

# **Park Visitor Research: Economic Impact, Health and Attitudes**



**NATIONAL PARK MARKET RESEARCH SUMMIT  
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# Visitor Trends in National Parks



- Visitation peaked in 1987. In 2010, visitation will finish about 1% below 1987 level despite high levels of visits to Yosemite, Yellowstone, Glacier and other key parks
- Over the same period, US population has grown 26%
- If the proportion of Americans visiting parks had remained the same as in 1987, national park visits in 2010 would have been about 365 million –or 80 million more than actual visits
- Drop in recreation visitor hours even more significant –down 13%

# Key Economic Impact Assessment Assessments



- National Park Service: National Park Visitor Spending and Payroll Impacts
- US Fish and Wildlife Service: National Survey of Fishing, Hunting and Wildlife-Associated Recreation
- Forest Service: National Visitor Use Monitoring
- USACE: Recreation: Value to the Nation
- Key State Assessments under SCORPs – 2010  
Montana Study
- Specific Recreation Industry Studies (ie, American Horse Council)

# U.S. Fish and Wildlife Service



- National Survey of Fishing, Hunting, and Wildlife-Associated Recreation conducted every five years
- Randomized national survey
- 2006 study results: \$122 billion spent on wildlife recreation per year
- 52% (\$64.1 billion) is spent on equipment and 31% (37.4 billion) is trip-related
- .87.5 million U.S. residents fished, hunted, or watched wildlife in 2006

# U.S. Army Corps of Engineers



- \$18 billion annually in economic impact
- \$13 billion a year on trip related expenses (gas, food and lodging) in local communities surrounding Corps lakes, leading to 250,000 jobs and \$16 billion in value added (includes wages & salaries, payroll benefits, profits and rents and indirect business taxes) to the nation's economy. This figure includes \$8 billion spent in local communities, resulting in 100,000 jobs and \$3.9 billion in value added to the local economies.
- \$5 billion a year on recreation equipment, creating 95,000 jobs and \$6.4 billion in value added to the nation's economy.

# Forest Service



- 173 million recreation visits to National Forests annually – an additional 300 million visits via scenic byways and other roads through forests
- Spending by recreation visitors amounts to \$13 billion/yr
- Greatest contributor to GDP by the national forests, supports 224,000 full and part time jobs
- Non-locals (those travelling more than 50 miles) spend \$10 billion
- Counts spending in town on gas, food, lodging, souvenirs
- Does NOT count any spending on recreation durables (RVs, boats, etc.) or any spending more than 50 miles away

# State Park Data: From SCORPS and Tourism



- Example: Economic Impact Survey of Visitors to Montana State Parks, 2010
- Montana state parks had over 1.9 million visitors in 2010, up 50% since 2002. Visitor spending exceeded \$289 million, up 35% and supported 1,600 jobs.
- Montana resident visits were up 79%, while nonresident visitation was down 16%
- Nonresidents spend \$122 million per year in Montana State Parks
- \$48 million of this is spent in parks; \$73 million is spent elsewhere in Montana
- Serendipity: broad support for MT license fee for parks

# Concessioners and Economic Impact



- **Concessioners have served park visitors since the 1870's -- today serve some 100 million park visitors annually**
- **Combined workforce of nearly 25,000 persons – front-line, visitor-contact jobs – and provide in excess of \$1 billion annually in lodging, food, retail and transportation services**
- **Franchise fee payments to NPS are \$80 million annually, or about the combined sum raised annually by the National Park Foundation and members of the Friends Alliance**
- **Guest Contribution programs operate in partnership with friends organizations and National Park Foundation, yielding in excess of \$1.1 in recent years at 13 parks alone**
- **Concessioner marketing and park promotion efforts exceed \$10 million annually, and are coordinated with the marketing and promotion efforts of state and gateway communities that equal that amount**

# Attitudes Toward National Parks: NPCA



- Conducted by Peter Hart and Associates in 2008 and 2010
- Bipartisan majority want the White House to work with local partners
- AGO has support of 84% of voters; potential to cut across partisan lines
- 85% of voters want to see national parks fully funded and restored, particularly in time for Centennial
- Summary: “...[O]ur national parks are a universally beloved asset for *all Americans- Republicans, independents, and Democrats alike. And Americans of all stripes want to ensure that those parks receive the funding they need so they can continue to be a place of beauty and inspiration and a source of pride.*”

# Health – the New Frontier

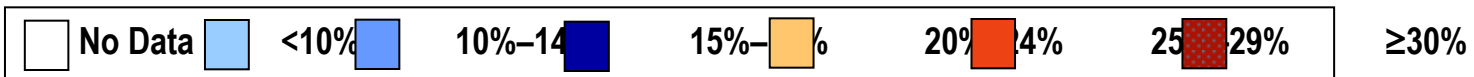
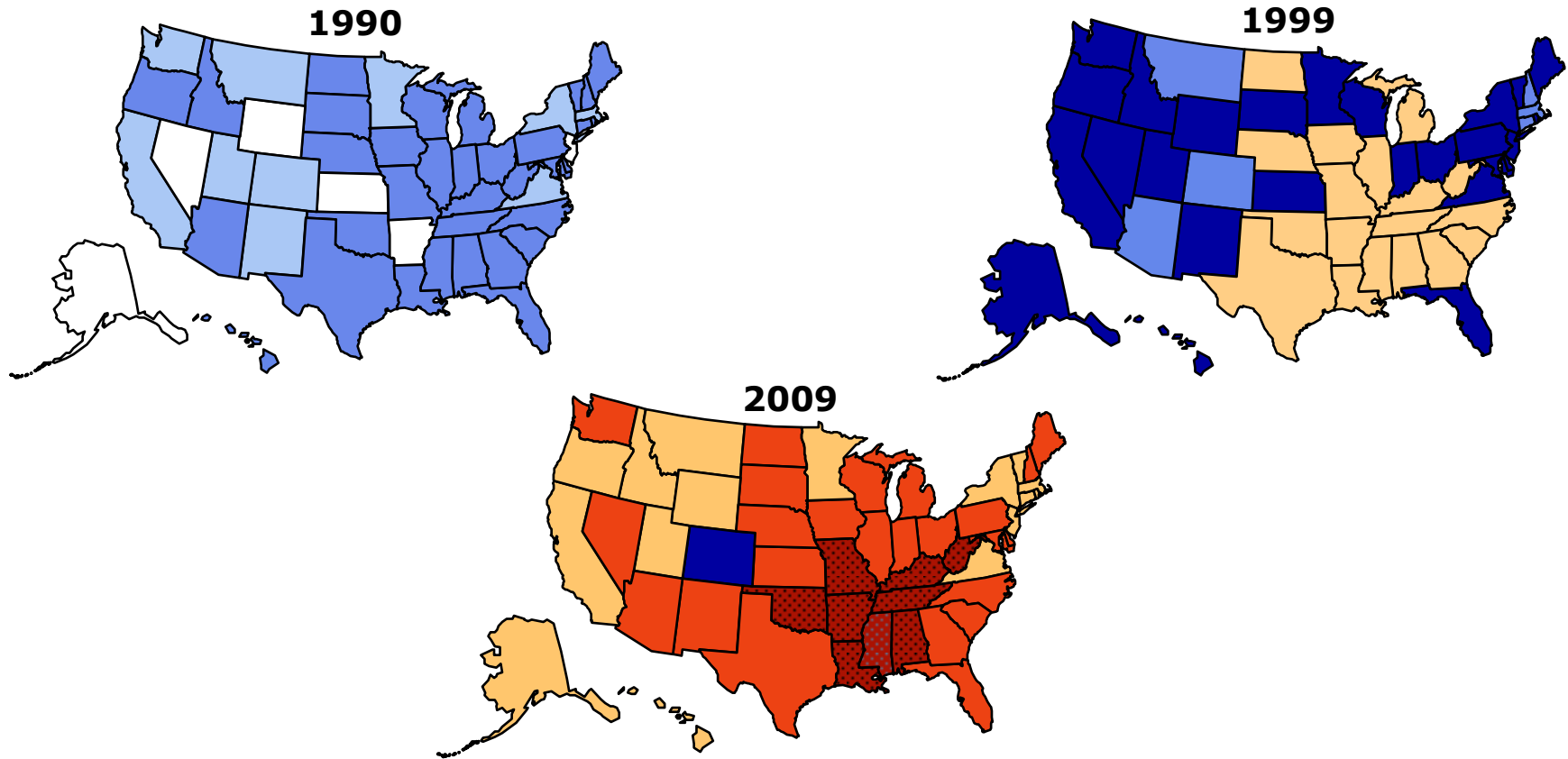


- Health –now 16.6% of GDP (\$2,7 trillion) and climbing -- 8,000 per American
- 70% of total costs are for lifestyle-induced chronic illnesses: consequences of smoking, poor diet, lack of exercise
- Surgeon General calls most lifestyle-induced chronic illnesses “preventable”
- NPS and others are increasingly active. 2007 pilot effort proved increasing physical activity during park visits to achieve daily recommended levels is practical
- New NPS team, led by Office of Public Health, underway
- America’s Great Outdoors report expected to tout Health and the Great Outdoors link
- Goal is to monetize parks role in health, gain health community contributions to operations and even capital needs. Australia is model

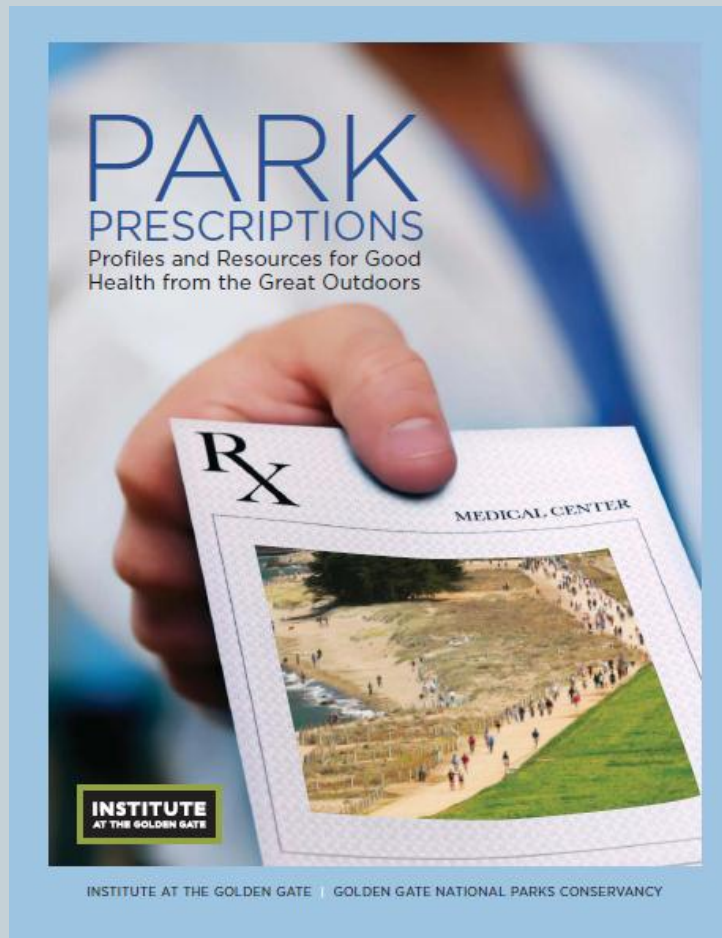
# Obesity Trends\* Among U.S. Adults

## BRFSS, 1990, 1999, 2009

(\*BMI  $\geq 30$ , or about 30 lbs. overweight for 5'4" person)



# From Coast to Coast – Doctors Prescribe the Outdoors



# The First Lady's Campaign to Combat Youth Obesity

