



Independent Nonpartisan Research



Overview

1

Data we have

2

Data we need

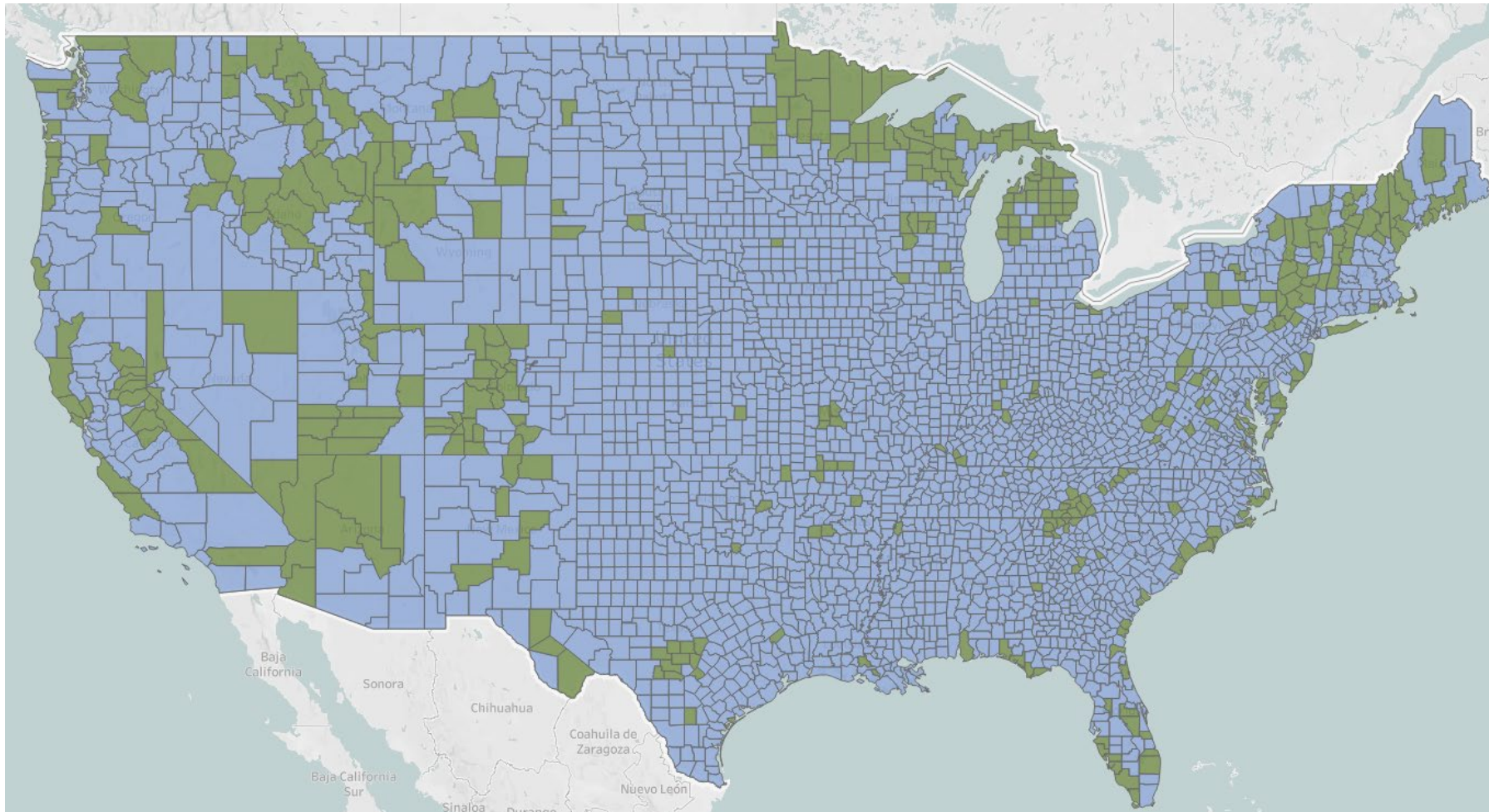
2

Data we have



1

Recreation dependence in the U.S.

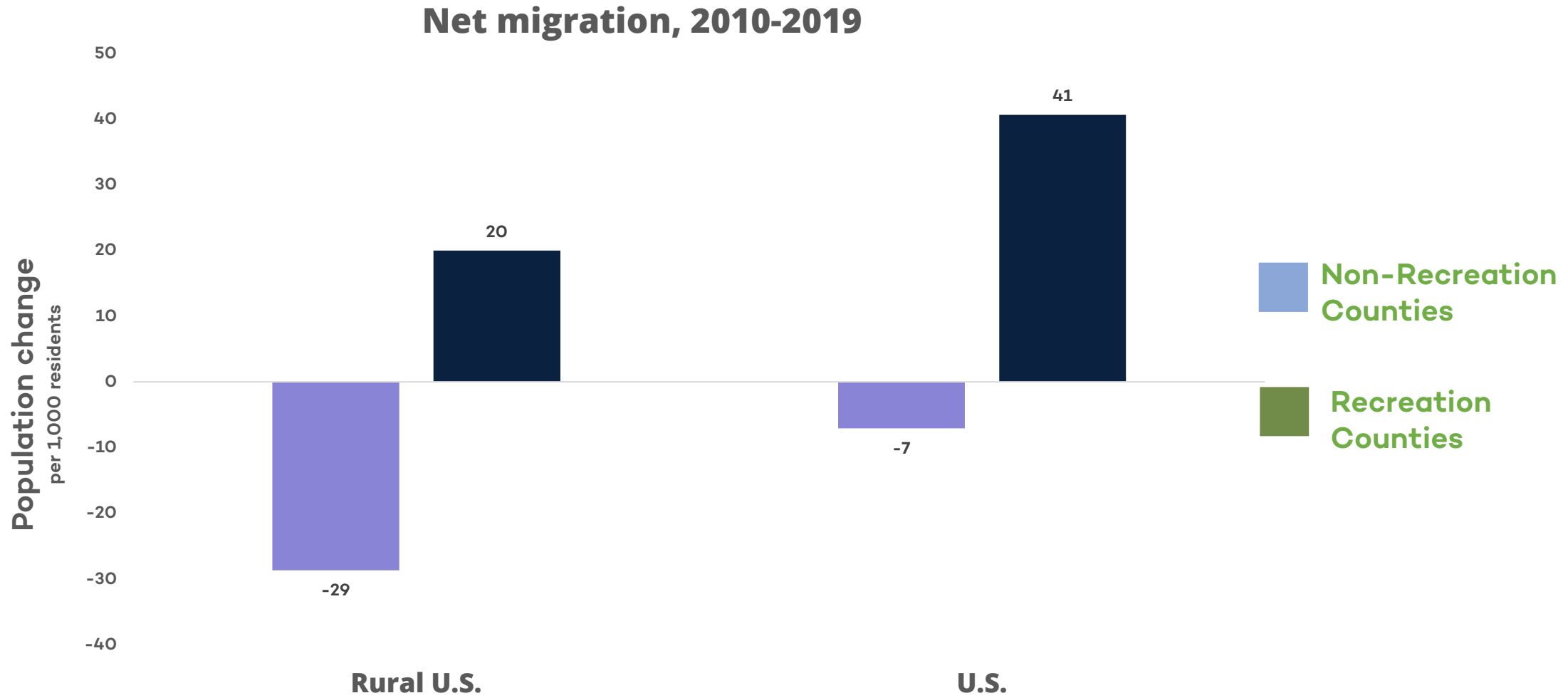


- Non-Recreation Counties
- Recreation Counties

Data source: U.S. Department of Agriculture, Economic Research Service. County Typology Codes.



1 Recreation economies bring more people

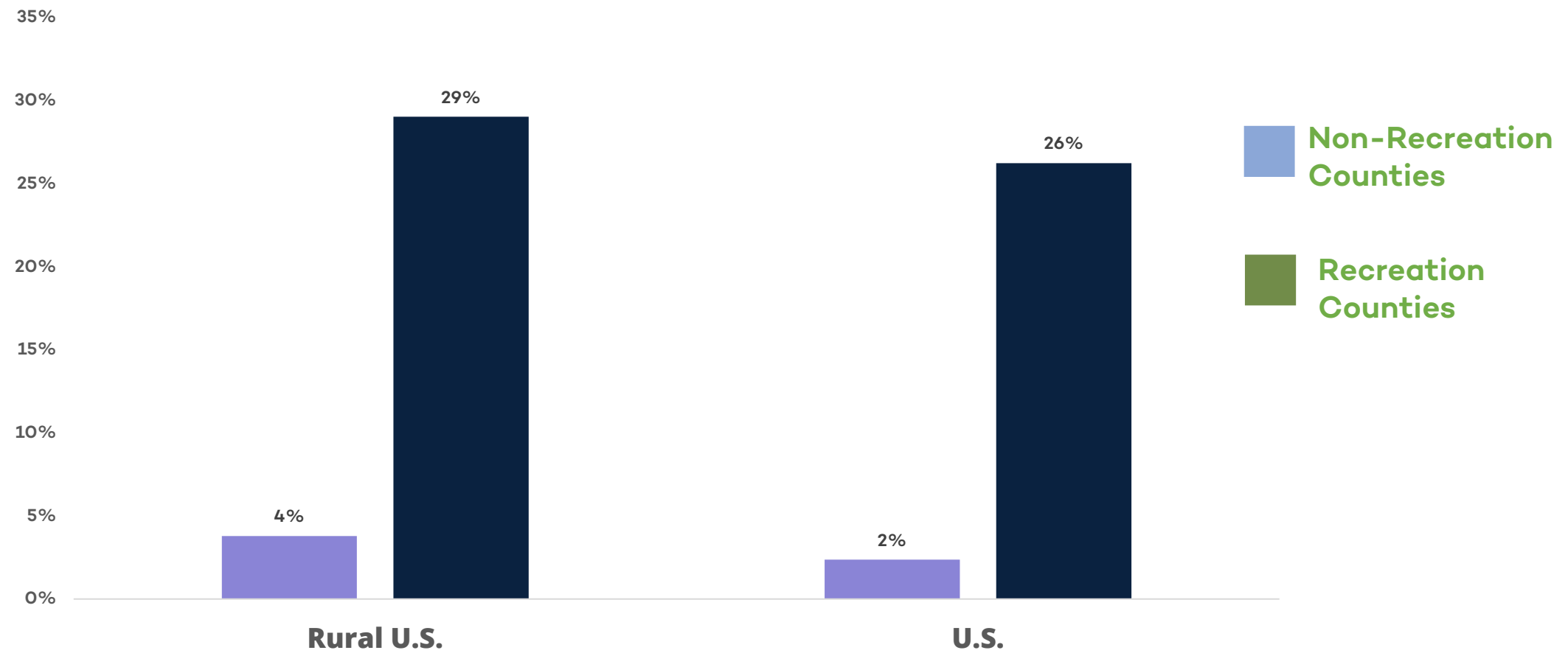


Data Sources: U.S. Department of Commerce. 2021. Census Bureau, Population Division, Washington, D.C., reported by Headwaters Economics' Economic Profile System, headwaterseconomics.org/eps.



1 Recreation economies bring wealth

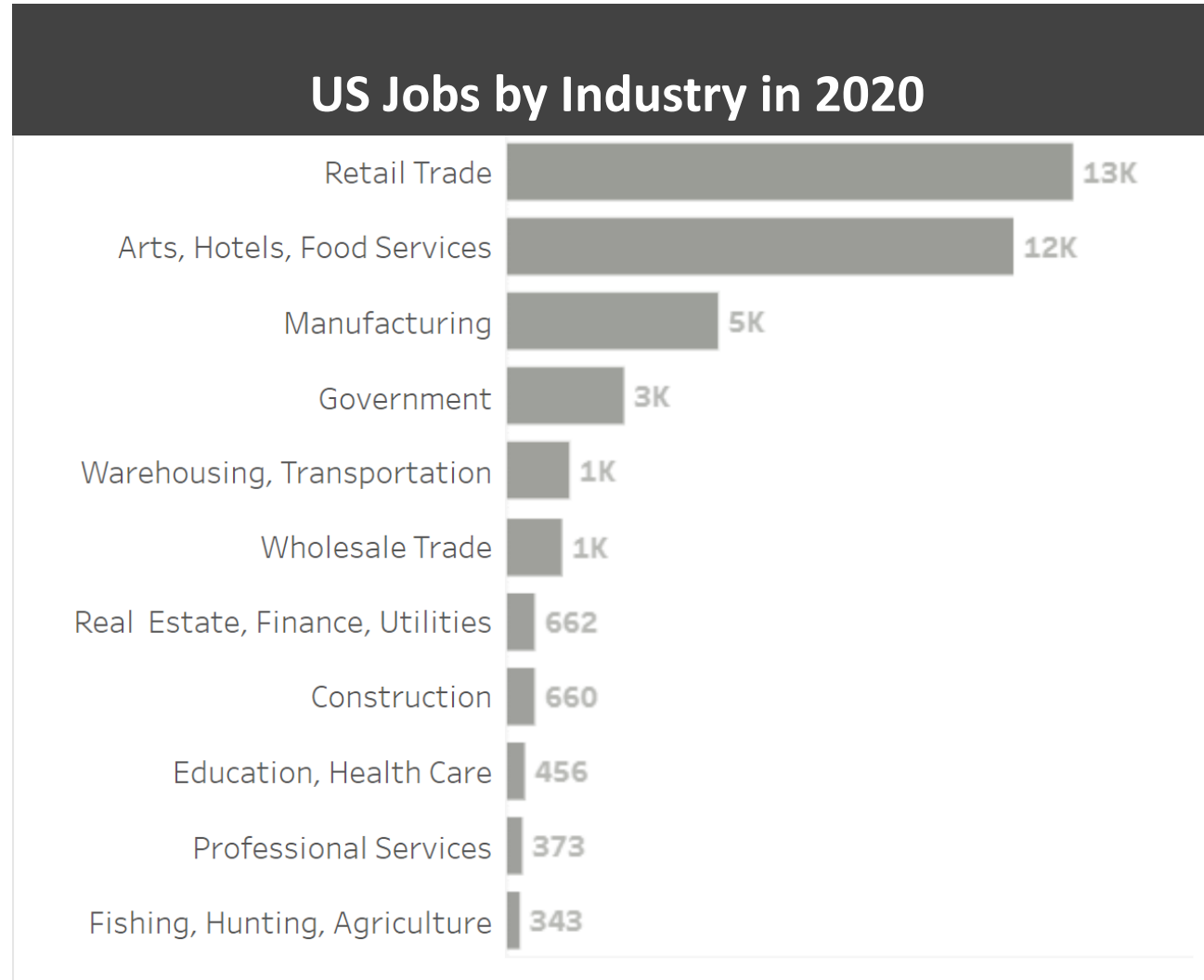
Percent of counties where people moving in earn more than current residents



Data Source: U.S. Internal Revenue Service. 2020. SOI Tax Stats – Individual Income Tax Statistics – ZIP Code Data.

1

Outdoor recreation is more than tourism



Data source: Bureau of Economic Analysis, Outdoor Recreation Satellite Account. Downloaded from <https://headwaterseconomics.org>.

1

Benefits to communities can be measured

This independent economic analysis finds that the Great American Rail-Trail® could generate annually:

 25.6M TRIPS

 \$229.4M
IN VISITOR SPENDING

 2,500
NEW JOBS

 \$22.8M
IN NEW TAX REVENUE

 \$104M
IN LABOR INCOME

 \$161M
GDP CONTRIBUTION

1

Benefits to communities can be measured



Methow Valley, WA

Return to community: \$6 income per \$1 invested



Whitefish, MT

Return to community: \$2.50 income per \$1 invested

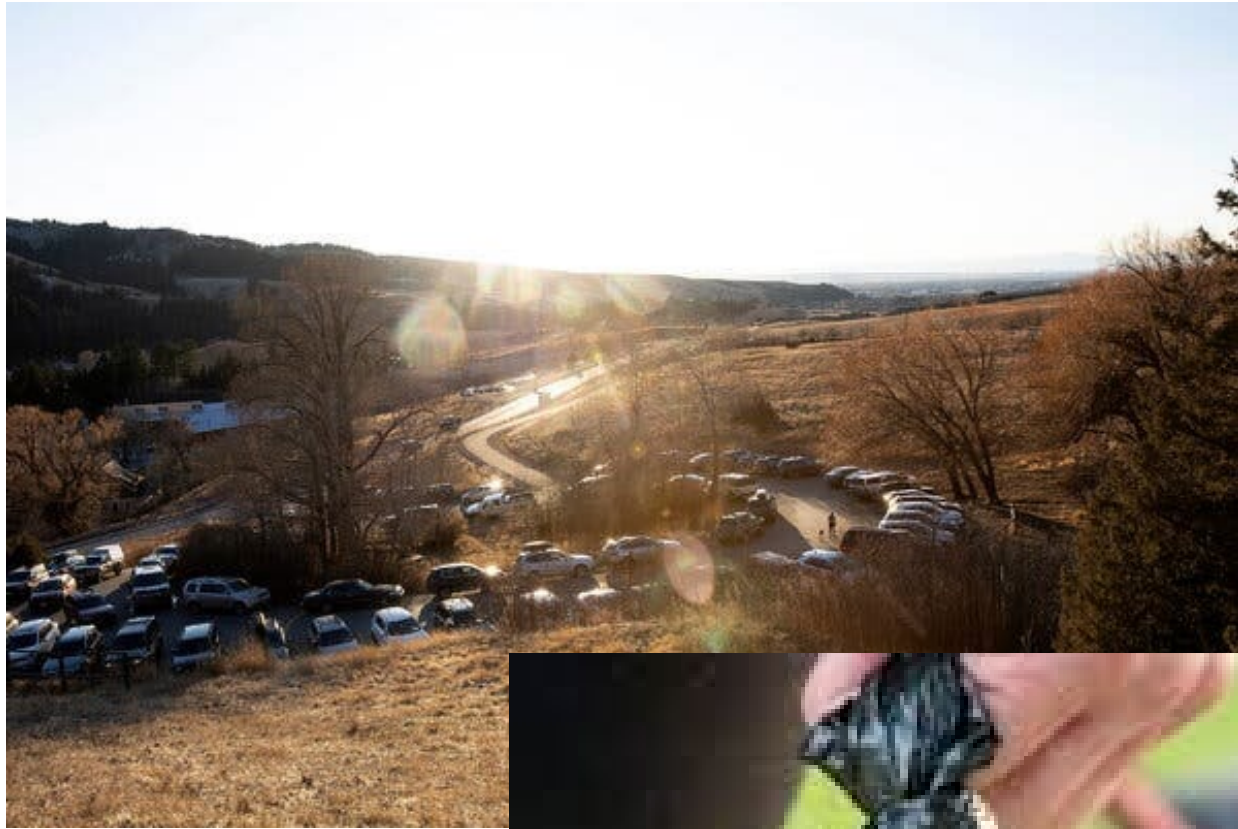


- **Recreation dependence**
- **Changes in population**
- **Changes in wealth**
- **Benefits to many sectors**
- **Benefits to communities**
- *And many more...*

2

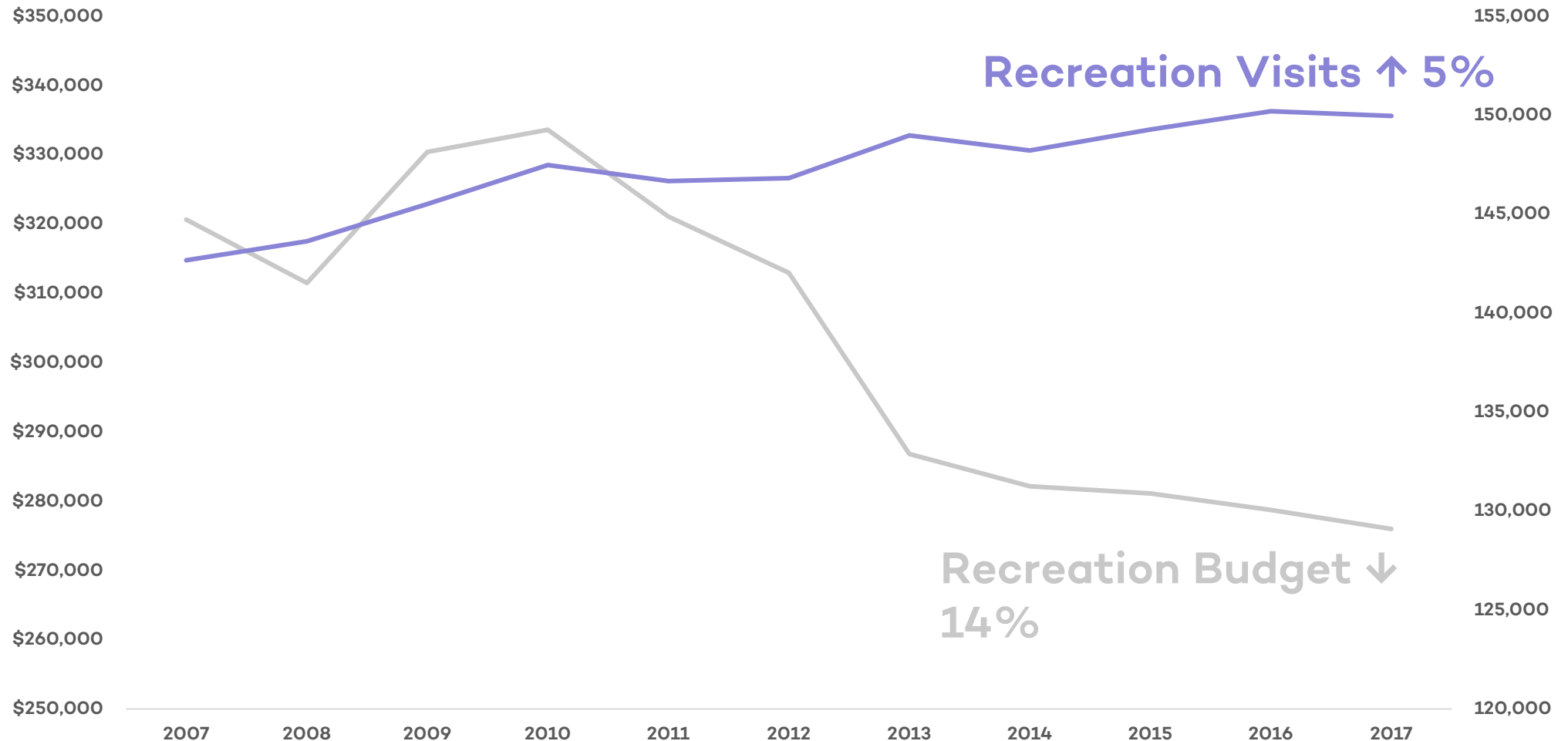
Data we need





Why do we need to know how much outdoor recreation is happening?

U.S. Forest Service Recreational Visits & Budget, 2007-2017



Recreation counting, 2.0



- **Using novel data to forecast:**

1. **Over time**
2. **Over space**

Many different sources



Photo-sharing & social media



Fitness-tracking

STRAVA



Search engine trends

Google

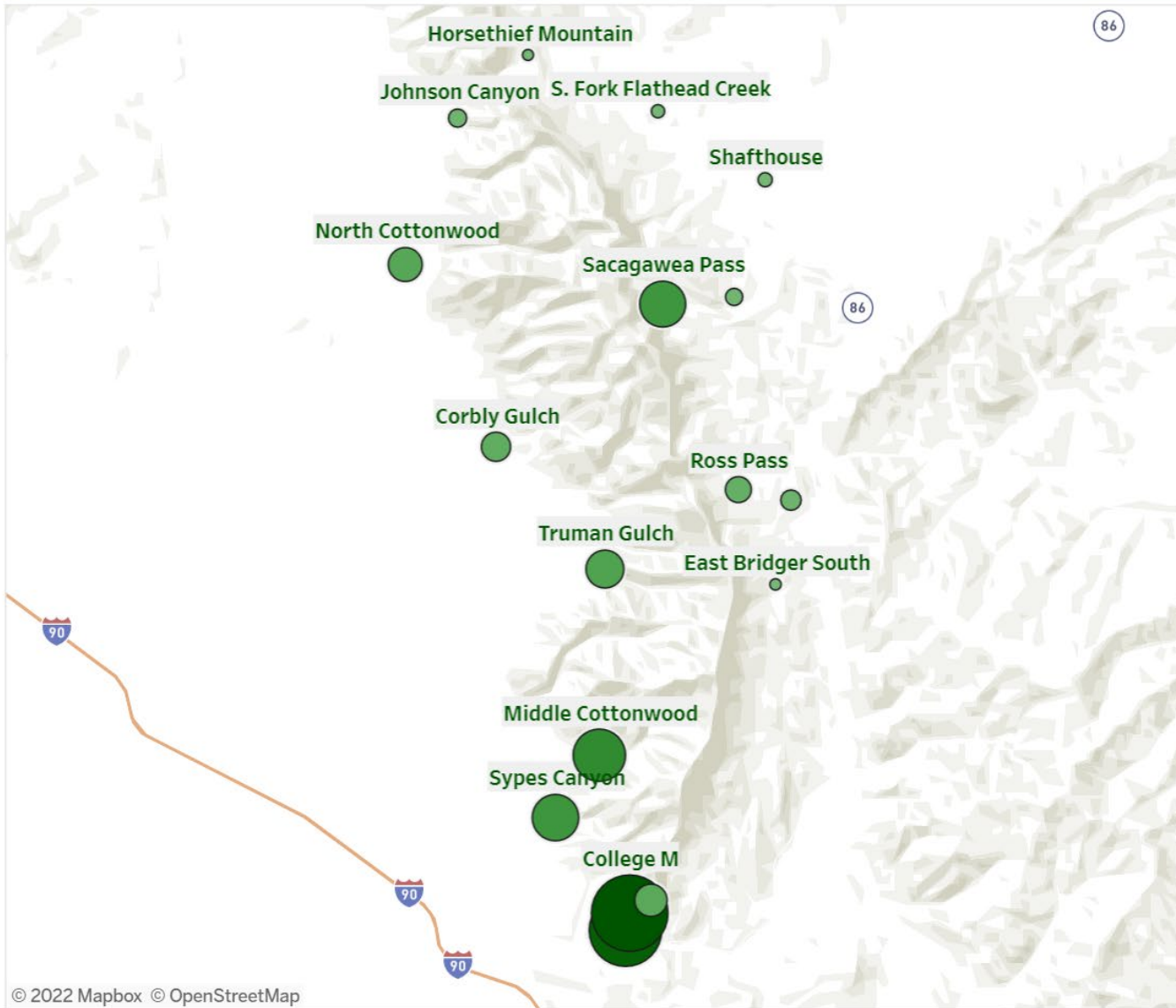


Cell phone data

Measuring Trail Use in Montana's Bridger Mountains

Select trail: (All)

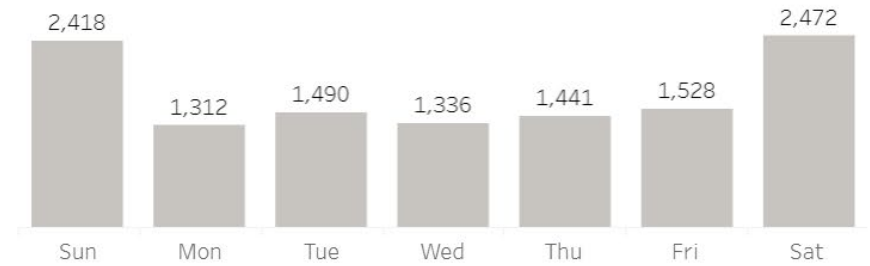
79 days sampled from: 6/27/2021 to 9/13/2021



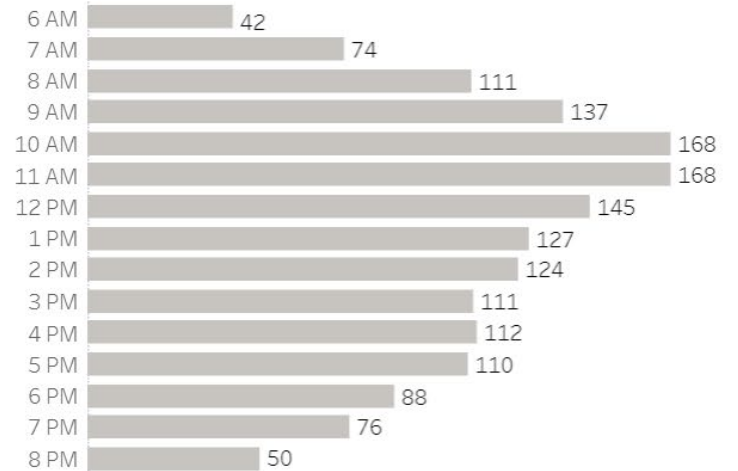
Select Days:

- All
- Weekday
- Weekend

Average Daily Traffic



Average Hourly Traffic




© 2022 Mapbox © OpenStreetMap

Data source: Infrared counters installed from June to Sept 2021. Due to out-and-back use, unique individuals are about half of total traffic.

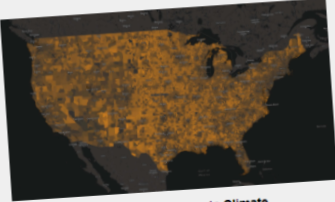
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Rural Capacity Map Supports Climate Resilience

Headwaters Economics' new Rural Capacity Map identifies communities where investments in staffing and expertise are needed to support infrastructure and climate resilience projects. The interactive map is the first of its kind and reveals that thousands of rural communities lack the resources needed to compete for federal funds that can help them prepare for climate threats such as flooding and wildfire. [More...](#)



Mobile Homes Face Higher Flood Risk

Mobile and manufactured homes are the most common unsubsidized, affordable housing in the United States. They also have disproportionately higher flood risk than other housing types and face unique regulatory barriers. We offer policy solutions and an interactive map showing where mobile homes have high flood risk. [More...](#)

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The Outdoor Recreation Economy by State

Using new data from the Bureau of Economic Analysis, Headwaters Economics updated its analysis of the outdoor recreation economy. Interactive maps, charts, and graphs make it easy to see the impacts of the outdoor economy in every state. While this sector declined by 19% from 2019 to 2020, it is still one of the most significant in the U.S. economy. [More...](#)



Improving Benefit-Cost Analyses for Rural ZIFs

Smaller, rural, and lower-income communities are at a disadvantage when it comes to accessing federal funding for climate adaptation. Our latest research explores how FEMA's calculations underscore mitigation projects in these areas, and suggests steps that might address the inequity. [More...](#)

DATA CORNER

Economic Profile System Now Includes Indigenous Areas

Headwaters' Economic Profile System (EPS) now includes search options for Indigenous Areas such as reservations and other tribal lands.

This latest update to our popular socioeconomic data tool allows users to quickly search and view data about the population, income, employment, and demographics for Indigenous Areas. Users can also customize reports with more detailed data and compare data across Indigenous Areas, cities, counties, or states.



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The unequal impacts of wildfire

The 2021 wildfire season has impacted millions of Americans, but marginalized and vulnerable communities have faced some of the deepest challenges. Headwaters Economics has released a new report and data tool that sheds light on the unequal impacts of wildfire across the country. [More...](#)



Housing price increases affect every state

It's not just tech-hubs and resort communities that are feeling the pressure of skyrocketing housing costs. Headwaters Economics' new analysis shows these unprecedented trends are impacting every state. We explore



Thank you!



Megan Lawson, Ph.D
megan@headwaterseconomics.org
406-570-7475