

OUTDOOR RECREATION ON FEDERAL PUBLIC LANDS & WATERS

*A Valuable
American Asset*



O:R OUTDOOR
RECREATION
ROUNDTABLE

INTRODUCTION

Federal public lands and waters are an invaluable asset owned by the American people and stewarded by our government. An essential aspect of this stewardship is managing the various revenue streams that public lands and waters support. For the federal government these revenue streams include taxes, lease payments, and permit fees, just to name a few. This income fills federal coffers, funds essential government functions, and services the federal budget deficit. The benefit extends to the private sector as well. The businesses that rely on public lands and waters fuel economies across the country, support countless jobs, and are the lifeblood of many rural communities. When managed properly, public lands produce compounding returns that benefit all Americans.

The analysis of economic activity on our shared public lands often focuses on energy and mineral extraction, timber harvest, livestock grazing, and commercial fisheries. While these pursuits are essential, they are not the only source of returns for the federal government. The conversation about generating revenue from our public lands is not complete without accounting for outdoor recreation.

Outdoor recreation on federal public lands and waters is a massive revenue generator. It creates a staggering \$128 billion in economic activity annually that benefits the federal government, American businesses, and American workers. Federal lands and waters are the single largest component of the nation's \$1.2 trillion outdoor recreation economy and offer unique environmental, health, societal, and economic advantages in communities throughout the country. This novel report explores the business of outdoor recreation on federal public lands and waters and what that means for America's balance sheet.

Federal lands and waters are foundational to the nation's
\$1.2 Trillion outdoor recreation economy.



COLORADO
Uncompahgre NF & BLM - Tres Rios Field Office



THE BUSINESS OF OUTDOOR RECREATION ON PUBLIC LANDS & WATERS

Americans have long sought time outdoors. Whether it's a desire to relax and spend time with friends and family, a passion for a backcountry sport, a desire to improve one's health, or a longing for adventure, the motivations to go afield are many. The activities pursued are even more diverse and include hiking, biking, horseback and offroad riding, hunting, fishing, RVing, camping, boating, paddling, climbing, skiing, and much more. Whatever the motivation or activity, the health benefits are great, and a growing body of research illustrates improved physical and mental health outcomes associated with time outdoors.

In pursuit of these beneficial adventures, Americans spend billions of dollars each year. With each visit to the great outdoors, enthusiasts buy clothing, equipment, food, fuel, or supplies. With each visit they pay for an entrance fee, hunting/fishing license, guided tour, campground reservation, or parking permit. With each visit they support a local gas station, guide, outfitter, restaurant, or motel. With each visit their spending supports private and public sector wages and generates tax revenues for local, state, and federal government. These dollars have a positive and often vital impact across the economy.

The most significant venue for outdoor recreation in the U.S. is our federal public lands and waters system. With 640 million acres of land and many hundreds of thousands of square miles of fresh and marine waters, our public lands make the outdoor recreation economy possible.

This economic powerhouse is poised for even more growth. In today's economy, in which workers are more mobile than ever before, many Americans are moving to be closer to national parks, national forests, and other federal public lands and waters. Access to the outdoors is becoming an important driver of employee recruitment and retention. This creates new economic activity, jobs, and businesses in rural America.

Of the 5 million American jobs created by outdoor recreation,
one out of five depend on federal public lands.



WASHINGTON

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WHAT IS OUTDOOR RECREATION ON PUBLIC LANDS & WATERS WORTH?

Most major federal land and water management agencies measure participation and visitor spending, helping us to understand the magnitude of outdoor recreation. These have been combined for the first time in this report into overall estimates of recreational activity and economic impact. The results are impressive:

Outdoor Recreation by Agency

Agency	Acres for Recreation	Days of Recreation	Visitor Spending
Bureau of Land Management	245,000,000	82,000,000	\$6.2B
Bureau of Reclamation	7,800,000	90,000,000	\$3.0B
Department of Defense	1,000,000	32,000	\$20.4M
National Oceanic and Atmospheric Administration	1,400,000	10,413,269	\$4.1B
National Park Service	85,000,000	325,498,646	\$27.2B
U.S. Army Corps of Engineers	12,400,000	266,037,436	\$15.2B
U.S. Fish and Wildlife Service	95,000,000	66,810,857	\$3.3B
U.S. Forest Service	193,000,000	156,100,000	\$12.9B
Total	640,600,000	996,892,208	\$71.8B

Through receipts, permits, entrance fees, leases, and other payments, outdoor recreation on federal public land directly contributes at least **half a billion dollars** annually to federal coffers.

Outdoor enthusiasts' initial expenditures are just the beginning. As these dollars change hands, they support jobs and wages, generate tax revenue for all levels of government, contribute to GDP, support conservation funding, and have a positive impact across the economy in communities adjacent to federal public lands and everywhere else in between. Starting with \$72 billion in direct annual spending by recreational visitors to federal public lands, these dollars then support over 900,000 jobs, nearly \$6 billion in federal tax revenues, and \$128 billion in economic activity, among other positive impacts.

Economic Impact of Outdoor Recreation by Agency

Agency	Jobs	Salaries & Wages	Contributions to GDP	Output	State & Local Taxes	Federal Taxes
Bureau of Land Management	76,000	\$3.8B	\$13.5B	\$12.2B	\$414.6M	\$457.4M
Bureau of Reclamation	38,200	\$1.8B	\$3.2B	\$3.7B	\$202.3M	\$223.2M
Department of Defense	243	\$16.0M	\$27.0M	\$51.5M	\$2.7M	\$4.0M
National Oceanic and Atmospheric Administration	37,086	\$2.6B	\$4.3B	\$7.8B	\$274.3M	\$302.6M
National Park Service	415,400	\$19.9B	\$33.0B	\$57.2B	\$1.8B	\$2.0B
U.S. Army Corps of Engineers	121,754	\$5.5B	\$9.0B	\$18.3B	\$1.0B	\$1.1B
U.S. Fish and Wildlife Service	53,267	\$2.1B	\$3.4B	\$5.9B	\$404.0M	\$738.1M
U.S. Forest Service	161,000	\$7.8B	\$15.8B	\$23.3B	\$858.0M	946.4M
Total	902,950	\$43.5B	\$82.1B	\$128.5B	\$5.0B	\$5.8B

Every day, access to outdoor recreation on America's public lands and waters contributes **\$351 Million** to the economy.

Every hour, these lands produce about **\$14.6 Million** in economic value from recreation.





Recreation is the largest source of economic returns

from U.S. Forest Service lands, supporting 161,000 jobs, compared to the combined 103,200 jobs from forest products, livestock grazing, mineral extraction, and energy production.

GENERATIONAL RETURNS FROM A FINITE ASSET

Thanks to outdoor recreation, a single parcel of public land or water can produce near-inexhaustible returns. A hiker, hunter, RVer, angler, or biker can visit a parcel hundreds of times. They can pass their passion for that wild landscape on to their children and grandchildren. With each visit, they directly pay the federal government, spend money in gateway communities, support manufacturing and retail businesses, and generate tax revenue. When properly managed, our federal public lands can support outdoor recreation and the associated economic activity for generations with little environmental impact.

If the same parcel of public land or water was used to extract a resource such as oil, gas, or minerals, the activity would also yield returns. However, the resources are finite. When the oil, gas, or minerals are gone, so are the associated jobs, income, and tax revenues. Furthermore, the land may require remediation before it is fit for other uses or it may never return as a revenue-bearing asset.

Outdoor recreation and extraction of natural resources are both critical for American prosperity. When land allocation is optimized for both, it ensures short and long-term returns while reducing depreciation of one of our nation's most important assets — our shared public lands and waters.



TENNESSEE

Image courtesy of USFWS

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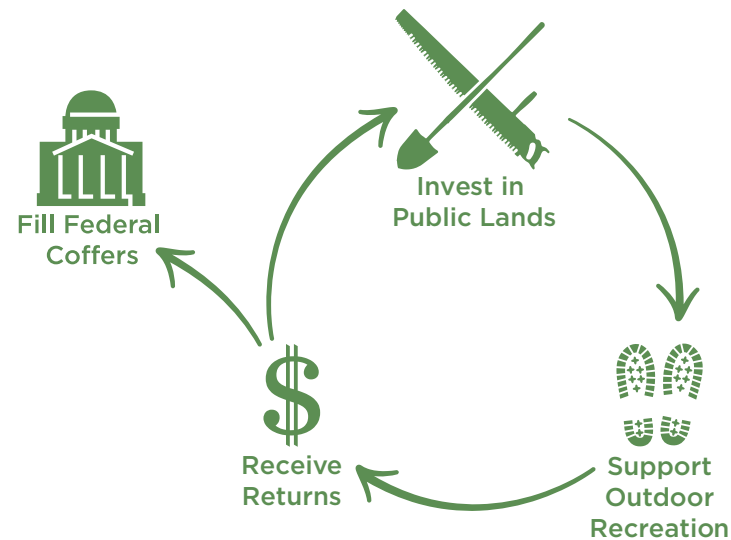
REINVESTMENT IS CRITICAL

For public land assets to generate ongoing returns, the federal government must reinvest a portion of their proceeds back into operations and stewardship. Adequate trails, updated infrastructure like boat ramps and campgrounds, fire and flood response services, scientific fish and wildlife management, and more are needed to facilitate outdoor recreation's growing impact on federal revenue and the entire recreation economy.

A portion of this reinvestment comes from government proceeds from ski leases; concessionaire agreements; entrance and campground fees; as well as guide, outfitter, and special use permits. More support comes from the over \$1.6 billion in federal excise tax revenue. Outdoor recreationists support these excise tax programs in several ways.

- Nonhighway recreational users contributed \$281.1M in federal gas taxes in 2021
- Hunters and shooters contributed \$914.4M in excise taxes on firearms, ammunition, and archery equipment in FY2025
- Anglers and boaters contributed \$416.4M in excise taxes on sport fishing equipment, import duties on fishing tackle and pleasure boats, and gasoline fuel taxes in FY2025

While these programs are impactful, more support is always needed. Maintaining and growing the financial returns from federal land and water assets requires continual reinvestment. When public lands are neglected, visitation will decrease as will revenues.





MINNESOTA

Boundary Waters Canoe Area Wilderness



CONCLUSION

There are many ways to generate returns from federal public lands such as oil, gas, mining, and timber. However, outdoor recreation is an equally important means of generating returns and should be included in the analysis of public land revenue streams. If managed properly, our public lands can support extraction of natural resources and outdoor recreation.

Maintaining public lands for outdoor recreation is not an expense for the federal government but an investment that yields incredible returns. These returns include \$128 billion in economic activity, over 900,000 jobs, nearly \$6 billion in federal tax revenue, and significant contributions to the physical and mental health of Americans. The outdoor recreation economy supports a diverse range of small businesses in rural communities across the country. Investing to maintain public land for outdoor recreation produces these returns consistently with minimal depreciation of the asset that is our shared outdoor heritage.

If managed properly outdoor recreation on federal public lands is an inexhaustible resource that can fund the federal government, fuel the economy, and benefit all Americans for generations to come. Outdoor recreation is an irreplaceable asset on America's balance sheet.

On America's balance sheet, outdoor recreation on federal public lands and waters is a sustainable, appreciating asset. It delivers compounding returns for our economy, supports public health, and safeguards opportunity for future generations.

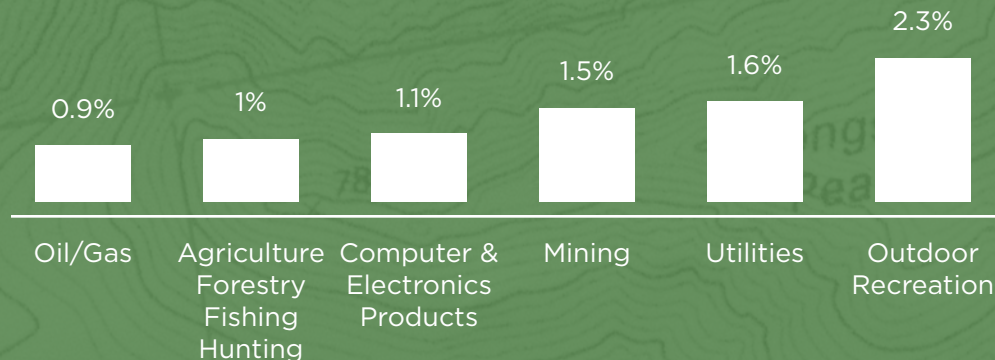
APPENDIX | ALL OUTDOOR RECREATION

Outdoor recreation is recognized by the Bureau of Economic Analysis (BEA) as an important part of the U.S. economy. Whether occurring in local neighborhoods, community ballparks, or on federal public lands, outdoor recreation is enjoyed by over half of all Americans. As measured by the BEA Outdoor Recreation Satellite Account (ORSA), outdoor recreation generates \$1.2 trillion in economic activity and supports 5 million jobs nationally, making it larger than other well-known industries such as oil/gas, mining, agriculture, utilities, and broadcasting/communications. Below are some of the many economic benefits of outdoor recreation according to ORSA.

ORSA | Contributions to the U.S. Economy from Outdoor Recreation, 2023

Category	Amount	% of U.S. Economy
Output	\$1.2T	-
Contributions to GDP	\$639.5B	2.3
Jobs	4,959,235	3.1
Salaries & Wages	\$293.9B	2.1

BEA | Contributions to U.S. GDP, 2023





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