

A scenic view of a mountain range with hikers on a rocky peak in the foreground. The sky is blue with scattered white clouds. The mountains in the background are layered and hazy. In the foreground, several hikers are standing on a rocky outcrop, looking out over the valley. One hiker is wearing a blue jacket and a backpack, another is in a yellow jacket, and a dog is visible between them.

April 1st  
2026

S.327

# Outdoor Rec Economic Impact Study

House Commerce & Economic Development Committee

**Nick Bennette**, Chair, Vermont Trails & Greenways Council  
Executive Director, Vermont Mountain Bike Association



**The consolidated, expert voice and support hub for recreational trails in Vermont.**

- 501(c)(3), founded in 1989
- Advisor to ANR, as designated in VT Statute
- Member organization w/ 1 PT Staff Member

**30+ organizational members:**

- Represent 50,000+ individuals
- Log 100,000+ hours of volunteer time annually
- Manage and maintain 8,000+ miles of trails
- Support 16,000+ jobs statewide through outdoor businesses and the broader impact of our work
- Steward trails on private land, which hosts over 70% of public access trails in Vermont
- Partner closely with state and federal agencies to manage trails on public land



VERMONT MOUNTAIN BIKE ASSOC.  
SINCE  1997

**The statewide organization responsible for mountain bike advocacy, education and stewardship.**

- 501(c)(3), founded in 1997
- Advisor to ANR, as designated in VT Statute
- VTGC Member Organization

**Hub & Spoke organization of 28 local Chapters that:**

- Counts ~9,000 individual Members
- Logs 25,000+ hours of volunteer time annually
- Manages and maintain 900+ miles of trails across 84 individual trail systems
- Actively partners with Vermont Adaptive & the Kelly Brush Foundation to advance accessibility
- Works with 100+ private landowners to host trails
- Fulfills a Cooperative Agreement with VT-FPR to manage trails on state land

# Background



**\$2.16B** Contribution to Vermont's GDP (4.8%)



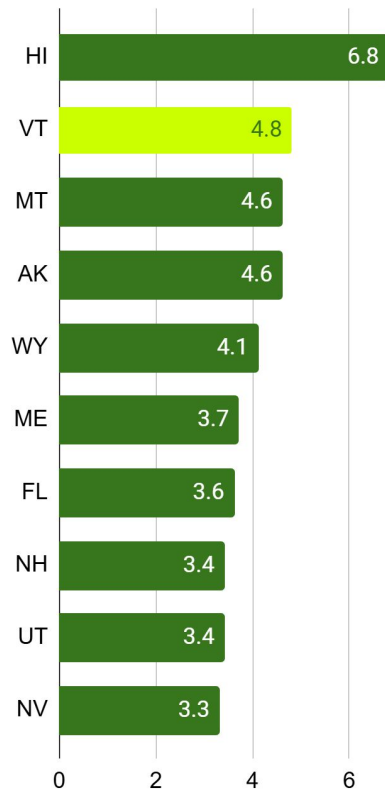
**16,900+** Outdoor Recreation Jobs

**15M** Annual visitor visits, 38% driven by OR\*

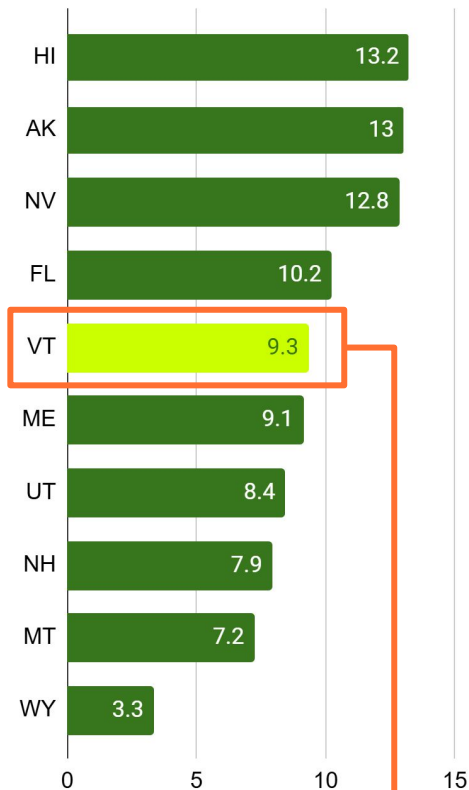
\* 2025 data

## Bureau of Economic Analysis Data, 2023

Outdoor Recreation Economy  
% of State GDP, 2023



Outdoor Recreation Economy  
Annual GDP Growth (%), '22-23



21st Nationally in OR as a % of GDP Growth

# Background



**\$2.18B** Contribution to Vermont's GDP (4.7%)



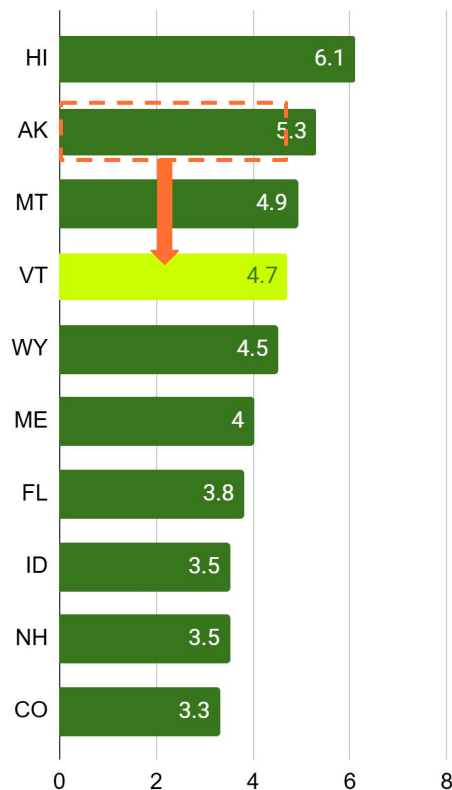
**16,600+** Outdoor Recreation Jobs

**16M** Annual visitor visits, 38% driven by OR\*

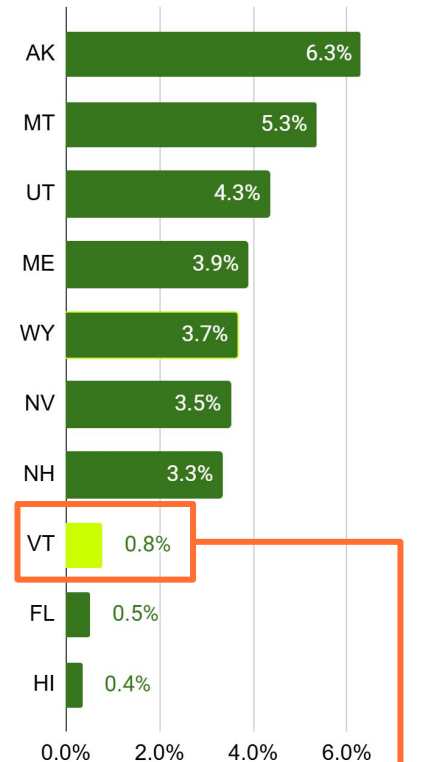
\* 2025 data

## Bureau of Economic Analysis Data, 2024

Outdoor Recreation Economy % of State GDP, 2024



Outdoor Recreation Economy Annual GDP Growth (%), '23-24



48th Nationally in OR as a % of GDP Growth

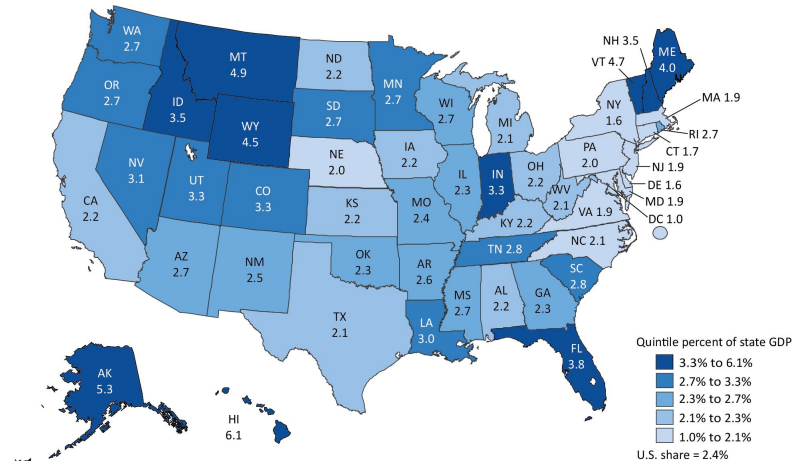
# More on BEA data

Outdoor Recreation Satellite Account information is useful - but also limited

- “Satellite” off the main BEA National Income and Product Accounts (NIPAs)
- Reorganizes **existing economic data** through an OR lens
- Defines OR activities and the goods and services associated with each activity: equipment, trips, fees, apparel, etc.
- Captures **total GDP impact**, not just spending (e.g. wages, profit)
- Estimates are conservative: **excludes the multiplier effects of OR spending** rippling through local economies

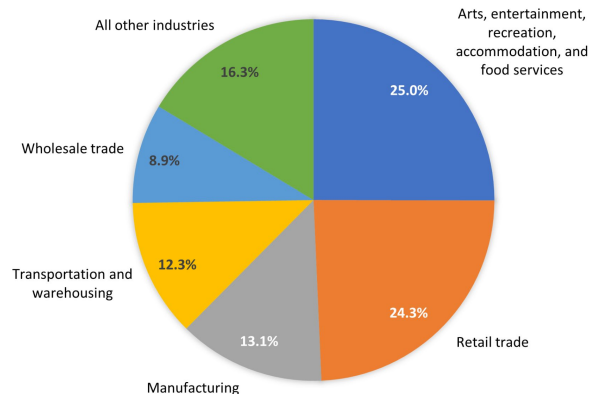
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State Outdoor Recreation Value Added as a Percent of State GDP, 2024



Industry Share of Outdoor Recreation, Current-Dollar Value Added, 2024

Outdoor recreation value added was \$696.7 billion

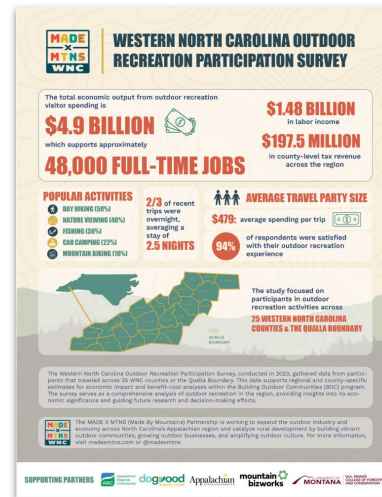


U.S. Bureau of Economic Analysis

# Other States

Many other regions are pursuing more accurate economic analysis

- Western **North Carolina** Outdoor Recreation Participation Survey (2023)
- **Minnesota** Economic Impacts of Outdoor Recreation Report (2025)
- The Economic Impact of Outdoor Recreation in **Arkansas** (2025)
- **New Hampshire** Outdoor Industry Inventory (2023)
- Economic Analysis of Outdoor Recreation in **Washington** State (2025)
- Economic Analysis of Outdoor Recreation in **Oregon** (2024)
- Economic and Fiscal Impact Analysis of the **Vermont** Trails and Greenway Council Member Organizations (2016)



VT's most recent (partial) study is now a decade old

# S.327 Request

Focus on the economic development potential of the state's OR economy

- Study would provide analysis of:
  - **Benefits** to Vermont's local economies
  - **Risks** facing the sector
  - Strategic outdoor recreation **investments** that support economic growth
  - Link to advancing the priority actions laid out in Vermont's **SCORP** (MFTVT)
- Regional sampling & extrapolation approach
- **Four** specific thematic aims:
  - **Stewardship** & deferred maintenance
  - Value provided by **private landowners** and associated economic risks
  - Value of direct & indirect **OR businesses**
  - **Climate risk** and mitigation investments



# Stewardship

## Backlog of deferred maintenance threatens our future prosperity

- Dramatic increase in demand over the last decade; accelerated through the pandemic
- **57%** of Americans recreated outdoors in 2024; has increased every year since 2014
- **93%** of Vermonters engaged in outdoor recreation in 2023
  - >50% in state parks, forests, and WMAs
  - 33% on privately-owned lands
  - 22% on mountain bike
- Over **6 million** visitor visits primarily for recreation
- Average trail use measures have increased **100-200%** since before the pandemic
- 2021 ERSA VMBA example: \$1.1M deferred maintenance need, \$489K request, \$0 awarded



# Private Landowners

A major foundation for our outdoor rec economy, and one that is at risk

- ~75% of public-access recreational trails are hosted by private landowners
- Different factors motivate Landowners to host public-access recreation, typically receiving **no formal or tangible recognition**
- **Withdrawal of access** can and has had serious impacts on connectivity and local economies
- Recreation managers act to address landowner concerns, though the scope of their ability to provide benefits is limited
- Critical need to assess **landowner costs & liabilities**, estimate the **economic value** they provide, and analyze **options and existing approaches** to better securing access

## Trouble in Paradise: Kingdom Trails Just Got Smaller for Mountain Bikers

THREE LANDOWNERS HAVE REVOKED BIKE ACCESS IN THE HEART OF ONE OF THE COUNTRY'S MOST POPULAR TRAIL SYSTEMS.

BY JESSICA COULON Updated: Jan 27, 2020 1:48 PM EST

SAVE ARTICLE

Vermont's Own **WCAX 3**

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**VAST reminds riders to respect private lands**

RIDING ON PRIVATE LAND TRAILS ASSOCIATION SAYS TO RESPECT PROPERTY OF OTHERS

18° 6:05

By WCAX News Team Published: Jan 23, 2023 at 11:25 PM EST

### Limitations of Recreational Access on Private Land

New Hampshire's heavy reliance on private property owners that permit recreational access introduces additional recreation management challenges that are not present on public lands. Changes in private property ownership or property owner attitudes can result in the **closure of recreational trails and hunting access**. In some cases, these closures can cut off major portions of a trail system.

Local trail clubs and organizations are often proactive with managing landowner relations, and various state laws limit landowner liability and provide tax incentives for recreational access. However, the landowner still maintains the final say over recreational access.

## VERMONT BACKCOUNTRY ETHICS

~ Leave Nothing But Tracks ~

### 1. PLAN AHEAD & PREPARE

- Practice safety first.
- Know where you are going.
- Know your own and your group's limits, and minimize risks.

### 2. TRAVEL ON DURABLE SURFACES

ACTS

Winter is an especially

part of an authorized project or

old booting and snowshoeing in

at a time, and slow down near

the Lower Fall State Overlook and Wil-

son, NH area (VTC)

WINTER TRAILS ASSOCIATION

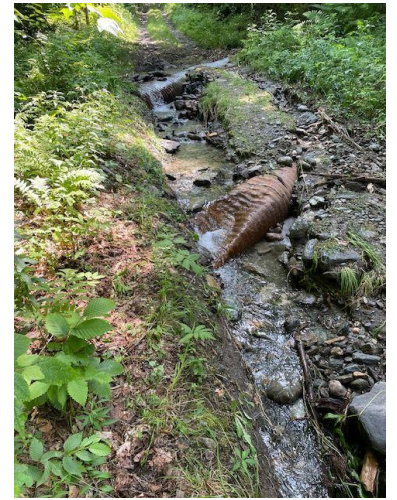
Leave No Trace

MOUNTAINTRAIL.ORG

# Climate Resilience

## Backlog of deferred maintenance threatens our future prosperity

- **Over \$1M** in 2023 VOREC Community Grants in support of flood recovery and resilience; primarily reactive projects focused on restoration
- No statewide assessment of which recreational assets are at greatest risk
- Additional need to understand the approximate and relative economic contribution of individual recreation assets to guide investment decisions
- Opportunity for Vermont to lead as a destination for climate-resilient recreation; 2023 improvements proven in 2024 storms
- VMBA impacts: **>50%** drop in visitation during the summer of 2023; lost impact of \$127 per visitor, **at least \$6M** in economic loss (likely much more)



# What to Study

Hundreds of prior investment projects for this study to use in assessing impact

- 84 VOREC Community Grant projects (2019-2023); \$11.25M in total investment; new construction, planning, inclusivity, and flood recovery
- 114 Recreational Trails Program (RTP) projects since 2016; \$5M in total investment; stewardship, maintenance, and new construction
- 34 Land and Water Conservation Fund (LWCF) projects since 2016; \$10.7M for protection and enhancement of conserved lands for recreation
- 12 Enhanced Recreational Access and Stewardship (ERSA) projects in 2021, \$1M in total
- Vital opportunity to develop investment guidance for future project prioritization, especially as we look to pursue the priority actions in *Move Forward Together Vermont* (SCORP)

MOVE FORWARD TOGETHER VERMONT VISION				
FOSTER HEALTHY AND VIBRANT COMMUNITIES THROUGH OUTDOOR RECREATION				
PURPOSE	Support partnerships, projects, and programs at the local, regional and statewide scale that protect Vermont's healthy, functioning environment, establish and maintain high-quality and inviting outdoor recreation spaces, and cultivate communities that are diverse in the people they engage and the opportunities they support.			
GUIDING PRINCIPLES	Collaborative	Inclusive	Data-Driven	
COMMON OBJECTIVES	<b>Equity</b> We will collectively expand opportunities and reduce barriers so that all people feel welcome in Vermont's outdoors.		<b>Climate Resilience</b> We will collectively strengthen the sustainability, flexibility, and resilience of our communities so that we can weather the impacts of climate change.	
	<b>Stewardship</b> PROTECT MAINTAIN CONSERVE <i>We will ensure that we protect the health of our environment and cultivate and preserve high quality outdoor recreation experiences.</i>	<b>Wellness</b> LEARN CREATE CONNECT <i>We will create and steward places and connections that welcome all people and allow them to heal, learn, grow, and live their lives fully.</i>	<b>Economic Development</b> CULTIVATE INVEST BUILD <i>We will support communities to be proactive in using outdoor recreation to create a sustainable, vibrant, future.</i>	
THEMES				
FIVE YEAR PRIORITY ACTIONS	Invest in stewarding and upgrading existing recreational infrastructure	Create and enhance in-community outdoor recreation opportunities that directly connect to where people live, learn, and work	Develop information and resources to demonstrate how outdoor recreation resources and vibrant local economies are connected	
	Strengthen guidance and education about climate resilient strategies that help communities interact with their rivers and water bodies	Develop recreational opportunities and conserve open spaces that strategically fill gaps in experiences and distribution across the state	Strengthen the capacity of municipalities to engage in Vermont's outdoor recreation economy	
	Cultivate and promote a stewardship ethic among Vermonters and visitors	Create safe, welcoming, and environmentally sustainable entry spaces into the outdoors	Strengthen workforce opportunities in Vermont's outdoor sector	
	Identify and support regional outdoor recreation planning and partnerships.	Centralize, improve, and make more accessible informational resources about outdoor recreation opportunities and events	Foster resilience and flexibility in outdoor recreation communities, organizations, and businesses to withstand major weather events and a variable climate	
	Create and promote a suite of technical assistance resources to strengthen the skills and expertise of non-profits, municipalities and businesses who manage recreation	Support programs that reduce the costs of outdoor recreation	Invest in organizations and businesses led by marginalized communities	
Reinforce and sustain public recreation on private lands	Strengthen connections between people working in health and wellness, people working in education, and people working in outdoor recreation	Support innovation in Vermont's outdoor sector by supporting entrepreneurship, providing resources to businesses, and seeking solutions to challenges		
	Strengthen community awareness about improved health and wellness outcomes through outdoor recreation			

# Recent Success

## The Economic Impact of Adaptive Recreation in Vermont

- VOREC-funded study; published 2026
- Focused on impacts of Vermont Adaptive events, programming and operations
- Evaluated direct (e.g. outdoor retail) and indirect (e.g. lodging) impacts
- Findings:
  - **\$10.3M** in total economic impact annually
  - **72 jobs** supported statewide
  - **\$1.8M** in federal, state and local taxes
- Every \$1 VASS spends generates an additional \$1 of economic impact across the state





# THANK YOU!

*And thank you for supporting Outdoor Rec Day, too!*

*Thank you for the  
2026 Outdoor Rec Day!*



VERMONT MOUNTAIN BIKE ASSOC.  
SINCE  1997

