

The West's Competitive Advantage: Landscapes, Open Lands and Unique History

*Get Out West! Advisory Group
Report to the Western Governors*



- *Outdoor Recreation*
- *Conservation*
- *Tourism*
- *Volunteerism*



Western Governors' Association

Dear Friends of the West,

*When I became Chair of Western Governors' Association in June 2011, I launched an effort to examine and celebrate outdoor recreation and tourism in the West. We branded our effort **Get Out West!** to not only tell outdoor enthusiasts and tourists to come to the West, but also as encouragement to kids and families – particularly in urban parts of our region – to get out into the region's great outdoor places.*

The West is blessed with incredible natural areas for outdoor recreation and tourism. Recreation hot spots in our region are known across the globe and we are becoming known as the place to come for world class outdoor recreation adventures. Western Governors consider the West the outdoor recreation and tourism capital of not just the nation, but of the world.

Outdoor recreation and tourism mean jobs and “clean” economic development. But to make sure the West remains the best place for outdoor recreation and tourism we need to make sure we have policies in place that facilitate the growth of these industries and maintain and improve the lands and waters, trails and signage that make the West a great place to visit and play.

To help my colleagues and me identify opportunities to grow the outdoor recreation and tourism economy in the region and to encourage youth to explore the West's great outdoor places, WGA empanelled the Get Out West Advisory Group. These experts have developed three reports, of which this is one. The reports are:

- *The West's Competitive Advantage: Landscapes, Open Lands and Unique History*
- *Connecting Kids and Families to the West's Great Outdoors*
- *Best Practices in Managing Recreation Assets*

The Governors thank the Advisory Committee members for their hard work. The members are listed in the back inside cover of this report.

In order to provide Governors, legislators and other decision makers with information to best understand the breadth and depth of the outdoor recreation industry, WGA brought together recreation industry leaders to commission a survey that has documented the economic contribution of outdoor recreation – in terms of sales, jobs, tax revenues – in the nation and in Western states. This data will help us all comprehend how the complex and multi-faceted recreation sector contributes to our economic base and how we can assist in fostering its continued growth.

I encourage you to review all four reports. The Advisory Committee has outlined a number of strategies Governors can adopt, which we will take under consideration. Western Governors have already taken action on three of them:

- *In December 2011 we adopted a resolution encouraging the federal government to streamline and improve the tourist visa application experience and wait time for approval to visit the U.S.*
- *In December 2011 we adopted a resolution encouraging the use of the conservation corps to do construction and maintenance of recreation assets on public lands.*
- *In June 2012 we are launching a Governor's Youth Outdoor Recreation Outreach Coordinator pilot program in several Western states.*
- *In the Fall of 2012 and early 2013, WGA and our recreation industry partners will be announcing industry economic information on a state-by-state basis*

*I urge you to **Get Out West!** We live in a beautiful part of this great country. Let's not take it for granted.*



Christine O. Gregoire
WGA Chair

The West's Competitive Advantage: Landscapes, Open Lands and Unique History

Get Out West! Advisory Group

Report to the Governors

June 2012

Introduction

Governor Chris Gregoire launched the *Get Out West!* initiative in June 2011 when she was elected Chair of the Western Governors' Association. The goals of the initiative are to grow the tourism and recreation economies in the West and connect kids to the West's great outdoor places.

Governor Gregoire convened an advisory group to develop recommendations for the WGA. This report and its companion reports — *Get Out West!: Connecting Kids and Families to the West's Great Outdoors* and *Get Out West!: Managing the West's Recreation Assets* - represents the Advisory Group's findings and recommendations.

Background

The development of the Western U.S. has been driven and shaped by its natural assets, landscapes and developments in technology. The region's natural endowments have attracted people to come to – or return to – the area for two centuries, including:

- Hunters and trappers, followed by farmers, lumberjacks and miners in the mid to late 1800s.
- Workers involved in depression era programs, including the Civilian Conservation Corps and large construction projects like Hoover Dam in the 1920-30s, and who stayed on after the Depression ended;
- GIs and airmen who came to the West in the 1940s for training and returned after the war;
- "Snowbirds" who came West as standards of living increased in the 1950-60s;
- Workers or "lone eagles," who can be based anywhere and do their jobs, thanks to the Internet.

New demographic trends – a growing standard of living in other countries, baby boomers in this country starting to retire – coupled with the increasing mobility of businesses and the internationalization of the world economy are new drivers that may lead people, businesses and tourists to *Get Out West!*

This report highlights the growing economic importance of tourism and outdoor recreation to the West; the region's recreational and tourism assets; and the importance of those assets to tourism, recreation, and decisions made by companies on location and relocation. It will conclude with recommendations for improving policies and programs that drive these sectors of the economy.

¹See inside back cover of this report for a list of Advisory Group members

New Pillars of the Western Economy

Tourism

The West has long been a magnet for both U.S. and international travelers who come for leisure and for business. The travel and tourism “industry” has slowly become one of the top five industries in Western states with many rural communities relying on tourism for their livelihood. According to the U.S. Travel Association’s Power of Travel²:

- Travel and tourism generated \$261 billion in the West in 2009, representing approximately 5% of the Gross State Product (GSP) in the West that year.
- Nearly 44 million Westerners worked in travel and tourism related industries accounting for more than 6% of all non-farm jobs.
- Travel and tourism expenditures also generate tax revenues for Western states totaling \$118 billion in 2009.

For most states, travel and tourism are among their top five industries, and they spend a considerable amount of money promoting them. This industry accounts for a significant amount of total economic activity in Hawaii (22% of GSP), Nevada, Guam (20%) and Montana (8%).

In 2007, business travel to the West generated nearly \$100 billion in expenditures and tax revenue, while leisure travel generated \$183 billion. Leisure travel had a more significant economic impact than business travel in every Western state, but there were some significant differences in just how much more important.³

Nearly 60 percent of all travelers to the U.S. from overseas came to the Western U.S. in 2010⁴, amounting to nearly 15 million tourists. Overseas visitors to the U.S. are forecast to increase by 46 percent by 2016, which could bring an additional 6.9 million overseas visitors to the West annually.

Tourists from overseas stay longer and spend more money per trip (an average of \$5,546) than tourists from other parts of the U.S. One third of all tourists from overseas visited two or more states on their visit.

Outdoor Recreation

The outdoor recreation industry makes up a substantial – and growing – part of the US economy. Retail sales of outdoor recreation goods and services equaled \$645.6 billion in 2011⁵.

Outdoor recreation is more important to some Western states than others. For example, it accounted for 3.5% of total economic activity in Washington State, 5% in Utah and 7.5 % in Montana in 2006.

State parks offer recreational opportunities for more than 725 million visitors in 2009, local citizens and international tourists alike. Those visitors generated \$20 billion of economic activity for communities surrounding 6,000 state park units nationwide. Budgets for state parks for that year were roughly \$2.3 billion⁶.

Outdoor recreation is more than motels, hunting guides and ski apparel. It includes jobs in numerous traditional economic sectors, such as research and design of new products like Patagonia’s work on natural fibers for clothing, manufacturing like Polaris’s plants making ATVs and ROHVs, retail and wholesale trade like REI and The North Face, accommodation and food service like Xanterra Parks and Resorts, and professional services.

² *Power of Travel*, U.S. Travel Association

³ *Power of Travel*, U.S. Travel Association

⁴ *Overseas Visitation Estimates for U.S. States, Cities, and Census Regions: 2010*. Office of Travel and Tourism Industries, International Trade Administration U.S. Department of Commerce

⁵ *The Economic Impact of Outdoor Recreation*, Western Governors’ Association, 2012

⁶ *America’s State Parks Web site*

In addition, many leading, internationally recognized outdoor recreation companies are headquartered in the West. That is not by accident. Many of these companies were founded and are based in the region so they can be close to abundant recreational opportunities to test new products, sell them to enthusiasts and recruit enthusiastic employees. They can also associate their brand image with the “Recreation Capitol of the World” – the Western U.S. For example:

- REI (Recreational Equipment, Inc.), a national retailer of quality outdoor gear and apparel, is headquartered in Kent, Washington, 18 miles south of Seattle. REI had sales of \$1.8 billion in 2011 and employs more than 10,000 workers. REI has made FORTUNE magazine’s “100 Best Companies to Work For” list for 15 consecutive years.
- Cabelas, is a leading specialty retailer and the world’s largest direct marketer of hunting, fishing, camping and related outdoor merchandise. It is headquartered in Sidney, Nebraska. Cabelas had sales of \$2.6 billion in 2010. At the end of 2010, Cabelas employed 13,700 workers, 6,100 of whom were employed full time.
- California is home to five of the major power sports distributors in the U.S. – American Honda, America Suzuki, Kawasaki Motors, KTM and Yamaha Motor Corp. The estimated economic value of the Motorcycle/ATV Retail Marketplace in California is over \$2.9 billion. States west of the Mississippi accounted for 5,522 motorcycle dealerships employing 50,409 workers with a payroll of \$1.69 billion in 2010.

Outdoor recreation conventions also mean big business to host cities every year. For example:

- The Outdoor Industry Association’s Outdoor Retailer is the world’s largest outdoor sports industry gathering in the world, bringing retailers and media together with more than 1000 brands in the business of producing and selling the active outdoor lifestyle. The event is held twice a year (Summer Market and Winter Market) in Salt Lake City. The event attracts over 21,000 attendees.
- For more than five decades, the SIA SnowShow has been the largest snow sports trade show globally. Nearly 1,000 brands are represented and the show draws an estimated 19,000 visitors. The event is held annually in Denver (formerly in Las Vegas). Representing over a \$3 billion industry, the industry’s retail buying power attends the SIA Show.

Outdoor recreation annual events also mean big business to host cities every year. For example:

- The Vail Valley Foundation and the outdoor recreation company Teva have held the Teva Mountain Games annually in Vail, Colorado for the last 10 years. The Games are the nation’s largest celebration of adventure sports, art, music and the mountain lifestyle and attract nearly 2,500 amateur and professional athletes and 40,000 spectators over the four-day event. Amateur and professional athletes in 8 sports and 24 disciplines converge on the rivers and trails of Vail, Colorado to compete for more than \$100,000 in prize money each year.
- The city of Sturgis, South Dakota calculates the economic impact on the region of the annual Sturgis Motorcycle Rally to be \$800 million. This year’s rally will be the 72nd annual event.

New Economic Sectors Driven by the West’s Natural and Cultural Assets

Assets

The West is home to unique and beautiful landscapes that attract tourists and outdoor recreationists. People all over the world know of the beaches in Guam and Hawaii; California’s redwoods and wine country; ski areas in Colorado and Utah; trout fishing in Idaho and Montana; small game hunting on the Great Plains; big game hunting in Alaska; hiking trails in Oregon and Washington; mountain biking in Moab; wind surfing on the Hood River; bird watching meccas in the central and pacific flyways; snowmobiling in Wyoming; and the scenic desert trekking in Arizona, New Mexico and Nevada.

Many activities foreign leisure tourists come to the U.S. for have a rural and sometimes distinctly Western flavor. Leisure travelers visit small towns (31%), national parks (23%) and Native American communities (4%). They camp (5%); go on environmental/ecological excursions (3%); and hunt, ski, fish and visit dude ranches (1-2 each %)⁷. While these percentages may seem small they translate into a lot of tourists. For example, the 4% that visited tribal communities equaled 716,000 tourists in one year.

Recreation and tourism in the West depend on publicly owned land. The West contains more than 58 million acres of land managed by federal, state and local agencies.

Type of Western Park	Acres
Parks in large urban cities	Over 1 million
State parks	Over 7 million
National parks and monuments	Over 50 million
<i>Total</i>	<i>Over 58 million</i>

In 2011, state and national parks in the West hosted over 354 million visits by state residents and tourists from the U.S. and other countries. These visits generated jobs and revenue for local communities, many located in rural areas. There are nearly 22 thousand miles of trails in state parks in West alone.

Trends and Challenges

Visits to the U.S. by overseas tourists stagnant — In 2010, the U.S. welcomed only 1% more overseas travelers than it did in 2000, despite an extraordinarily weak U.S. dollar and an additional 60 million long-haul travelers worldwide (up 40%⁸). This was likely influenced by terrorist attacks on U.S. soil in 2001 and subsequent changes in visa policies as well as a lack of any nationally coordinated public-private effort to market the U.S. to overseas tourists.

Participation in outdoor recreation flat or declining — The U.S. population grew by 27.5 million between 2000 and 2010⁹. However, visits to state and national parks in the U.S. by residents and tourists remained relatively flat for that time period averaging about 1.5 billion annually despite continued investments in acquisition, capital construction and maintenance of facilities¹⁰.

Participation in most nature based outdoor recreation activities is down while urban recreation participation is up.

The notable exceptions to the trends are increased participation in hiking and canoeing.

OHV use is now recognized as one of the faster growing outdoor activities. A variety of statistical sources show that demand for OHV driving and riding grew especially fast in the 1990s, and in the first few years of this decade¹¹.

There are troubling signs on the horizon for the next generation however. A recent study¹² found 8-18 year olds spend more than 7½ hours a day, seven days a week with some form of electronic media.

The West's population is becoming more urban, making it increasingly more important to provide close-to-home or "gateway" outdoor recreation experiences and opportunities. While state and national parks and a variety of other public lands provide remarkable resources in the Western U.S., many citizens do not take advantage of these resources due to time or travel constraints, a lack of

⁷ Profile of Overseas Travelers to the United States: 2010 Inbound. Office of Travel and Tourism Industries, International Trade Administration U.S. Department of Commerce

⁸ Power of Travel, U.S. Travel Association http://www.poweroftravel.org/international/trends_arrivals.htm

⁹ Annual Estimates of the Population for the United States, U.S. Census Bureau, Population Division

¹⁰ Annual Information Exchange, National Association of State Park Directors, 2001-2010 and National Park Service Public Use Statistics Office online database <http://www.nature.nps.gov/stats/>

¹¹ Source: Off-Highway Vehicle Recreation in the United States and its Regions and States: A National Report from the National Survey on Recreation and the Environment (NSRE) February, 2008

¹² GENERATION M2 — Media in the Lives of 8- to 18-Year-Old. A Kaiser Family Foundation Study, JANUARY 2010

Ten-Year History of Sports Participation

*Participated more than once (in millions)
Seven (7) years of age and older*

	2010	2008	2006	2004	2002	2000	Change 2000-2010
Fishing	33.8	42.2	40.6	41.2	44.2	49.3	-15.5
Camping (vacation/overnite)	44.7	49.4	48.6	55.3	55.4	49.9	-5.2
Backpack/Wilderness Camp	11.1	13.0	13.3	15.3	14.8	15.4	-4.3
Boating' Motor/Power	20.0	27.8	29.3	22.8	26.6	24.2	-4.2
Hunting with Firearms	16.3	18.8	17.8	17.7	19.5	19.1	-2.8
Water Skiing	5.2	5.6	6.3	5.3	6.9	5.9	-0.7
Skiing (cross country, alpine, snowboarding)	15.5	14.0	14.2	15.3	15.2	14.0	1.5
Mountain Biking (off road)	7.2	10.2	8.5	8.0	7.8	7.1	0.1
Hunting w/Bow & Arrow	5.2	6.2	5.9	5.8	4.6	4.7	0.5
Target Shooting - Airgun	5.3	5.0	5.6	5.1	4.1	3.0	2.3
Target Shooting	19.8	20.3	17.1	19.2	18.9	14.8	5.0
Weight Lifting	31.5	37.5	32.9	26.2	25.1	24.8	6.7
Exercise Walking	95.8	96.6	87.5	84.7	82.2	86.3	9.5
Aerobic Exercising	38.5	36.2	33.7	29.5	29	28.6	9.9
Exercising with Equipment	55.3	63.0	52.4	52.2	46.8	44.8	10.5
Workout at Club	36.3	39.3	37.0	31.8	28.9	24.1	12.2
Running/Jogging	35.5	35.9	28.8	26.7	24.7	22.8	12.7
Hiking	37.7	38.0	31.0	28.3	27.2	24.3	13.4
Canoeing	NA	10.3	7.1	7.5	7.6	6.2	NA

Source: National Sporting Goods Association, 2010

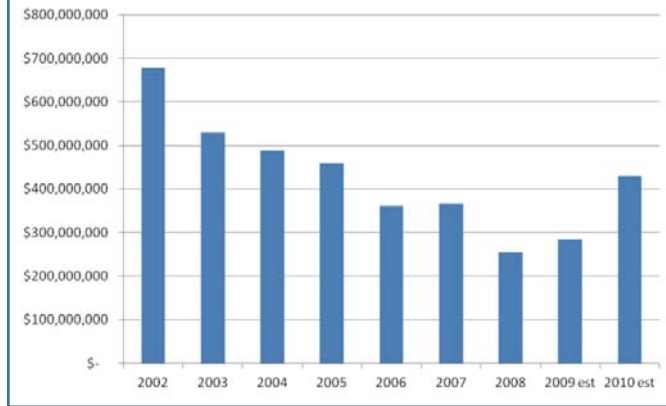
outdoor skills or knowledge, or not having adequate information about where to go. City and county parks and trails are providing “gateway” experiences that provide a setting for urban populations comfortable with being outside without the time and expense of more distant or wilderness experiences. In Colorado, surveys by Great Outdoors Colorado and Colorado State Parks (now Colorado Parks and Wildlife) indicate that trails are a top priority for the public and particularly trails that are close to home and provide local and regional connections.

Investment in outdoor recreation assets cut back — State and federal budgets for recreation assets were pared back during the recession and the long, slow recovery. For example, California announced it was closing 70 state parks last year.

The Land and Water Conservation Fund (LWCF) has been the principal funding source for federal land acquisitions for conservation and recreation purposes since 1965. Funding for the LWCF comes from leases paid by companies drilling offshore for oil and gas. The LWCF also serves as a major source of state and local funding for land acquisition and development of public outdoor recreation resources through a state matching grant program. Appropriations for the LWCF program, which collects \$900 million in fees every year, have been significantly cut back, especially the state grant program. The unappropriated balance of the fund is currently more than \$17 billion.

The Recreational Trails Program (RTP) was created in 1991 as part of the Intermodal Surface Transportation Efficiency Act and was subsequently reauthorized in 1998 and in 2005. It plays a vital role in funding state trail programs and projects all across the country, including trail building, maintenance and other trail-related projects. The RTP requires that 30% of program funds be dedicated to

Annual Appropriations from the Land and Water Conservation Fund



Source: U.S. Department of the Interior, Budget Office

non-motorized uses and 30% to motorized uses with an additional 40% for mixed-use trails that may or may not include motorized uses.

The RTP is administered by the Federal Highway Administration. Funding for the program comes from federal taxes on gasoline purchases for use in off-highway vehicles. Funds are allocated to states based on a formula that honors the user-pay/user-benefit character of the program. RTP funds are utilized by state transportation departments and natural resource agencies in cooperation with citizen

advisory committees. Available funding is leveraged with cash and in-kind support – often doubling available federal funds. Work for these projects is primarily done by youth corps, volunteers, and small businesses, providing employment opportunities for many hardest hit by the recession; and the finished projects are catalysts for tourism, providing valuable access to public lands.

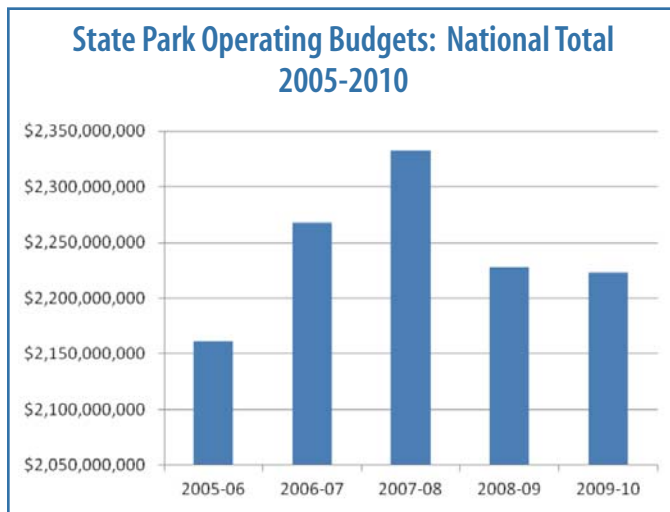
The RTP has funded in excess of 15,000 projects across the nation over the past 19 years.

Recreational Trails Program Funding

State	Apportionments	Total	Apportionments	Total
	Before Rescissions	Rescissions	After Rescissions	Obligations
	1993-2011	2001-2011	1993-2011	1993-2011
	(\$ million)	(\$ million)	(\$ million)	(\$ million)
Alaska	14.61	-3.07	11.54	12.13
Arizona	19.09	-0.35	18.74	13.22
California	63.16	-11.48	51.69	43.59
Colorado	18.05	-0.91	17.13	16.28
Hawaii	10.16	-0.47	9.69	8.33
Idaho	15.86	-1.19	14.67	14.66
Kansas	14.87	-0.16	14.72	13.95
Montana	15.64	-0.98	14.66	14.38
Nebraska	12.57	-1.13	11.44	10.79
Nevada	13.15	-0.85	12.31	12.06
New Mexico	15.57	-1.21	14.36	13.23
North Dakota	11.32	-0.62	10.70	10.65
Oklahoma	17.36	-0.19	17.17	15.39
Oregon	16.28	-1.31	14.97	14.69
South Dakota	11.55	-0.13	11.43	10.84
Texas	41.61	-3.76	37.84	34.81
Utah	15.61	-0.55	15.06	15.01
Washington	20.42	0.00	20.42	20.22
Wyoming	14.16	-0.03	14.13	13.34
Total to Western States	361.05	-28.39	332.66	307.57
Total USA	906.03	-61.62	844.41	761.83

At the same time, asset investments have declined, estimates of the total amount of unmet needs for public outdoor recreation facilities and parkland acquisition in the West in 2011 was \$8.6 billion¹³. In addition, the national park system has a maintenance backlog of \$8 billion, the Fish and Wildlife Service about \$1.7 billion, and the BLM at less than \$100 million, according to Will Shafroth, Councilor to the Secretary for America's Great Outdoors at the Department of the Interior.

Funding for state parks' operating costs have been cut back during the recession too. Several states were forced to close or curtail services at some parks. With state budgets improving, state park operating budgets are starting to see some modest increases.



Source: National Association of State Park Directors, *Statistical Report of State Park Operations: Annual Information Exchanges, 2005-2010*

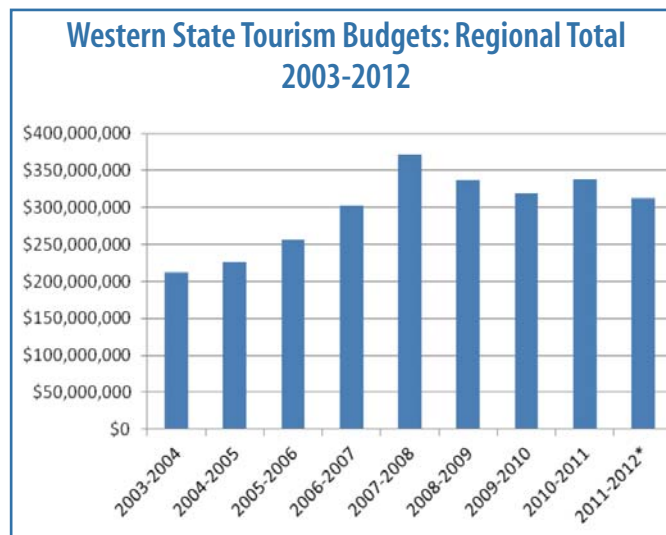
Until 1995, the U.S. Travel and Tourism Agency, part of the Department of Commerce, was responsible for our international tourism marketing. When the USTTA was zero-budgeted out of existence by Congress, the U.S. became the only industrialized country in the world without an official international tourism marketing agency. This continued for more than a decade and a half, until Congress in 2010 passed the Travel Promotion Act. During this period, the number of international visitors to the U.S. increased, but the U.S. share of the global tourism market steadily declined.

The Travel Promotion Act created the Corporation for Travel Promotion, a public-private entity with unprecedented financial resources to market the U.S. internationally. Federal support is provided by a \$10 fee on visitors from "visa waiver" countries (32 countries which the U.S. has reciprocal agreements to waive visas for tourists). This fee is projected to generate at least \$100 million per year for the CTP and now is reportedly generating even more than

Investment in tourism promotion

cut back — State budgets for tourism promotion were pared back during the recession and the long, slow recovery. For example, Washington State closed its tourism office. Many Western states are now increasing tourism funding as state budgets improve. However, as a region, budgets are still not much higher than they were five years ago.

The new Corporation for Travel Promotion is an historic attempt by the U.S. to market the country abroad and significantly increase the number of international visitors coming to our shores.



Source: 2011-2012 Preliminary U.S. State Tourism Office Budgets Prepared for the National Council of State Tourism Directors, An Industry Council of the U.S. Travel Association

¹³ 2011 Land and Water Conservation Fund Annual Report

projected. It must be matched 2:1 by the private sector, including state tourism offices and local destination marketing organizations (in-kind matches are allowed). By comparison, the total budget for the old USTTA never exceeded \$20 million and typically was not more than \$15-16 million, with only \$2-3 million of that spent directly on marketing programs. This is why the tourism industry regards the CTP as the dawn of a new day and the entry (not even the re-entry) of the U.S. as a formidable competitor for international visitors and expenditures.

Managing Recreational and Tourism Assets

Managing the West's recreational assets is challenging since they are owned and managed by local, state, federal, tribal and private interests. Unlike a resort, where the entire recreation experience is managed by one company, a person's outdoor recreation outing in the West depends on the activities and cooperation of a number of entities. For example, a family going river rafting might stay overnight at a private motel, hire a private river rafting guide who gets a permit from a federal agency to float on a river whose water is managed by the state (and sometimes influenced by release of water from federally controlled dams) and may float through federal, state and/or private property.

Every five years states are required to develop a Statewide Comprehensive Outdoor Recreation Plan in order to be eligible for funding from the Land and Water Conservation Fund. Ideally, this process includes all stakeholders, both public agencies and private interests, including citizens.

Several Governors have created task forces or commissions to help guide outdoor recreation policy and asset management. In June 2005, Utah created an Outdoor Recreation Economic Ecosystem Task Force. The task force was charged with developing a report that would:

- identify Utah's premier outdoor recreation destinations and natural assets;
- identify the protection and or management needs of those "recreation gems" and "recreation ecosystems;"
- work with local, state and federal governments and agencies to facilitate and develop sustainable protection and proper management of those "recreation gems" and "recreation ecosystems;"
- work with local, state and federal governments and the tourism industry to promote local recreation assets and outdoor recreation to the benefit of local communities and rural economies across Utah;
- identify information sources and technologies, including geographic information systems that will contribute to identifying and advertising outdoor recreation opportunities.

Strategies for More Efficiently Managing Assets

Recent budget cuts by state and federal agencies have led to efforts to right-size and realign assets and how they are managed. Some examples follow.

Privatization — In 2011 California State Parks announced it would close 70 out of 278 state parks by July 1, 2012, because of state budget challenges. In November 2010, voters rejected a plan to keep all the parks open when they turned down Proposition 21, which would have raised vehicle license fees \$18 a year to double the state parks budget.

Public Support — Six months after the release of California's closure list, nine of the 70 parks have found private donors and nonprofit groups to provide the money necessary to keep them open.

Public-Private Partnerships — Dead Horse Point State Park is 5,300 acres located just outside the entrance to Canyonlands National Park. In 2008, the state park spent \$40,000 to build 15 miles of biking and hiking trails in a stacked loop system linking the state park to the national park. Half the money was provided by a local corporation, Intrepid Potash, for whom the trails were named. The other half was paid off in year one. Since the trails' opening, revenues for the park have been steadily climbing from \$494,991 in 2008 to \$709,202 in 2011. The park now takes in twice its expenses and is a net contributor to other parks in the state park system.

State-Federal Partnerships — South Dakota negotiated an agreement with the Corps of Engineers to “buy” Corps property — about 60 parcels of land (more than 90,000 acres) that includes campgrounds, river access points and game production areas along the Missouri. South Dakota has a perpetual lease from the Corps and manages the property.

State-Tribal Partnerships — The Washington state Parks Department and the Swinomish Tribal Community entered a partnership to jointly own and manage Kiket Island as a public park on the Swinomish Reservation, and to be managed as a unit of Deception Pass State Park.

Conservation Corps — Conservation Corps in the West currently employs young people in land stewardship and disaster response activities in partnership with local, state and federal agencies. There are currently 35 Conservation Corps serving more than 12,000 youth annually in the West. The National Park Service Chief of Maintenance conducted an analysis on Conservation Corps and found that using a Conservation Corps resulted in a 44% cost savings for the NPS in addition to the benefits of engaging young people.

Volunteerism — There are many examples of organizations across the West and the nation harnessing people’s love of the outdoors to encourage volunteer efforts to maintain great recreational and tourism assets. For example:

- REI mobilizes tens of thousands of volunteers every year to build trails, clean up beaches and restore habitat (<http://www.rei.com/aboutrei/volunteer.html>)
- The Washington Trails Association organizes Volunteer Vacations, week-long work parties that connect hikers with much-needed trail maintenance projects. Trip fees are currently \$195, which provides volunteers with a week of fine cooking and a meaningful project led by skilled crew leaders. (<http://www.wta.org/volunteer/vacations>)
- National Public Lands Day (NPLD) is the nation’s largest, single-day volunteer event for public lands in the United States. In 2012, NPLD will be held on September 29, 2012. In 2011, 180,000 volunteers worked at over 2,060 sites in every state. (<http://www.publiclandsday.org>)
- The San Bernardino National Forest Association in southern California has established a very strong volunteer base to assist the Forest with major volunteer programs including: Off-Highway Vehicle Volunteers - Today’s sophisticated multi-terrain technology has created exciting opportunities for visiting parts of the forest few people get to see. The Association’s Off-highway Vehicle Programs field more than 300 OHV Patrol Volunteers who contribute over 30,000 hours every year to teaching visitors trail ethics, land and resource stewardship, and maintaining and monitoring trails. (<http://www.nationalforestassociation.org>)

Reorganization

In 2011 Colorado combined the Division of Wildlife and the Division of Parks and Outdoor Recreation into a new division. The reorganization streamlines state government, improves service to customers and preserves critical programs by combining resources of the two divisions. The reorganized division will remain a part of the Department of Natural Resources and be called Parks, Wildlife and Outdoor Recreation.

New Fee Models

From 2001-2010 visits to state parks in the West — for the region as a whole — declined by 16%. However, some states saw increases. Montana went from a daily pass model to a vehicle registration fee to enter state parks. That change in funding from a pay when you enter to an honor system where you are expected to pay when you register your car. After changing its fee model, Montana saw a 79% increase in resident visitation with a 4% increase in customer satisfaction (from 90-94%) from 2002 to 2010.

What's Being Done to Catalyze the Tourism and Outdoor Recreation Sectors

Tourism

International Marketing

Until last year the United States was the only industrialized nation without a nationally coordinated program to attract international travelers. Brand USA (formerly the Corporation for Travel Promotion) was created in 2010 to encourage travelers from all over the world to visit the United States. The public-private marketing entity was created to work in close partnership with the travel industry, maximizing the social and economic benefit of travel in communities around the country.

Streamlining and Improving Federal Tourism Policy and Procedures

On January 19, 2012, the President signed an Executive Order establishing visa and foreign visitor processing goals and the task force on travel and competitiveness. The task force is developing a "National Travel and Tourism Strategy" with recommendations for new policies and initiatives to promote domestic and international travel opportunities throughout the United States with the goal of increasing the United States market share of worldwide travel, including obtaining a greater share of long-haul travel from Brazil, China and India".

Geotourism

Several geographic areas in the West have partnered with the National Geographic Society to jointly market the tourism, outdoor recreation, history and heritage of their communities. Geotourism collaborations in the West to date include:

- Central Cascades: Oregon and Washington
- Crown of the Continent: Alberta, British Columbia and Montana
- Four Corners Region: Arizona, Colorado, New Mexico and Utah
- Sierra Nevada Project: California and Nevada
- Greater Yellowstone: Idaho, Montana and Wyoming
- Redwood Coast: California

The USFS, BLM, NPS, USFWS, BIA have all signed an MOU with National Geographic to support these efforts. The six Western States Geotourism projects listed above have invested more than \$1.5 million and thousands of volunteer hours in developing and marketing Web sites and printed MapGuides highlighting more than 3,000 unique and authentic destinations, events and attractions.

Outdoor Recreation

The public and private sectors are working together to reconnect Americans to the nation's unparalleled outdoor places.

Local intergovernmental partnerships connecting recreational assets — Some cities and surrounding communities are working with state and federal agencies to provide a seamless recreation experience. For example, The Peaks to Prairies Children's Forest Corridor will link parks and nature centers to create a cohesive network of outdoor spaces along the South Platte River in Denver, Colorado to provide youth and families a gateway to journey from downtown Denver upstream to the National Forests and downstream to the grasslands. The Children's Forest Corridor will serve as both a physical and virtual connector. A Web site will be developed through GetOutdoorsColorado.org for partners, youth and families to link to each other. Johnson Habitat Park, in central Denver, will serve as an

urban base camp, offering unstructured play, exploration, education and stewardship. The 50 mile corridor from the mountaintops to the city, and beyond to the grasslands, will create an unprecedented opportunity and experience for Coloradans.

America's Great Outdoors Initiative — The America's Great Outdoors Initiative was launched in 2010 and has developed a national strategy to rework inefficient policies, target investments and make the federal government a better partner with states, tribes and local communities in promoting and managing outdoor recreation assets and opportunities.

Get Out West! Initiative — Governor Gregoire, the 2011/2012 chair of the Western Governors' Association, is leading the Get Out West! initiative. Governor Gregoire is working with fellow governors to highlight the connection of outdoor recreation and tourism to the health of the local economies, as well as citizens in the region. In addition to promoting outdoor recreation and tourism across the West, the initiative will draw attention to the importance of effective strategies to manage tourism and outdoor recreation assets so they are available for future generations¹⁴.

America's State Parks Alliance — In 2010 the National Association of State Park Directors established the America's State Parks alliance. The alliance has united state, federal and private interests to work collaboratively to promote parks and connect young families and kids to the outdoors. The alliance is sharing resources, best practices and engaging in national partnerships with corporations for stewardship programs, aiding state parks during a time of severe state budget cuts and strong demand for state park experiences. Partnerships with corporations and non-profit groups are helping preserve many of America's most prized natural assets through their affiliation and sponsorship of programs such as reforestation, trail preservation and maintenance and solar-energy installations.

Conclusion and Recommendations

Conclusions

The Western U.S. is blessed with world class tourism and outdoor recreation assets.

These assets generate a significant number of jobs and income for Western states (between 6-22% of total income depending on the state).¹⁵

The public sector in the West owns, manages and maintains a large portion of the region's tourism and outdoor recreation assets. In addition, its policies have a significant impact on private sector assets.

The future growth of the tourism and outdoor recreation sectors in the West depends upon a number of factors, including:

- The success of the United States' new international marketing campaign called BrandUSA to recapture market share of the world's tourism visits;
- The pace, strength and breadth of economic recovery in the U.S., which will influence leisure spending and retirement plans of millions of people;
- Public sector investment and policy decisions that increase and improve the West's recreation assets; and
- The lifestyle decisions of those under 30 years old, who have not developed an outdoor and travel ethic as has previous generations.

¹⁴ *The primary goals of Get Out West! are connecting kids to nature and growing the tourism and recreation economies in the West. Recommendations for connecting kids to nature can be found in the companion report to this document — Get Out West!: Connecting Kids and Families to the West's Great Outdoors*

¹⁵ *These assets also generate significant other benefits including wildlife habitat and water quality.*

Recommendations

The *Get Out West!* Advisory Group applauds the Western Governors' support¹⁶ of using youth conservation corps as a cost-effective mechanism for construction and maintenance of recreation assets on public lands. The Advisory Group also applauds the Western Governors' support¹⁷ for reforms to the nation's visa process for foreign tourists interested in traveling to the U.S.

The Advisory Group encourages the Governors to continue their leadership and regional cooperation to improve management of public lands for recreation and to protect important resources. The Advisory Group offers for consideration the following consensus recommendations:

1. Support BrandUSA and direct state tourism directors to assist and coordinate their efforts with this new national strategy.
2. Work with state legislatures to look at outdoor recreation and tourism as a major economic sector and develop a holistic strategy to manage state assets and revise state policies to facilitate growth in this sector.
3. Work with public and private sector interests to provide as seamless an outdoor recreation and/or tourism experience as possible. Governors can act as conveners to facilitate this collaboration.
4. Work with public, private and non-profit interests to introduce young families and their kids to the great outdoor places in the West¹⁸.
5. Help reconnect citizens to their state and regional outdoor spaces by promoting: national free admission days in both state and national parks; the annual National Get Outdoors Day; the annual National Public Lands Day; employment opportunities associated with the Youth Conservation Corps; and volunteer opportunities help to maintain the region's tourism and recreation assets.
6. Encourage citizens to purchase park passes, fishing and hunting licenses, and boat and off-highway vehicle registrations as investments in the state's outdoor recreation assets and in the health and well being of their families.
7. Support creation and funding of a "Western Warriors" state park pass, which would provide free or reduced admission to state parks for 1 – 2 years for all returning U.S. combat troops and their families, as well as family members of those who died in combat while serving Iraq or Afghanistan. State Parks can serve as quiet places to help heal the wounds to body, mind, heart and soul for return soldiers.
8. Support full funding for the federal and state portions of Land and Water Conservation Fund.
9. Support recreation as a core mission for the USDA Forest Service and ensure fire suppression costs no longer derail core Forest Service programs, such as recreation by ensuring adequate funding of the newly established Flame Fund.
10. Support funding for the Recreation Trails Program managed by the Federal Highway Administration.

The findings and recommendations in this report are those of the Get Out West! Advisory Group. The information and recommendations contained herein do not necessarily reflect the views of individual Governors or the Western Governors' Association.

¹⁶ Western Governors' Policy resolution 11-12: Western Conservation Corps

¹⁷ Western Governors' Policy resolution 11-6: Improving International Travel to the West

¹⁸ See companion *Get Out West!* reports.

Get Out West! Advisory Group

Lise Aangeenbrug
Executive Director
Great Outdoors Colorado

John Binkley
President
Alaska Cruise Association

Harry Bruell
President & CEO
Southwest Conservation Corps

Jeff Chapman
Member of Board of Directors, Backcountry Horsemen
of Washington and of Washington Trails Association

Mike Collins
Vice President, Public Affairs
REI

Adam Cramer
General Counsel and Policy Architect
Outdoor Alliance

Derrick A. Crandall
President
American Recreation Coalition

Jeri Duran
Montana Office of Tourism
Department of Commerce

Ben Ellis
Director
Alaska State Parks and Outdoor Recreation

Russ Ehnes
Executive Director
National Off-Highway Vehicle Conservation Council

George Harris
President
Northwest Marine Trade Association

Julie Heizer
Deputy Director for Industry Relations
Office of Travel and Tourism Industries, ITA
U.S. Department of Commerce

Frank Hugelmeyer
President & CEO
Outdoor Industry Association

Robin Jennison
Secretary
Kansas Department of Wildlife Parks & Tourism

Aubrey C. King
Executive Director
Western States Tourism Policy Council

Ashley Korenblat
CEO, Western Spirit Cycling
Director, International Mountain Bicycling Association
Public Lands Initiative

Martin LeBlanc
Mission Outdoors Director, Sierra Club
Executive Vice-President, IslandWood School

Rue Mapp
Youth Investment Program Officer
Stewardship Council

Lori McCullough
Executive Director
Tread Lightly!, Inc.

Nancy Merrill
Director
Idaho Parks and Recreation

Eleanor Morris
Policy Associate
The Nature Conservancy

Sandy Pantlick
Director
Oklahoma Travel Promotion

Nathan Rafferty
President and CEO
Ski Utah

Sherry L. Rupert
Board Member and Treasurer
American Indian Alaska Native Tourism Association
(AIANTA)

Mark Rupp
Director
Washington State – WDC Office

Andy Treharne
Western States Manager
Congressional Sportsmen's Foundation

Will Shafroth
Councilor to the Secretary
America's Great Outdoors
Department of the Interior

Amanda Smith
Governor's Energy Policy Advisor &
Executive Director, Utah Department
of Environmental Quality

Diane Shober
Director
Wyoming Office of Tourism

Kathy Van Kleeck
Senior VP, Government Relations
Motorcycle Industry Council (MIC)
Specialty Vehicle Institute of America (SVIA)
Recreational Off-Highway Vehicle Association (ROHVA)

Claudia Vecchio
Director
Nevada Department of Tourism and Cultural Affairs

Esther Worker
Education Account Manager
Esri



**WESTERN
GOVERNORS'
ASSOCIATION**

1600 Broadway • Suite 1700
Denver, Colorado 80202
(303) 623-9378
www.westgov.org