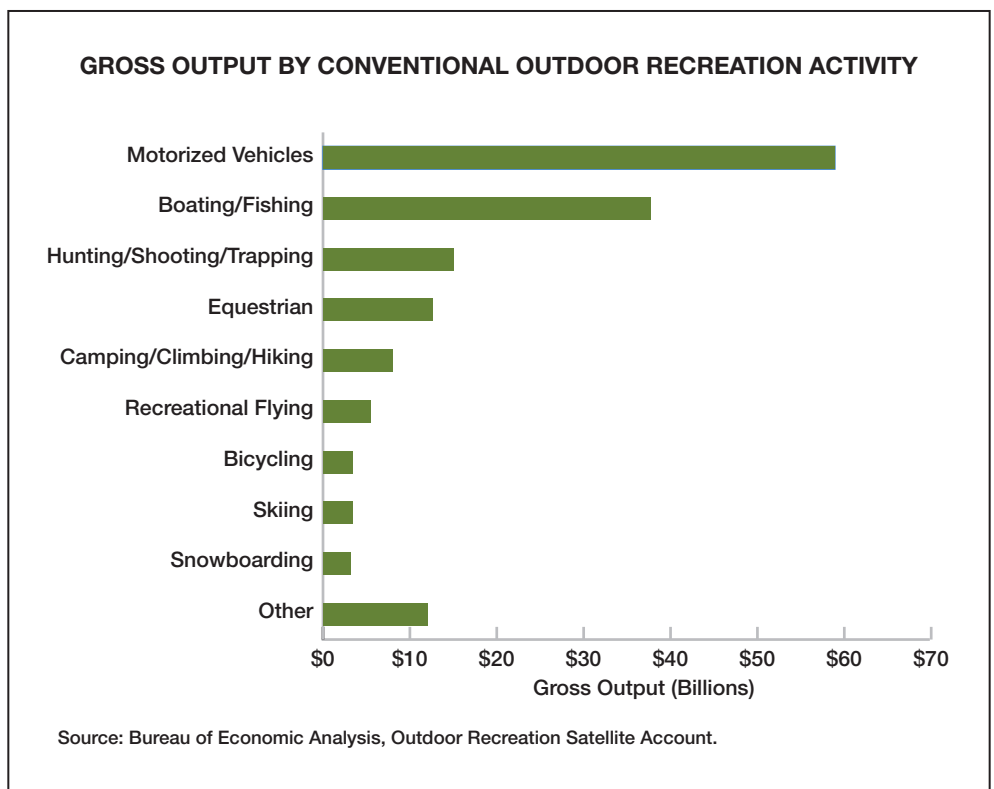
Outdoor Recreation Activities	
Conventional Activities	Other Activities
<ul style="list-style-type: none"> • Bicycling • Boating/Fishing • Camping/Climbing/Hiking • Equestrian • Hunting/Shooting/Trapping • Motorized Vehicles • Recreational Flying • Skiing • Snowboarding • Other Conventional Activities 	<ul style="list-style-type: none"> • Amusement Parks/Water Parks • Festivals/Sporting Events/Concerts • Field Sports • Game Areas (including Golf and Tennis) • Guided Tours/Outfitted Travel • Productive Activities • Other Outdoor Recreation Activities
Supporting Outdoor Recreation	
<ul style="list-style-type: none"> • Construction • Trips and Travel • Government Expenditures 	

Source: Bureau of Economic Analysis, Outdoor Recreation Satellite Account.



The BEA measures the impact of these individual activities in terms of gross output estimated through sales or receipts for goods and services associated with the particular activity. For example, gross output associated with skiing could include the physical skis and accessories, apparel, repair services, and lift tickets. Additionally, gross output includes sales to both final users and other intermediate industries. In 2016, the total gross output associated with outdoor recreation activities was \$673.2 billion, with the conventional activities category generating \$247.2 billion (36.7%). Other activities generated \$86.6 billion (12.9%) and supporting activities generated \$277.3 billion (41.2%). Among the conventional activities, those related to motor vehicles (including RVs and motorcycles) had the greatest contribution to gross output, accounting

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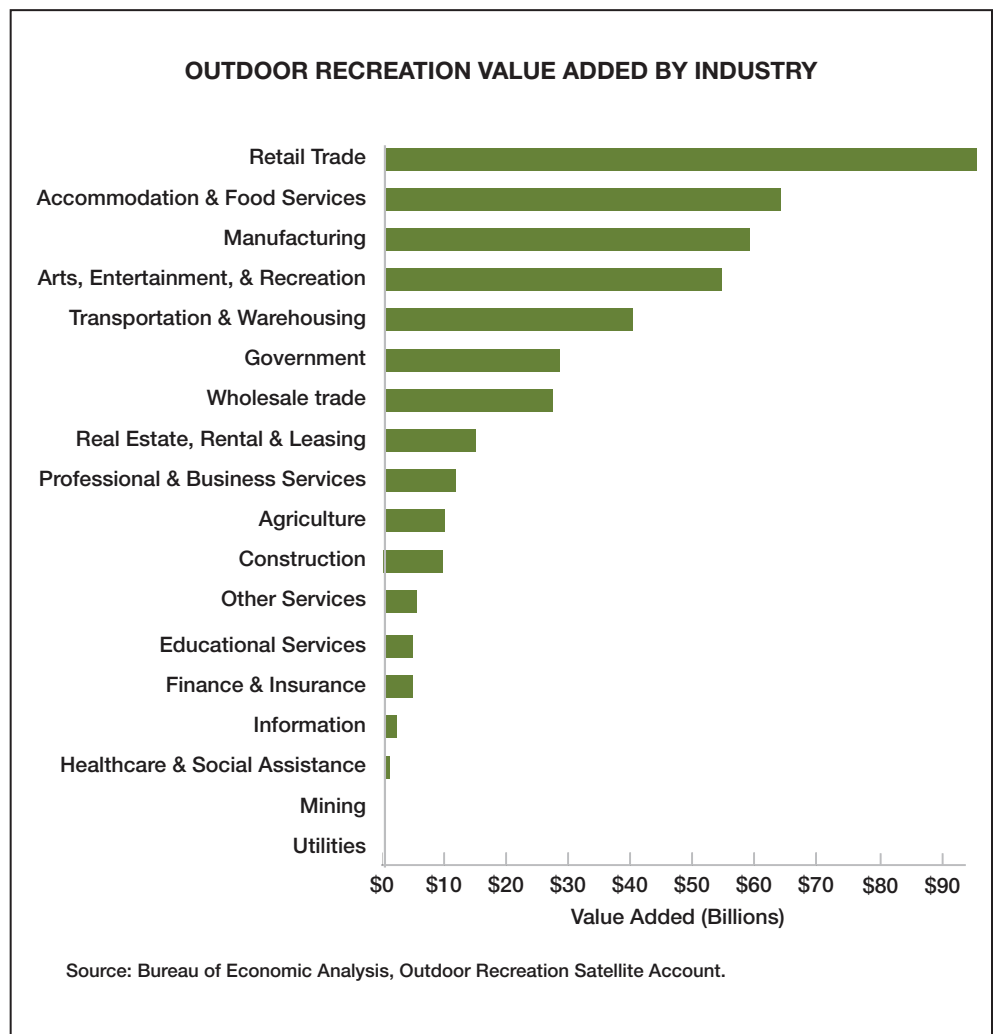


for nearly \$59.4 billion in 2016. Following vehicle-related activities, boating and fishing (\$38.2 billion); hunting, shooting, and trapping (\$15.4 billion); equestrian (\$12.7 billion); and camping, climbing, and hiking (\$7.9 billion) accounted for the five-largest conventional outdoor activities.

Value added measures how an individual industry's production contributes to the overall economy through its interaction with outdoor recreation. In 2016, the Retail Trade industry added \$81.7 billion of value through outdoor recreation—the highest amount of all individual industries. Retail Trade activity captures the sale of goods to the general public to be used in outdoor recreation activities, including gear, vehicles, and parts. Alone, Retail Trade makes up 21.9% of all activity within the outdoor recreation economy. Following Retail Trade are Accommodation and Food Services (\$55.7 billion); Manufacturing (\$51.3 billion); Arts, Entertainment, and Recreation (\$47.4 billion); and Transportation and Warehousing (\$34.9 billion). These top five industries make up nearly three-quarters (72.5%) of the total value added by the outdoor recreation economy.

Along with output and value added, the economic contribution of outdoor recreation can be quantified with measures such as employment, consumer spending, and tax revenue. The Outdoor Industry Association (OIA), a Colorado-based outdoor research and advocacy group, estimates these impacts using the following groups of activities: camping, fishing, hunting, motor sports (motorcycling and off-roading), snow sports, trail sports, water sports, wheel sports (cycling and skateboarding), and wildlife viewing. On a national level, in 2016, these outdoor recreation activities generated \$886 billion in consumer spending, employed 7.6 million Americans, contributed \$267.8 billion in wages and salaries, and provided \$65.3 billion in federal tax revenue and \$59.2 billion in state and local tax revenue.

The OIA also measures the economic



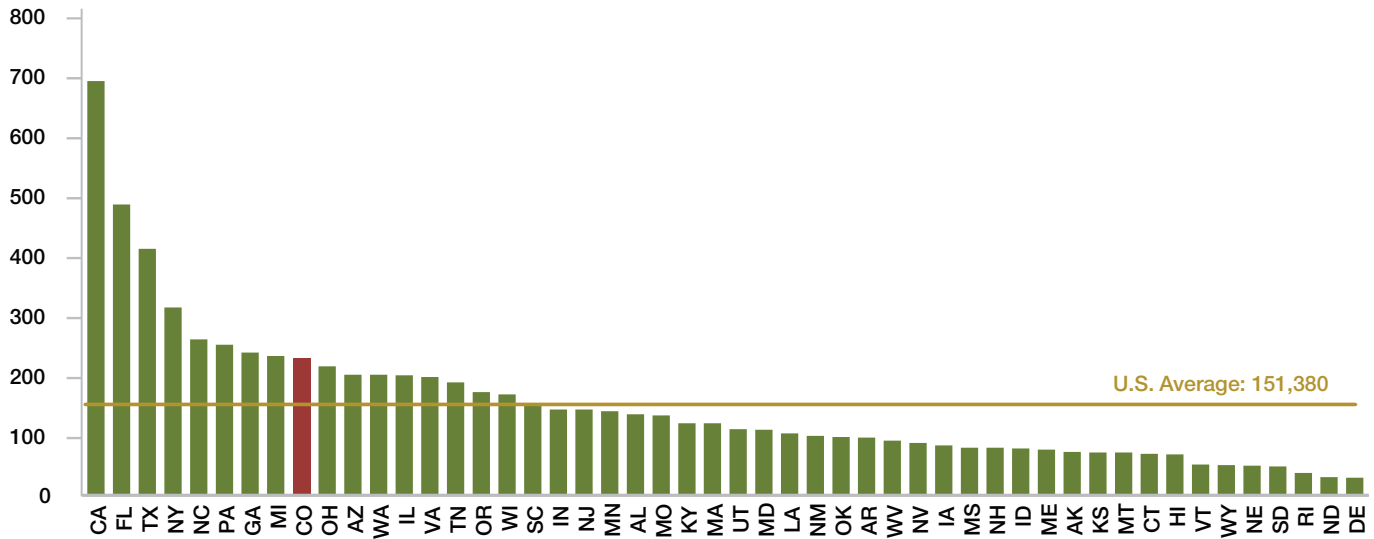
impact of outdoor recreation for individual states. In 2016, outdoor recreation-related consumer purchases in Colorado totaled \$28 billion. Of this amount, \$15.2 billion came from Colorado residents, while out-of-state visitors spent the remaining \$12.8 billion. Purchases that fall into this category include outdoor recreation products such as gear, apparel, services, and vehicles, as well as spending on trips and travel (including airfare, lodging, tickets, and lessons). Additionally, Colorado's outdoor recreation economy provided 229,000 direct jobs. These jobs include more recognizable outdoor-related occupations such as park rangers, ski instructors, and guides, but also take into account less obvious jobs such as retail sales associates and equipment manufacturers that depend on outdoor recreation. The OIA estimates that these jobs generated

\$9.7 billion in wages and salaries for Colorado workers in 2016. Finally, the outdoor industry contributes significantly to the public sector, generating approximately \$2 billion in state and local tax revenue in 2016.

It's no secret that Coloradans benefit from some of the top outdoor recreation resources in the country. According to the OIA, 71% of Colorado residents participate in outdoor recreation activities each year, the ninth-largest proportion among all states and far higher than the national average of 48.8%. Nearly a quarter (22%) of these activities take place less than 30 minutes away from the participant's home. Mirroring Colorado's highly active lifestyle, the state's outdoor recreation economy is one of the largest in the nation. Among all states, Colorado ranks ninth in direct jobs, sixth in consumer spending (including residents


OUTDOOR RECREATION JOBS BY STATE

Direct Jobs (Thousands)



Source: Outdoor Industry Association.

and out-of-state visitors), fifth in wages and salaries, and seventh in combined state and local tax revenues related to outdoor recreation.

Colorado's vast array of recreation activities continues to make it one of the most attractive states in the country for outdoor enthusiasts. While these activities promote a healthy, active, and fun-filled lifestyle, it's undeniable that the benefits of outdoor recreation go beyond just an improved quality of life. By employing thousands of residents and facilitating billions of dollars of commerce, the outdoor industry is a driving force within local, state, and national economies. Given these facts, the next time you hit the slopes, lace up your hiking boots, or pitch a tent, keep in mind that your outdoor activities don't just improve your personal health, but are essential toward building a stronger and healthier economy. 

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The Case for Leave No Trace

Dana Watts

Leave No Trace is an international movement, nonprofit organization, and conservation program dedicated to protecting the outdoors by teaching people to enjoy it responsibly. The organization accomplishes this mission by delivering cutting-edge education and research to millions of people across the country every year.

Colorado is blessed with some of the most magnificent outdoor destinations in the country, if not the world. Visitors flock to Colorado to explore the largest collection 14,000-foot peaks in the country; many of the top-visited river corridors in the world; and endless trails, parks, and forests. Eighty-two million visitors are traveling to and around our state annually (Colorado Tourism Office, Colorado Tourism Sets All-Time Records for Sixth Consecutive Year, <https://www.colorado.com/news/colorado-tourism-sets-all-time-records-sixth-consecutive-year>).

That number is part of an overall trend of increased visitation to public lands. Last year, there were 13 million visits to Colorado's state parks, and 290 million visits to public lands in 11 western states with Colorado ranking number two in visitation. Yet with these increasing visitation numbers, the land management agencies that manage these public lands wrestle with budgets that consistently lag behind. The flood of people enjoying the outdoors is not being matched with the funding to care for them, leading to critical concerns about their long-term health.

To add to the issue, 9 out of 10 people who visit the outdoors aren't equipped with the necessary skills and information to protect the land while they enjoy it. Consequently, people are causing significant yet preventable damage, and that damage is adding up—littered parks and damaged trails, formidable impacts



Overcrowding on public lands in Colorado is commonplace but addressed by Leave No Trace education. Photo: Leave No Trace Center for Outdoor Ethics



Leave No Trace education in action. Photo: Leave No Trace Center for Outdoor Ethics

of fire, polluted waterways, and serious wildlife issues. Consider:

- People caused almost half the 73,000 wildfires on national forest lands between 2006 and 2015. And campfires were the cause of one-third of those human-caused fires, scorching in excess of 1.2 million acres (Greenwire, Biggest culprit behind human-caused blazes: campfires, <https://www.eenews.net/greenwire/stories/1060045283/search?keyword=wildfires>).
- City of Boulder Open Space and Mountain Parks estimates that 40 tons (80,000 pounds) of dog waste is deposited in trash receptacles and on the lands they manage annually.
- Wildlife in our parks and frontcountry are routinely relocated or euthanized due to conflicts with humans. The National Park Service cites human garbage as the origin of many of these unfortunate and unnecessary conflicts.

Protecting wildlife, appropriate use of fire, clean water, and healthy parks and trails all become a reality when people learn about and practice Leave No Trace. Costly and irreversible damage to nature is eliminated or substantially reduced through Leave No Trace education, training, and outreach. Better yet, research shows that people who learn about Leave No Trace change their behavior in the outdoors and are highly likely to share their knowledge with peers.

History

The 24 year-old Leave No Trace was formed initially to develop and deliver environmental programs to teach people to reduce their impacts on public lands. In partnership with the country's primary land management agencies, the programs reach a wide and diverse audience with a core goal of empowering people to care for our shared public lands. The foundation of the Leave No Trace message is based in science and to that end, the Center conducts research designed to inform new and effective ways to educate people. These groundbreaking research studies utilize



Conundrum Hot Springs

cutting-edge methods, blending diverse data collection techniques to study Leave No Trace-related issues. This research fuels education, messaging, and innovative programs that contribute to the long-term care of parks and protected areas.

A Case Study for Leave No Trace

Leave No Trace has a multitude of programs to get the job done. One of the most prominent is called Hot Spots. The Leave No Trace Hot Spots Program identifies areas that are suffering from the severe impacts of outdoor activities that can thrive again with Leave No Trace solutions. Hot Spot areas receive a unique blend of trainings, expert consulting, education programs for youth and adults, service projects, monitoring programs, and more. The result is areas on the road to a healthy and sustainable recovery with site-specific Leave No Trace tools in place.

One such Hot Spot is in Colorado. In 2017, the Center identified a remote yet newly discovered gem of a natural area, Conundrum Hot Springs. Near the Maroon Bells–Snowmass Wilderness and a rigorous 8.5-mile hike from Aspen, these primitive hot springs have become a highly popular destination. Currently,

nearly 5,000 overnight visits take place in a single season—which marks a 200% increase in use in the last 10 years. The area is showing the impacts: 139 piles of human waste found near the springs, 140 illegal fire rings, and hundreds of pounds of garbage that visitors leave behind every summer.

As a designated Hot Spot, Leave No Trace spent months of planning and a week on-site working with the White River National Forest staff to execute targeted training for agency staff and key volunteers, educating the visiting public, and cleaning up the area around the hot springs. The 2017 program was extremely successful, and the Aspen-Sopris Ranger District has already increased the incorporation of Leave No Trace into their management plans and tactics. In 2018, Leave No Trace will return to the area to continue to strengthen and build the local Leave No Trace programs. The overall goal of this revisit is to continue to expose more visitors to minimum impact education, furthering the Conundrum Hot Springs on the road to recovery.

As participation in outdoor recreation increases, defining and better communicating a sustainable recreation paradigm for outdoor enthusiasts will

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FROM THE EDITOR

While outdoor-related activities offer myriad health, recreation, and entertainment leisure benefits, they also make a substantial economic impact. In its first-ever estimates of the economic contribution of outdoor recreation to the U.S. economy, the Bureau of Economic Analysis estimated the industry's contribution.

The articles in this issue, primarily written by government and business leaders working in the outdoor recreation industry, quantifies the economic contribution; highlights its creativity and innovation; and details the importance of the industry's economic contributions, particularly to rural Colorado communities. An article about one higher education program training students to work in the industry rounds out the issue.

Our next issue will present a review of the Colorado economy midway through the year. Look for it this summer in your inbox.

We are interested in your suggestions for topics of upcoming issues. Please contact me directly at 303-492-1147.

—Richard Wobbekind

Save the date and watch for more information!

Fifty-Fourth Annual 2019

COLORADO BUSINESS ECONOMIC OUTLOOK


December 10, 2018
Grand Hyatt Denver, 1750 Welton Street

Brought to you by
Leeds School of Business, University of Colorado Boulder

www.colorado.edu/business/brd

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become increasingly important in the years to come. Park managers and partners must address expectations for public use, while simultaneously protecting the critical natural and cultural resources found in parks and natural areas all across the country. Leave No Trace is the most relevant and critical framework for ensuring the continued enjoyment and protection of parks and protected areas for current and future generations. 

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COLORADO BUSINESS REVIEW



The CBR is a quarterly publication of the Business Research Division at CU Boulder. Opinions and conclusions expressed in the CBR are those of the authors and are not endorsed by the BRD, the Leeds School of Business faculty, or the officials of CU.

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Richard L. Wobbekind, editor; Cindy DiPersio, assistant editor; Brian Lewandowski, technical advisor; Shannon Furniss, design.

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