

The Outdoor Recreation Economy



TAKE IT OUTSIDE FOR AMERICAN
JOBS AND A STRONG ECONOMY



Economic Benefits:

- 6.1 million American jobs
- \$646 billion in outdoor recreation spending each year
- \$39.9 billion in federal tax revenue
- \$39.7 billion in state/local tax revenue

The State of the Outdoor Industry

EVERYTHING GROWS OUTSIDE, INCLUDING JOBS AND THE ECONOMY.

Much has changed since 2006 when Outdoor Industry Association commissioned the first economic study on outdoor recreation in the United States. The Great Recession radically altered consumer spending habits, unemployment reached its highest level in decades, and federal and state deficits resulted in massive spending cuts.

Despite the uncertainty, more than 140 million Americans make outdoor recreation a priority in their daily lives, proving it with their wallets by putting \$646 billion of their hard-earned dollars right back into the economy. Even better, this spending directly results in highly sought-after jobs for 6.1 million Americans.

At the core of the outdoor recreation economy is the outdoor consumer, whose diverse interests fuel a robust and innovative industry. Today's outdoor lovers aren't confined to traditional demographics or activity segments. They seek meaningful outdoor experiences in their backyards and in the backcountry. They are all genders, ages, shapes, sizes, ethnicities and income levels. They live throughout America, and they view outdoor recreation as an essential part of their daily lives. They fill their garages with bicycles, dirt bikes, backpacks, boats, skis, tents, hunting rifles and fishing gear. This is redefining the outdoor industry, an evolution that is evident in the growth of sales and jobs since 2006.

In short, outdoor recreation is a growing and diverse economic super sector that is a vital cornerstone of successful communities that cannot be ignored. Most importantly, outdoor recreation is no longer a "nice to have," it is now a "must have" as leaders across the country recognize the undeniable economic, social and health benefits of outdoor recreation.



AMERICANS SPEND
NEARLY AS MUCH
ON SNOW SPORTS
(\$53 BILLION)
AS THEY DO ON
INTERNET ACCESS
(\$54 BILLION).

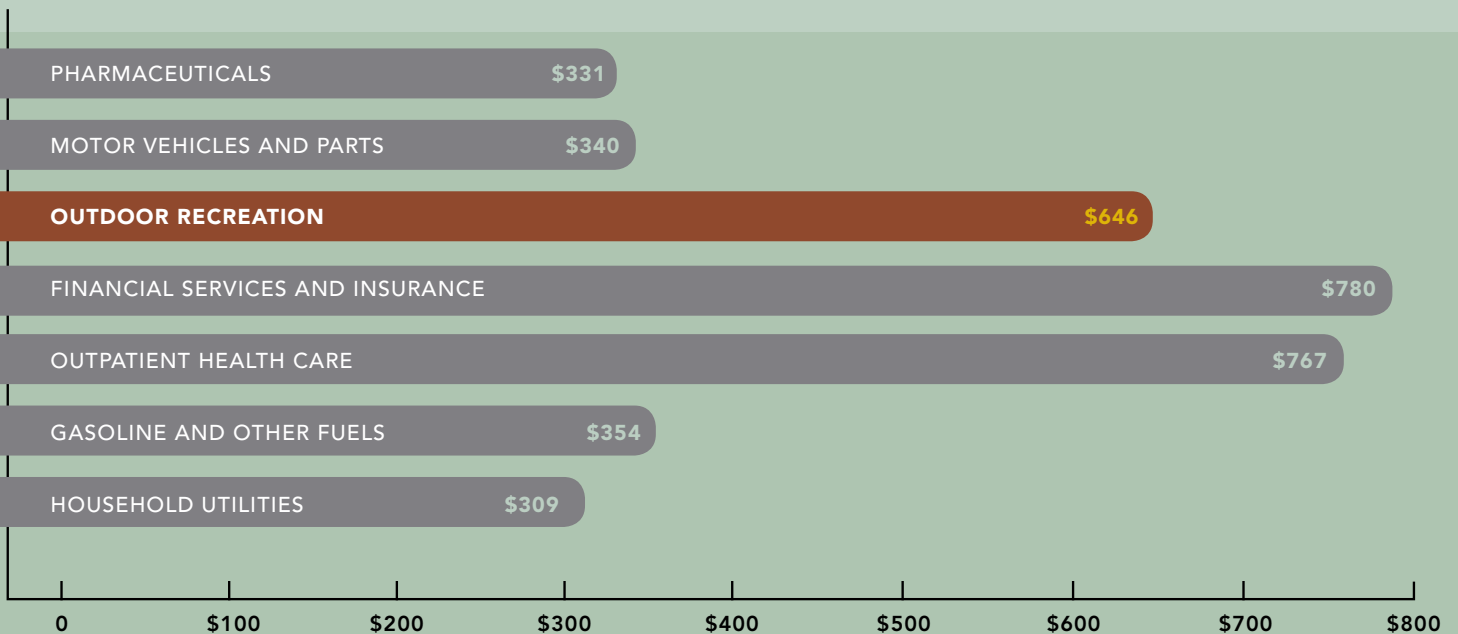
Outdoor Recreation Is Big Business

Outdoor recreation is bigger than you think and a significant economic driver in the United States.

More than 140 million Americans make outdoor recreation a priority in their daily lives – and they prove it with their wallets. Each year, Americans spend \$646 billion on outdoor recreation.

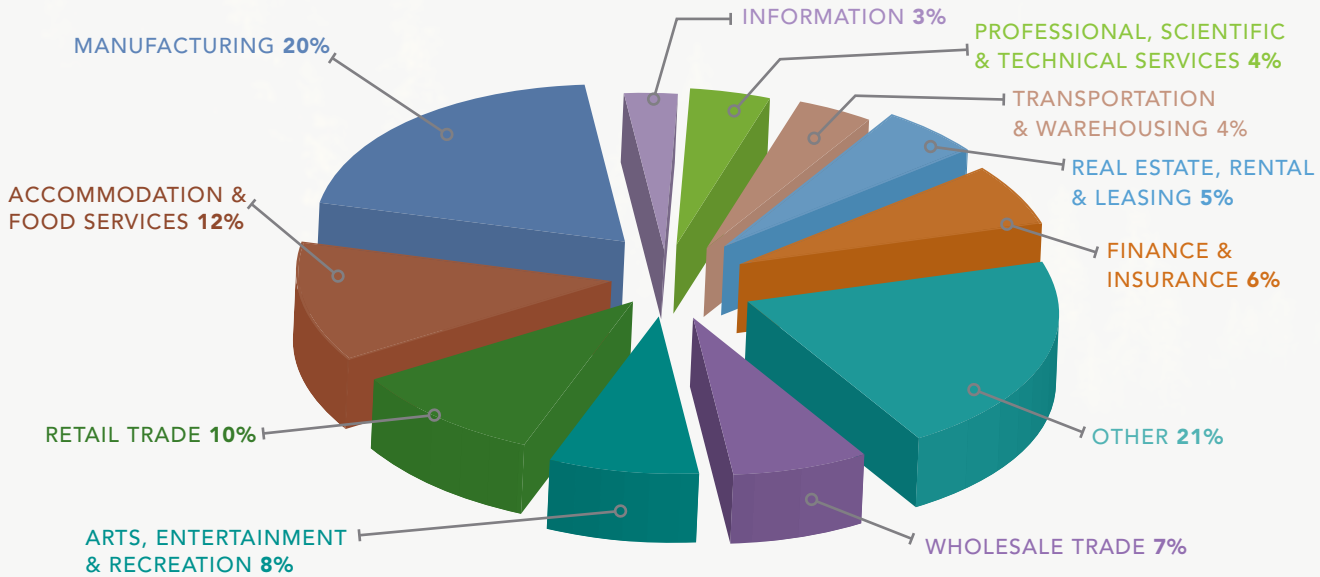
An Overlooked Economic Giant

Annual Consumer Spending, in Billions



Outdoor Recreation is Essential to the American Economy

The impact of outdoor recreation reaches far beyond the outdoor industry, directly fueling major traditional American economic sectors.



AMERICANS SPEND MORE ON BICYCLING GEAR AND TRIPS (\$81 BILLION) THAN THEY DO ON AIRPLANE TICKETS AND FEES (\$51 BILLION).



An Economy as Vast and Powerful as the Great Outdoors

WHAT DRIVES THE OUTDOOR RECREATION ECONOMY?

The outdoor recreation economy thrives when Americans spend their hard-earned dollars in the pursuit of outdoor recreation. This spending occurs in two forms: the purchase of gear and vehicles, and dollars spent on trips and travel.

Gear purchases include anything for outdoor recreation, such as outdoor apparel and footwear, bicycles, skis, fishing waders, tents, rifles or backpacks. Vehicle purchases include vehicles and accessories used only for outdoor recreation, such as boats, motorcycles, RVs, snowmobiles and all-terrain vehicles.¹

The outdoor recreation economy grows long after consumers purchase outdoor gear and vehicles. They spend money on day and overnight trips, and on travel-related expenses such as airfares, rental cars, lodging, campgrounds, restaurants, groceries, gasoline and souvenirs. They pay for river guides and outfitters, lift tickets and ski lessons, entrance fees, licenses and much more. Their spending supports innumerable small business owners. And they visit recreation areas that are cared for by land managers, park rangers, NGOs and volunteers.

This spending is the outdoor recreation economy — \$646 billion in spending that each year supports 6.1 million direct jobs and \$80 billion in federal, state and local tax revenue.

¹ Vehicles used for commercial purposes or commuting are not included.

Adventuring into the Great Outdoors Fuels the Economy

Outdoor Recreation Product Sales
\$120.7 Billion

APPAREL, FOOTWEAR, EQUIPMENT, VEHICLES, ACCESSORIES, SERVICES

Trips and Travel-Related Spending
\$524.8 Billion

FOOD/DRINK, TRANSPORTATION, ENTERTAINMENT/ACTIVITIES, LODGING, SOUVENIRS/GIFTS/MISC.



FOR EVERY DOLLAR SPENT ON GEAR AND VEHICLES, AN ESTIMATED FOUR DOLLARS IN SPENDING ON TRIPS AND TRAVEL RESULTS.

Putting America to Work

America is globally recognized as the leader in outdoor recreation. Advancements in technical apparel, footwear and equipment for outdoor activities are driving innovation and entrepreneurship, while creating a demand for highly skilled workers in areas like technology, product design, manufacturing, sustainability and global commerce.

A tremendous diversity of career opportunities exists beyond product-related jobs. When Americans play outside during day outings or overnight trips, their spending directly supports professions like guides and outfitters, lodging operators, park managers and rangers, concessionaires, small business owners and many more.

In total, 6.1 million American livelihoods¹ directly depend on outdoor recreation, making it a critical economic sector in the United States.

Outdoor Recreation Creates Jobs

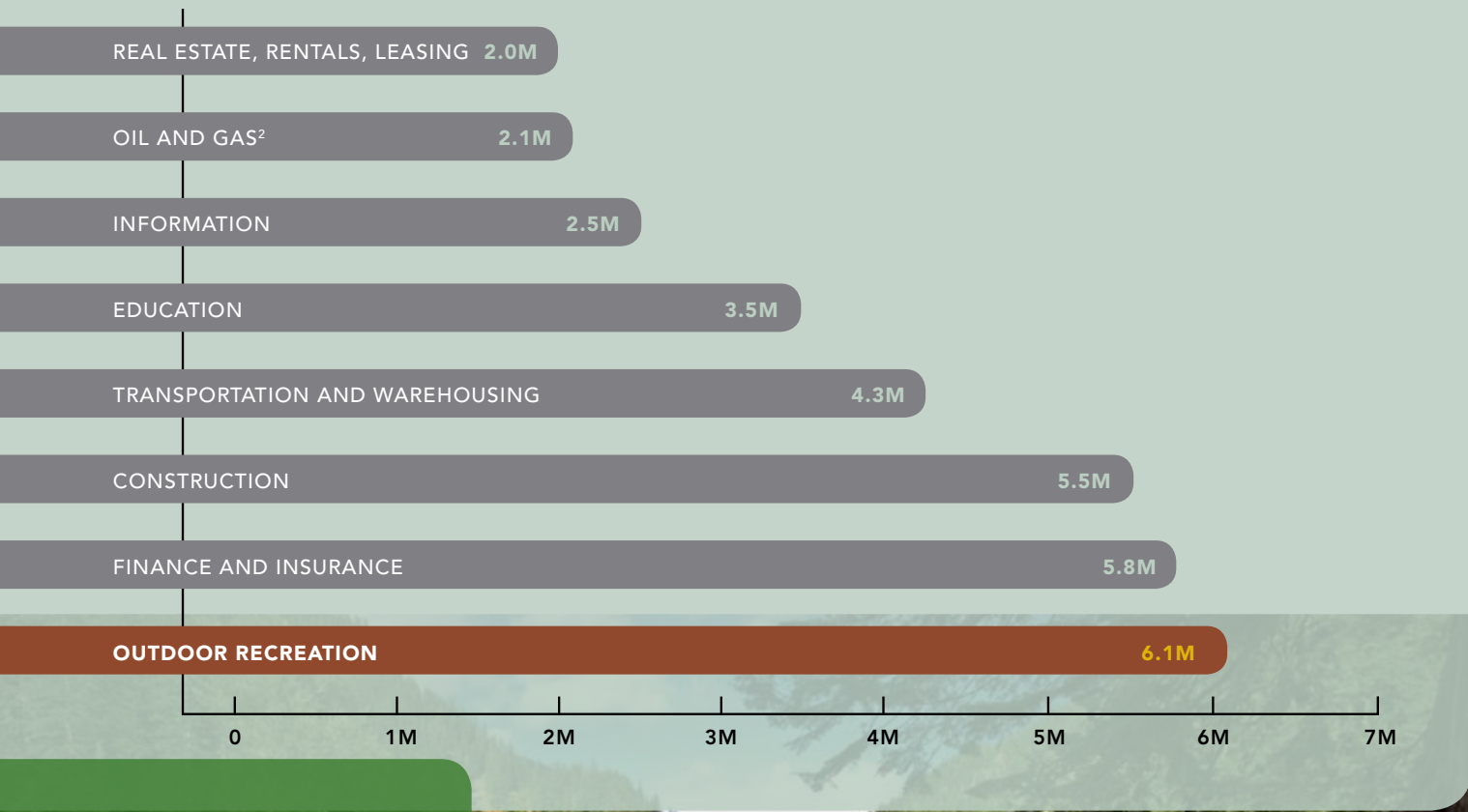
Average Salaries Generated²



¹ Reflects American jobs directly supported by outdoor recreation. Indirect, induced or ripple effect impact would be significantly higher. ² Average salaries based on Manufacturer Benchmarking Report, 2011, Outdoor Industry Association. ³ Source: Bureau of Labor Statistics, 2010.

Outdoor Recreation Employs America

Job Comparisons, by Industry¹



MORE AMERICANS JOBS DEPEND ON TRAIL SPORTS (768,000) THAN THERE ARE LAWYERS (728,200) IN THE U.S.³



¹ Bureau of Labor Statistics, 2011. ² American Petroleum Institute, direct jobs in 2007 from The Economic Impacts of the Oil and Natural Gas Industry on The U.S. Economy: Employment, Labor Income and Value Added, 2009. ³ U.S. Bureau of Labor Statistics Occupational Outlook Handbook 2012-13 Edition, 2010, www.bls.gov/ooh/Legal/Lawyers.htm.

Strong, Steady Growth

This report calculates the direct economic impact for an expanded set of outdoor recreation activities, some of which were not included in the prior report.

Therefore, care should be taken when attempting to make a trend analysis between this report and the prior report.

However, analysis of comparable activities demonstrates that the outdoor recreation economy grew approximately 5 percent annually between 2005 and 2011 – this during an economic recession when many industries contracted.¹



BICYCLING

Paved-road
Off-road



CAMPING

RV campsite
Tent campsite
Rustic lodging



FISHING

Recreational fly
Recreational non-fly
Fishing from a boat



HUNTING

Shotgun
Rifle
Bow



MOTORCYCLING

On-road
Off-road



OFF-ROADING

ATV
ROV
Dune buggies
Jeeping



SNOW SPORTS

Downhill skiing
(including telemark)
Snowboarding
Cross-country skiing
Nordic skiing
Snowshoeing
Snowmobiling



TRAIL SPORTS

Trail running, unpaved
Day hiking, unpaved
Backpacking
Rock climbing
(natural rock or ice)



WATER SPORTS

Kayaking
Stand-up paddling
Rafting
Canoeing
Boating (motorized)



WILDLIFE VIEWING

Bird watching
Other wildlife watching

¹ Based on analysis of 2011 data to comparable 2006 data. For details see the technical report on methods and findings.

The outdoor recreation economy grew approximately 5 percent annually between 2005 and 2011 – this during an economic recession when many sectors contracted.¹



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Quality Places to Play for All Americans

PRESERVING ACCESS TO OUTDOOR RECREATION OPPORTUNITIES PROTECTS THE ECONOMY, THE BUSINESSES, THE COMMUNITIES AND THE PEOPLE WHO DEPEND ON THE ABILITY TO PLAY OUTSIDE.

Behind outdoor recreation stand 140 million Americans who want and deserve access to a variety of quality places to play and enjoy the great outdoors.

Every year, hundreds of millions of visitors – young and old, after-work enthusiasts to international travelers, and from coast to coast – flock to America’s parks, forests and waters. From seashores and local parks to the wild backcountry, America’s public lands and waters are the very foundation of the national outdoor recreation system.

Outdoor recreation can grow jobs and drive the economy if we manage and invest in parks, waters and trails as a system designed to sustain economic dividends for America.



MORE THAN 725 MILLION VISITS TO STATE PARKS PROVIDED A COLLECTIVE \$20 BILLION ECONOMIC BENEFIT TO COMMUNITIES SURROUNDING STATE PARKS NATIONWIDE.¹

¹ National Association of State Park Directors, 2009.



Outdoor recreation can continue to be a jobs generator and an economic driver.

Recreation visits to Department of Interior-managed lands result in over 316,000 jobs and nearly \$25 billion in economic impacts each year to the communities and regions surrounding Interior-managed land.¹

Nearly 35 million people visit national wildlife refuges annually, supporting almost 27,000 private sector jobs and producing about \$543 million in employment income.²

Rural western counties with more than 30 percent of their land under federal protection **increased jobs at a rate four times faster** than rural counties with no federally protected lands.³



THE NATIONAL PARK SERVICE ESTIMATES \$32 MILLION WOULD BE LOST PER DAY IF BUDGET CUTS SHUT DOWN THE PARKS.

1 Department of the Interior, Economic Impact of the Department of the Interior's Programs and Activities, 2008, http://www.doi.gov/news/pressreleases/2010_02_23_release.cfm.

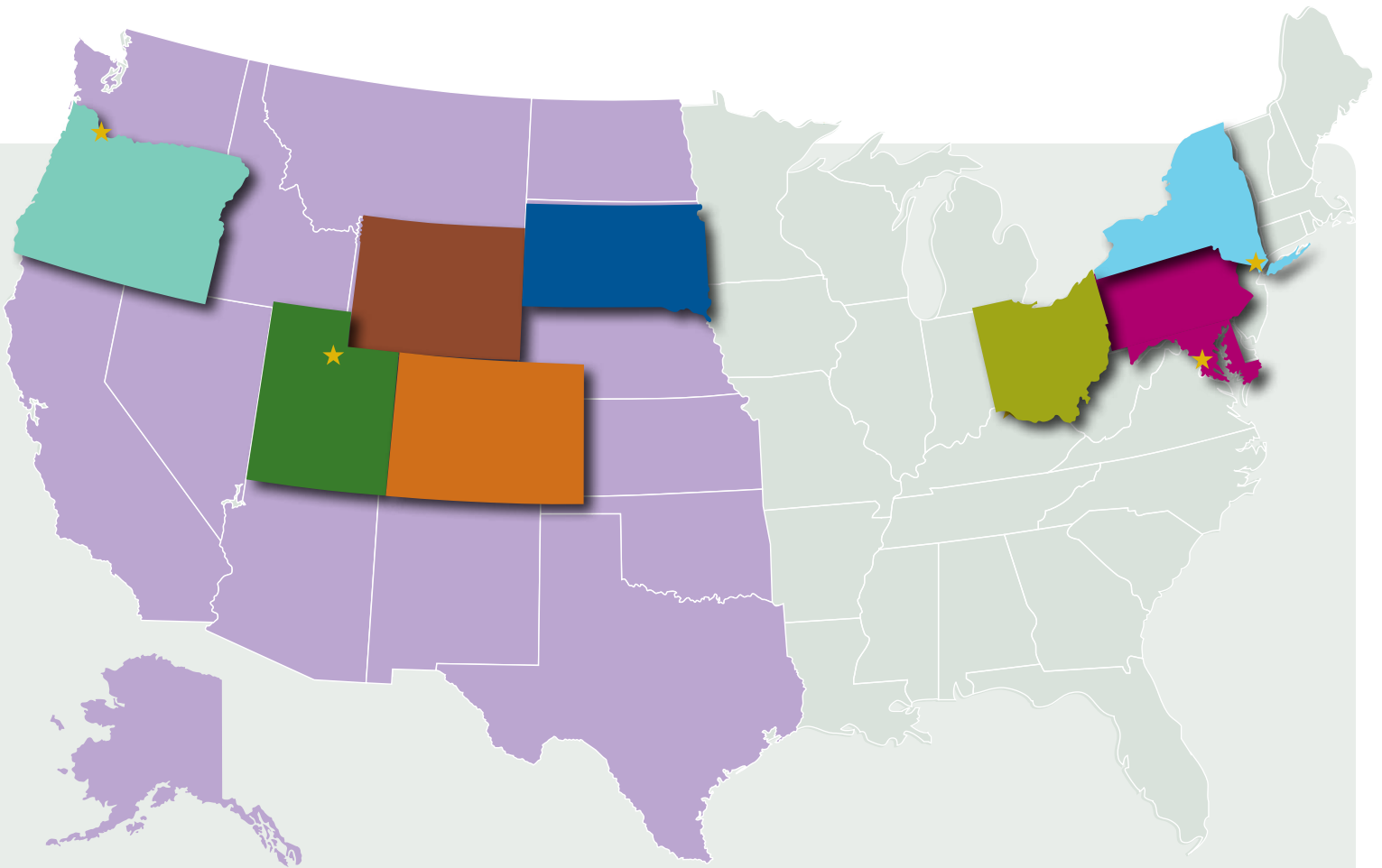
2 National Wildlife Refuge System, Banking on Nature 2006: The Economic Benefits to Local Communities of National Wildlife Refuge Visitation. 3 Between 1970 and 2009, Headwaters Economics, 2012.

Outdoor Recreation Strengthens Local Communities

THE OUTDOOR RECREATION ECONOMY GENERATES \$80 BILLION IN NATIONAL, STATE AND LOCAL TAX REVENUES EACH YEAR.

Cities and towns across the country are tapping into the business of outdoor recreation, and with good reason. They recognize that outdoor recreation and open spaces are key ingredients to healthy communities, contribute to a high quality of life, and most importantly, attract and sustain businesses and families.





GET OUT WEST! INITIATIVE

The Western Governors' Association reports that outdoor recreation in 19 western states results in \$256 billion in direct spending and 2.3 million jobs.¹

OGDEN, UT

The City of Ogden recognizes the potential to transform the city from a forlorn railroad town to one of the country's top outdoor destinations. By investing in public space restoration, Ogden adds more jobs than any other region in the country, lowers crime by 33 percent, and secures more than \$1.2 billion in investment – all while lowering taxes three times.²

CENTRAL PARK, NEW YORK CITY, NY

A cluster of enterprises, events and activities connected to Central Park generates \$395 million in economic activity, and more than 3,780 jobs. Additionally, an analysis of NYC parks finds that land values of residential properties increase the closer they are to a park.³

STURGIS, SD

The annual Sturgis Motorcycle Rally generates more than \$800 million in economic activity to the region from an estimated 417,000 visitors who stay an average of nearly six days.⁴

CINCINNATI, OH

Research finds that homeowners are willing to pay a premium of \$9,000 on houses that are within 1,000 feet of bike paths.⁵

COLORADO

The USA Pro Cycling Challenge reports more than \$83.5 million in economic impact during the one-week period, with more than one million spectators lining the roads.

SALT LAKE CITY, UT

The Outdoor Retailer summer and winter trade shows draw more than 46,000 people annually to Salt Lake City, generating more than \$40 million annually for the local community.⁶

GREAT ALLEGHENY PASSAGE

Connecting Washington, D.C., to metro Pittsburgh, the trail generates \$7 million in direct spending.⁷

PORTLAND, OR

The City of Portland targets the outdoor industry as part of its five-year economic growth and job creation strategy. The athletic and outdoor industry in Oregon directly employs more than 14,000 workers.⁸

CODY, WY

About 10 percent of jobs in Cody, Wyoming, are associated with direct spending on fishing, hunting and wildlife viewing. Hunters, anglers and wildlife watchers contribute an estimated \$30.1 million to Cody's economy.⁹

Access additional and expanded case studies about the economic impact of outdoor recreation online at outdoorindustry.org/recreationeconomy

1 Western Governors' Association, A Snapshot of The Economic Impact of Outdoor Recreation, 2012. 2 City of Ogden, UT. 3 Central Park Conservancy, Valuing Central Park's Contribution to New York City's Economy, 2009. 4 City of Sturgis, SD. 5 University of Cincinnati, 2011, www.uc.edu/news/NR.aspx?id=14300. 6 Visit Salt Lake, 2010. 7 Allegheny Trail Alliance, The Great Allegheny Passage Economic Impact Study, 2007-2008. 8 Portland Development Commission. 9 Sportsmen for Responsible Energy Development, Conserving Lands and Prosperity: Seeking a Balance Between Conservation and Development in the Rocky Mountain West, 2012.

And \$646 Billion Is Just the Beginning

The Outdoor Recreation Economy report takes a conservative approach in tracking direct annual spending by Americans in pursuit of outdoor recreation across 10 activity categories (Bicycling, Camping, Fishing, Hunting, Motorcycling, Off-Road, Snow Sports, Trail Sports, Water Sports and Wildlife Viewing). It is not inclusive of every activity that could be recognized as outdoor recreation. Vehicles used for commercial purposes or commuting are not included, nor is spending by international visitors.

Most importantly, the report focuses on direct economic impact¹, rather than using indirect, implied, multiplier or ripple effects that include impacts of spending, jobs and wages as they circulate further throughout the economy. If these effects were used as the basis of this report, the stated economic impact and jobs impact would be substantially larger.

When Outdoor Recreation Ripples through the Economy²

- \$1.6 trillion in economic impact

- 12 million jobs

The Outdoor Recreation Economy report was developed using online surveys conducted by Harris Interactive and the development of IMPLAN economic models to identify income, jobs and tax revenue impacts at the regional and national levels. For additional details, see the full technical report available at outdoorindustry.org.

1 Direct impact is measured as the jobs, labor income and value added within outdoor recreation. 2 The ripple effect (also referred to as a multiplier) is a common economic tool that considers the process of bringing final product to market to determine final total economic contribution. See technical report for the ripple effect impacts of outdoor recreation.

In Conclusion

Outdoor recreation is a larger and more critical sector of the American economy than most people realize. As a multi-dimensional sector, the outdoor industry pumps \$646 billion in direct spending into the American economy and fuels traditional sectors like manufacturing, finance, retail trade, tourism and travel.

Furthermore, 6.1 million American lives directly depend on outdoor recreation. As the globally recognized leader in outdoor recreation, America is poised to drive an industry that offers a diversity of rewarding and highly skilled career opportunities for people today and into the future.

Supporting the outdoor recreation economy are our nation's public recreation lands and waters. Not only is access to quality places to play outside critical to our businesses, it is fundamental to recruiting employers and at the heart of healthy and productive communities. Open spaces and recreation areas are magnets that draw after-work activity and tourists alike.

Most importantly, the outdoor recreation economy can continue to be a growing generator of jobs and an economic powerhouse if we manage and invest in America's parks, waters and trails as a national outdoor recreation system designed to reap economic dividends for America. The continued growth and success of this great American industry hinges on outdoor recreation opportunities for everyone.



**A BALANCED,
HEALTHY
ECONOMY IS NOT
AN EITHER/OR
CHOICE.**

The Outdoor Recreation Economy Direct and Total Impact by Activity Category¹

OUTDOOR RECREATION PARTICIPANTS ANNUALLY SPEND:

| | Gear, Accessories & Vehicles | Trip Related Sales | Total |
|-------------------------------|------------------------------|--------------------|-------------------|
| Bicycling | \$10,538,970,178 | \$70,781,975,693 | \$81,320,945,871 |
| Camping | \$18,613,995,403 | \$124,769,735,895 | \$143,383,731,298 |
| Fishing ² | \$9,742,089,046 | \$25,725,732,919 | \$35,467,821,965 |
| Hunting ³ | \$8,525,723,987 | \$14,636,912,252 | \$23,162,636,239 |
| Motorcycling | \$10,024,945,513 | \$32,501,773,446 | \$42,526,718,959 |
| Off-Roading | \$13,160,580,559 | \$53,334,247,815 | \$66,494,828,375 |
| Snow Sports | \$7,718,490,380 | \$45,328,719,522 | \$53,047,209,901 |
| Trail Sports | \$12,251,578,246 | \$68,376,967,617 | \$80,628,545,863 |
| Water Sports | \$19,420,893,225 | \$66,776,605,002 | \$86,197,498,227 |
| Wildlife Viewing ⁴ | \$10,736,692,517 | \$22,585,482,854 | \$33,322,175,371 |
| All Activities | \$120,733,959,053 | \$524,818,153,015 | \$645,552,112,068 |

THE DIRECT IMPACTS BUSINESSES SERVING RECREATIONISTS ANNUALLY PROVIDE:

| | Participants' Spending | Jobs Supported ⁵ | Income ⁶ | Federal Taxes | State & Local Taxes |
|-------------------------------|------------------------|-----------------------------|---------------------|------------------|---------------------|
| Bicycling | \$81,320,945,871 | 772,146 | \$38,648,426,853 | \$5,174,111,079 | \$5,574,649,290 |
| Camping | \$143,383,731,298 | 1,356,902 | \$68,478,337,142 | \$9,427,118,081 | \$7,129,695,106 |
| Fishing ² | \$35,467,821,965 | 307,175 | \$12,665,085,157 | \$2,150,221,890 | \$2,424,626,040 |
| Hunting ³ | \$23,162,636,239 | 201,822 | \$9,016,303,488 | \$1,477,166,379 | \$1,545,494,202 |
| Motorcycling | \$42,526,718,959 | 410,972 | \$20,826,351,065 | \$2,793,477,670 | \$2,592,588,678 |
| Off-Roading | \$66,494,828,375 | 684,464 | \$33,589,472,749 | \$4,410,555,545 | \$4,056,094,360 |
| Snow Sports | \$53,047,209,901 | 504,342 | \$25,248,804,500 | \$3,187,138,690 | \$3,714,016,392 |
| Trail Sports | \$80,628,545,863 | 768,251 | \$38,431,908,045 | \$5,140,507,597 | \$5,555,850,984 |
| Water Sports | \$86,197,498,227 | 802,062 | \$40,325,800,635 | \$3,730,693,094 | \$4,853,254,404 |
| Wildlife Viewing ⁴ | \$33,322,175,371 | 289,168 | \$13,018,994,705 | \$2,378,112,717 | \$2,229,661,345 |
| All Activities | \$645,552,112,068 | 6,097,303 | \$300,249,484,338 | \$39,869,102,741 | \$39,675,930,802 |

THE RIPPLE EFFECT CREATED FROM THE DIRECT IMPACTS IS EVEN GREATER:

| | Ripple Effect Spending ⁷ | Jobs Supported ⁵ | Income ⁶ | Federal Taxes | State & Local Taxes |
|-------------------------------|-------------------------------------|-----------------------------|---------------------|------------------|---------------------|
| Bicycling | \$198,747,895,981 | 1,478,475 | \$101,437,240,467 | \$12,650,585,765 | \$13,636,495,368 |
| Camping | \$356,462,236,509 | 2,618,577 | \$180,781,845,610 | \$23,043,702,517 | \$17,416,053,882 |
| Fishing ² | \$97,759,933,329 | 763,262 | \$34,168,207,715 | \$5,722,310,749 | \$6,499,863,763 |
| Hunting ³ | \$61,924,172,768 | 460,223 | \$23,711,273,356 | \$3,745,306,917 | \$3,953,276,857 |
| Motorcycling | \$102,072,982,246 | 767,363 | \$52,994,114,496 | \$6,717,463,094 | \$6,254,971,503 |
| Off-Roading | \$165,046,037,979 | 1,273,130 | \$86,679,309,235 | \$10,946,221,713 | \$10,061,337,739 |
| Snow Sports | \$129,617,935,438 | 964,884 | \$66,206,588,130 | \$7,799,705,749 | \$9,080,167,867 |
| Trail Sports | \$196,884,308,195 | 1,466,941 | \$100,659,948,859 | \$12,560,296,484 | \$13,582,923,165 |
| Water Sports | \$206,311,014,957 | 1,521,486 | \$104,811,013,503 | \$9,118,759,152 | \$11,689,789,939 |
| Wildlife Viewing ⁴ | \$100,808,196,738 | 722,398 | \$36,548,075,766 | \$6,655,021,673 | \$6,255,499,241 |
| All Activities | \$1,615,634,714,139 | 12,036,739 | \$787,997,617,135 | \$98,959,373,813 | \$98,430,379,325 |

1 View technical report for full details at outdoorindustry.org. 2 American Sportfishing Association, Sportfishing in America: An Economic Engine and Conservation Powerhouse, 2007. 3 Association of Fish and Wildlife Agencies, Hunting in America: An Economic Engine and Conservation Powerhouse, 2007. 4 U.S. Fish and Wildlife Service, Wildlife Watching in the U.S.: The Economic Impacts on National and State Economies in 2006, 2008. 5 Jobs are full-time and part-time. 6 Income includes salaries, wages, business profits (proprietors profit and corporate dividends) and is comparable to Gross Domestic Production. 7 The total spending in the economy stimulated by businesses and their employees re-spending recreational dollars on business inputs and via paychecks.

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- Southwick Associates. *Sportfishing in America: An Economic Engine and Conservation Powerhouse*. Produced for the American Sportfishing Association with funding from the Multistate Conservation Grant Program. 2007.
- Southwick Associates. *Hunting in America: An Economic Engine and Conservation Powerhouse*. Produced for the Association of Fish and Wildlife Agencies with funding from Multistate Conservation Grant Program. 2007.
- U.S. Department of the Interior, Fish and Wildlife Service. *Wildlife Watching in the U.S.: The Economic Impacts on National and State Economies in 2006*. 2008.

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ABOUT OUTDOOR INDUSTRY ASSOCIATION

Based in Boulder, Colo., with offices in Washington, D.C., Outdoor Industry Association (OIA) is the leading trade association for the outdoor industry and the title sponsor of Outdoor Retailer. OIA supports the growth and success of more than 4,000 manufacturers, distributors, suppliers, sales representatives and retailers of outdoor recreation apparel, footwear, equipment and services. For more information, go to outdoorindustry.org or call 303.444.3353.

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For over 20 years, Southwick Associates has been the leader in quantifying the economic benefits of outdoor recreation, and fish and wildlife economics and statistics. Southwick Associates also helps companies understand their position in the outdoor market and the products in greatest demand by consumers. Experienced and dependable, Southwick Associates provides the insights and intelligence needed to succeed in the outdoor market. southwickassociates.com

4909 PEARL EAST CIRCLE, SUITE 300
BOULDER CO 80301 | 303.444.3353
OUTDOORINDUSTRY.ORG



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