

HUMAN POWERED SNOWSPORTS

2018 TRENDS & IMPACT REPORT





**WINTER
WILDLANDS**
A L L I A N C E

Generating \$887 billion in annual consumer spending, \$125 billion in tax revenues and sustaining 7.6 million jobs, the outdoor recreation industry is a significant and growing sector of the American economy.¹ Snowsports constitute a substantial portion of the outdoor recreation industry. In 2017 winter outdoor recreationists spent over \$72 billion on snowsports alone, supporting 695,000 jobs and contributing over \$10 billion in state and federal taxes.² While these figures include motorized and lift operated activities, human-powered snowsports are an important part of the outdoor industry and the fastest growing segment within the otherwise stagnant winter outdoor recreation industry.^{3,4,5}

HUMAN-POWERED SNOWSPORTS ENCOMPASS A BROAD RANGE OF ACTIVITIES AND SKILL SETS INCLUDING BACKCOUNTRY SKIING AND SPLIT-BOARDING, ALPINE TOURING, MOUNTAINEERING, CROSS-COUNTRY SKIING, SNOWSHOEING, OVER-SNOW HIKING, AND NEW ACTIVITIES SUCH AS SNOW-BIKING (OR FAT BIKING).

Each activity offers different adventures, but shares the unique experience of traveling through winter backcountry environments under our own power. These winter backcountry experiences, filled with wildness and wildlife, natural sounds and weather, exploration and introspection, adventure and accomplishment, draw millions of locals and tourists alike to public lands across the United States.

With high participation growth, equipment expenditures, and related tourism revenues, human-powered winter backcountry activities create jobs and bring income into rural economies while contributing to community development, quality of life and public land conservation. A complete picture of human-powered snowsports' impact therefore includes important and far-reaching social and environmental factors in addition to economic metrics. International standards are increasingly encompassing socio-ecological elements into sustainable development frameworks to measure overall industry impact and value. This report integrates environmental, social and economic impact to demonstrate human-powered snowsports' contribution to vibrant, healthy, and sustainable rural communities and economies, improving quality of life for both visitors and residents.

HUMAN POWERED SNOWSPORTS GROWTH

In 2016 nearly 16 million people participated in human-powered winter recreation and these numbers are growing rapidly.^{6,7,8} In the past three years, cross country skiing had the highest participation growth rates among all winter sports.⁹ During the same period backcountry skiing and split boarding participant numbers also continued to rise.¹⁰ Sales in uphill gear more than doubled between 2015 and 2017 while winter backcountry equipment sales increased by over 50% in 2016.¹¹ Looking forward, the Forest Service and USDA see backcountry skiing as a top activity in terms of growth, predicting participation increases between 55%-106% by 2060.^{12,13} As participation continues to expand, human-powered snowsports' impact on our economy, local communities and natural environment broadens.

15.949 MILLION PARTICIPANTS INCLUDING:

5.1 MILLION

**Cross
Country
Skiers**

**3.7 MILLION
Snowshoers &
Over-snow Hikers**

4.1 MILLION

**Backcountry
Skiers**

2.6 MILLION

**Backcountry
Snowboard &
Splitboarders**

400,000

**Snow bikers &
Fat bikers**

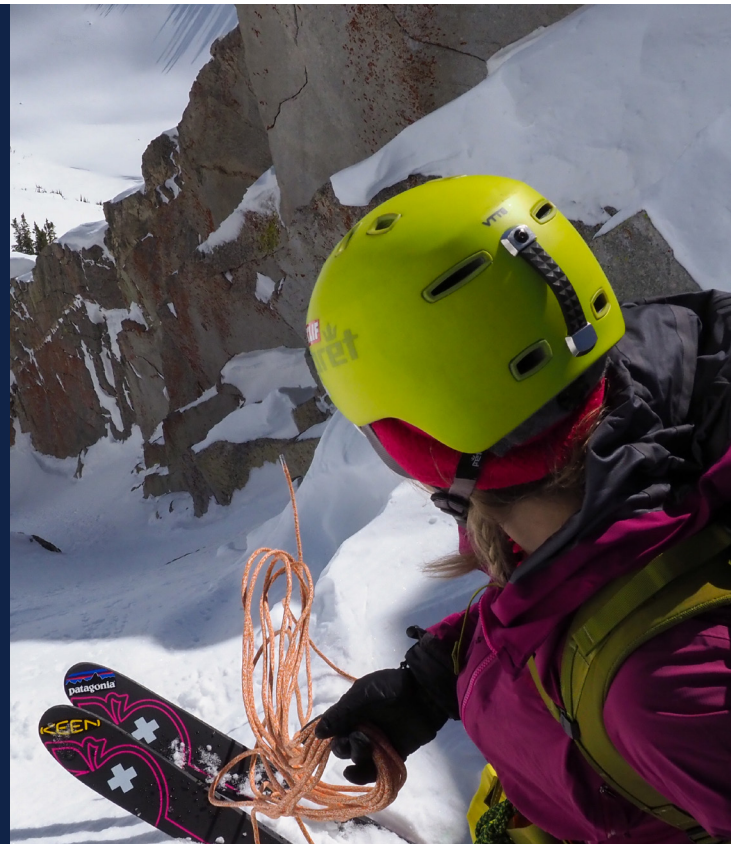
* Total participation based on individual human-powered activity numbers and may include overlap. Additionally many backcountry users are self guided and therefore there may be additional participants missing from this data. **SIA estimate based on mountain bike numbers and fat bikes sold.

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ENVIRONMENTAL IMPACT

Human-powered snowsports turn backcountry areas into valued ‘winter recreation resources’ that attract tourists and local participants.¹⁵ Unlike resort or motorized winter recreation, human-powered snowsports have limited impact on surrounding natural settings or other users. Participants produce no noise or emission pollutants, wildlife interactions are scarce, and with snow on the ground, erosion or vegetation disruption is minimal.¹⁶ Furthermore, human-powered winter snowsport participants are highly motivated stakeholders in public land protection; setting and promoting best practices in the backcountry,¹⁷ contributing to conservation initiatives, and engaging with public lands and climate policy.^{18,19} Often visitors, tourists and second home-owners drawn to winter recreation communities bring strong environmental ethics and are keen to contribute to parks and recreation fundraising, protection, and expansion.²⁰ With high participation, limited impact, and strong conservation ties winter human-powered recreation increases the value of natural resources and provides a renewable revenue source for surrounding communities.

“STRONG PERSONAL ATTACHMENT TO AN OUTDOOR RECREATION ACTIVITY CAN LEAD TO AN EQUALLY STRONG COMMITMENT TO PROTECT THOSE FEATURES OF THE ENVIRONMENT WHICH CONTRIBUTE DIRECTLY TO ENJOYMENT OF THE ACTIVITY.” - Dunlap & Heffernan



SOCIAL IMPACT

Access to human-powered recreation in nature provides positive mental, physical, and social benefits to local communities and visitors. Physical activity in winter backcountry settings can be an important antidote to increasingly sedentary, indoor and urban lifestyles. Improvements in cardiovascular health and endurance, increased energy, feelings of revitalization and satisfaction, and decreases in tension, confusion, anger and depression are just some of the health benefits associated with backcountry recreation.²¹ Particularly in winter, physical activity outdoors increases metabolism speeds, provides vitamin D, and can help reduce seasonal affective disorder.²² Socially, human-powered snowsports draw diverse people to rural areas. This provides opportunities to connect over shared interests, places, and experiences, and builds a sense of community. Active lifestyles, access to nature, and local culture create engaged and vibrant communities which benefit permanent residents and in a positive feedback loop, attract further visitors or potential home buyers.²³

CASE STUDY: TETON COUNTY

*The Grand Teton and West Yellowstone region in Wyoming attracts over 40,000 visitors and nearly 8000 local residents participating in human-powered snowsports. Winter backcountry recreation and related tourism annually contributes over **\$22 MILLION** directly to local economies including **\$12 MILLION** in visitor spending. These activities directly generate nearly **\$3 MILLION** in wages for employees and **\$1 MILLION** in state and local government tax revenues. Beyond economic contributions, winter backcountry recreation has become a key aspect of Teton County's culture. Seasonal residents expressed that the opportunities for backcountry recreation were a key part of their reason for purchasing a second home in the region. Furthermore, Teton County was recently ranked as having the state's best overall health outcomes. While difficult to measure, this is certainly due in part to the availability, quality and ease of access to opportunities for human powered backcountry recreation.*

ECONOMIC IMPACT

Beyond the significant revenue streams from winter backcountry equipment and apparel, Forest Service visitor data finds that on average human-powered winter backcountry visitors spend over \$550 per overnight trip or close to \$100 per day trip.^{25,26} This includes spending on activity-specific services such as park fees, guides or tours and indirect amenities including gas, food, souvenirs, lodging etc. Locals spend on average \$27 per day and over \$250 during overnight trips.^{27,28} This influx of local and visitor spending in backcountry areas helps support local jobs, small businesses, and rural economies. For example, cross country ski tourism on the Gallatin National Forest provides over \$400,000 to the local economy and generates approximately 30 local jobs.²⁹ This creates further indirect and induced economic value as local business owners and workers live, spend, and pay taxes within the same community, reinvesting value in local community development, infrastructure, and natural recreation resource conservation.

INCREASING GEAR SALES

In 2016, \$54 MILLION
worth of uphill equip-
ment & backcountry
accessories were sold.
\$32 MILLION in alpine
touring gear sales alone.
Cross country sales top
\$72 MILLION annually.
This past year more than
7000 fat bikes were sold.





“THERE IS NOTHING IN THE PHYSICAL LANDSCAPE OR FEATURES OF A PARTICULAR PIECE OF LAND THAT MAKE IT A RECREATION RESOURCE; IT IS THE COMBINATION OF THE NATURAL QUALITIES AND THE ABILITY AND DESIRE OF MAN TO USE THEM THAT MAKES A RESOURCE OUT OF WHAT MIGHT OTHERWISE BE A MORE OR LESS MEANINGLESS COMBINATION OF ROCKS, SOIL AND TREES.”

-Clawson & Knetsch

This report demonstrates the unique and multifaceted value that human-powered backcountry winter recreation brings to state and local economies. Highlighting the long-term social and environmental benefits demonstrates sustainable economic impact from renewable recreation resources.³¹ Trends indicating increased popularity in human-powered snowsports, coupled with their contribution to sustainable development, forms the foundation for valuing natural recreation amenities, managing recreation use, and understanding the importance of protecting winter wildlands.



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