

Tourism and Extension: Current Snapshot and Future Opportunity

Presented at Sustainable Tourism and Outdoor
Recreation Conference
Astoria, OR, October 2019

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Presentation Outline

- Recreation and Tourism trends and impacts in the U.S.
- Recreation and Tourism and Extension
- Where do we go from here



United States Department of Agriculture
National Institute of Food and Agriculture

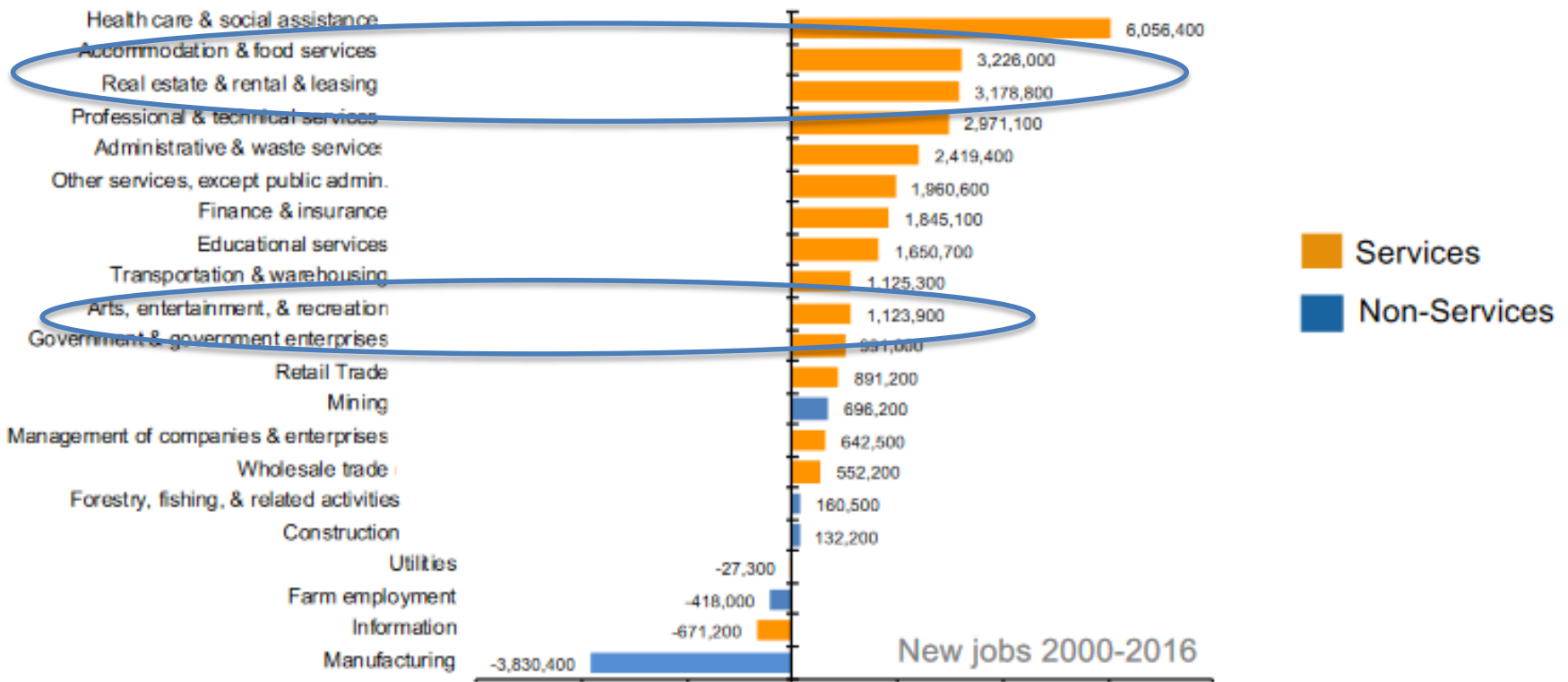
This presentation draws on work underway or completed under various USDA/NIFA-funded grants. The work would not be possible without the funding, which is greatly appreciated.



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95% of New Jobs in U.S. in SERVICES

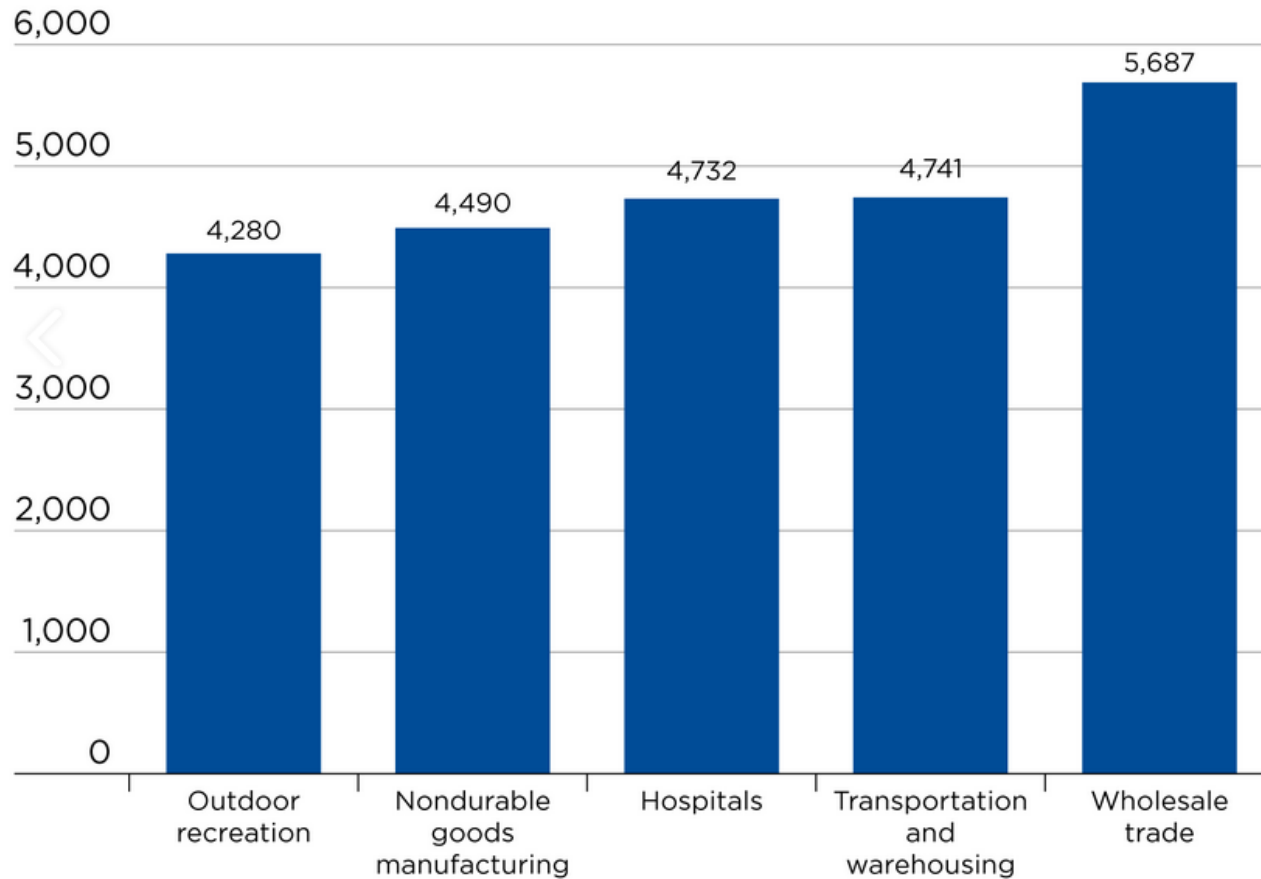


<https://headwaterseconomics.org>

U.S. Department of Commerce, 2016. Bureau of Economic Analysis, Regional Economic Information System, Washington, D.C. Table SA25N.

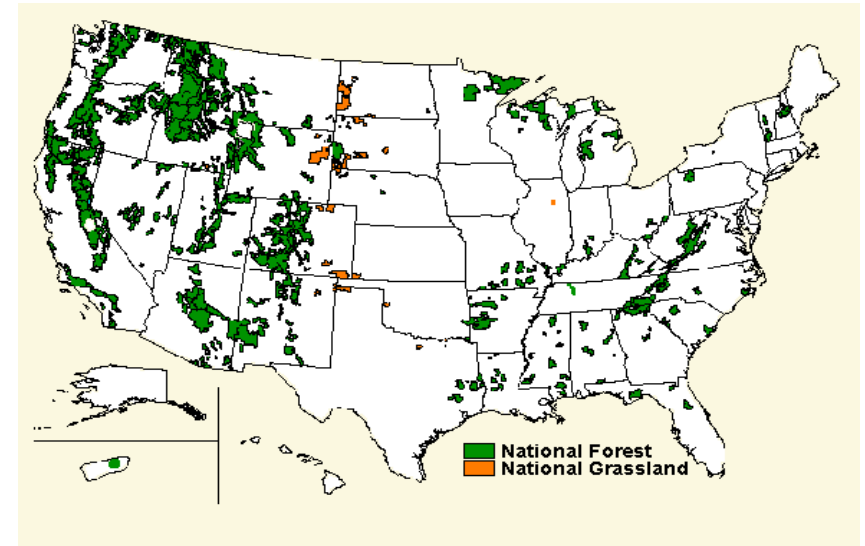
Outdoor Recreation Employment and Comparable Industries, 2016

Thousands of jobs



U.S. Bureau of Economic Analysis (BEA)

National Parks & Federal Lands



In 2017:

- 331 million park visits
- \$18.2 billion is local gateway spending
- \$35.8 billion in economic output
- 306,000 jobs
- \$11.9 billion in labor income
- \$20.3 billion in VA

Total Value Added Contributed to the National Economy

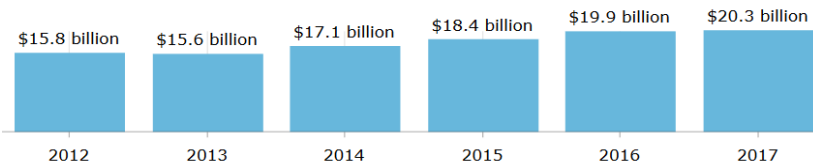
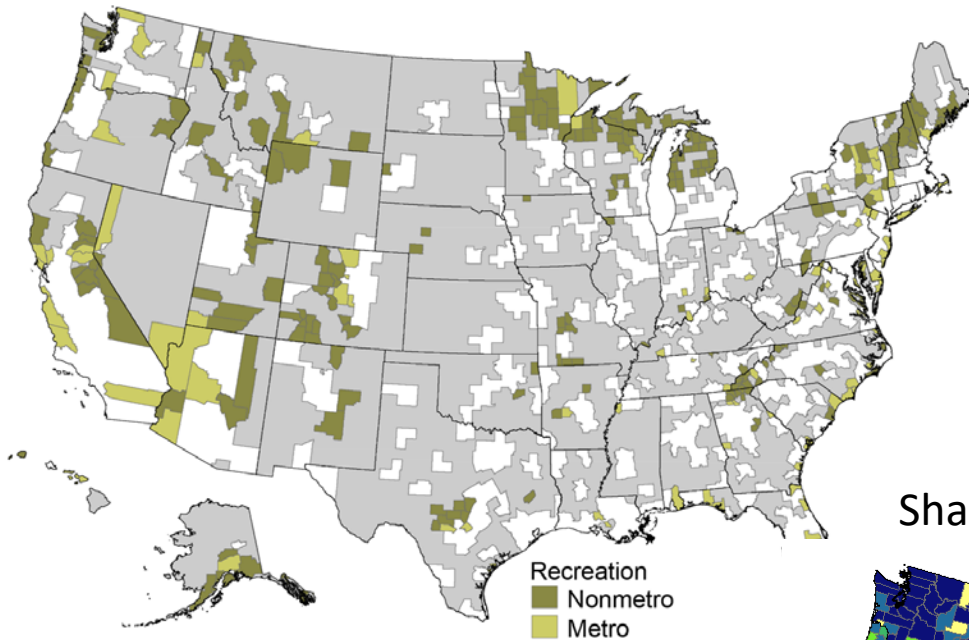


Table 7. 2012 Economic contributions of visitor spending for recreation on federal lands and waters (2012 dollars).

Agency	Recreation Visitation (millions)	Visitor Spending (billion \$)	Jobs (thousands)
National Park Service	283	15	243
Bureau of Land Management	59	3	58
U.S. Fish and Wildlife Service	47	2	37
Bureau of Reclamation	28	1	26
Forest Service	161	11	194
National Oceanic and Atmospheric Administration	NR ¹	5	135
U.S. Army Corps of Engineers	360	13	187
All FICOR Agencies	938	51	880

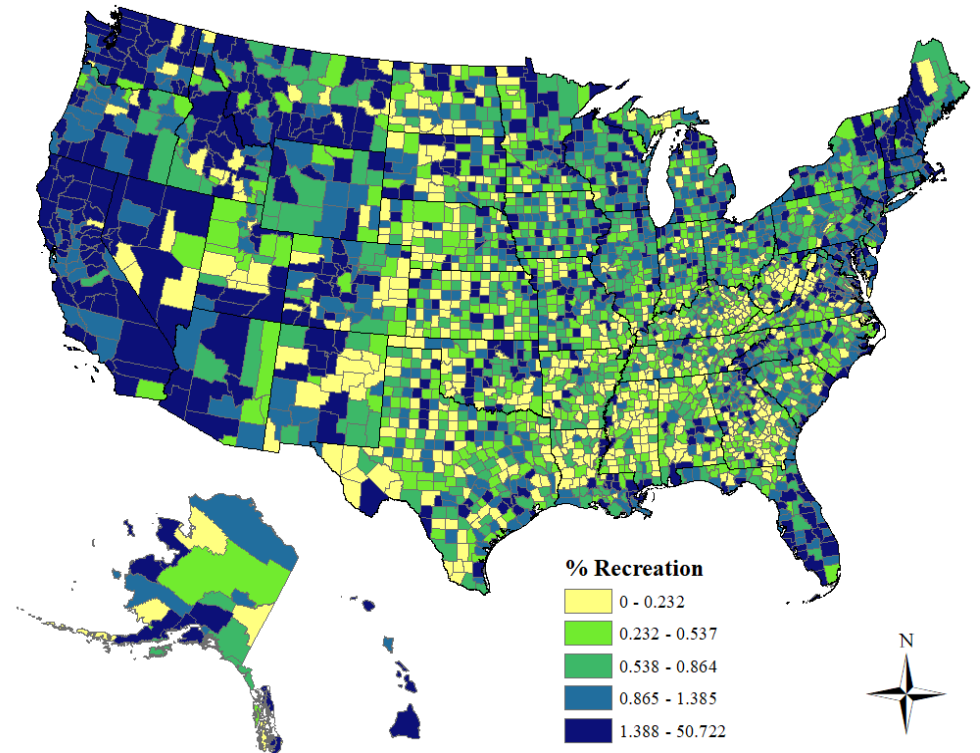
¹ NR = not reported
Source: English 2014

Recreation counties, 2015 edition

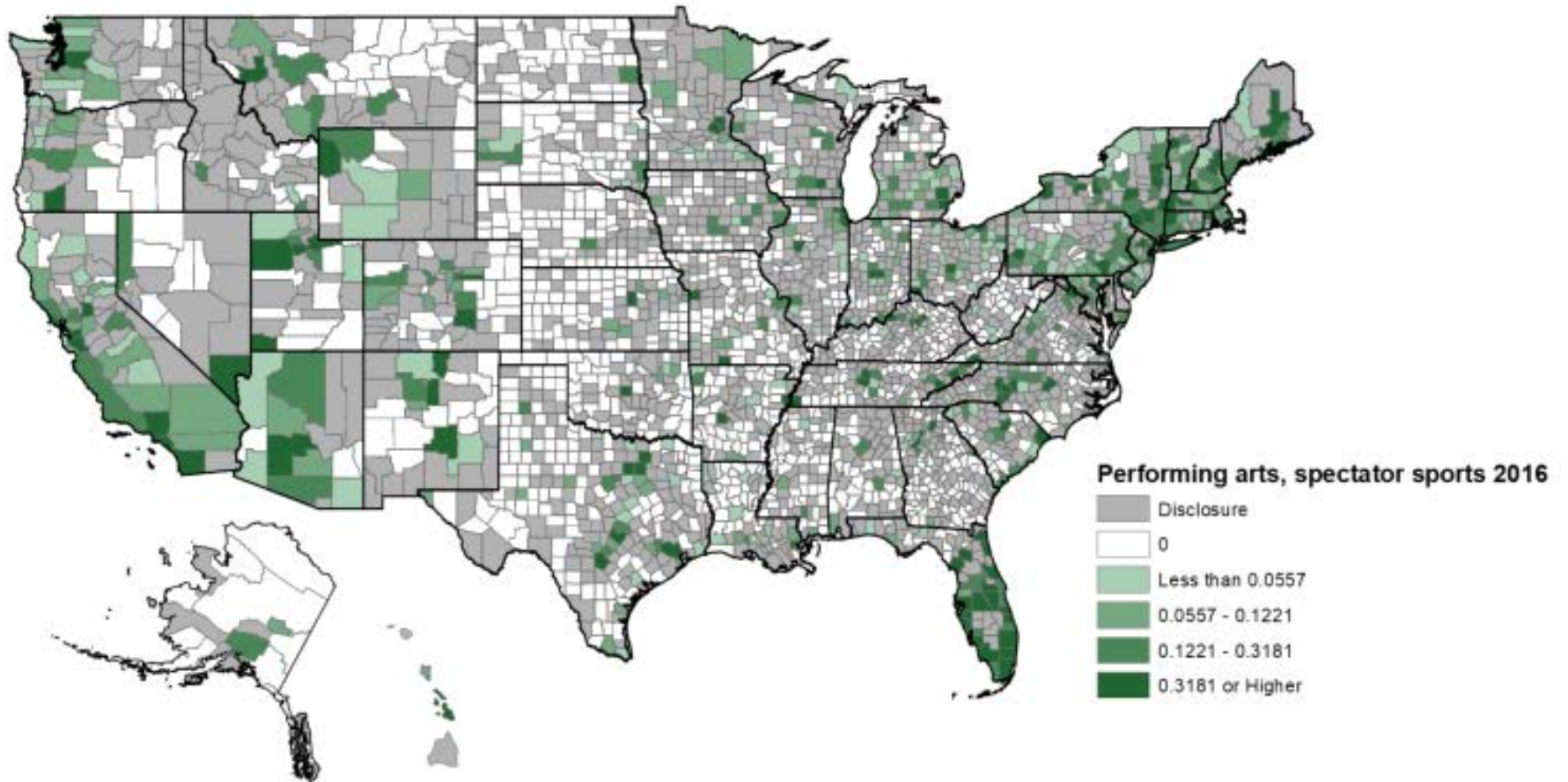


Recreation counties determined by a weighted index of three measures: 1) job following: entertainment, recreation, accommodations, eating/drinking places, and 2) the share of vacant housing units intended for seasonal/occasional use. Recreation counties are those with a score more than one deviation above the mean. Note that county for the recreation counties only. Map revised May 2017; see errata for details. Source: USDA, Economic Research Service using data from Bureau of Economic Analysis and U.S. Census Bureau.

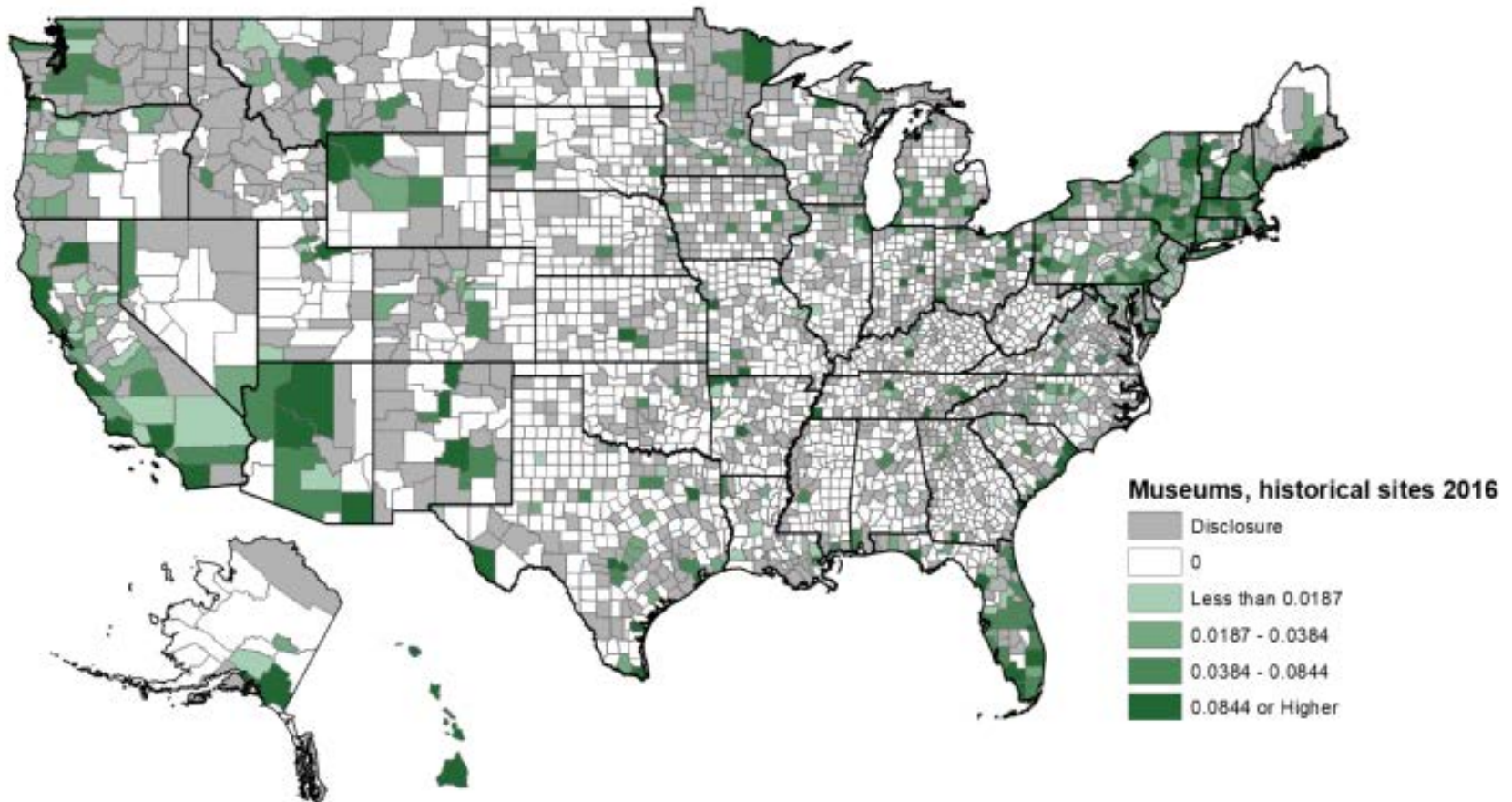
Share of County Employment in Recreation



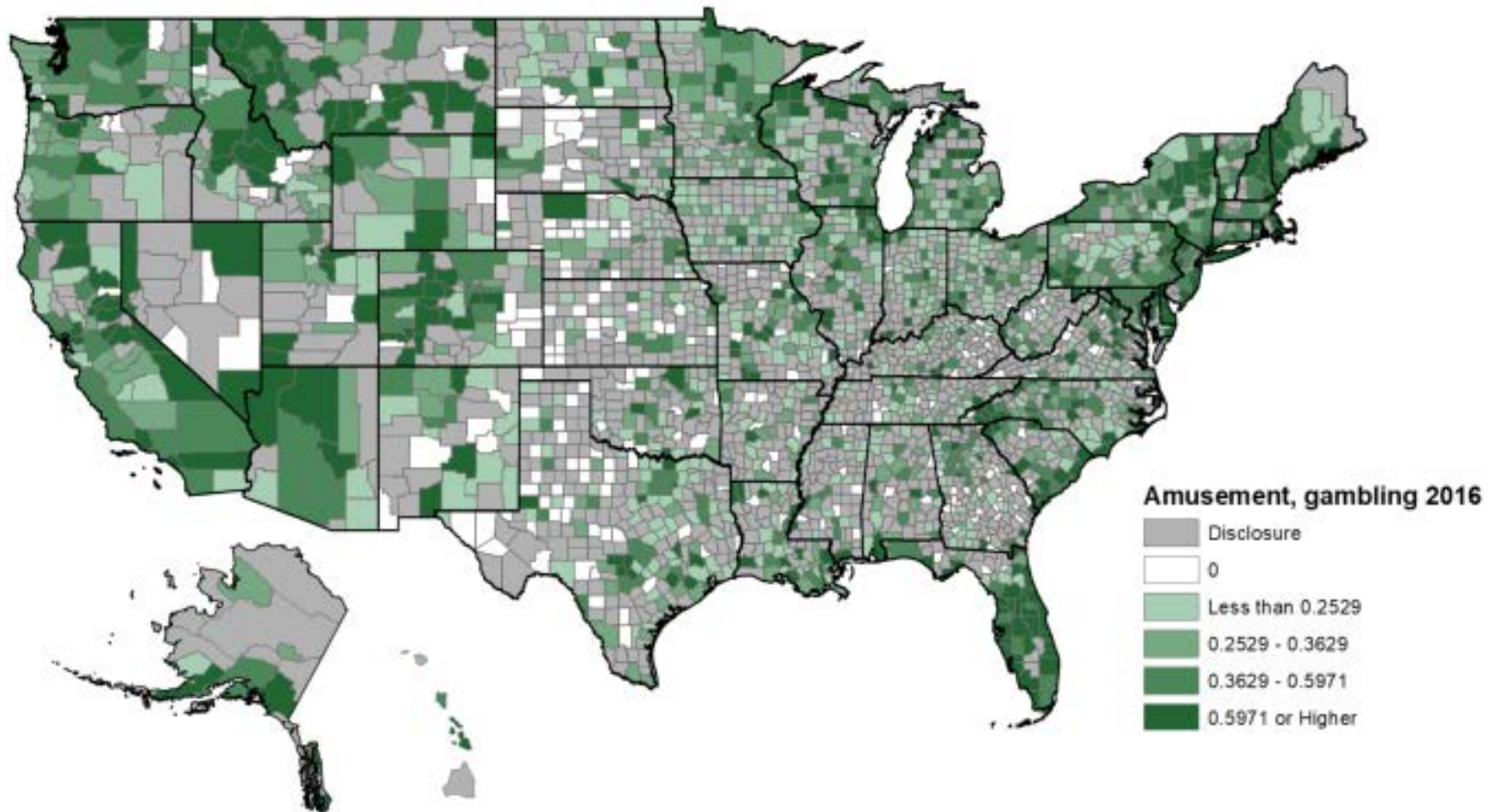
Performing arts, spectator sports 2016



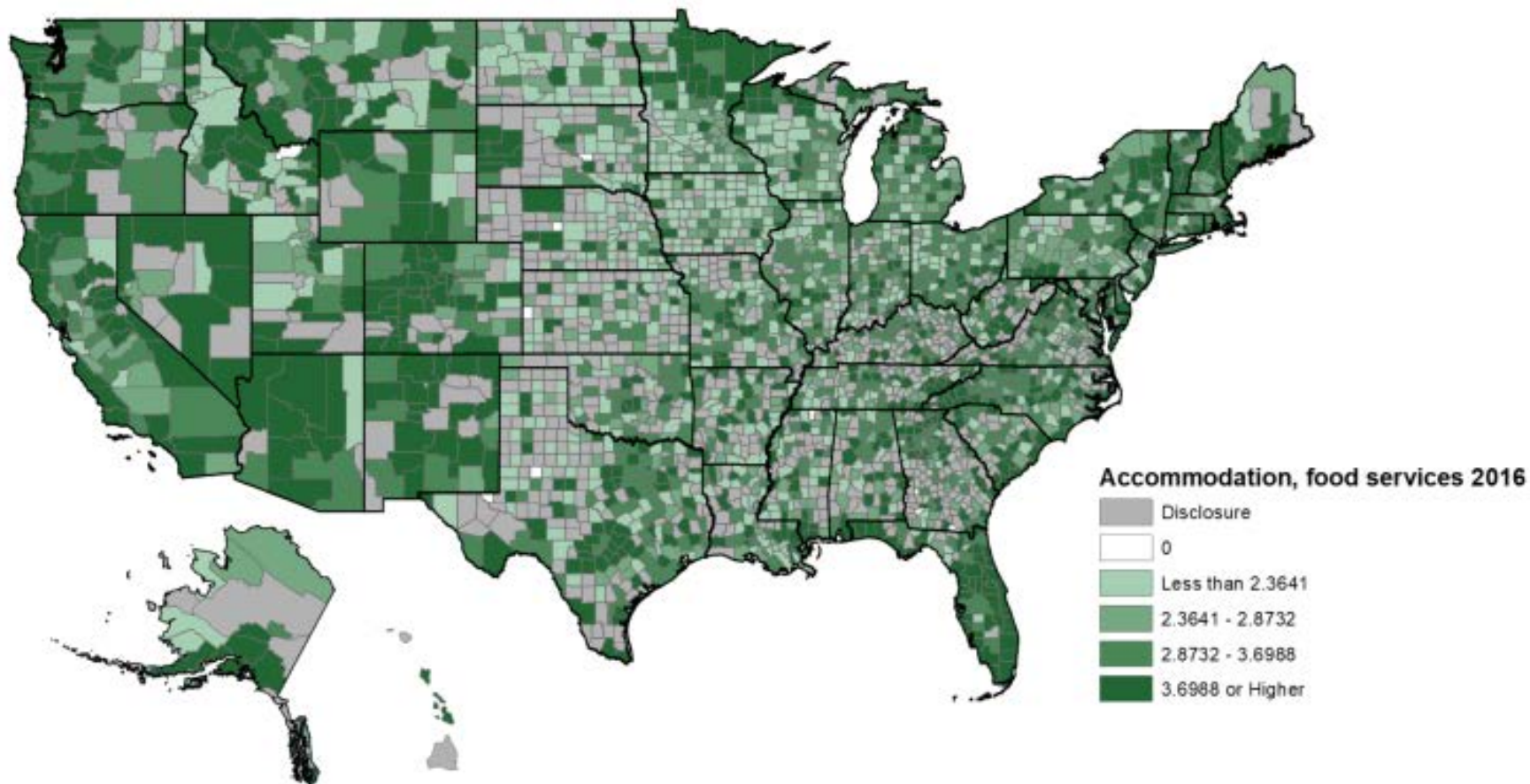
Museums, historical sites 2016



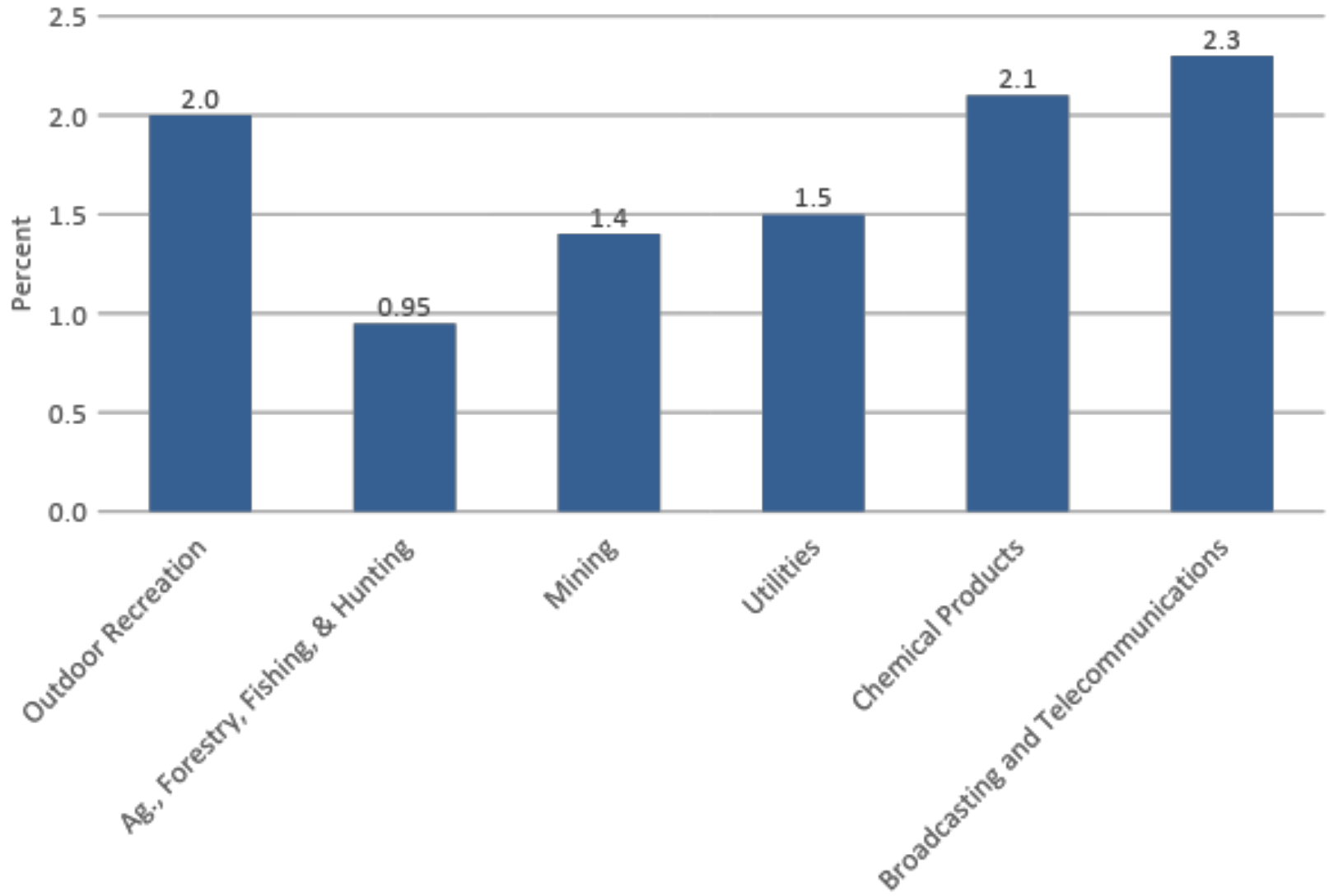
Amusement, gambling 2016



Accommodation, food services 2016

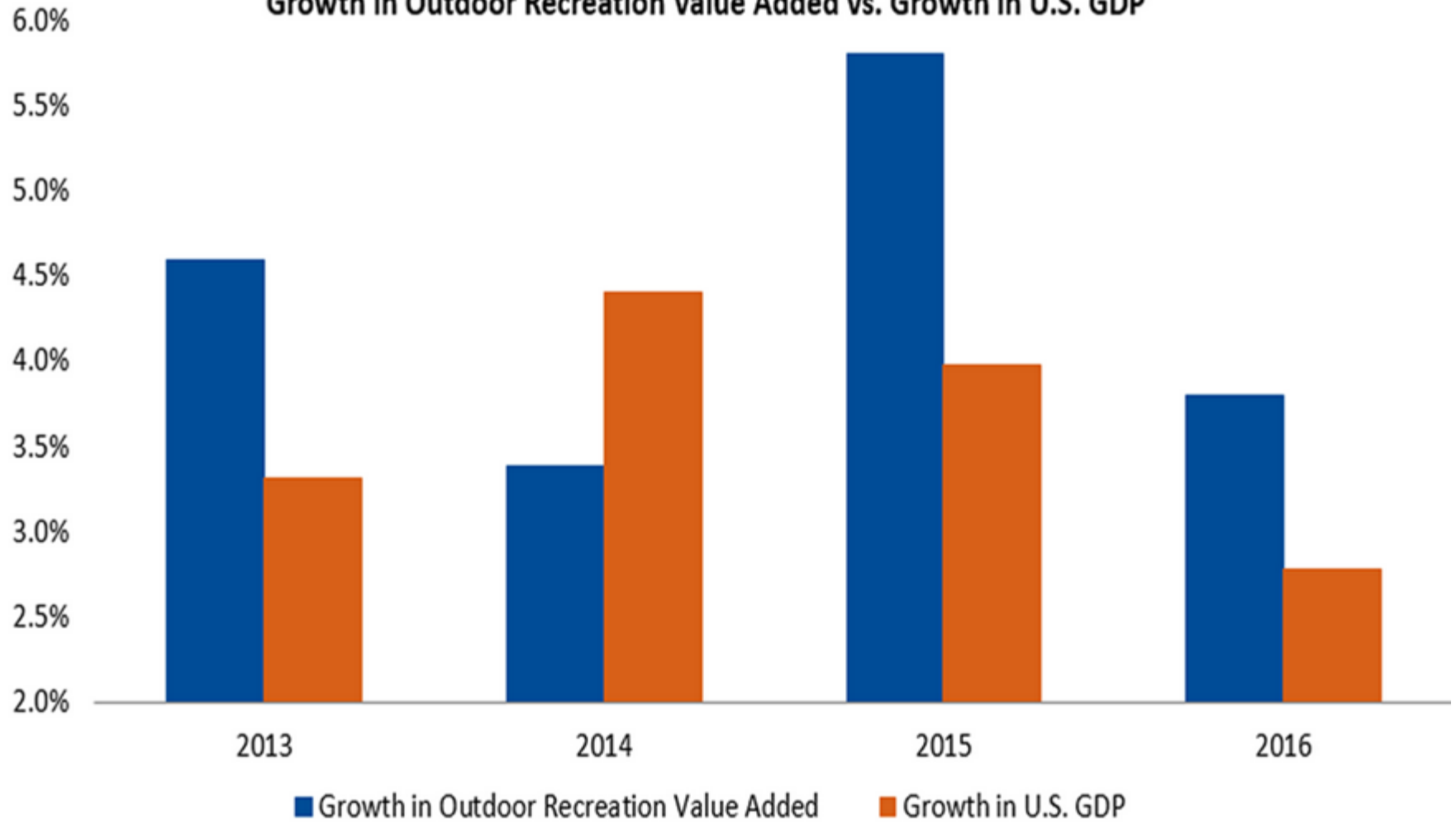


Outdoor Recreation as a Percent of GDP with Comparable Industries, 2016



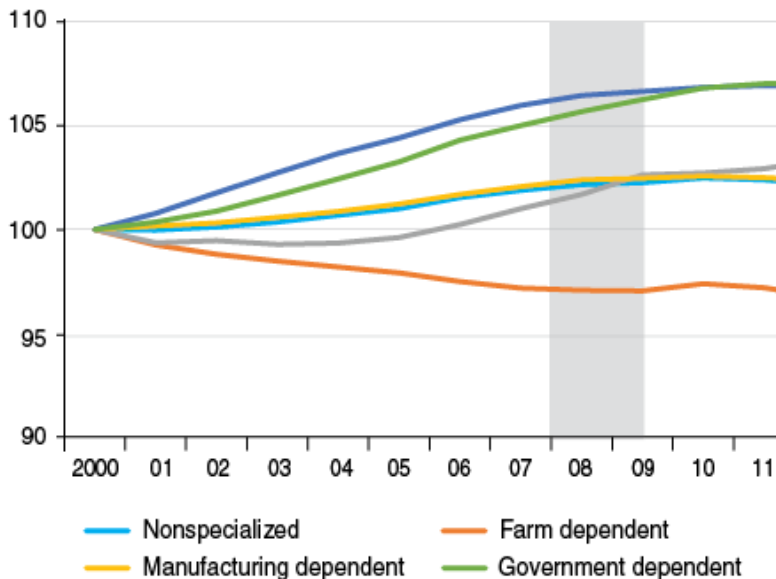
Source: US Bureau of Economic Analysis and authors' calculations

Growth in Outdoor Recreation Value Added vs. Growth in U.S. GDP



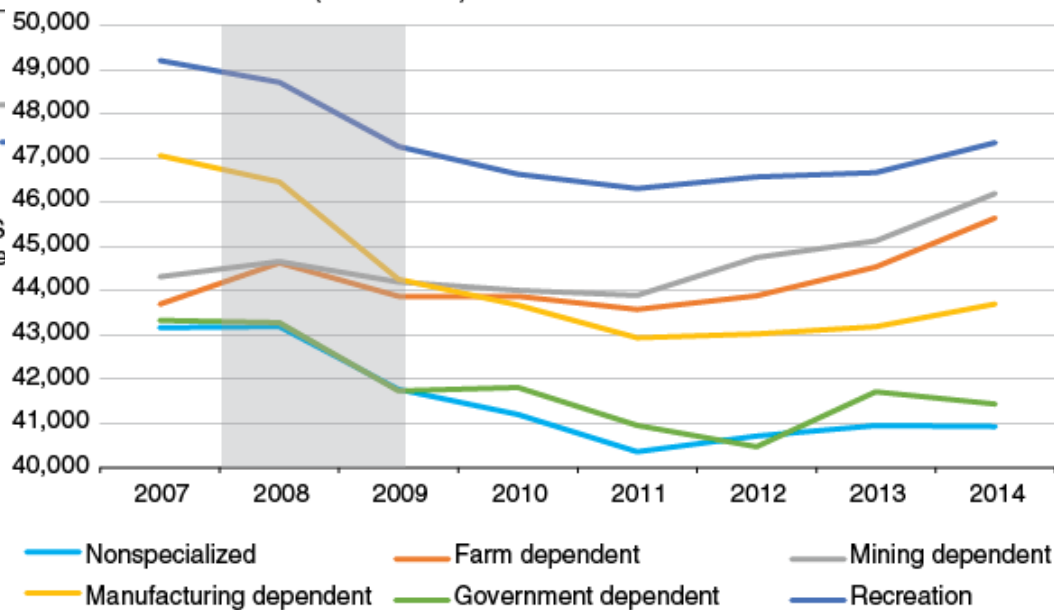
Rural recreation county population grew in the early 2000s but leveled off after the Great Recession

Index (Level in 2000 = 100)



Rural median household incomes were highest in recreation counties

Median household income (2014 dollars)

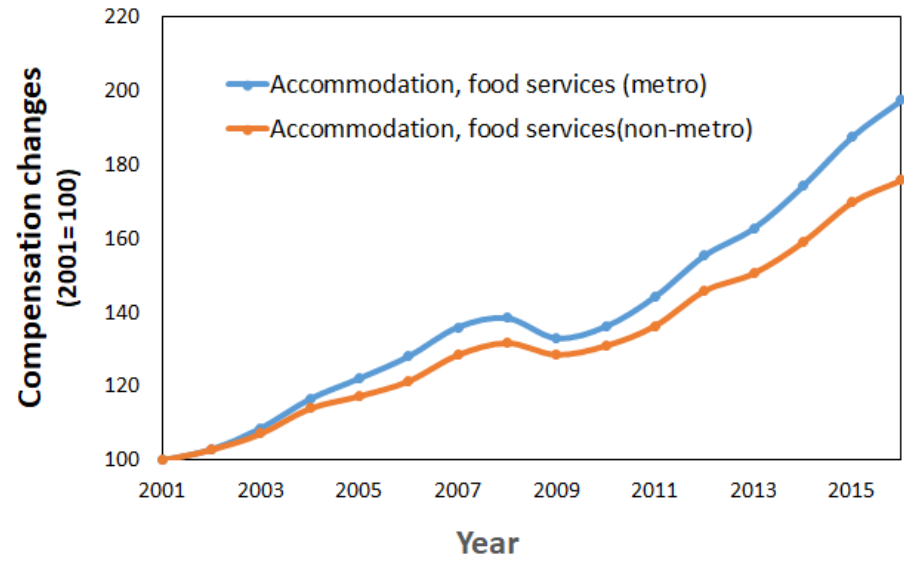
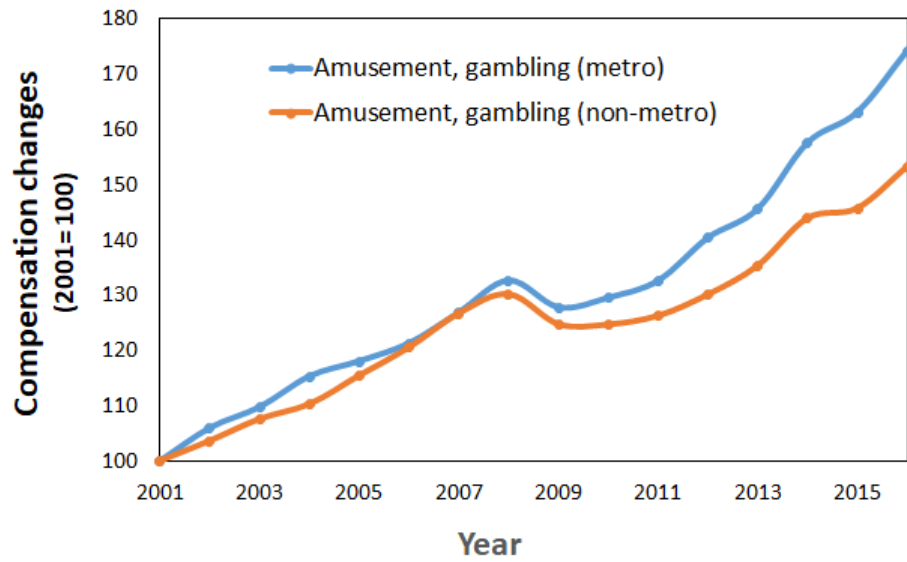
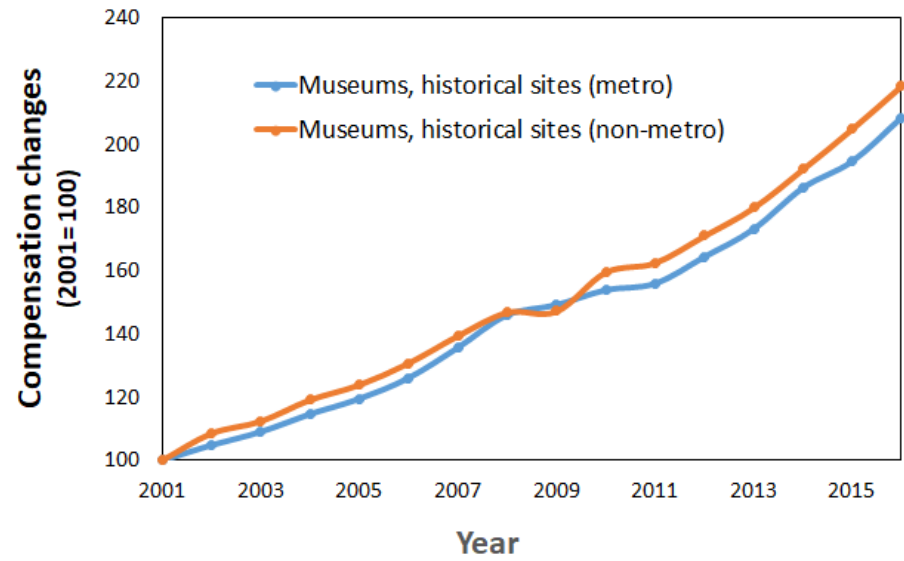
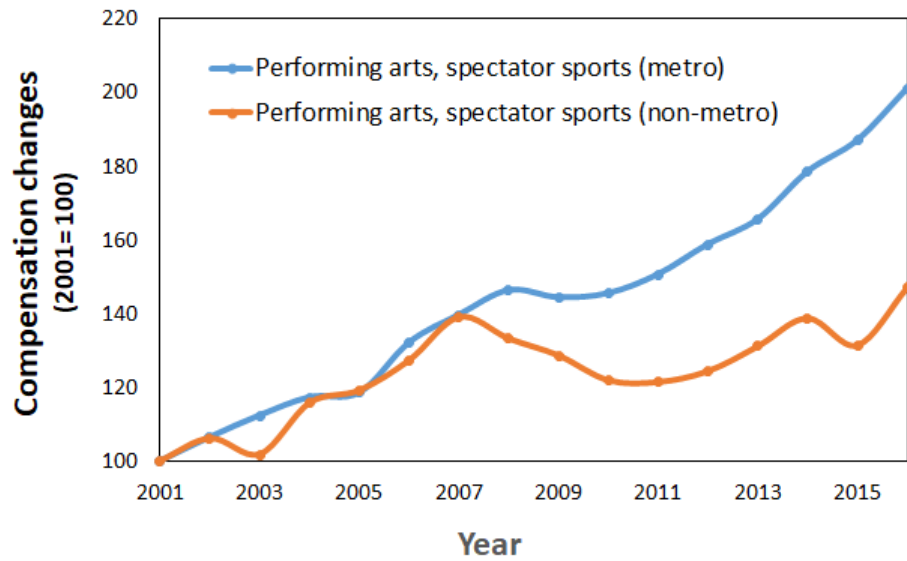


Note: Values for all years reflect classification of counties in 2015 ERS Source: USDA, Economic Research Service using county population e Census Bureau.

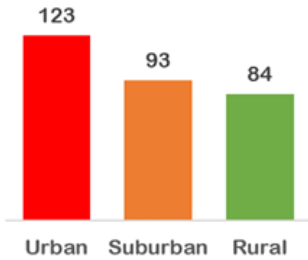
Note: Medians show that half of those who live in a type of county are in a county with a lower median household income, and the other half are in a county with a higher median household income. Values are in constant 2014 dollars, deflated by Consumer Price Index.

Source: USDA, Economic Research Service estimates based on Small Area Income and Poverty Estimates data sets.

Source: <https://www.ers.usda.gov/amber-waves/2016/december/usir-the-ers-county-economic-types-to-explore-demographic-and-economic-trends-in-rural-areas/>



Rural-urban continuum codes

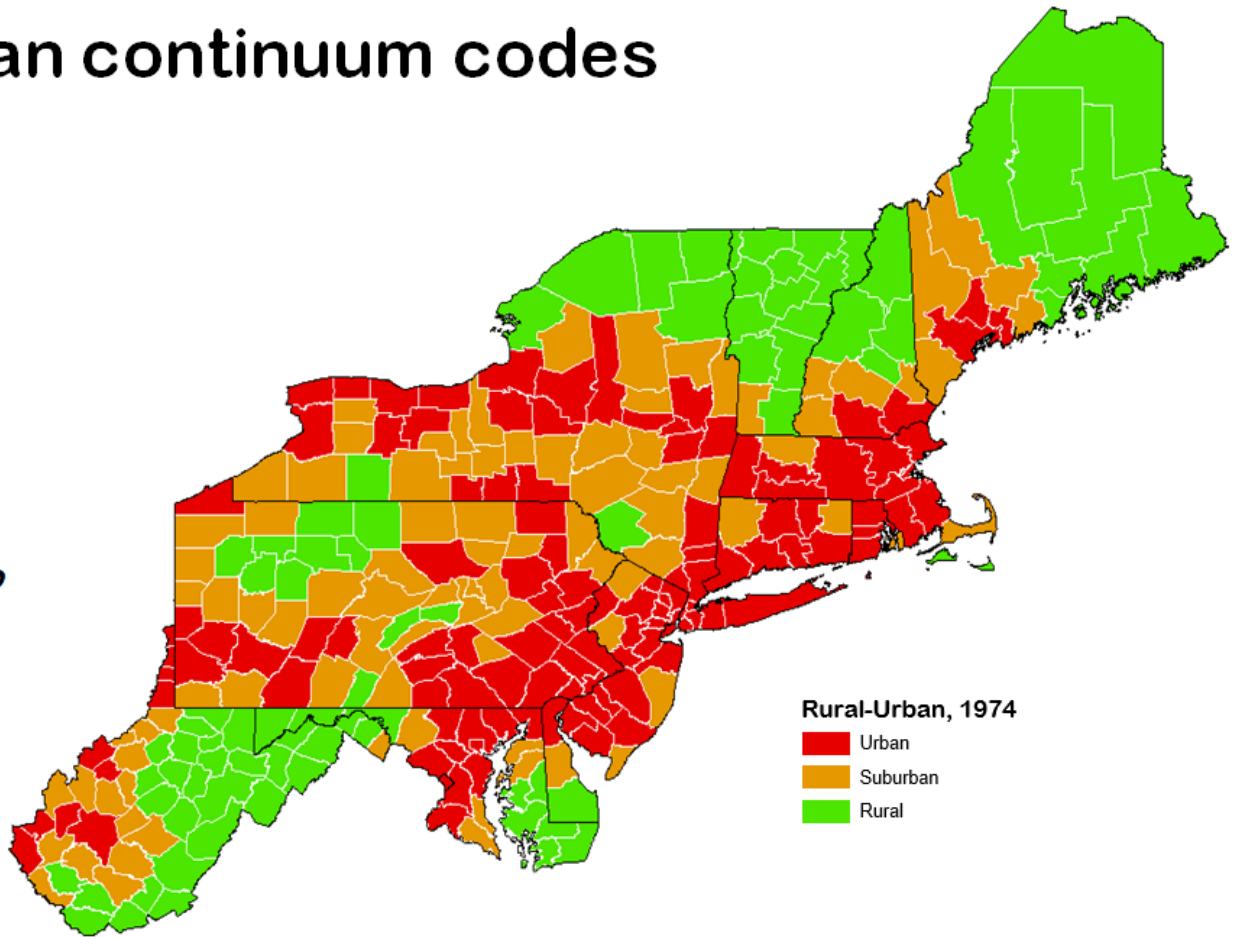


Classification based on pop size and adjacency to metro

Metro: 1,000,000
250,000-1mn
<250,000

Non-metro: 20,000+
2,500-20,000
less than 2,500

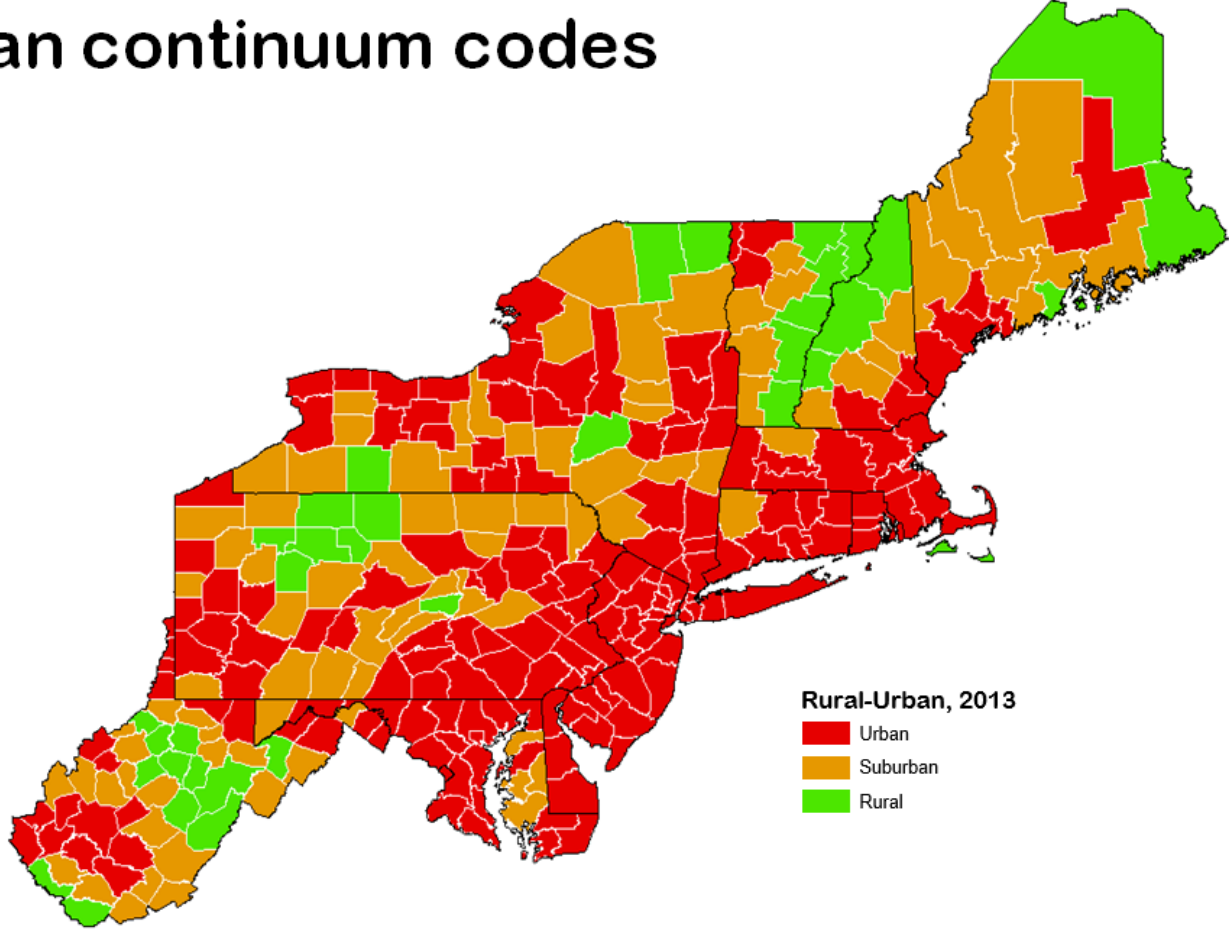
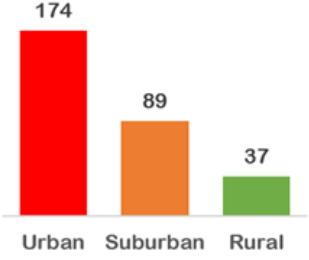
And metro adjacent or not



Rural-Urban, 1974
Urban
Suburban
Rural

Data source: USDA ERS, Rural-Urban Continuum Codes, 1974

Rural-urban continuum codes



Data source: USDA ERS, Rural-Urban Continuum Codes, 2013

Live

Work

Play



**Cooper House
Bed & Cocktail**



Canaan Valley

Davis

Parsons

Thomas



MATT HAUGER

Matt helped launch the Boulder Parks online initiatives, including this web site and the park's Facebook page.

Matt received his Master of Divinity from Duke University's Divinity School (Durham, NC) in 2010. He currently works as a marketing specialist on CHRE's Microsoft account, designing and developing digital content for Microsoft offices across North America. He and his wife Emily live in Davis, WV.



National Extension Tourism survey

- the “pulse” of tourism programs in Extension
- distributed online through Qualtrics
- NET Design Team contact list
- NERC RD contact list
- Sea Grant Contact list
- NACDEP facebook
- snowballing technique
- Land grant - 116 responses
- Sea grant – 31 responses
- Total = 147

National Extension Tourism survey

Data Analysis

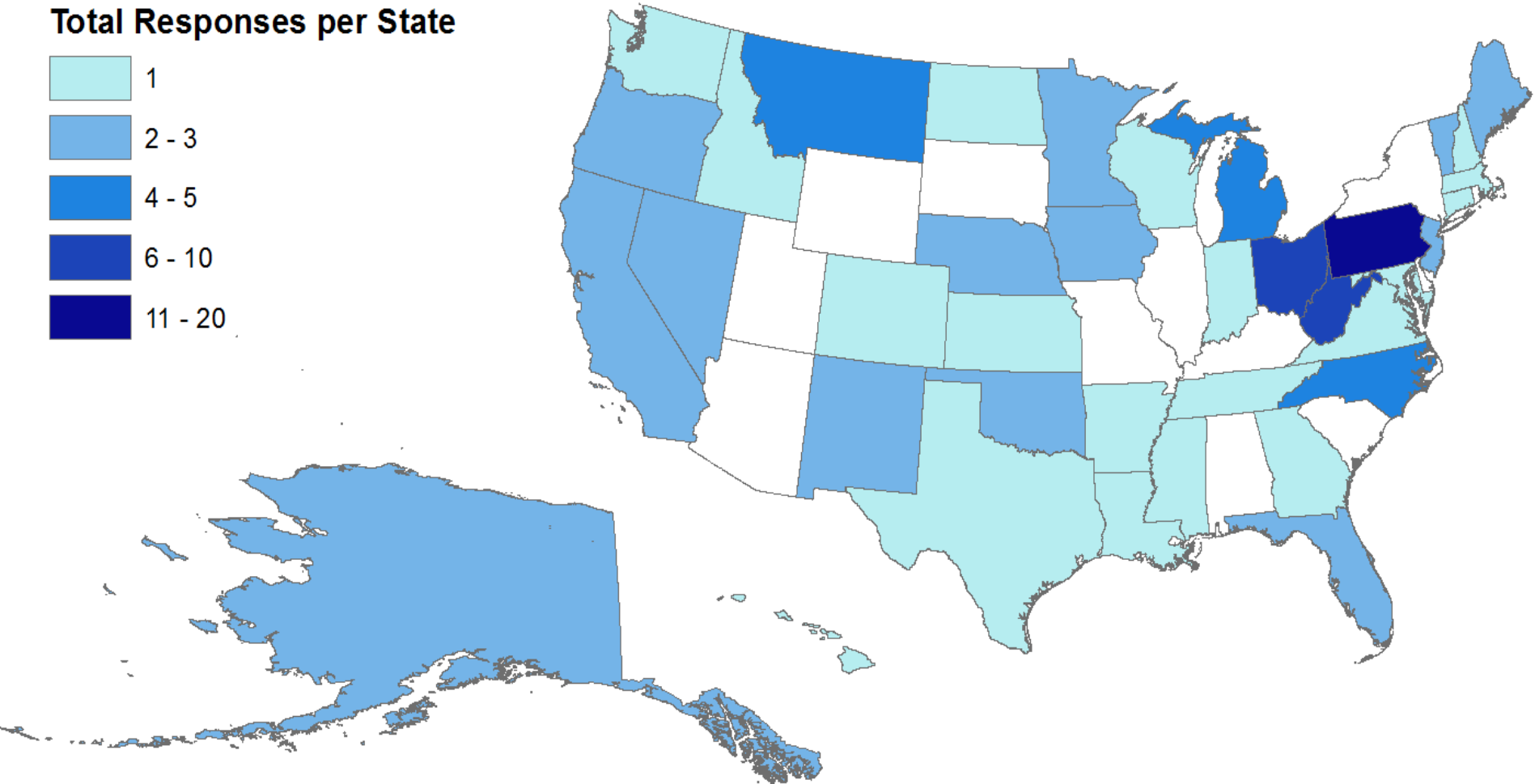
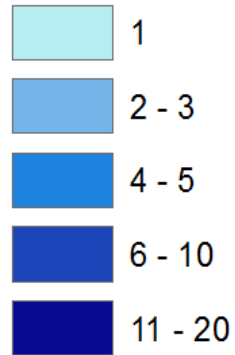
- Land Grant
- Sea Grant
- Combined
- Qualitative - descriptive analysis
- Quantitative – coding to identify themes

Survey Responses

Land Grant

National Extension Tourism Survey

Total Responses per State

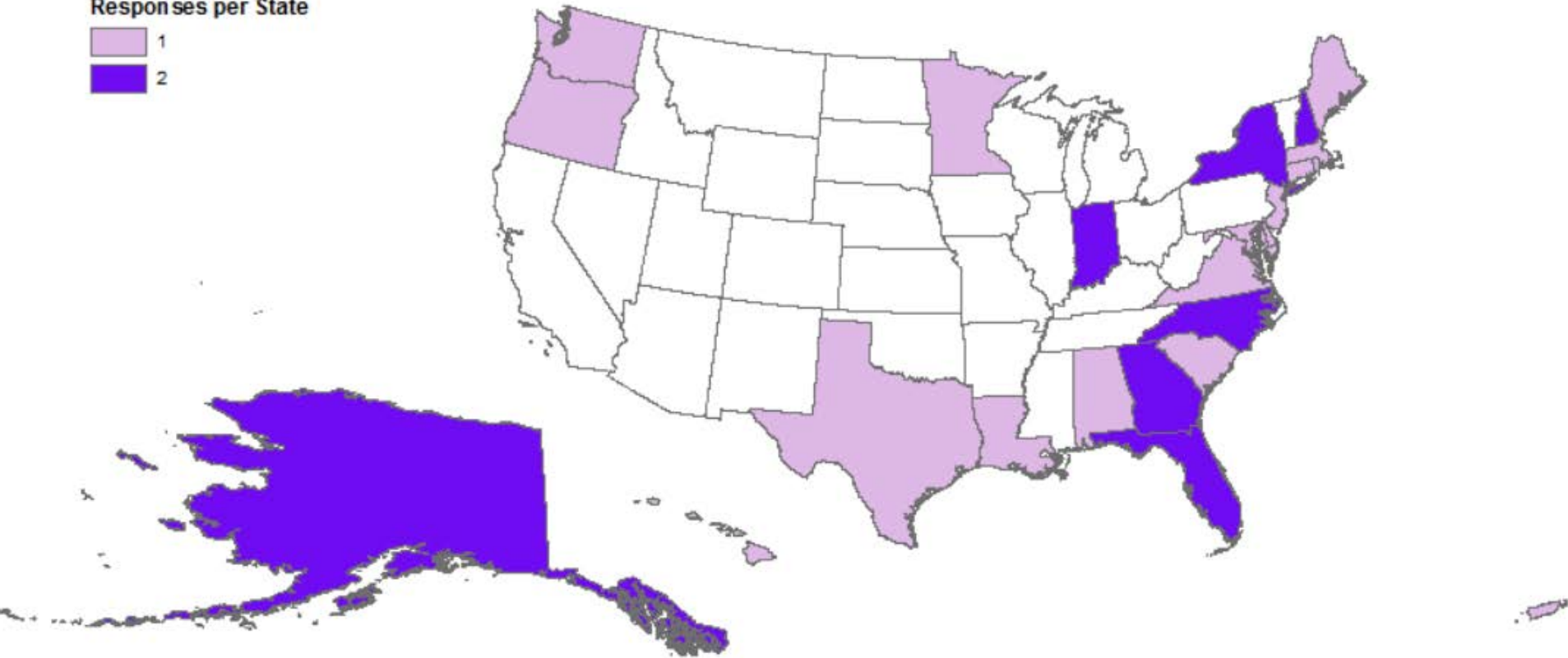


Not shown are the two responses from Canada and one response from a national U. S. organization.

Survey Responses

Sea Grant

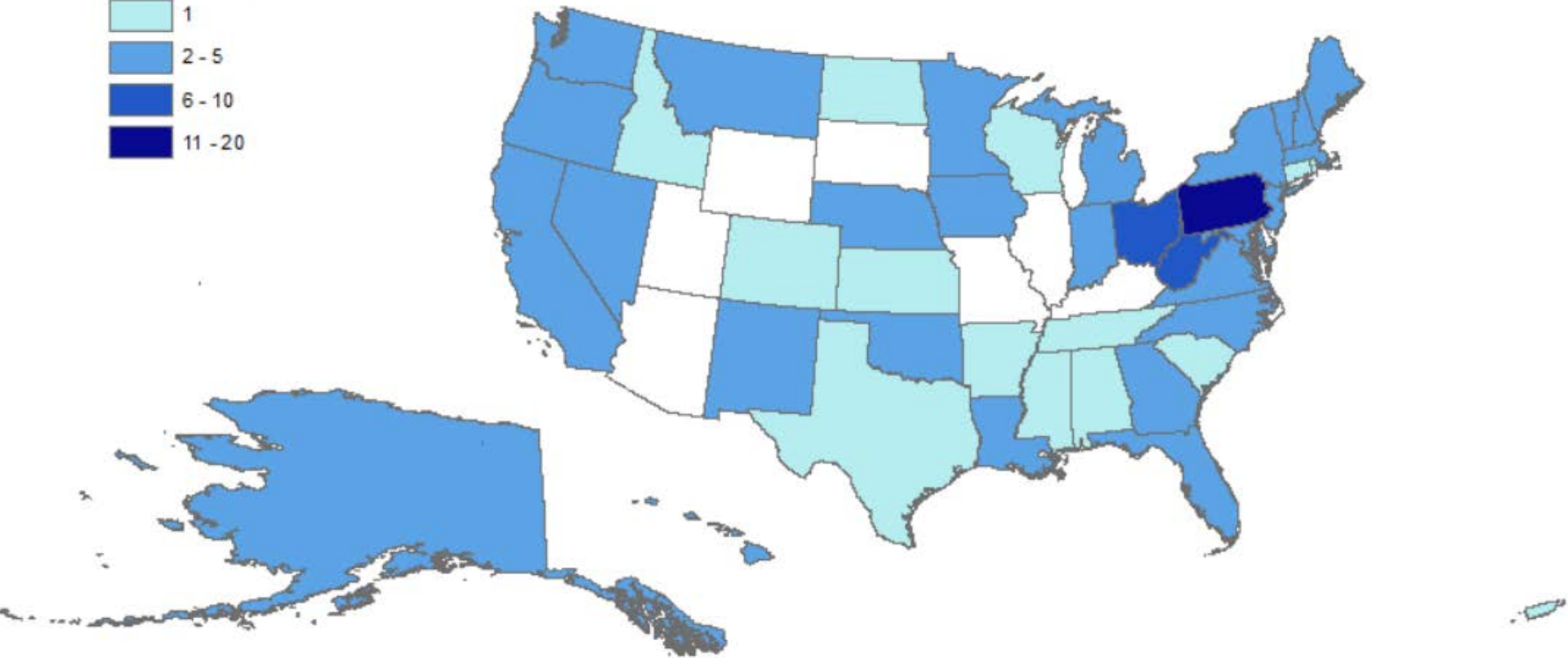
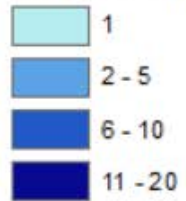
Sea Grant Survey
Responses per State



Survey Responses combined

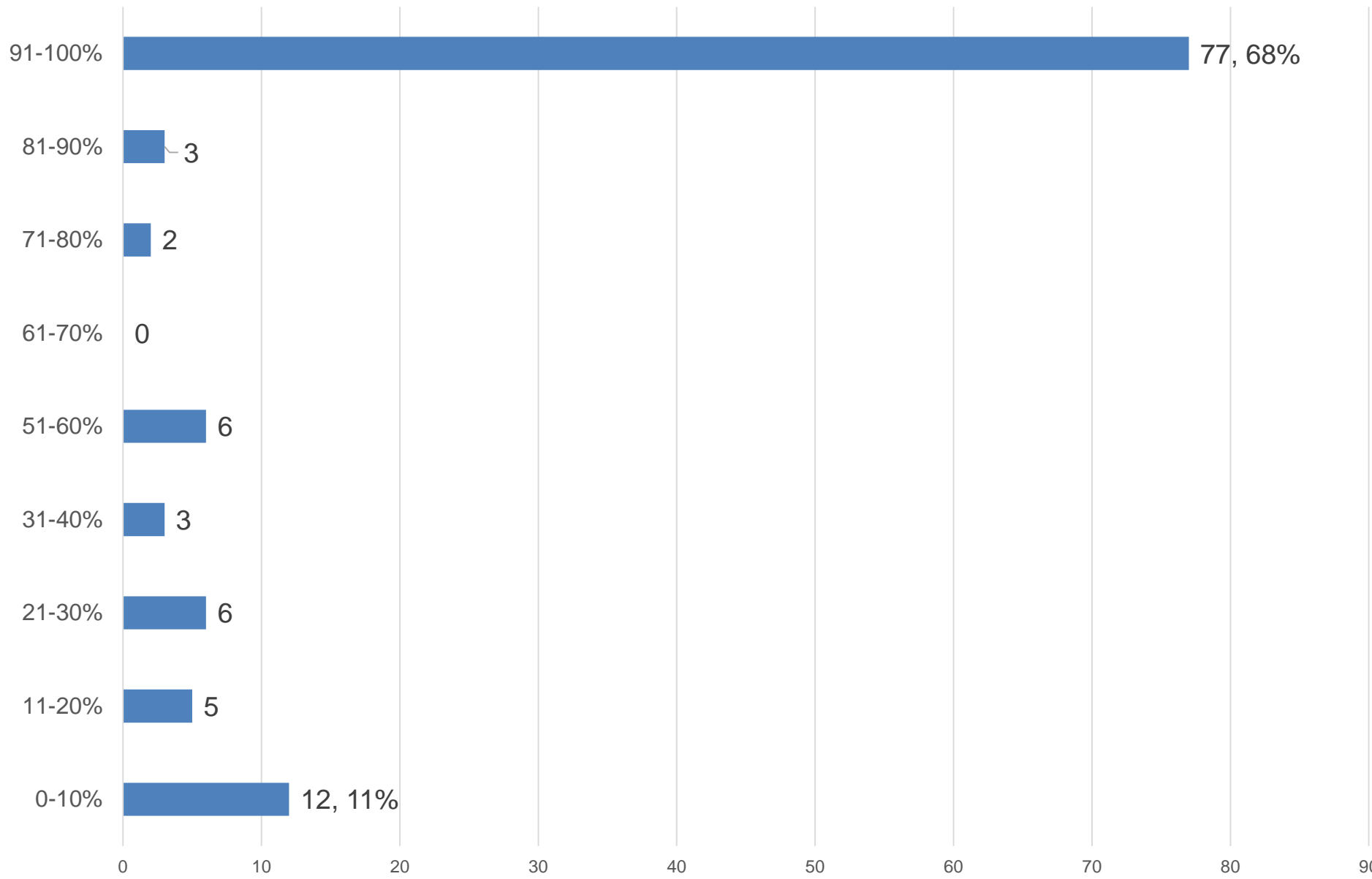
Combined Surveys

Responses per State



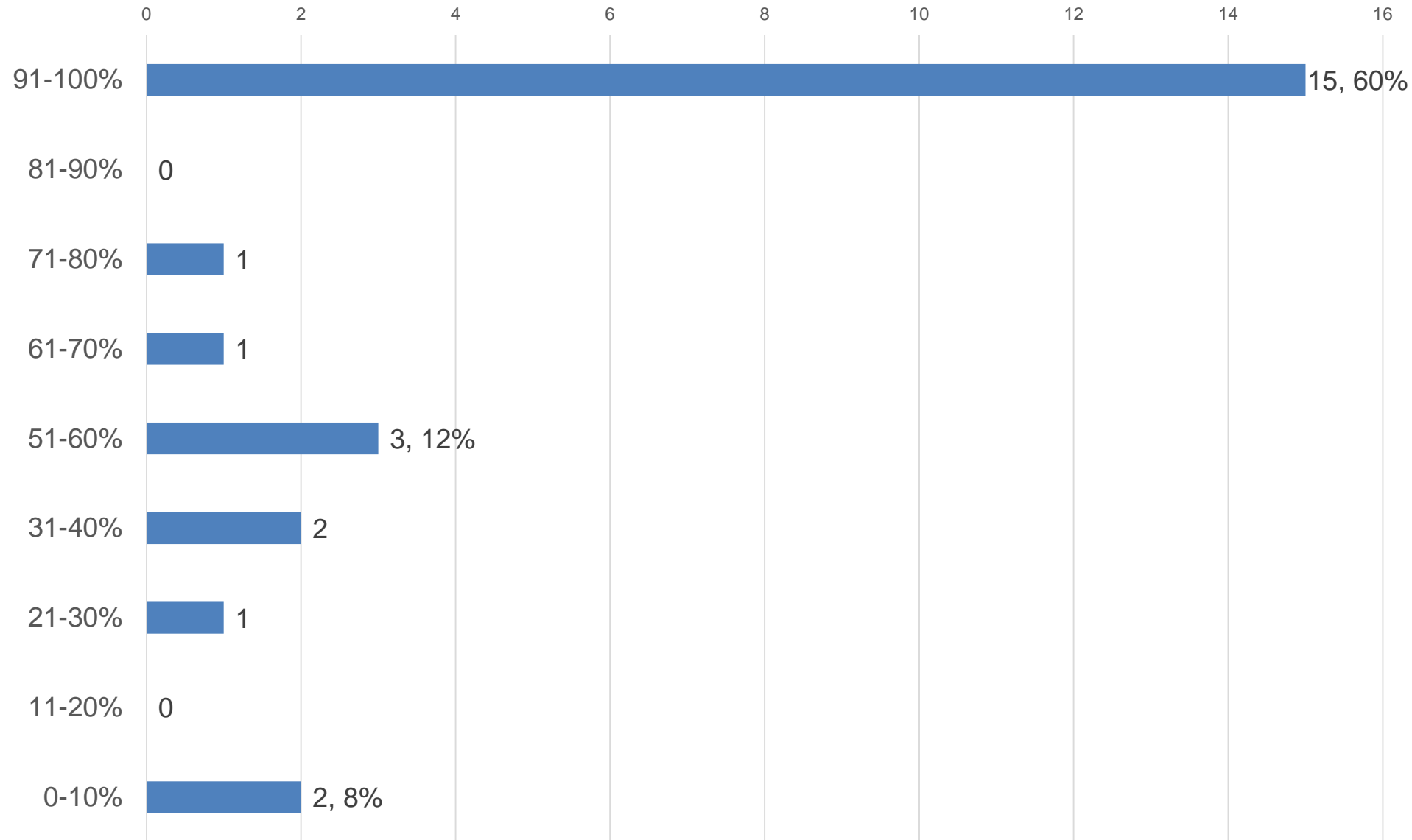
What is your percent Extension appointment?

Land Grant



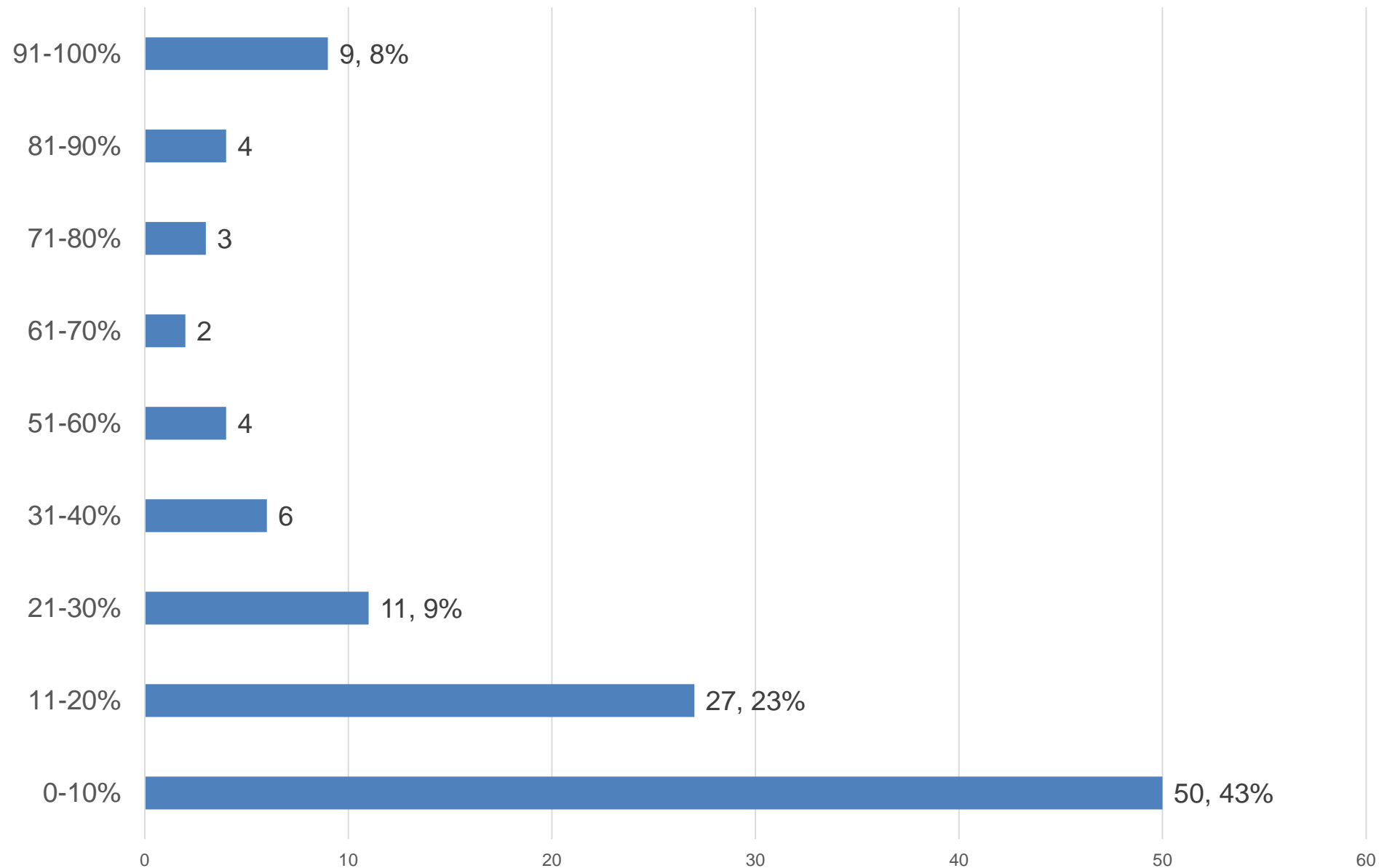
What is your percent Extension appointment?

Sea Grant



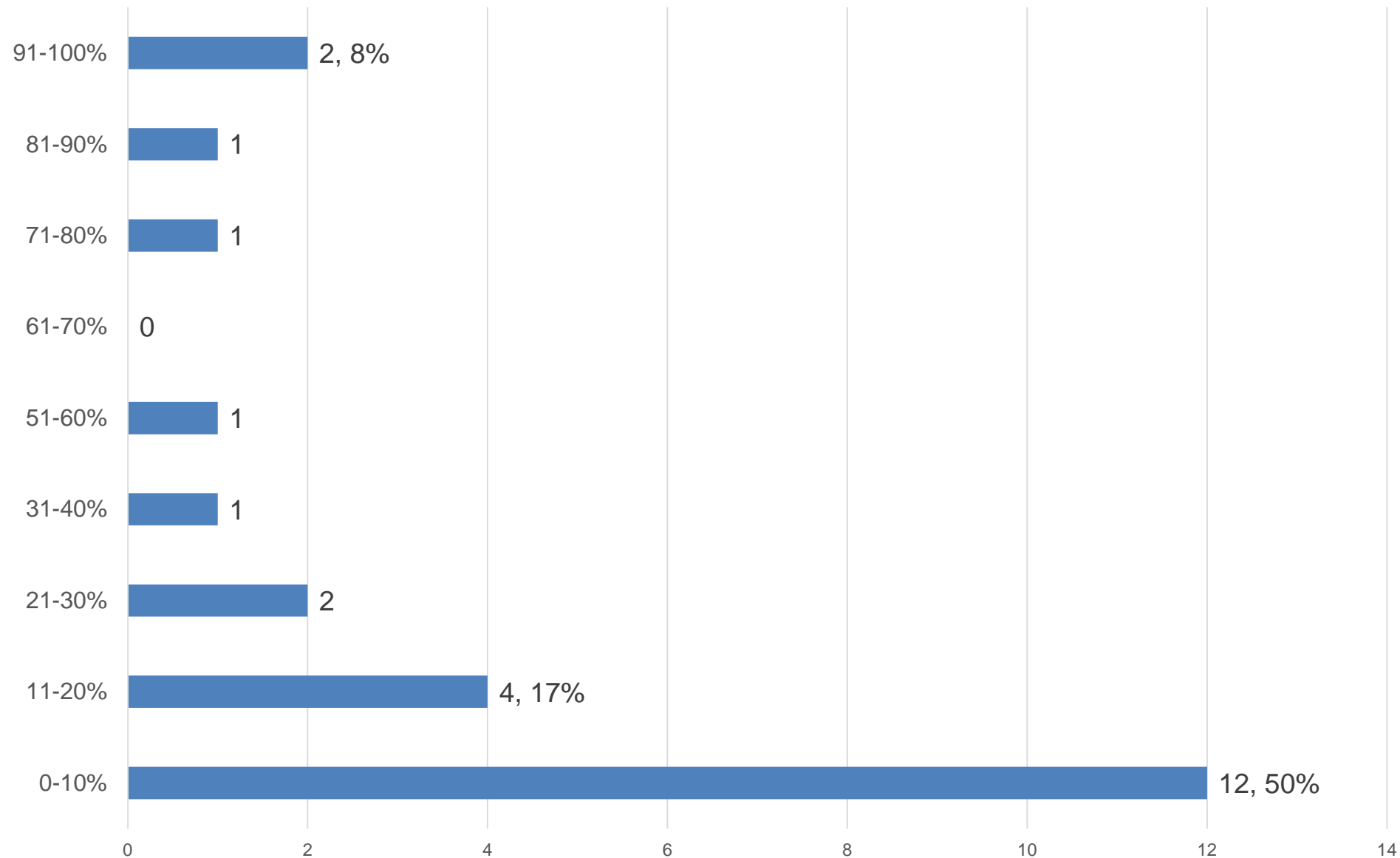
Percentage of time allocated to tourism related work

Land Grant



Percentage of time allocated to tourism related work

Sea Grant

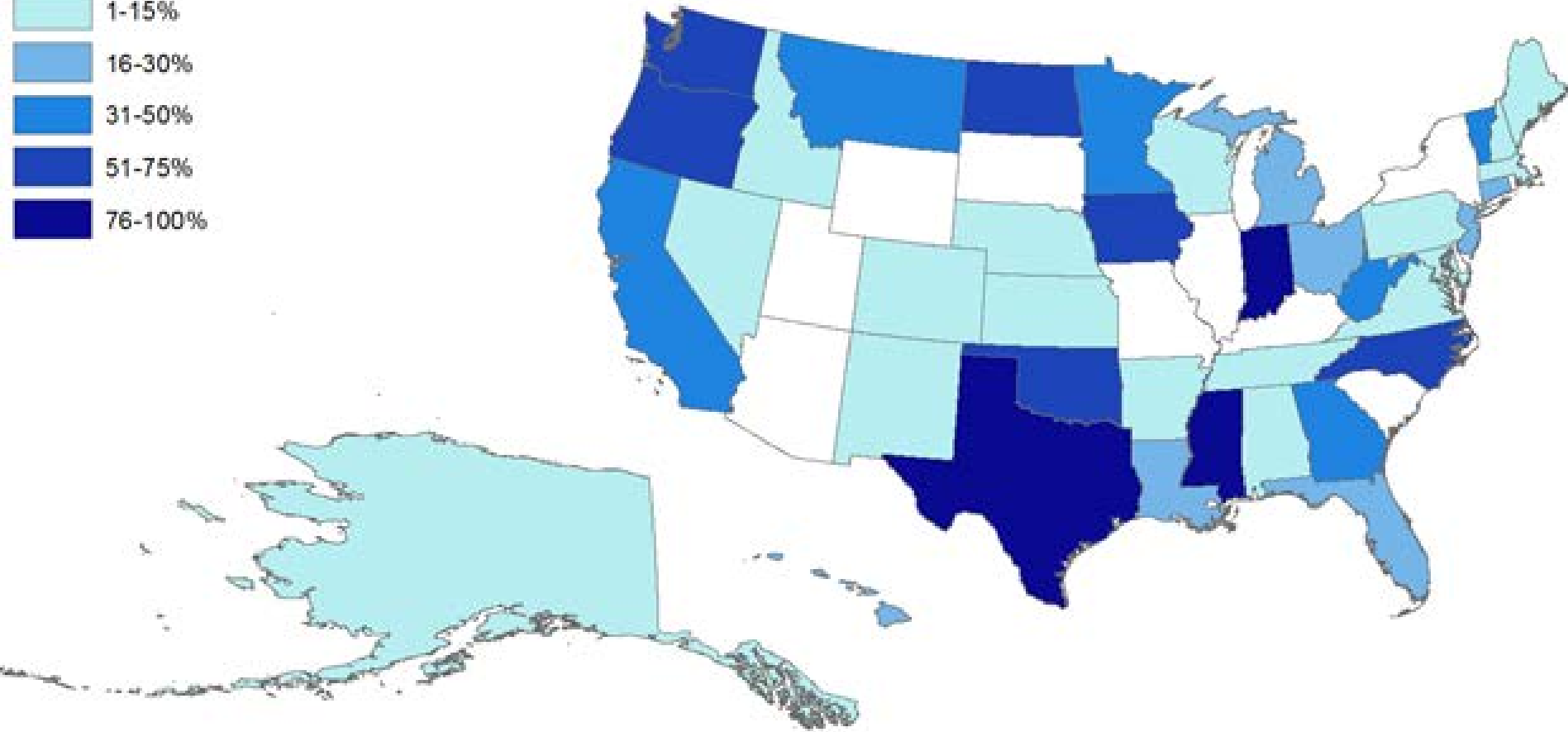
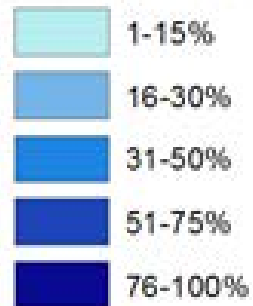


Percentage of time allocated to tourism related work

Land Grant

National Extension Tourism Survey

Average Percentage of Time Allocated to Tourism Related Work

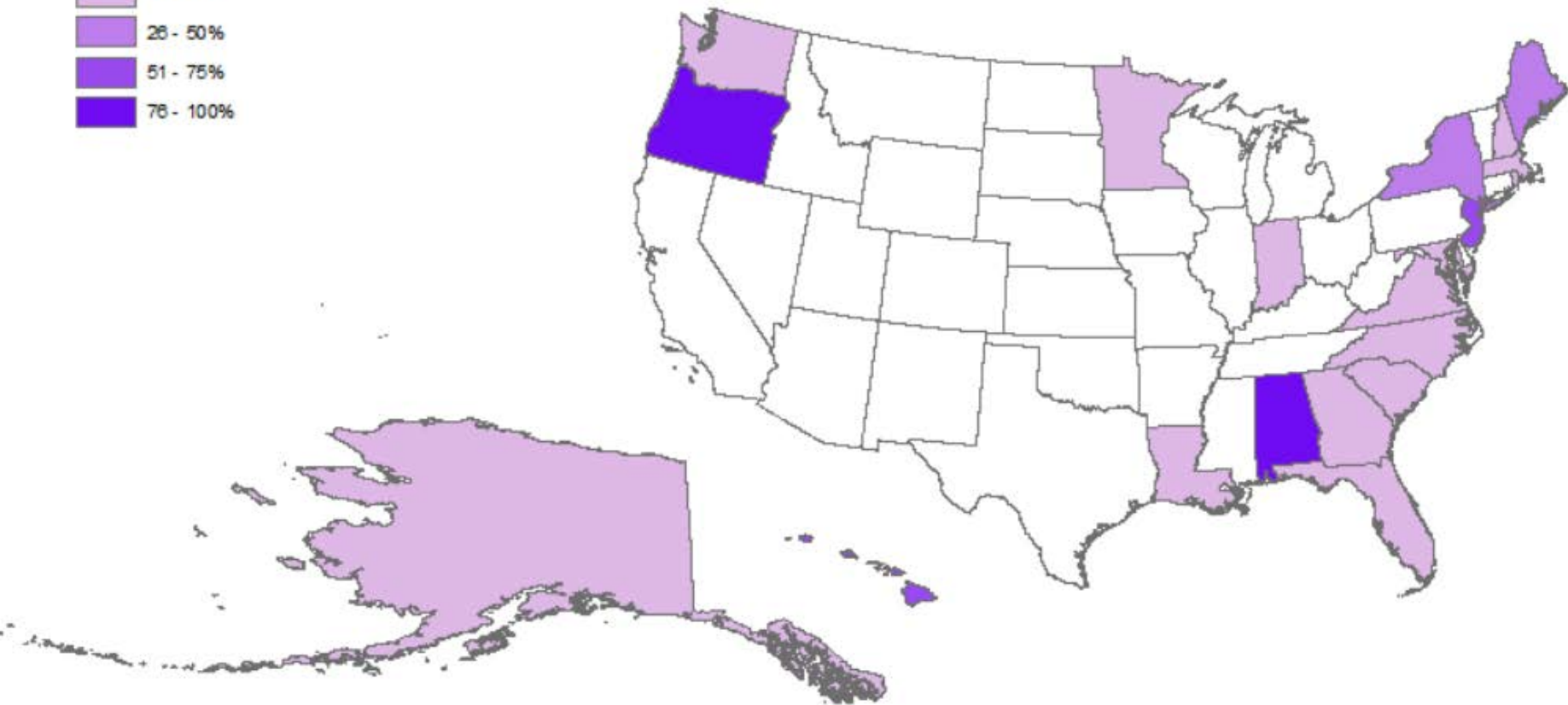
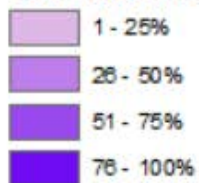


Percentage of time allocated to tourism related work

Sea Grant

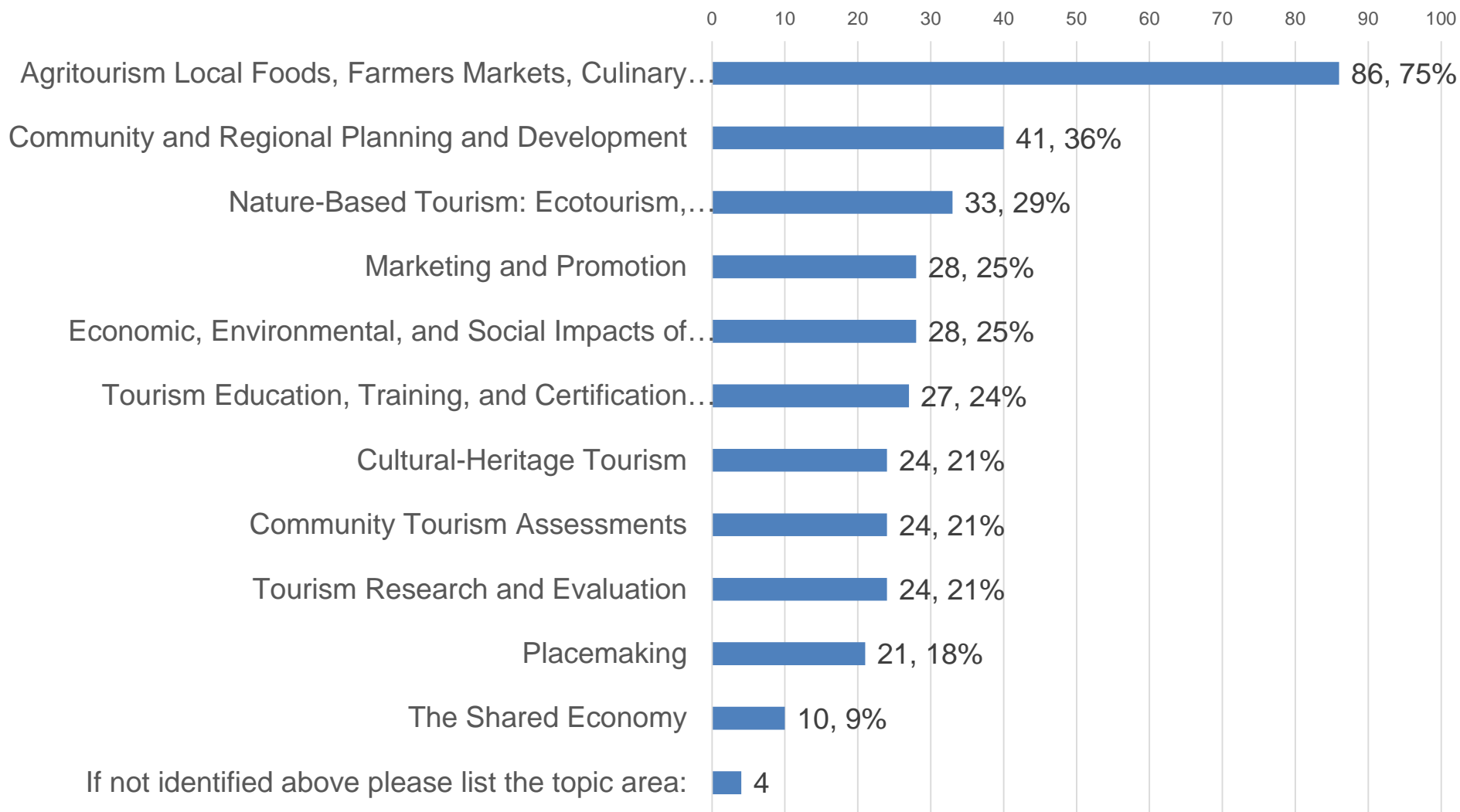
Sea Grant Survey

State Avg of % Time Allocated to Tourism Work



Please indicate the topical area related to the tourism programs you offer or participate in

Land Grant



Land Grant Topical Areas Offered - other

Invasive Insects

Leadership Development

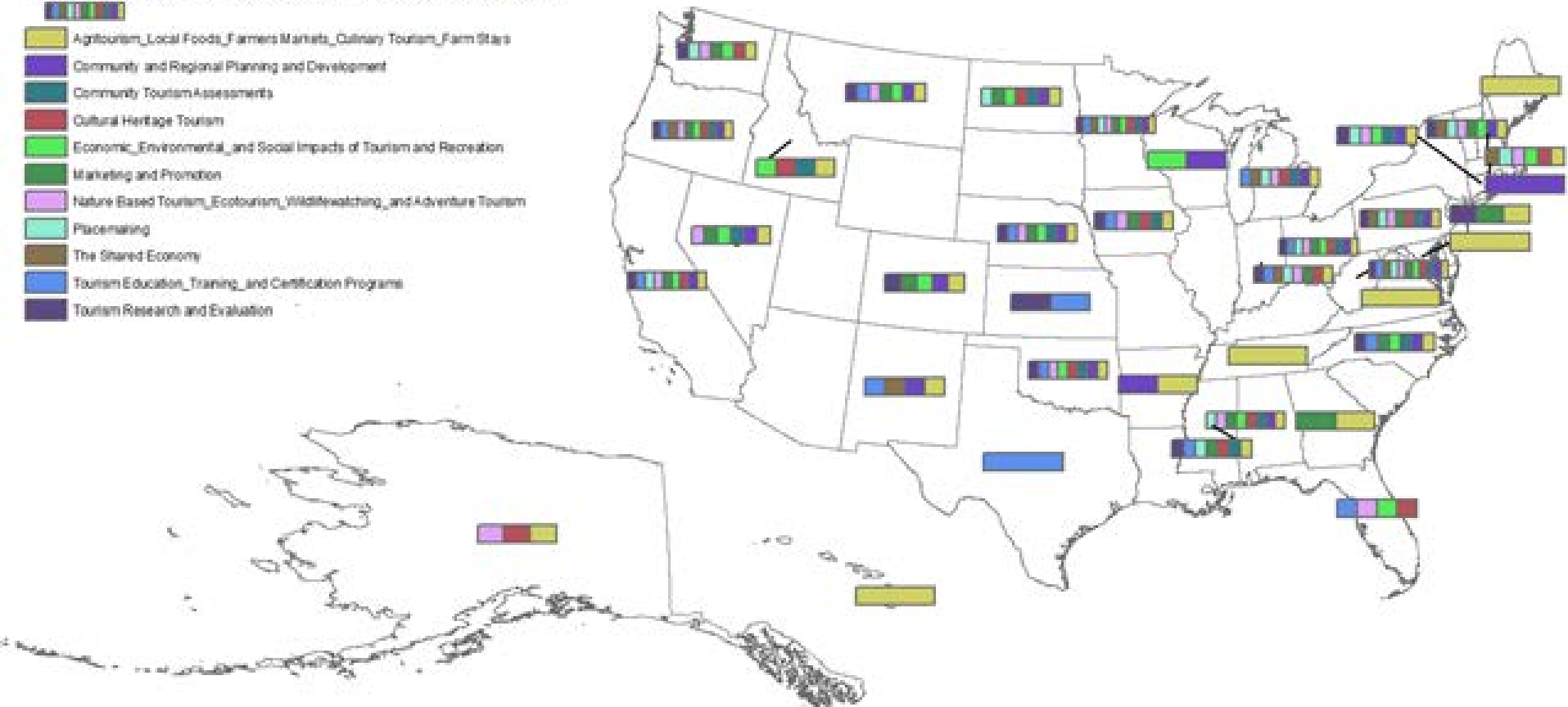
State and International Cultural Immersion trips

High Performance Housing Educational Attraction

Topical areas

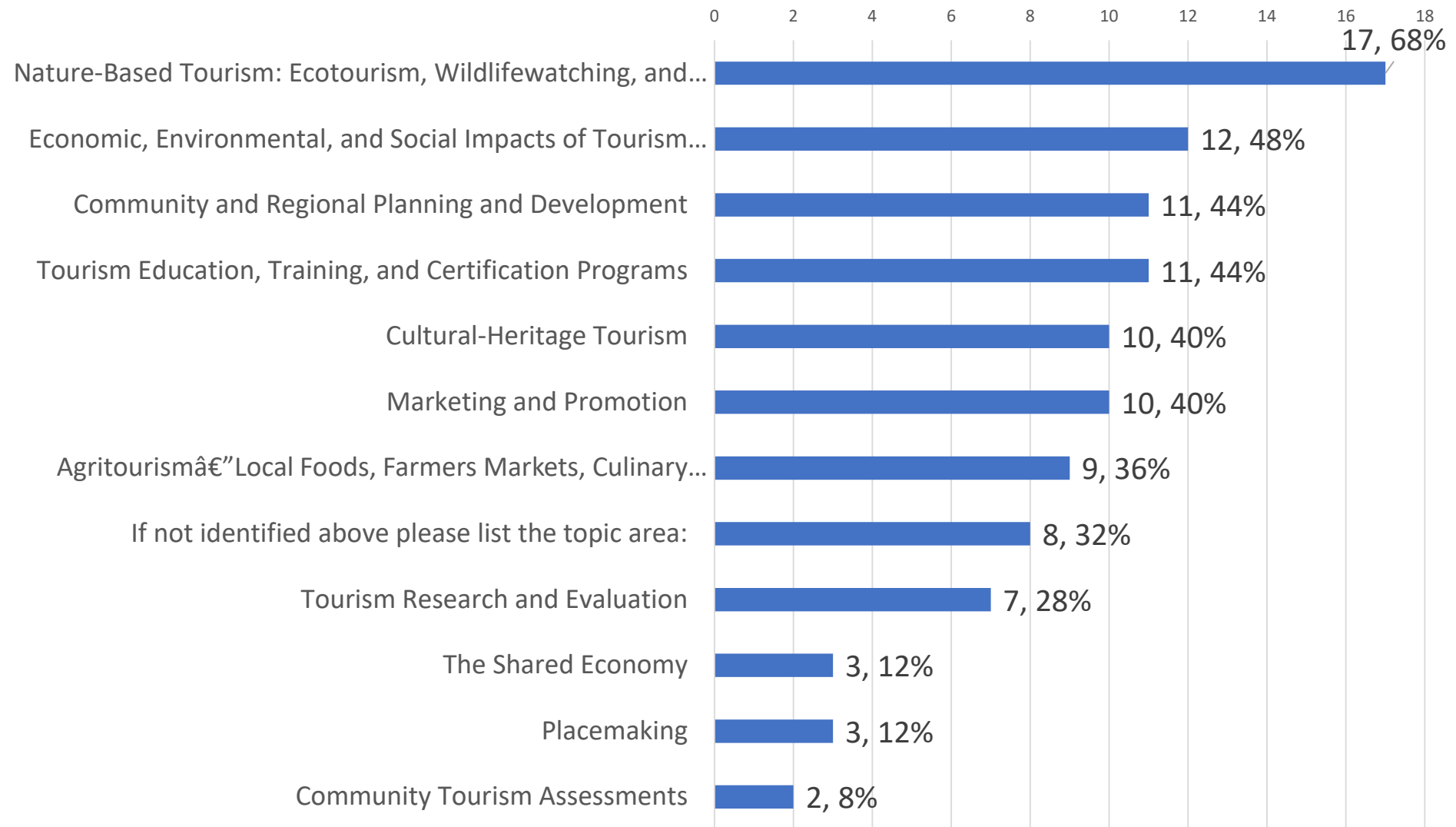
Land Grant

Topical Areas of Programs Respondents Offer or Participate In



Please indicate the topical area related to the tourism programs you offer or participate in

Sea Grant



Sea Grant Topical Areas Offered - other

Clean and Resilient Marina Program

Guide and Tour Operator Training

Safety and Hazards Awareness

Coastal Processes

RFH charter fishing

Related to resilience

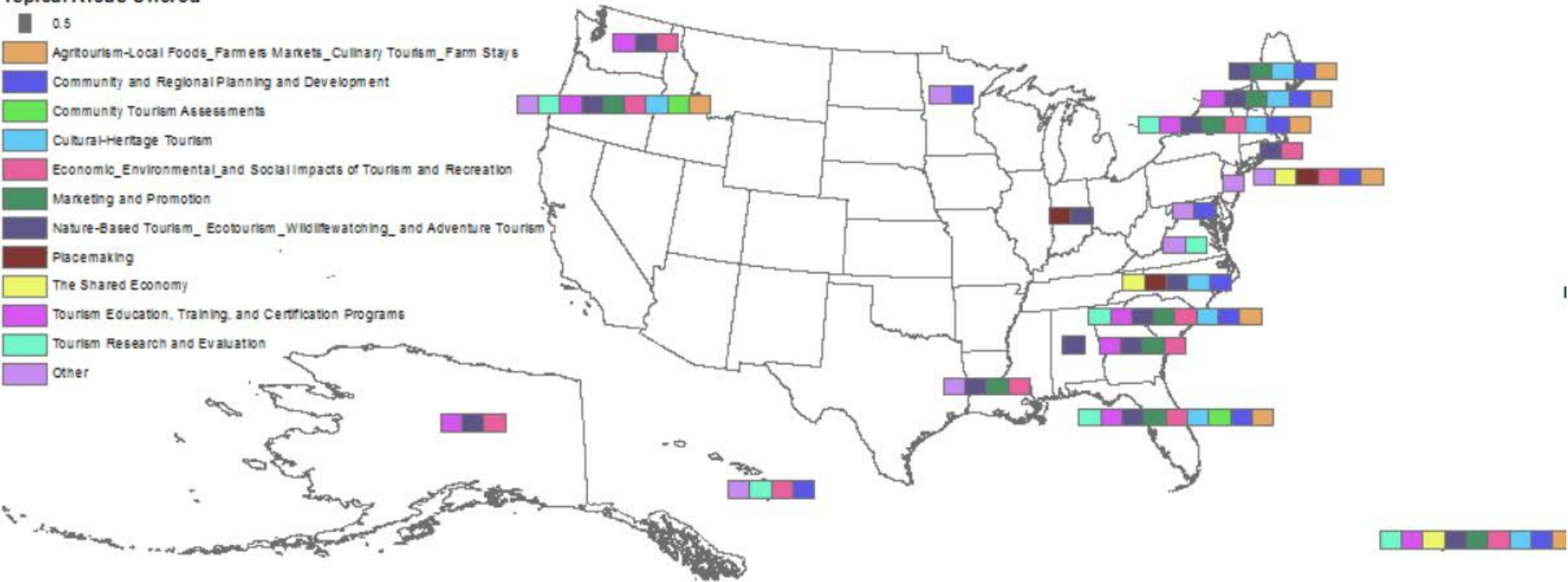
Climate Impacts to Tourism

water quality and pollution reduction

Topical areas

Sea Grant

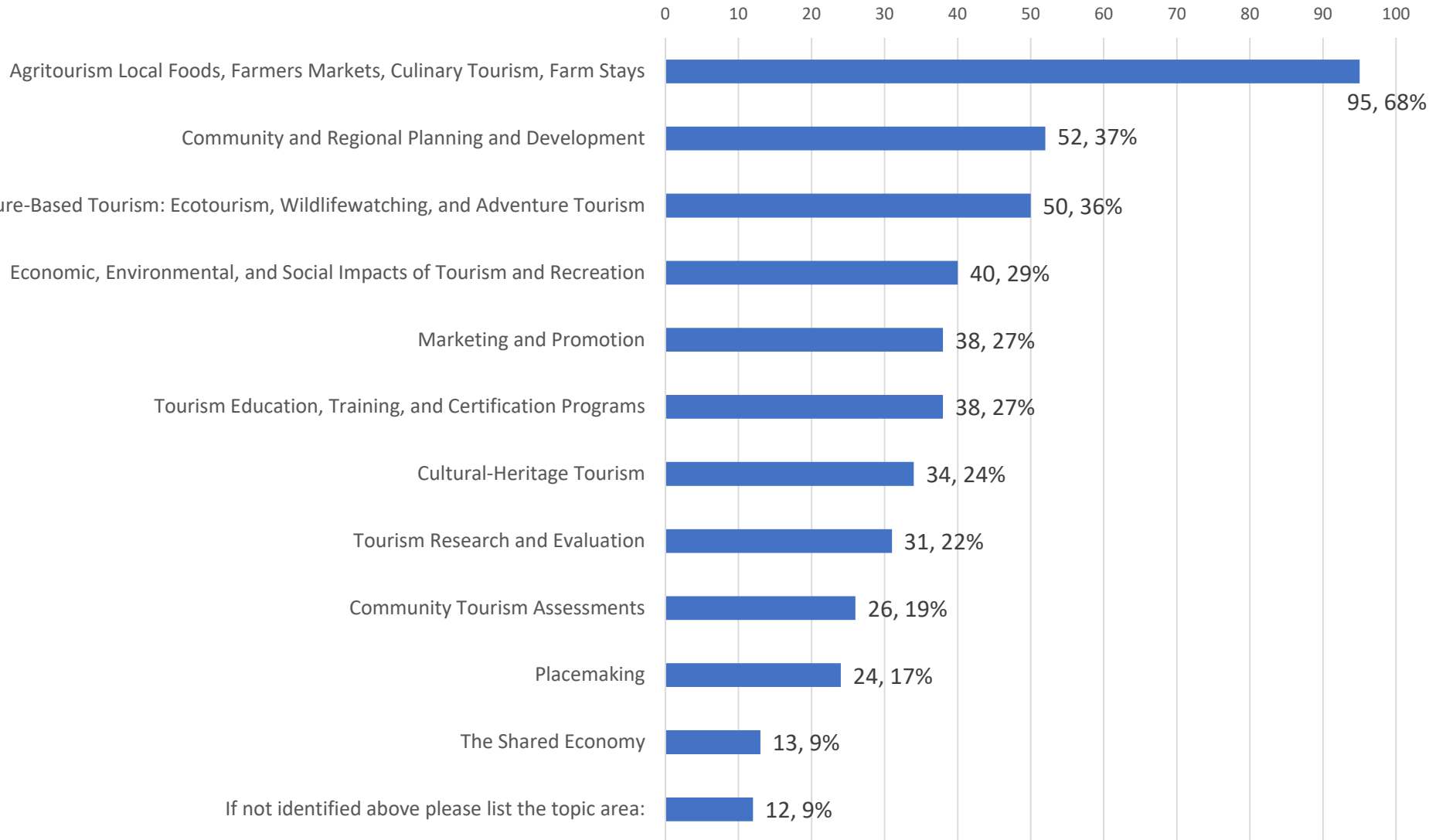
Topical Areas Offered



6 blank responses removed 3 states from the map.
8 responses gave additional, more specific answers.

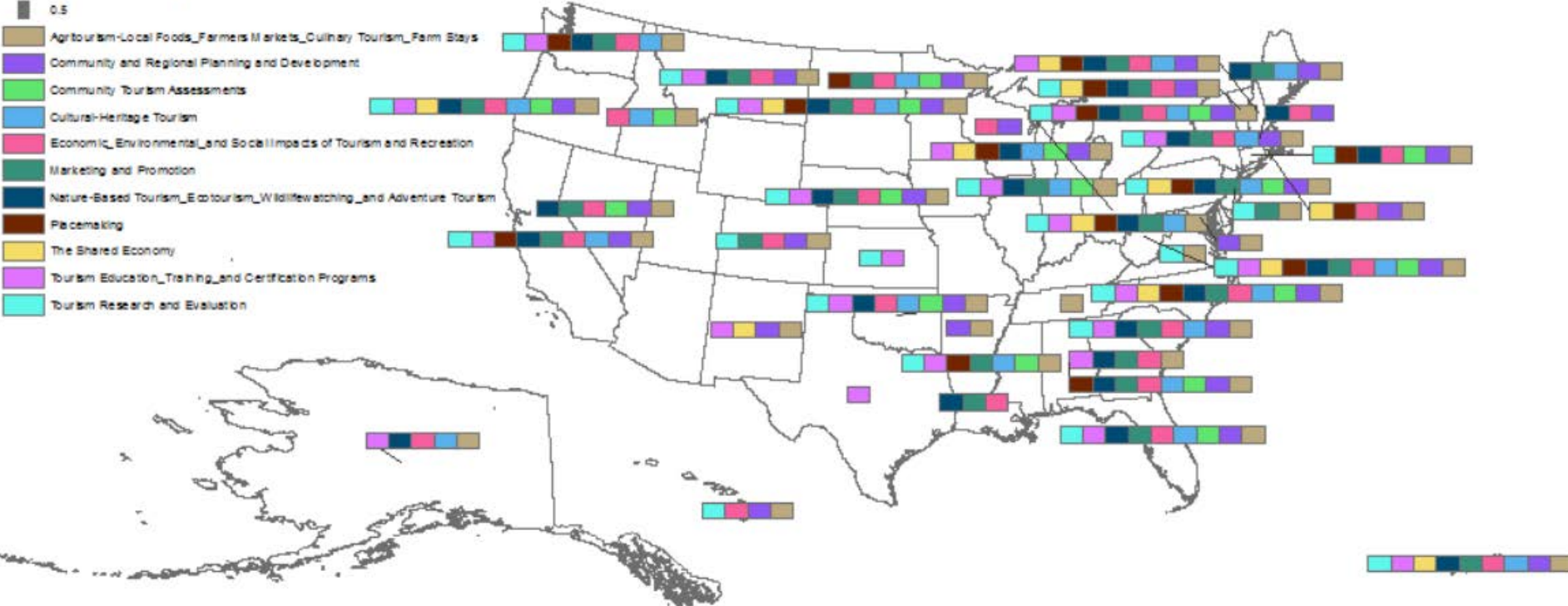
Please indicate the topical area related to the tourism programs you offer or participate in

Combined



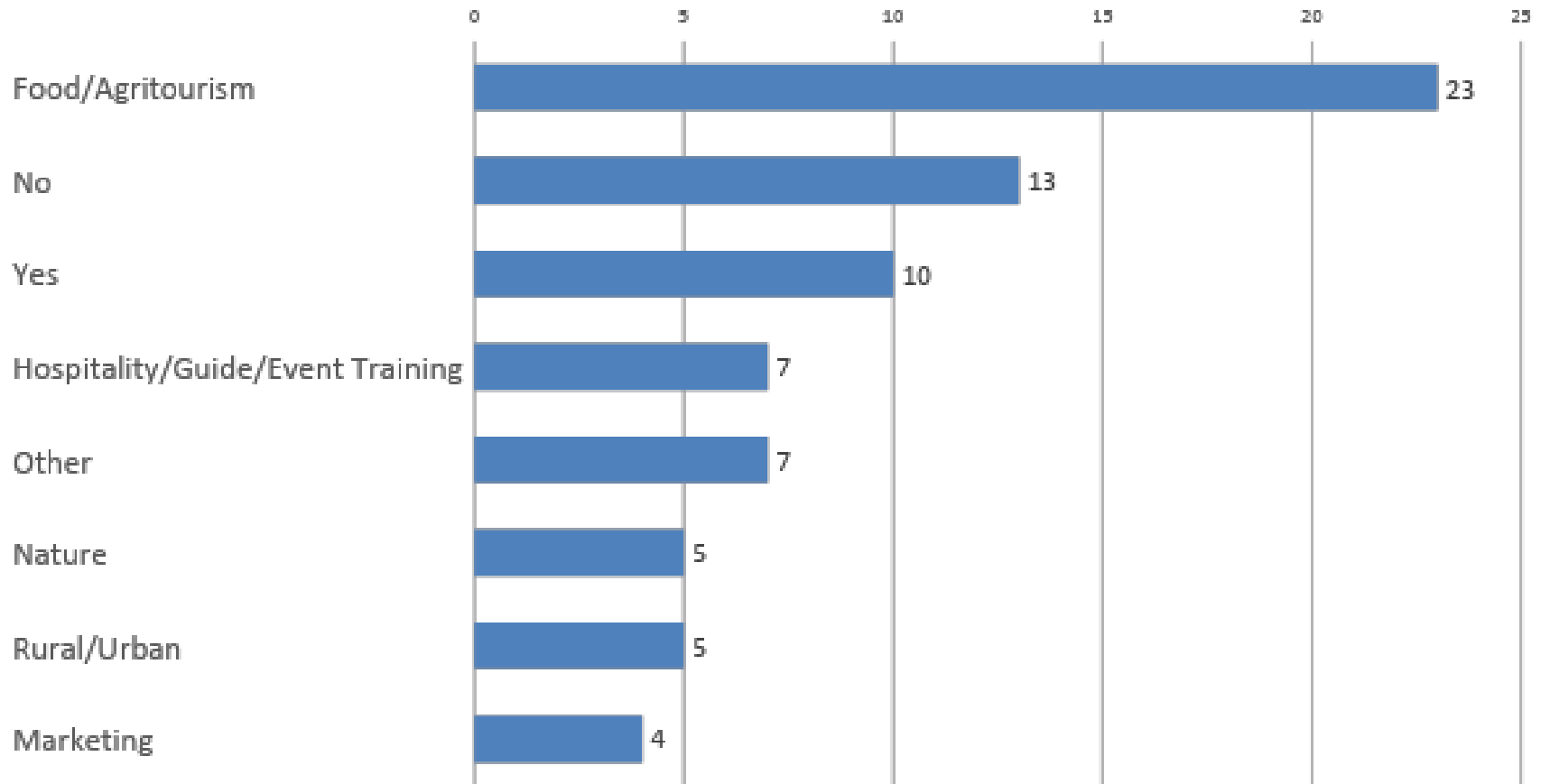
Combined Topical Areas Offered

Topical Areas of Programs Offered



Are there tourism programs that are needed/demanded/requested in your state/region that you are unable to offer but wish you could?

Land Grant



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Are there tourism programs that are needed/demanded/requested in your state/region that you are unable to offer but wish you could?

Sea Grant

Impacts of large cruise ships on marine environment

Marine **environmental education** for tourists

Birding tourism

Assessing the **economic impacts** of tourism on the coast

Ecotourism/helping eco-tourism businesses develop in rural areas

Promoting **aquaculture** and local food

Developing a revenue-based field experience related to coastal activities

Conducting a **needs assessment** in the state

Nature-based tourism **certification program(s)**

Tour guide training with certification

Courses related to **sustainable tourism business practices** as well as environmental issues/impacts

Need to **assess** what we want to do

Economic Impact Studies, Discovery Tours

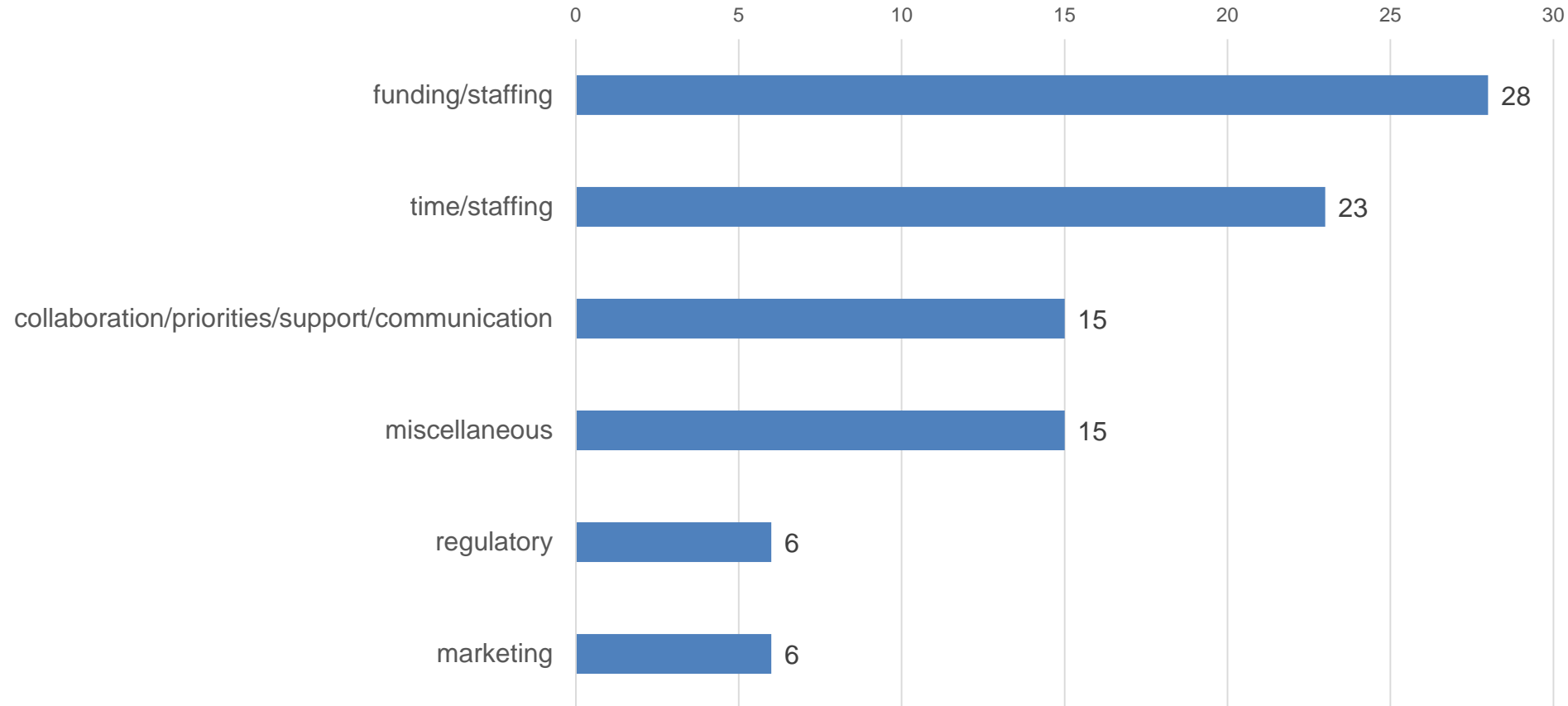
Leadership development for tourism professionals

programs that link **fisheries** and **aquaculture** with tourism

Visitor **carrying capacity** studies

What challenges or constraints do you face in being able to provide services to support tourism in your state/region?

Land Grant



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What challenges or constraints do you face in being able to provide services to support tourism in your state/region?

Land Grant

- At the moment **tourism isn't a recognized CE program**
- The need is far greater than the **capacity**
- Our programs are in high demand but our **staffing capacity** does not allow us to full meet the demand.
- Educator **capacity** and **administrative program focus**.
- We need better **communication** between all parties.
- **Endorsement** and **support** at the state level is needed
- **Competing programs!**
- **Agency collaboration**
- Extension is **not always seen as a key asset** by state tourism office
- In our state there is not a lot of overlap between Tourism and Community Development programs and the **culture of these organizations is very different**. This leads to missed opportunities for co-promotion and sharing of mutually beneficial data.
- We have a great tourism agency in our county. I think the biggest thing is **determining each others strengths and combining resources**.



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What challenges or constraints do you face in being able to provide services to support tourism in your state/region?

Sea Grant

- staff time x 8
- funding x 5
- lack of state specialist with expertise
- lack of dedicated person to focus on tourism
- lack of dedicated tourism program
- lack of resources
- **integration with University** - experiential learning
- clearly **defining roles** with other organizations
- **misaligned priorities**
- competing demands
- **needs assessment** to determine niche
- lack of data
- developing online training
- negative impacts from over-tourism

National Extension Tourism Network

TRIPLE BOTTOM LINE TOURISM

SUSTAINABLE TOURISM
& OUTDOOR
RECREATION

HOME ▾

WEBINARS, VIDEOS & ARTICLES

NETWORK CONTACT INVITATION ▾

NATIONAL RESOURCES ▾

NET STOR 2019 CONFERENCE ▾

Register Now

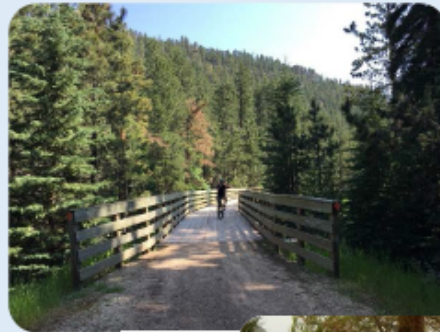
October 8 – 11, 2019
Astoria, Oregon

Sustainable Tourism &
Outdoor Recreation
Conference

<http://extensiontourism.net>

Recreation Economy Resource Guide

*For USDA Forest Service, Rural Development and
National Institute for Food and Agriculture Field Staff*



Recent Efforts

NERCRD grants

First Impressions

Trail Towns

AFRI grant proposal

Agritourism

2018 NACDEP Conference

2019 NACDEP and NET conferences



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So What, But for.....

- We are a national tourism leader
- Is Extension prepared to respond to 21 Century needs?
- How do we connect with external partners to support a national sustainable tourism movement?

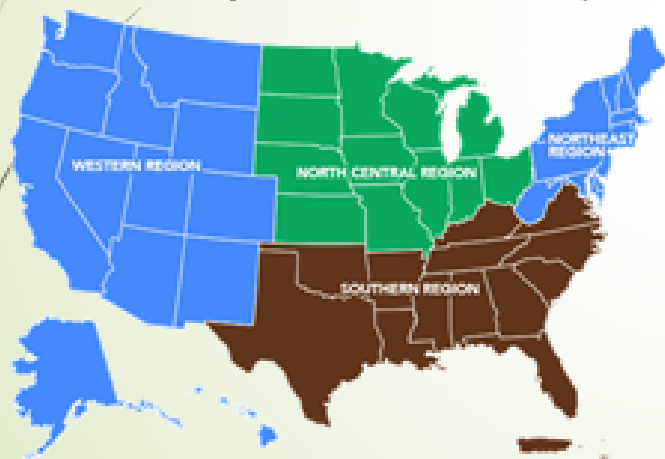


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The Regional Rural Development Centers link the research and educational outreach capacity of the nation's public universities with communities, local decision-makers, entrepreneurs, families, and farmers and ranchers to help address a wide range of community and economic development issues.



<https://nifa.usda.gov/regional-rural-development-centers>

FY17-18 Contacts

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United States Department of Agriculture
National Institute of Food and Agriculture



Stronger Economies Together



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Thank you!

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