



The Economic Benefits issue

Winston Churchill once advised, "If you are going through hell, keep going."

Despite the wisdom of this maxim, for park professionals and too many of our associates, moving forward may seem difficult given today's reduced budgets and slumping businesses.

The good news is that despite troubled times, outdoor recreation remains an important part of California's economy.

No matter how you run the numbers, outdoor recreation provides jobs for hundreds of thousands of Californians and supports businesses throughout our state, by contributing to tourism, sales of recreation equipment and services, and park agency purchases and salaries.

This issue of *The California Park Planner* explores outdoor recreation and the economy, and includes the latest statistics, links to useful reports, and articles about how parks can expand their important role in California communities' return to progress and prosperity.



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Outdoor recreation a significant contributor to state's economy

by Alex Stehl, astehl@parks.ca.gov

Each year outdoor recreation on California's public lands contributes billions of dollars to the state's economy and hundreds of thousands of jobs, according to a recent report to California State Parks. In 2008 such recreation directly contributed about \$21 billion and about 200,000 jobs.* When economic multipliers are included, the contribution increases to about \$40 billion and 313,000 jobs. These contributions and more are described in a recent report, *California Outdoor Recreation Economic Study: Statewide Contributions and Benefits*.

Focus on public lands

California State Parks commissioned the study and report by Colorado-based BBC Research and Consulting to evaluate the economic contribution of outdoor recreation on public lands, *Outdoor recreation*, page 2.

Trail systems help boost economies

by Cheryl Essex, cessex@parks.ca.gov

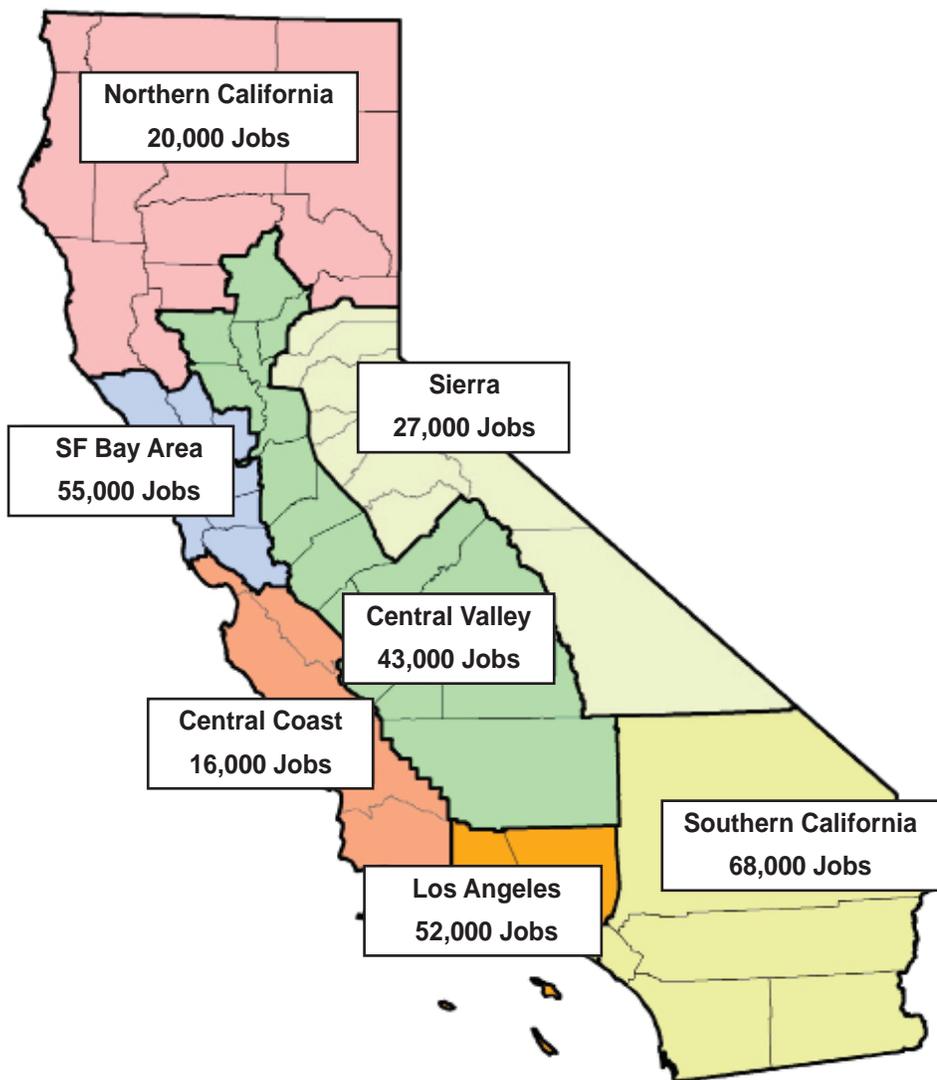
Trail systems are gaining in popularity across the United States for recreation, tourism, people-powered transportation, and as a tool for economic development.

A review of literature presented by American Trails, a national organization working on behalf of trail interests, suggests that long-distance trails that accommodate bicycles generate the most economic benefits. As one example, along the San Francisco Bay Trail (www.baytrail.org), a 500-mile shoreline trail around the bay, bicycle rentals totaled about 250,000-300,000 in 2008 and generated \$5 to \$6 million in gross revenue, including sales of items like accessories, clothing, and supplies, and

Trails, page 4.

* See definitions of economic contribution types in page 3 sidebar.

Outdoor recreation, from page 1.



The 2008 economic contribution of outdoor recreation on public lands in California, by region (including multipliers).

including California State Parks' lands, federally-managed lands, local and regional parklands, and other public locations. The study, partially funded by the National Park Service's Land & Water Conservation Fund, draws on data from a number of reports, including a 2007-2009 survey of visitors to 26 California state parks and a 2008 outdoor recreation survey of California

adults. Outdoor recreation other than that on public lands was excluded from the study, such as golfing on private courses, hunting on farms or ranches, bicycling on public streets, and recreation activities in other non-recreation settings.

In 2008, direct visitor-, operating-, activity-, and equipment-related expenditures for outdoor recreation on public

lands in the state totaled about \$21 billion. Visitor and operating expenditures in the California State Park system contributed about \$3.4 billion to the economy and 35,000 jobs; California State Parks was responsible for the largest share of economic contribution by a single agency. At national forests, national parks, BLM outdoor lands, national wildlife refuges, and other federally-managed lands, visitor and operating expenditures contributed about \$3.5 billion and 39,500 jobs. At the state's hundreds of local and regional park agencies, visitor and operating expenditures contributed about \$5.1 billion and 56,000 jobs. Expenditures on selected activities, such as fishing, hunting, boating, and golf, totaled \$5.2 billion. Equipment-related expenditures totaled \$3.5 billion.

Expenditures and jobs supported, by region

Of the study's seven state regions—Central Coast, Central Valley, Los Angeles, Northern California, San Francisco Bay Area, Sierra, and Southern California—the largest amount of direct expenditures, \$5.1 billion, occurred in the Southern California region, followed by the San Francisco Bay Area and the Los Angeles regions, with over \$4 billion each. The Central Valley region had the smallest amount of expenditures, with \$1.2 billion.

Including economic multipliers, outdoor recreation supported

about 1.5 percent of all jobs in California in 2008. This total included more than 60,000 jobs in the Southern California region, reflecting the magnitude of that region's recreation expenditures. Each of the seven regions benefitted from at least 15,000 jobs related to outdoor recreation. Outdoor recreation had the most significant economic impact in the Sierra and Northern California regions, where the proportion of jobs related to recreation was more than three times the statewide average.

Out of 440 'specific industry' economic sectors in the state, the approximately 200,000 jobs directly supported by outdoor recreation in 2008 placed the outdoor recreation sector in the top 30. Sectors with similar job levels that year included trucking transportation (185,000 jobs) and legal services (222,000 jobs).

For more information

Download the report summarized in this article, *California Outdoor Recreation Economic Study: Statewide Contributions and Benefits*, at www.parks.ca.gov/corp/. Also available at the same location is the companion report, *California Outdoor Recreation Economic Study: State Park System Contributions and Benefits*, which quantifies the economic contribution to the state economy from the California State Park system.

Other research of interest:

- *The Economics Associated*

with Outdoor Recreation, Natural Resources Conservation and Historic Preservation in the United States, a 2011 report by Southwick Associates, was commissioned by the National Fish and Wildlife Foundation. This report identifies the level of impacts of natural resource conservation, outdoor recreation, and historic preservation on the U.S. economy; what data currently exist; and key data gaps. www.trcp.org/assets/pdf/The_Economic_Value_of_Outdoor_Recreation.pdf.

- *Measuring the Economic Impact of Park and Recreation Services* is a how-to guide for park professionals on conducting economic impact studies, released by

Dr. John L. Crompton and the National Recreation and Park Association. This 2010 report also summarizes results of more than 100 economic impact analyses conducted by Dr. Crompton's research team over the past decade. www.nrpa.org/uploadedFiles/Explore_Parks_and_Recreation/Research/._Crompton%20Research%20Paper-Final-150dpi.pdf.

- *The Active Outdoor Recreation Economy Report*, published by The Outdoor Industry Foundation, is based on nearly 14,000 interviews conducted to understand recreation's role in our economy. www.outdoorfoundation.org/research/index.html. ●

Key terms defined: Measuring the economic contribution and impact of outdoor recreation

Direct economic contributions: the initial economic effects from visitor expenditures and the operating expenditures of recreation providers (such as California State Parks). Example: Gasoline bought for a family trip to a California state park.

Indirect economic contributions: the economic effects resulting from purchase of goods and services by directly affected industries from other firms. Example: The wholesale purchases of food and supplies by a gasoline station that directly services state park visitors goes on to indirectly affect wholesale food and supply businesses.

Induced economic contributions: the economic effects stimulated by purchases by employees of directly and indirectly affected businesses. Example: Apartment rent paid by an employee of a gas station that directly services state park visitors.

Economic multiplier: the combination of direct, indirect, and induced effects, commonly referred to as the "multiplier" for a specific direct effect. The multiplier equals the direct + indirect + induced effects divided by the direct effect. Example: If the sum of direct, indirect, and induced effects on sales is \$2 million, and the direct effect is \$1 million, the multiplier equals two.

Source: *California Outdoor Recreation Economic Study: Statewide Contributions and Benefits*, available at www.parks.ca.gov/corp/.

Trails, from page 1.

supporting at least six local bicycle shops.¹

The Sacramento River Trail, anchored by the world-class Sundial Bridge at Turtle Bay, connects Redding to hundreds of miles of popular wilderness trails. Bob Warren, manager of the Redding Convention and Visitors Bureau, says, “I hear from hotels all the time that people are coming here to

How well-managed trail systems contribute to economic vibrancy

Here are some of the many economic benefits of trails.⁴

Trail tourism increases business income, including income from food and lodging, and tax receipts. *Who benefits:* Visitors, businesses, local and state governments.



Trail-oriented events mean gate and concession income, increased community recognition and spirit. *Who benefits:* Residents, visitors, businesses, local and state governments.

Urban development and redevelopment along trail corridors can improve quality of life and draw wealthier residents and employers, creating temporary construction jobs and permanent jobs that serve visitors. *Who benefits:* Residents, visitors, businesses, local and state governments.

Community improvement with trails engages volunteers and fosters community pride. Regular recreation can lead to a reduction in treatment of obesity-related illnesses. *Who benefits:* Residents, employers, state and federal health programs.

Trails near residential areas can increase property values. *Who benefits:* Homeowners, local governments.

Retail stores near trails often increase sales and rental of outdoor recreation equipment like bicycles and bike gear, hiking equipment, equestrian tack, and boats as well as other supplies like food and gasoline. *Who benefits:* Businesses, local and state governments.

use the trails.” Bruce Reynolds tapped into the trail tourist market by opening Shasta Glide ‘n Ride in 2007. He rents bicycles and has served almost 5,000 visitors—a significant portion of them international tourists—with Segway tours of the Sacramento River Trail.

Elsewhere in the U.S., the GAP Trail Town Program[®] is a model for a trail program that both seeds and harvests economic benefits. This program enlivens the Great Allegheny Passage (GAP), a 141-mile rail trail traversing mostly rural communities and wildlands in Pennsylvania and Maryland. Forty-seven new and thirteen expanded trail-serving businesses have been operating along the route since the program’s 2007 start.² While trail construction cost about \$70 million, the program generated \$40 million in direct spending in 2008 alone—a significant benefit to the mostly rural post-industrial towns along the route.³

Check out the resources at American Trails website’s Economic Impact of Trails section (www.americantrails.org/resources/economics/index.html), and you, too, will be convinced that this economic engine is gaining ground! ●

1. Source: “California Trail Systems, Economic Engines Revitalizing our Communities,” a Coastal Conservancy presentation at the 2009 California Trails & Greenways Conference. California State Parks supports this annual conference. For more information see www.parks.ca.gov/trails/conference.

2. Source: “‘Trail Towns’ on Great Allegheny Passage benefit from visitor spending,” an article in the Resources section of the American Trails website. Article available at www.americantrails.org/resources/economics/Trail-Towns-Great-Allegheny-Passage-tourism.html.

3. Sources: The Great Allegheny Passage website, www.atatrail.org/pv/trailtowns.cfm, and an October 2011, American Trails webinar, “Making the Case for Trails in Tight Economic Times.”

4. Adapted from information in “Economic benefits of trails,” an article in *American Trails* magazine, Summer 2011, available on the American Trails website, www.americantrails.org, as well as information in studies at www.americantrails.org/resources/economics/index.html.

Economics a major factor in state park closure plans

California State Parks faces a current \$22 million budget shortfall. To meet this challenge, unprecedented since California's park movement began in 1864, a team of experienced superintendents developed criteria to identify parks of greatest significance—those that best exemplify the state's natural and cultural heritage and its valuable and diverse recreational opportunities. Also critical are those parks that generate significant revenue, to support resource protection, recreation, and education throughout the park system.

Applying these criteria to the system's 278 park units resulted in a list of 208 that could continue to operate within the department budget. (The 32 parks operated by other organizations will stay open.) The superintendents devised an initial plan to close the remaining 70 parks and reduce management to caretaking until better times return.

As this publication is released, closure plans are still being refined. One promising approach is expanding the use of partnerships with local agencies and nonprofits. Los Angeles County, Santa Clara County, East Bay Regional Parks and nonprofit organizations like the Santa Barbara Trust for Historic Preservation are among those already operating and maintaining state parks. More partners are stepping up, taking some parks off the closure list. The National Park Service will cooperate with the department to operate Tomales Bay State Park (SP) and Del Norte Redwoods SP. At Muir Woods National Monument, increased day use fees will help support nearby Samuel P. Taylor SP's campground. Other partnerships with nonprofits, local governments, and outdoor land agencies are being explored, spurred by a new law (AB 42) that expands nonprofits' ability to operate state parks. In addition, the State Park and Recreation Commission recently approved a solicitation to gauge concessionaires' interest in operating 29 parks on the closure list, especially those with campgrounds or other business

opportunities. Philanthropic contributions may keep a few parks open under California State Parks' management. Also under examination are enterprise models of park operation that earn more revenue, rather than assume a return to substantial government funding.

You can expect to hear more of this dialog as we move forward. Like other park agencies in the state facing reduced budgets, California State Parks is continuing to do its best to protect park resources, provide recreation and education, and support local communities. ●

Plans aim to minimize impacts to resource protection, access, and revenue

Despite the negative aspects of closing parks, these system-wide indicators remain robust (figures based on initial plans to close 70 parks):

- Natural resource protection. Of the 67 parks identified as protecting outstanding and representative habitats in the *Natural Parks Report*,¹ and in Frederick Law Olmsted, Jr.'s 1928 survey,² 53 (79%) will remain open.
- Cultural resource protection. Of the 22 parks identified as being key to preserving and teaching California history,³ 20 (90%) will remain open.
- Public access. The 208 parks that would remain open ("open parks") account for 92% of current attendance.
- Revenue generation. Open parks account for 94% of current revenues.

1. *Natural Parks Report*. www.parks.ca.gov/pages/23071/files/naturalparksreport_11_3_05.pdf.

2. For more information on the survey, see www.parks.ca.gov/?page_id=940.

3. *The California History Plan: Telling the Stories of Californians (2009)*. www.parks.ca.gov/?page_id=24742.

Economic sustainability is goal of Delta recreation proposal

by Dan Ray, dray@parks.ca.gov

Economic sustainability is an objective of California State Parks' recent *Recreation Proposal for the Sacramento-San Joaquin Delta and Suisun Marsh*. The proposal, a response to 2009's Delta Reform Act,¹ recommends a network of recreation areas in the Delta, combining existing and newly designated areas.

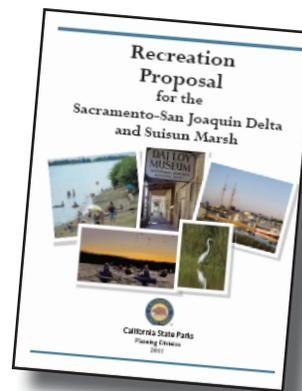
Delta's location, natural resources key

Recreation and tourism are among the Delta's key assets, the proposal reports. Travel spending in Delta counties was \$5.3 billion in 2008, including \$784 million in the 'arts, entertainment, and recreation retail sales' sector. About 2,500 local jobs are tied to this sector. Five million people live within 20 minutes of the Delta, providing a steady demand for recreation that will grow with the 80 percent increase in the region's population forecast by 2050. The Delta's location between San Francisco, the wine country, and Sierra Nevada destinations offers opportunities to attract out-of-area tourists, too.

The Delta's overcommitted water supplies, fragile levees, and troubled ecosystem are the topic of many discussions about the region. Its recreation attractions include 192,000 acres of public land and waterways spread over 700 miles of sloughs and winding channels. Parks, wildlife refuges, boating and fishing areas, scenic highways, trails, private resorts and marinas, hunting clubs, museums, historic sites, and festivals add to the region's recreation and tourism infrastructure.

Recreation strategy maximizes dollars

To grow the recreation and tourism economy, the proposal recommends a 'gateway-basecamp-adventure' strategy. At entries to the region—the gateways—communities, tourism businesses, and transportation agencies would improve wayfinding and travel information to help casual visitors find their way into the Delta's sometimes confusing landscape of islands and country roads. Expanded



Download the 40-page recreation proposal and related documents, including a map showing recommendations, at www.parks.ca.gov/deltarecreation.

retailing could capture some expenditures for recreation supplies and equipment that now occur closer to visitors' homes. Parks, resorts, and historic communities inside the Delta—the basecamps—can provide accommodations and services to draw visitors deep into the region and transform day trips to overnight stays. Diverse recreation activities—the adventures—at various price points can appeal to more visitors and increase daily expenditures. Affordable family favorites such as bicycling or picnicking (spending is about \$11-\$16 daily per person) can be supplemented by higher-end boating (\$41 daily), wildlife watching (\$44 daily), angling (\$41-\$62 daily), hunting (\$68 daily), and historic tourism (\$34 daily).

Recreation helps build a Delta 'brand'

Recreation opportunities should be integrated into water or ecosystem restoration projects, the report recommends, to maximize returns on public investments. Concessionaires and other private partners can extend the capacity of cash-strapped agencies. Skills of the region's hospitality businesses should be boosted by economic development programs that emphasize marketing, technical assistance, and training. As recreation and tourism build the Delta's 'brand,' the Delta's competitiveness for businesses, residents, and jobs will also improve. ●

1. The Act, along with bill number SBx7 1 (2009-2010 Session), amended and added to the Public Resources Code and the Water Code.

Outdoor recreation a beacon for economic growth

by I Ling Thompson, *The Outdoor Foundation*, ithompson@outdoorindustry.org

Here's the good news. The recession isn't stopping Americans from getting outside and enjoying the great outdoors.

Public lands, parks elemental to popularity

In a recent study, The Outdoor Foundation found that more than 50 percent of Americans participated in an outdoor activity in 2010. Today, that equates to nearly 138 million Americans finding refuge and renewal in the outdoors, hiking, fishing, camping, biking, climbing, skiing, paddling or hunting. Our nation's networks of parks and public lands are at the heart of our country's uniquely American experience.

Outdoor recreation has always been a favorite American past-time, even through troubled times. Presidents like Abraham Lincoln, Teddy Roosevelt, and Franklin Roosevelt understood the connection between national pride, the people, and the land. They had the foresight to protect iconic landscapes for the American people to enjoy, despite being faced with recessions and war. This legacy was infectious and now exists as a network of parks and monuments, wilderness areas and wildlife refuges, scenic rivers, and historic sites that continue to inspire and draw people from around the world today.

Americans seek out active recreation

The bad news is that our country is troubled with unemployment and growing state and federal deficits. But through it all, Americans are still going outside and getting active. This trend is telling and offers a glimpse into an iconic industry directly tied to our nation's public lands.

Simply put, Americans spend money, create jobs, and support local communities when they get active outdoors. According to The Outdoor Industry Association, Americans spend \$289 billion each year on gear, trip-related items, and services to participate in outdoor activities. Additionally, nearly



The author enjoying California's outdoors.

6.5 million Americans are employed thanks to outdoor recreation. Iconic parks and recreation hotspots draw outdoor enthusiasts from around the world. When they visit, they purchase gear to protect them from the elements, buy equipment to do their activities, and they spend money on food and lodging that supports local economies.

Large impact on jobs, revenue, sales in state

In California, outdoor recreation matters to the economy. It supports 408,000 jobs, generates \$3.1 million in annual state tax revenue and produces \$28 billion annually in retail sales and services.* And it's California's many spectacular state parks and other recreation opportunities from the coast to the mountains that draw outdoor enthusiasts.

Our nation's network of accessible public lands is the infrastructure supporting the steady growth behind the recreation economy. Imagine the trucking industry without highways, or the performing arts without a civic center. Now, imagine going for a hike without access to a trail. Or fishing without access to a river or lake.

* In contrast to the study on page 1 of this issue that reported on outdoor recreation on public lands, the 2006 Outdoor Industry Foundation study referenced here reported on outdoor recreation that occurred on both public and private recreation lands or at other venues.

Beacon, page 8.

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Published twice a year, *The California Park Planner* provides employees of California State Parks and park agencies with information on trends and developments affecting park planning.

Beacon, from page 7.

It is important that policymakers understand the economic opportunities linked to recreation lands to inform and guide decision-making at all levels.

Ensuring that the nation's recreation infrastructure—from close-to-home parks to wilderness lands and everything in between—receives investment and is supported with sound policy is good for communities, the economy, and the continued growth of a vibrant American industry.

Where to find more information

Find the Outdoor Foundation's *2011 Outdoor Recreation Participation Report* at www.outdoorfoundation.org. For more on the Outdoor Industry Association, a trade organization for companies in the active outdoor recreation business, see their website at www.outdoorindustry.org. ●

Reader survey results summarized

by Eileen Hook, ehook@parks.ca.gov

In June, 281 readers of *The California Park Planner* responded to a 14-question, online survey sent to subscribers (other than state employees). Survey highlights:

- 72% of respondents have worked in park planning for 5 years or more, nearly half for more than 15 years.
- 85% work for a local park agency.
- 34% are park managers, deputy directors or directors; 30% are park planners or facility designers; and 23% work in administration or budgets.
- 59% feel the publication fulfills its purpose (see blue sidebar at left, last paragraph) 'very well.'
- 72% skim the *Planner*, 19% read each article, and 63% forward the issue to colleagues.
- 76% like the current length of articles.
- 57% find *Planner* content 'somewhat useful', 23% find it 'very useful'; 52% have used 'one or two ideas' from the *Planner*.
- Regarding content, 80% want more links and references to reports; 36% want more statistical data and information.

Suggested topics for future issues included marketing, economics, partnerships, fund raising, and the future of parks; many respondents also offered to write articles.

Thanks to all who took the time to respond! ●