The Economic Impact of Outdoor Recreation in Nevada

NEVADA
DIVISION OF
OUTDOOR RECREATION

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Foreword

Nevada's vast landscapes are a core part of our state's identity, offering generations of Nevadans unparalleled opportunities for adventure and connection. Today, outdoor recreation is also a dynamic sector of our economy, enhancing residents' quality of life and attracting visitors from around the globe.

The Nevada Division of Outdoor Recreation commissioned this economic analysis to guide strategic support for this growing sector. This report provides the first clear, data-driven picture of outdoor recreation's full scope: from direct spending in local communities to the nonmarket benefits enhancing our collective well-being.

The findings are compelling. Outdoor recreation is a significant economic engine, generating billions in economic output and supporting over 75,000 jobs across Nevada and the Tahoe Basin, stimulating nearly $14 billion of economic activity. The analysis also highlights recreation's unique role as a catalyst for economic diversification: nearly 40% of the sector's benefits are realized in our rural counties, promoting widespread prosperity.

This report is a foundational tool for decision making, it offers a common language and a shared set of facts for policymakers, land managers, business leaders, nonprofit organizations, and community advocates to address future challenges and opportunities. The insights within will guide strategic investments in infrastructure, development of a skilled workforce, expansion of access and opportunity, and stewardship of our natural and cultural resources.

My sincere thanks to the consultant team, academic collaborators, and our many government partners for their essential contributions to this study. This report gives us the clear data needed to build a thriving and sustainable outdoor recreation future for the Silver State.

Denise Beronio
Administrator
Nevada Division of Outdoor Recreation

Acknowledgments

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Their contributions helped ensure the accuracy, relevance, and practical value of this analysis. We thank them for their support.

Funds for this project were made available through a partnership with the Nevada Department of Tourism and Cultural Affairs through the U.S. Economic Development Administration's (EDA) Travel, Tourism, and Outdoor Recreation program (as part of the American Rescue Plan). The EDA program funding invests in marketing, infrastructure, workforce, and other projects to rejuvenate safe leisure, business, and international travel. Additional support was provided by the Land and Water Conservation Fund (LWCF), a federal program established in 1964 that uses revenues from offshore energy development to expand public access, protect natural areas, and enhance recreation opportunities nationwide.

Prepared by
Radbridge Incorporated
radbridge.com

RRC Associates
rrcassociates.com

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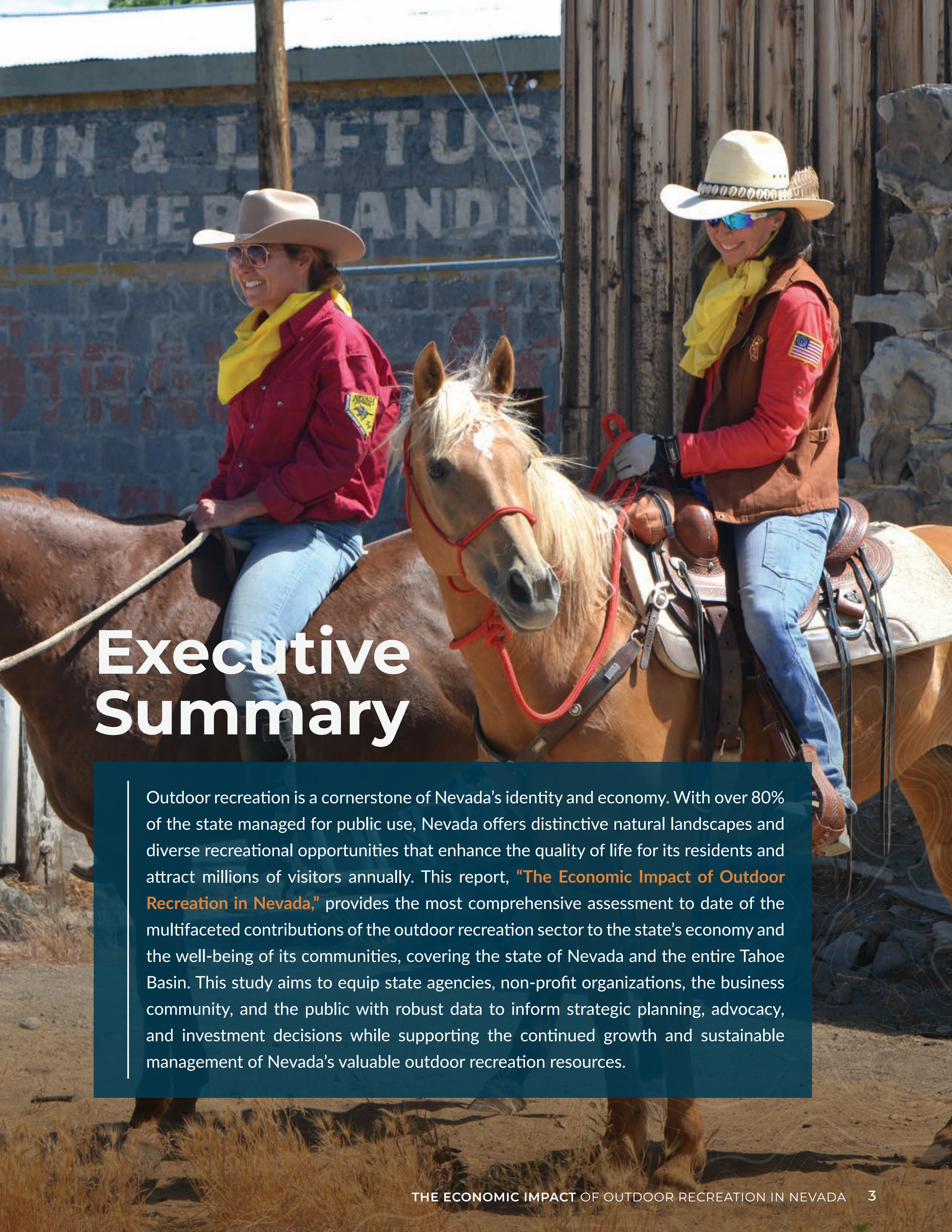


Executive Summary

Outdoor recreation is a cornerstone of Nevada's identity and economy. With over 80% of the state managed for public use, Nevada offers distinctive natural landscapes and diverse recreational opportunities that enhance the quality of life for its residents and attract millions of visitors annually. This report, **"The Economic Impact of Outdoor Recreation in Nevada,"** provides the most comprehensive assessment to date of the multifaceted contributions of the outdoor recreation sector to the state's economy and the well-being of its communities, covering the state of Nevada and the entire Tahoe Basin. This study aims to equip state agencies, non-profit organizations, the business community, and the public with robust data to inform strategic planning, advocacy, and investment decisions while supporting the continued growth and sustainable management of Nevada's valuable outdoor recreation resources.

A Powerful Economic Force:
Outdoor Recreation's Economic Impact

In total, Nevada's outdoor recreation generates $24 billion annually in combined market and nonmarket benefits, underscoring its profound importance to the state's economy and quality of life. This assessment confirms outdoor recreation's critical role not only as an economic engine, but also as a contributor to public health and quality of life.

The findings of this study reveal that outdoor recreation is a significant economic contributor to Nevada and the surrounding Tahoe Basin region.

Across the study area, visitors spend money on both trips and recreational equipment, adding up to $9.2 billion in annual expenditures, based on 2023 data. This spending flows through the economy, creating a total economic impact of $13.7 billion.

The outdoor recreation sector is a substantial employer, supporting 75,223 jobs and contributing $3.8 billion in labor income to households across Nevada and the Tahoe Basin. Furthermore, outdoor recreation generates $8.8 billion in Gross Domestic Product (GDP), demonstrating its contribution to the overall economic productivity of the region. Importantly, this activity also translates into significant fiscal benefits for government agencies, with $2.3 billion in total tax revenue generated, including $468 million for local governments, $700 million for the state, and $1.1 billion at the federal level. Collectively, these results establish outdoor recreation as a vitally as important component of Nevada's economy.

Visitation and Spending:
Drivers of Economic Prosperity

The substantial economic contributions of outdoor recreation are driven by 159 million annual visits to the thousands of public and private recreation sites across Nevada and the Tahoe Basin. Visitors, both local and nonlocal, inject significant revenue into local economies through their expenditures. In addition to the $3.7 billion spent on equipment purchases, key spending categories include approximately $1.09 billion on hotels and lodging, $919 million on fuel, $838 million on restaurants and bars, $758 million on retail purchases, and $537 million on entertainment and recreation services. This diverse spending profile ensures that the economic benefits of outdoor recreation are distributed across multiple sectors of the economy.

The activity-level data also reveal that most visitors participate in multiple types of recreation during a single trip, such as combining hiking with photography or camping with fishing. This pattern highlights the interconnected nature of outdoor experiences and their broad economic reach across spending categories.

Lands used for outdoor recreation in this study are managed by a wide range of federal, state, and local agencies, as well as select nonprofit and private conservation organizations. These include, but are not limited to, lands managed by the U.S. Forest Service, U.S. Fish and Wildlife Service, Bureau of Land Management, National Park

Service, Nevada State Parks, Nevada Department of Wildlife, municipal park departments, counties, improvement districts, and nonprofit conservation entities.

Beyond Market Transactions: The Significant Nonmarket Value of Outdoor Recreation

The contributions of outdoor recreation extend far beyond directly measurable market transactions. This study also quantifies important nonmarket benefits that significantly impact the well-being of Nevadans and visitors alike. Participation in outdoor recreation activities is associated with an estimated $2.06 billion in avoided healthcare costs each year, reflecting the physical health benefits derived from outdoor physical activity. Furthermore, visitors derive substantial personal value from their recreational experiences, often exceeding what they directly pay. This "consumer surplus" – the added value individuals receive from accessing and enjoying natural landscapes and recreational opportunities – is estimated at $8.2 billion annually across the study area. These nonmarket values highlight the significant, often under-appreciated, societal benefits of preserving and enhancing access to outdoor recreation, including fostering environmental conservation and stewardship practices among participants.

New Insights through Mobile Location Analysis and Machine Learning

Visitation at thousands of diverse sites, including those without on-the-ground monitoring, was estimated using anonymized mobile location data analyzed with advanced machine learning. This innovative approach allowed for a comprehensive and geographically precise understanding of visitor patterns. Furthermore, the study differentiated between local and nonlocal visitor spending profiles and utilized actual device movement data to allocate spending to specific communities with a high degree of accuracy, moving beyond traditional proximity-based estimates. The economic impacts of the spending were then modeled using the industry-standard IMPLAN input-output model, incorporating Nevada-specific multipliers.

Impacts Across Nevada and the Entire Tahoe Basin

This research aims to provide a broad view by analyzing outdoor recreation visitation and its economic impacts across the state of Nevada. Notably, the study covers the entire Tahoe Basin, both its Nevada and California portions, to ensure a thorough understanding of this important bi-state recreational hub. The full report provides detailed breakdowns of these economic contributions at various sub-state levels (e.g., county, community, legislative districts, and tourism regions), illustrating the widespread reach of outdoor recreation's economic benefits and its importance to communities across Nevada, including the state's many rural counties, which make up 14 of the state's 17 counties.

Why These Findings Matter:
Informing Policy, Investment, and Advocacy

It is anticipated that the findings presented in this report will be useful for a wide range of stakeholders. By providing a clear, data-driven picture of outdoor recreation's economic contributions and its significant nonmarket contributions, this study:

Supports Informed Decision-Making: It offers credible data essential for state and local government agencies in policy development, land management, and strategic planning.

Guides Investment: The detailed geographic analysis can help identify opportunities for investment, particularly in rural areas where outdoor recreation can be a cornerstone of economic diversification and vitality.

Strengthens Advocacy and Funding Efforts: It equips land managers, non-profit organizations, recreation advocates, and grant writers with compelling evidence to support their initiatives and secure funding.

Enhances Public Understanding: It clearly communicates the significant role outdoor recreation plays in the economic health and overall well-being of Nevada.

Modernizes Outdoor Recreation Economics: It supplements traditional estimation techniques to provide more accurate and scalable coverage of visitation and economic impact analysis.

Investing in Nevada's Natural Advantage for a Prosperous Future

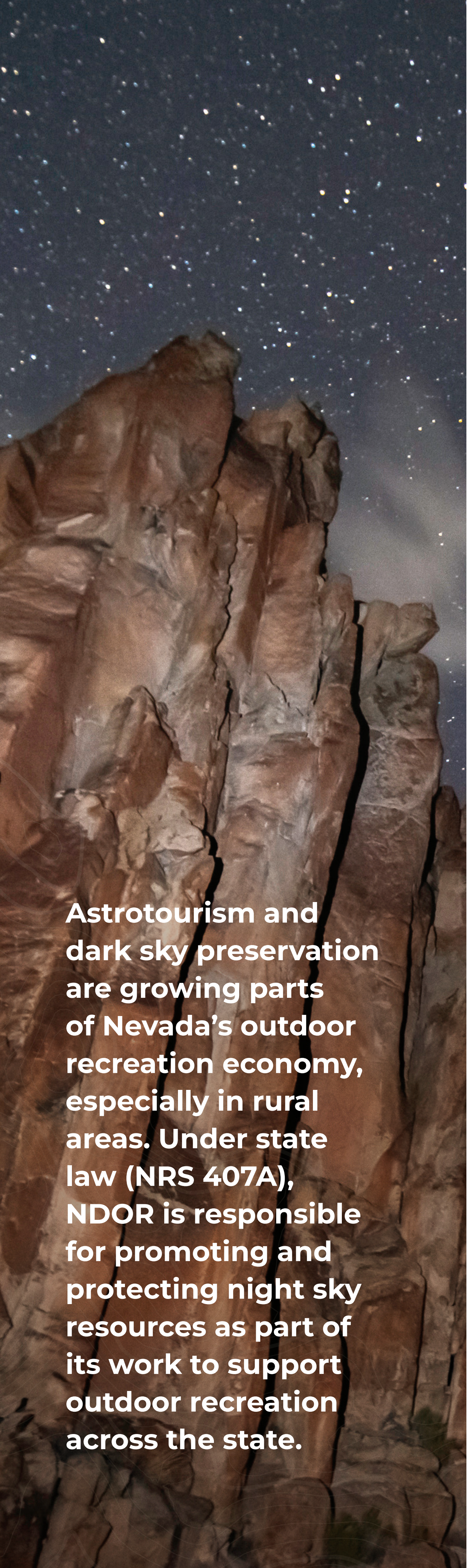
Outdoor recreation is clearly a significant economic force, a major source of employment, and an important contributor to the tax base and overall quality of life in Nevada. The substantial economic outputs, coupled with significant nonmarket benefits such as health cost savings and consumer surplus, highlight the considerable value of Nevada's natural landscapes and recreational infrastructure.

However, the outdoor recreation sector faces growing pressures that could hinder its continued development and resilience. These include aging infrastructure, funding shortfalls, workforce gaps, weather-related risks, and persistent barriers to access.

To address these challenges and fully realize the sector's potential, this report outlines a strategic set of policy recommendations. These proposals are intended to spark informed dialogue, foster collaboration across sectors, and guide targeted investments that will ensure the long-term vitality of outdoor recreation in the state. The recommendations are organized across four priority areas: infrastructure funding and finance, data and technology enhancements, economic and workforce development, and community engagement. Together, they aim to ensure Nevada's outdoor recreation system remains world class, while expanding access and economic opportunity for communities across the state, especially in rural areas where these benefits can be most transformative.

The Purpose and Scope of This Report

Nevada, a state renowned for its vast and dramatic landscapes, from the sun-drenched Mojave Desert to the alpine splendor of the Sierra Nevada and the unique ecosystems of the Great Basin, offers an unparalleled arena for outdoor recreation. These natural assets are not merely scenic backdrops; they are fundamental to the Nevada experience, increasingly shaping the state's cultural identity, enhancing the quality of life for its residents, and emerging as an important component of the state's economy. With over 80% of its land publicly owned, encompassing approximately 58.1 million acres, Nevada provides access to a wide spectrum of recreational pursuits. This report, "The Economic Impact of Outdoor Recreation in Nevada," offers a detailed assessment of the economic contributions made by Nevada's outdoor recreation industry.



The outdoor recreation sector is experiencing robust growth nationally, and Nevada is positioned at the forefront of this expansion. Recreation has rapidly evolved from a lifestyle amenity into a significant economic engine, contributing billions to the state's economy annually and supporting tens of thousands of jobs. The rise of outdoor recreation is particularly salient as Nevada continues to seek economic diversification, in order to build a resilient economic base beyond its traditional anchor industries (e.g., gaming, hospitality, and mining).. In addition to these economic impacts, outdoor recreation plays a strategic role in advancing public health and strengthening community engagement—further reinforcing its value to the state.

In an era marked by increasing demand for outdoor experiences and a growing recognition of the economic potential held within natural landscapes, a clear, data-driven understanding of this sector's impact is more important than ever. Since 2020, public engagement with the outdoors has grown significantly, further elevating the need for sustainable stewardship and informed policymaking.

To that end, the primary goal of this report is to produce the most accurate, defensible, and comprehensive statewide economic analysis of outdoor recreation in Nevada to date. The study's core objectives are:

- To quantify the full range of market-based economic contributions, including visitor spending, equipment purchases, total economic output, jobs supported, labor income, GDP/value-added, and tax revenues generated at local, state, and federal levels.
- To assess and, where possible, quantify significant nonmarket values associated with outdoor recreation, such as health cost savings attributable to physical activity and the consumer surplus that visitors derive from their experiences, representing the value they gain beyond what they spend.
- To detail the geographic distribution of these economic impacts across Nevada's diverse regions, counties, communities, legislative districts, and tourism areas, including both urban and rural economies.
- To furnish robust, actionable insights that can inform policy development, federal, state and local agency planning, non-profit advocacy, strategic investment, and broader public understanding of outdoor recreation's value.

To achieve these objectives, the study encompasses the entire state of Nevada, with a specific and deliberate inclusion of the entire Tahoe Basin, comprising both its Nevada and California portions, to ensure a complete understanding of this critical bi-state recreational and economic hub. **The analysis covers a broad range of public and private recreation sites and defines outdoor recreation as leisure activities in nature, both motorized and non-motorized.** This definition, which includes activities like hiking, camping, hunting, and off-roading, is consistent with the framework used by the U.S. Bureau of Economic Analysis (BEA) to track the nation's economy. The findings show how these recreational assets support local economies and can help guide future planning across Nevada and the Tahoe Basin.

This research is grounded in a commitment to methodological innovation that advances outdoor recreation economic analysis. Using cutting-edge data sources, such as anonymized mobile location data, paired with machine learning techniques, the study provides robust estimates of visitation across thousands of sites, including those without direct monitoring. This approach allows for more precise, site-level allocation of visitor spending and economic impact, marking a clear improvement over traditional estimation techniques alone. It is especially effective in capturing recreation's influence in rural and dispersed areas. A detailed description of these methods is provided in Section 3 of this report.

This report is structured to guide the reader from a broad understanding of the outdoor recreation sector's importance to the specific details of its economic contributions and implications. Following this introduction, the report will cover:

- **Section 2** ***Outdoor Recreation*****:** A Strategic Pillar for Nevada's Future: An overview of Nevada's outdoor recreation assets, its competitive advantages, and the sector's role in economic diversification.
- **Section 3** ***Methodology*****:** An overview of the data sources, analytical techniques, and economic modeling employed.
- **Section 4** ***Key Economic Contributions*****:** A presentation of the headline findings regarding market-based impacts such as spending, output, employment, income, and tax revenue.
- **Section 5** ***Nonmarket Value Assessment*****:** An analysis of important non-economic benefits, including avoided health costs and consumer surplus.
- **Section 6** ***Policy Recommendations for Nevada's Outdoor Recreation Economy*****:** Strategic policy recommendations for advancing Nevada's outdoor recreation economy, informed by the findings of this report. Recommendations focus on infrastructure, sustainable funding, workforce development, access, climate resilience, and resource stewardship.
- **Section 7** ***Conclusion and Next Steps*****:** A summary of the study's main takeaways and recommendations for the future.

> **"The information contained in this report is intended to build a deeper appreciation for outdoor recreation's significant role and inform decisions that will advance the sustainable growth and continued vibrancy of this sector, which in turn will contribute to a prosperous and healthy future for all Nevadans."**

Image Courtesy of: Remi Warren

Outdoor Recreation: A Strategic Pillar For Nevada's Future

Outdoor recreation represents a significant and expanding sector in Nevada's economy. The U.S. Bureau of Economic Analysis (BEA) reported that the outdoor recreation industry contributed $8.1 billion to Nevada's Gross Domestic Product (GDP) in 2023, positioning the state 10th nationally in this sector.[1] With a year-over-year growth rate of 12.8%, Nevada's outdoor recreation economy was one of the fastest-growing in the United States. For context, Nevada's nominal GDP was approximately $246 billion in 2023, and total nonfarm employment showed a 2.1% rise in the year leading up to September 2024. This suggests that outdoor recreation comprises approximately 3.3% of the economy, and that the sector's growth rate is far outpacing the overall economy.

$8.1
BILLION
to Nevada's Gross Domestic Product (GDP) in 2023

12.8%
GROWTH RATE
was one of the fastest-growing in the United States

3.3%
OF GDP
outdoor recreation makes up 3.3% of Nevada's GDP

Beyond these aggregate figures, specific segments were notable on their own. For example, visitor activity related to National Parks contributed $239 million to the state's economy and supported 2,490 jobs in 2023.[2]

Nevada's strategic positioning provides substantial competitive advantages for outdoor recreation development. With over 80% of its land publicly owned (federal, state, local, and tribal) and proximity to approximately 80 million Western U.S. residents, the state offers unique opportunities for sector expansion.[3] This geographic foundation, combined with diverse recreational assets, positions outdoor recreation as a key driver of economic diversification.

This chapter outlines Nevada's outdoor recreation assets, its competitive advantages, and the sector's role in economic diversification. The analysis establishes context for the detailed visitation and economic impact analysis presented in subsequent chapters.

Nevada's Outdoor Recreation Assets and Competitive Edge

Nevada's strength in the outdoor recreation sector is built upon a combination of natural resources and strategic positioning. The state's landscapes offer environments for a multitude of activities, while its geographic location and existing tourism infrastructure create opportunities for further growth and integration.

A Landscape of Opportunity:
Abundant Public Lands and Iconic Natural Destinations

Nevada's extensive public lands form the foundation of its outdoor recreation economy, driving activity across multiple sectors including hospitality, retail, transportation, and conservation services. The state's diverse natural resources and assets create year-round economic opportunities that extend well beyond traditional tourism. Key destinations demonstrate this economic multiplier effect:

Lake Tahoe serves as a premier bi-state destination, offering year-round recreation opportunities. Local attractions in the winter include renowned ski resorts like Heavenly, Palisades, and Northstar, and summer activities include boating, kayaking, beach fun, hiking, and biking. This sustained activity supports a range of local businesses and services.

Red Rock Canyon National Conservation Area, located just outside of Las Vegas, is an internationally recognized destination for world-class rock climbing and desert hiking. It attracts a global audience, supporting specialized retail, guide services, and outdoor education, while integrating with the broader Las Vegas tourism market.

Great Basin National Park in eastern Nevada offers remote backcountry experiences and is noted for its exceptional dark night skies. Officially recognized as a Gold Tier International Dark Sky Park by DarkSky International, it is also home to the Great Basin Observatory, the first research-grade observatory built within a U.S. National Park. These unique assets have supported significant growth in astro-tourism and eco-tourism, creating a niche market that drives demand for outdoor gear, lodging, and guided services, thereby contributing to the economic vitality of nearby rural communities.

Black Rock Desert National Conservation Area hosts the Burning Man Festival, which has a notable local economic effect. The area also supports year-round off-roading, OHV adventures, and backcountry camping, benefiting small towns in the vicinity.

Hunting, Fishing, and Wildlife Viewing activities across Nevada's diverse ecosystems generate significant revenue through licensing, guided services, and equipment sales. Premier angling destinations like Lake Mead, Pyramid Lake, and Walker River, along with key wildlife refuges, attract both consumptive and non-consumptive users. These refuges include Stillwater National Wildlife Refuge near Fallon and the Ruby Lake National Wildlife Refuge, which stretches between Elko and White Pine Counties. Together, these destinations support rural economies through guide services, lodging, and specialized retail, and also draw eco-tourists for birdwatching and photography.

Strategic Location and Integration with Nevada's Tourism Economy

Nevada's strategic location in the Western U.S. puts nearly 80 million residents within driving distance, positioning the state as a leading outdoor recreation hub. Las Vegas, a major international tourism destination, also functions as a gateway for adventure tourism. Analysis by Travel Nevada indicates a strategic focus on the state's abundance of public lands and unique desert environments as key differentiators. Their research suggests that outdoor recreation is often paired with other activities to form a broader and richer visitor experience. Visitor profiles identified by Travel Nevada, such as "Road Tripper," "Nature Lover," and "Cultural Traveler" support this view.[4] Marketing efforts, like the "Get a Little Out There" campaign aim to reach both domestic and international audiences by highlighting Nevada's unique opportunities and broad appeal.

Outdoor recreation is also increasingly integrated with Nevada's established hospitality and gaming sectors. The state's tourism strategy has expanded to include natural attractions as part of a holistic visitor experience, particularly evident in regions like Reno-Tahoe, where visitors can combine outdoor activities with casino entertainment. In Las Vegas, tour operators actively promote excursions to nearby Red Rock Canyon, Lake Mead, Mt. Charleston, Spring Mountain National Recreation area, and Valley of Fire, diversifying the traditional entertainment offerings. This strategy aims to lengthen visitor stays, increase overall spending, and appeal to a broader demographic that values outdoor experiences. Many tour companies offer pickup directly from major casino resorts, reflecting a broader trend toward experiential tourism that combines Nevada's built entertainment environment with nearby natural attractions. Large outdoor events, from endurance races like the Silver State 508 to gatherings like Burning Man, also draw substantial participation and generate local economic activity through direct spending and increased demand for services.

Outdoor Recreation as a Catalyst for Economic Diversification and Resilience

Outdoor recreation's economic influence extends to supporting tourism, retail, manufacturing, and infrastructure development, stimulating economic activity across multiple sectors through demand for lodging, adventure travel, equipment, and related services. According to the BEA Outdoor Recreation Satellite Account (ORSA), the sector directly contributed $8.1 billion to Nevada's GDP in 2023 (3.3% of state GDP) and supported 58,425 jobs.[5] To understand its relative scale within the state's economy, Table 1 compares outdoor recreation to other key Nevada sectors in 2023.

Table 1. Comparative Analysis of Key Nevada Economic Sectors (2023)

Industry Sector	Contribution to Nevada GDP (Current USD Billions)	Jobs Supported
Outdoor Recreation (BEA Reported)*	$8.10	58,425
Gaming & Tourism (Leisure & Hospitality: Arts, Entertainment, Recreation; Accommodation & Food Services)	$36.9 ($12.4 + $24.5)	344,126
Mining (Mining, Quarrying, and Oil & Gas Extraction)	$5.10	14,586
Manufacturing	$11.20	65,865

* BEA estimate reflects only direct GDP and employment from outdoor recreation industries, based on national industry codes. This study estimates $5.2 billion in direct GDP and 66,502 direct jobs in Nevada from trip-related and equipment spending using a bottom-up, visitor-based approach. Estimates are not directly comparable.

This comparison highlights that while Leisure & Hospitality (representing Gaming & Tourism) remains a dominant sector of the economy, outdoor recreation's GDP contribution ($8.1 billion) exceeds that of the Mining sector ($5.3 billion) and is nearly as large as the Manufacturing sector ($11.2 billion).[6,7] Its employment base of 58,425 jobs is also considerable, surpassing that of Mining. It is important to recognize that many of these sectors, while distinct, are also closely interrelated and synergistic. For example, outdoor recreation inherently supports $2.86 billion of GDP from the hospitality industry, including lodging, dining, and entertainment services, as well as another $260,343 of the manufacturing GDP.

Understanding the Numbers: BEA vs. Visitor-Based Estimates

The economic figures in this report differ from those published by the BEA, due to differences in data sources and methods. Both approaches are valid, but they serve different purposes.

The BEA's Outdoor Recreation Satellite Account provides a top-down estimate based on national industry data. It uses standardized categories to estimate how much of each sector (like retail, hospitality, and manufacturing) is tied to outdoor recreation. According to the BEA, outdoor recreation directly contributed $8.1 billion to Nevada's GDP in 2023 and supported 58,425 jobs. It's important to note that BEA figures do not include 1099 or self-employed workers, which are common in outdoor recreation sectors like guiding and many small business services.

In contrast, this study uses a bottom-up approach grounded in real-world visitor activity. This study used mobile location data, survey-informed spending, and site-level visitation estimates to measure actual economic contributions tied to outdoor recreation in Nevada. The analysis includes both trip-related and equipment spending to capture the two primary economic channels of the outdoor recreation economy. Using this method, it was estimated that outdoor recreation directly generated $6.1 billion in GDP and supported 57,745 jobs across the state in 2023. These figures reflect direct jobs and output only, not secondary or ripple effects.

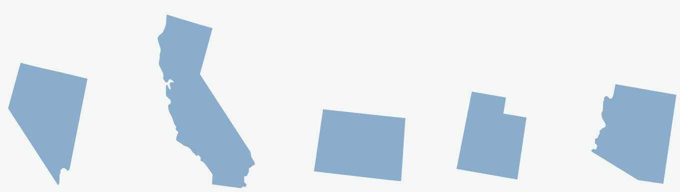
This study also captures the indirect and induced effects of outdoor recreation, the economic ripple effects as businesses purchase from suppliers and employees spend their wages locally. These secondary effects add another $2.7 billion in GDP and over 17,478 jobs. While not included in the BEA's direct estimates, these effects are essential to understanding the full economic footprint of outdoor recreation in Nevada.

Comparison with Outdoor Recreation Economies in Other Western States

Table 2 presents 2023 BEA data comparing outdoor recreation's economic contribution across Western states, providing context for Nevada's position within the regional landscape. The analysis reveals that states with extensive public land access, including Utah, Nevada, and Colorado, tend to generate a larger share of GDP from outdoor recreation, reflecting the economic importance of these public assets.

While Nevada shares this high GDP proportion characteristic with other public land-rich states, the state's outdoor recreation economy demonstrates distinct features in terms of scale, composition, and market dynamics. Understanding these regional patterns and Nevada's unique position provides important context for identifying competitive advantages and strategic growth opportunities within the Western outdoor recreation market.

Table 2. Outdoor Recreation GDP Contribution and Jobs in Select Western States (2023)



State	NV	CA	CO	UT	AZ
Outdoor Recreation GDP Contribution (2023)	$8.1B	$81.5B	$17.2B	$9.5B	$9.5B
Percentage of State GDP	3.30%	2.10%	3.20%	3.40%	2.70%
Jobs Supported	58,425	545,448	132,594	71,898	110,794
Outdoor Recreation GDP Per Capita	$2,526	$2,078	$2,915	$2,802	$1,873

Methodology

Framework

This study was designed to ensure a rigorous, transparent, and replicable methodology, and to produce accurate and geographically precise estimates. The study included the following steps:

1. Defining the geographic and sectoral scope of the analysis.
2. Estimating statewide visitation using advanced mobile location data and machine learning.
3. Analyzing visitor spending patterns.
4. Modeling the market-based economic impacts of this spending.
5. Estimating the value of significant nonmarket benefits associated with outdoor recreation.

Each step of the study is designed to build on the previous one to ensure a cohesive and well-supported analysis. This chapter provides an overview of these stages, with more detailed information available in the accompanying Technical Appendix.

Figure 1. Study Area Encompassing the State of Nevada and the Full Tahoe Basin

Defining the Scope of Analysis

The initial phase focused on clearly delineating the study's boundaries, both geographically and in terms of the recreational activities and sites included.

Geographic Scope The geographic scope of this analysis encompassed the entire State of Nevada, as well as the California side of the Tahoe Basin. This comprehensive bi-state approach for the Tahoe Basin was essential for capturing the integrated nature of the basin's recreational economy and ensuring that impacts attributable to this popular region were fully captured.

Sectoral Scope and Site Identification The study adopted a broad definition of outdoor recreation activities and the sites where they occur. Approximately 1,500 unique public and private outdoor recreation sites across Nevada and the Tahoe Basin were identified and included. The primary source for this site inventory was the Nevada Division of Outdoor Recreation (NDOR) GIS team. This asset data was supplemented and cross-referenced with the Protected Areas Database of the U.S. (PAD-US). While Bureau of Land Management (BLM) lands and other federal and Tribal managers comprise a significant portion of Nevada's public lands beyond that shown in the Figure 2, this report focuses specifically on designated "recreation lands"; those areas that are actively managed for a broad range of outdoor recreation activities and visitor infrastructure. Many land areas not included lack formal recreation amenities, access points, or consistent use data, making them less aligned with the scope of this analysis. By narrowing the focus to lands with defined recreational purpose and facilities, this report aims to provide a more accurate assessment of recreation-driven economic and social impacts.

Figure 2. Recreation Lands Included in This Study

Visitation Modeling and Estimation: Leveraging Mobile Location Data and Machine Learning

A key foundation of this study was the use of anonymized mobile location data and advanced machine learning models to estimate visitation, with the goal of achieving broad coverage and high accuracy across all identified recreation sites.

Data Source and Preparation

- **Anonymized Mobile Location Data:** The study utilized anonymized and aggregated mobile location data for calendar year 2023, procured from an established third-party vendor specializing in privacy-compliant location intelligence.[i] Derived from sources such as mobile application Software Development Kits (SDKs), all data was fully anonymized and aggregated before acquisition, ensuring individual privacy was rigorously protected. Analyses were conducted solely on group-level patterns of movement and did not target any specific devices.

- **Data Filtering:** Raw mobile location data was extensively pre-processed to isolate signals most likely to represent genuine recreational visits. Advanced filtering techniques removed data points likely associated with non-recreational activity, such as devices merely passing through an area (e.g., highway traffic) or static devices associated with nearby residential or commercial properties. This ensured that the data used for visitation modeling predominantly represented actual engagement with recreation sites. Details of these filtering protocols are in the Technical Appendix.

i. Calendar year 2023 was selected as the study period to align with the most recent full year of available mobile location data, partner agency visitation records, and comparative economic data from the Bureau of Economic Analysis (BEA).

Machine Learning Approach for Visitation Estimation

To estimate total annual visitation for all ~1,500 identified sites, including those without on-site counting mechanisms, the study employed an XGBoost machine learning model, chosen for its robust performance and ability to model complex relationships. The primary objective was to scale observed mobile device visit patterns, derived from the filtered location data, to generate total annual visitation estimates for each site. The model was trained using a large dataset that included:

- **Known Visitation Counts:** Ground-truth visitation data from a diverse portfolio of agency-managed sites (National Parks, National Wildlife Refuges, State Parks, National Forest sites, local parks). For Calendar Year (CY) 2023, this dataset provided monthly visitation counts covering approximately 7% of the total possible site-by-month combinations across all included recreation areas, providing real-world benchmarks.[ii]
- **Site and Contextual Attributes:** Predictive variables such as prevailing weather conditions, nearby population density, managing agency level, and local air quality metrics. Individual visitor demographics were not direct inputs to this model.
- **Temporal Data:** All modeling was based on mobile activity observed throughout CY2023.

The trained model generated an estimated total annual number of visits for each of the ~1,500 recreation sites. The Technical Appendix describes the model specification and validation in greater detail.

Visitor Segmentation: Differentiating Local and Nonlocal Visitors

To apply appropriate spending data, visitors were segmented into 'local' and 'nonlocal' categories, a crucial distinction as spending patterns (especially for lodging) vary significantly. This segmentation was based on a device's Common Evening Location (CEL), defined as its predominant observed location during evening hours, dynamically updated based on a 30-day rolling average. A device was classified as 'nonlocal' to a specific recreation site if its CEL was more than 35 miles (Euclidean distance, or as the crow flies) from that site, or if its CEL was out of Nevada and the California portions of Tahoe Basin.

ii. Lakes, rivers, and local parks represented approximately 78% of the recreational units (polygons) analyzed in this study. Typically, comprehensive visitation tracking at these types of sites is limited.

Visitor Spending Estimation

Visitor spending serves as the critical link between recreation participation and measurable economic contributions. This study quantifies the direct infusion of outdoor recreation dollars into Nevada's economy by combining observed visitation volumes (derived from agency visitation counts, mobile location data, and machine learning) with segmented spending profiles differentiated by visitor origin (local/nonlocal) and land management type. These spending estimates form the foundational inputs for IMPLAN modeling, which translates direct spending into broader economic effects.

Development of Visitor Spending Profiles

Spending profiles were constructed using a hybrid approach. Profiles were directly transferred from cases in which they were found to already exist from reliable and methodologically sound sources (e.g., National Park visitors) and peer-reviewed outdoor recreation economic literature. Where no reliable sources were identified, a new visitor spending survey was conducted specifically for this study (1,089 responses in Nevada via an online panel). This approach ensured profiles complemented existing economic data from state and federal agencies. Distinct average per-day spending profiles were developed for 'local' and 'nonlocal' visitors, with detailed breakdowns in the Technical Appendix.

Table 3. Percentage Breakout of Respondents from the Visitor Spending Survey

Visitor Type	Overall Sample
Local - Full-time resident of Nevada (reside in the state 12 months/year)	51.79%
Part-time resident of Nevada (reside in the state less than 12 months/year)	7.71%
Nonlocal - Not a resident of Nevada	40.50%

Complimentary Spending Profile Data Sources

Spending profiles for this analysis were complimented by studies produced by federal and state agencies and academic researchers, such as those from the University of Nevada, Reno (UNR). For high-volume federal lands such as National Parks, data from the National Park Service's Visitor Spending Effects (VSE) reports were used directly.[8] Profiles for U.S. Forest Service lands were adapted from Eric White's 2017 study and modified using guidance on the Humboldt-Toiyabe National Forest.[9] For BLM lands, water-based recreation, and certain wildlife activities such as hunting and fishing, national data from the USFWS (2022) and Pew BLM reports (2018) were used to validate findings from the survey.[10,11] Additional adjustments were made using the 2024 Nevada Outdoor Recreation Survey.

For state-managed lands, including Nevada State Parks and sites overseen by the Division of Forestry and State Lands, profiles came from the 2022 Economic Impact of Nevada State Parks report and were validated with updated Nevada survey results.[12]

For local parks, we identified several low-spend state parks that function similarly and used them as proxies for estimating local park spending.

The table below summarizes the primary sources used by site type.

Table 4. Sources for Expenditure Profiles

Profile Type	Source(s)
Federal Lands	NPS VSE (2022–2023); Eric White (2017); NV Outdoor Rec Survey (2024)
State Parks and other State Lands	NV State Parks Economic Impact Study (2022); NV Outdoor Rec Survey (2024)
Local/Regional Parks	NV Outdoor Rec Survey (2024); NV State Parks Economic Impact Study (2022)
NGO Conservation Lands	NV Outdoor Rec Survey (2024)
Water-Based Recreation	USFWS National Survey (2022); NV Outdoor Rec Survey (2024)
Cross-validation Sources	USFWS National Survey (2022); NPS SEM-adjusted VSE; Pew BLM Economic Contributions (2018)

Spending Categories

In an effort to closely adhere to the existing visitor spending literature, the analysis included the following standard spending categories: Lodging, Food & Beverage, Fuel (Gasoline/Diesel/Electricity), Retail Purchases, Recreation & Entertainment Services, and Government Fees.

Calculation of Total Visitor Spending

Total visitor spending was calculated by multiplying the annual visitation estimate for each recreation site (disaggregated by local and nonlocal segments) by the corresponding average per-person per-day spending profile for that segment. These site-level spending estimates were then aggregated to inform the economic impact analysis.

Modeling the Spatial Distribution of Visitor Spending

Accurately linking outdoor recreation visitation to localized economic activity requires more than estimating total spending; it demands an understanding of where spending actually occurs. To address this, the study employs an innovative spatial modeling approach that goes beyond traditional proximity-based assumptions.

> By leveraging anonymized mobile location data and a two-stage raster-based geographic information system (GIS) process, the analysis captures observed movement patterns of visitors across developed areas in Nevada and the Tahoe Basin.

This method enables the allocation of visitor spending to specific geographic locations based on real-world behavior, reflecting how and where visitors interact with commercial services following recreation site visits. The result is a more precise and defensible estimate of the spatial distribution of outdoor recreation's economic contributions, supporting improved decision-making at the community and regional levels.

Stage 1: Capturing Visitor Movement in Developed Areas

To understand likely expenditure locations, the study first identified when devices (aggregated and anonymized) visited a recreation site—based on pings within the site boundaries. While all data used in this analysis were aggregated to ensure privacy, the method is described here as if from individual devices, for illustrative purposes.

Once a device was identified as a visitor to a specific recreation site (based on device pings within the site's boundaries), the study then analyzed the broader travel patterns of that same device. Specifically, anonymized mobile pings generated by these identified visitors throughout the day(s) of their recreational visit were examined to understand their movement in the surrounding region. These wider-area pings from visitors were then aggregated into hexagonal raster grid. To pinpoint likely areas of expenditure, this aggregation focused only on those pings that occurred within "developed land" pixels. For this analysis, developed lands were identified using the National Land Cover Database (NLCD), including areas classified as Low, Medium, and High Intensity Development (Classes 22-24), to isolate commercial footprints and transportation corridors at scale. The result is a spatial "footprint" of likely visitor spending, grounded in observed travel behavior rather than static buffers.

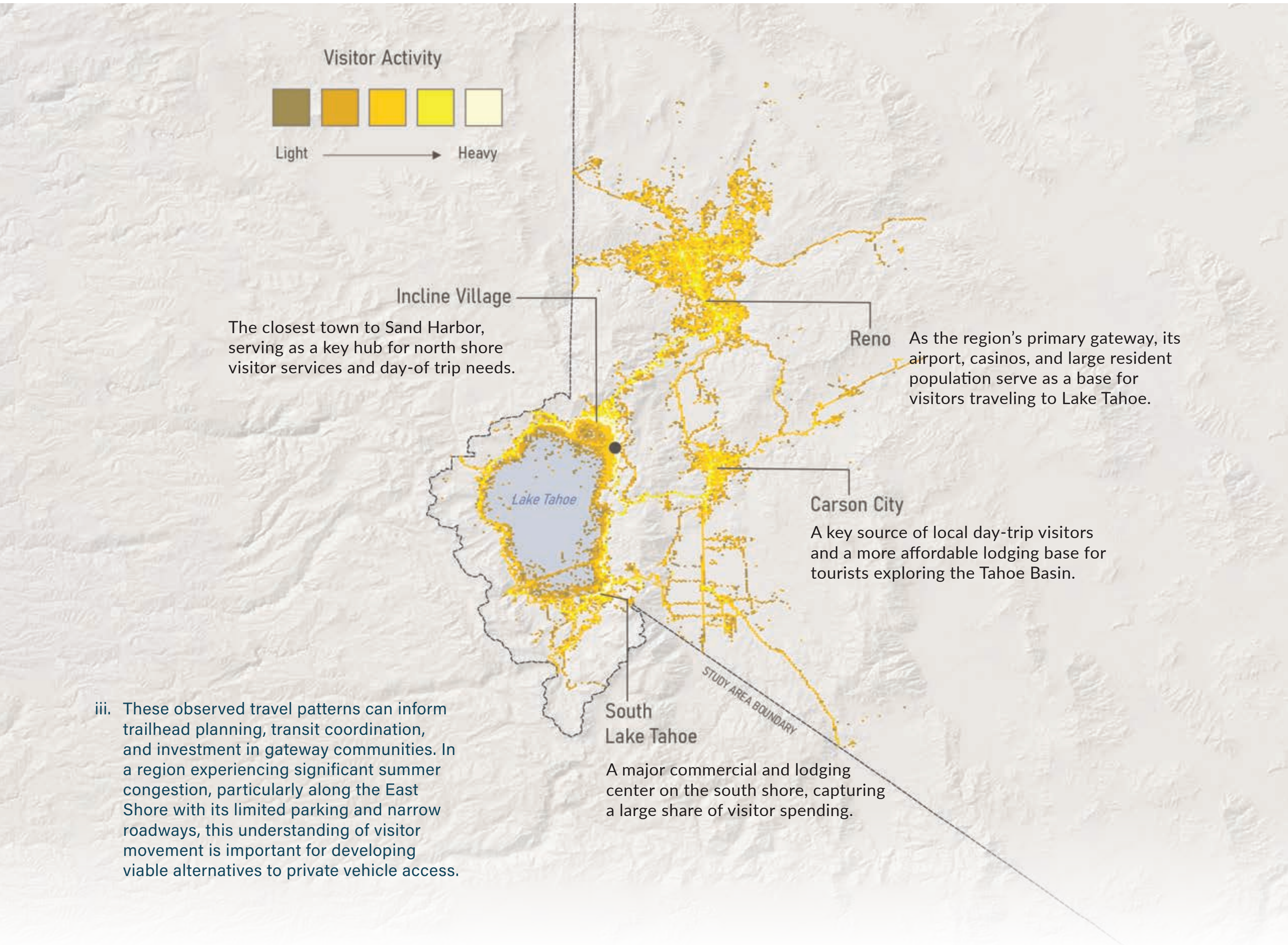
Stage 2: Augmentation and Economic Allocation

For sites with insufficient direct ping data, their rasters were augmented by statistically blending their limited data with average normalized ping patterns from their overlapping counties. This ensured sufficient data density while preserving local characteristics.

These developed-area-constrained ping distribution maps then formed the basis for geographically allocating total estimated visitor spending, further refined by weighting movement patterns by measures of relative economic activity (e.g., GDP concentration) within observed travel corridors. Figure 3 illustrates the travel pattern of visitors to Sand Harbor State Park, showing the spatial concentration of activity across the Reno-Tahoe and Carson City region.

This map displays the density of mobile device pings from visitors to Sand Harbor State Park throughout their full day of travel within the study area. Pings are aggregated to a hexagonal grid and filtered to developed land areas. These footprints form the basis for allocating estimated visitor spending across the region based on observed movement patterns. High-density areas suggest locations where recreation-related expenditures are most likely to occur.

Figure 3. Spatial Footprint of Visitor Movement from Sand Harbor State Park[iii]



iii. These observed travel patterns can inform trailhead planning, transit coordination, and investment in gateway communities. In a region experiencing significant summer congestion, particularly along the East Shore with its limited parking and narrow roadways, this understanding of visitor movement is important for developing viable alternatives to private vehicle access.

Market-Based Economic Impact Analysis

Translating outdoor recreation visitation into measurable economic contributions requires robust modeling that captures how spending circulates through the economy. This section outlines the market-based economic impact analysis used to quantify the direct, indirect, and induced effects of visitor spending in Nevada and the broader Tahoe Basin.

Modeling Software and Approach

The analysis used IMPLAN (IMpact analysis for PLANning) input-output modeling software, an established and widely used platform for input-output modeling.[13] Nevada-specific economic multipliers from IMPLAN were employed to reflect the state's unique economic structure. The direct inputs were the geographically allocated estimates of visitor spending, representing a change in final demand for the industries represented by each spending category (e.g., full-service restaurants).

Types of Economic Impacts Measured

The IMPLAN model estimated:

- **Direct Effects:** Initial spending in businesses like hotels, restaurants, etc.
- **Indirect Effects:** Secondary activity as businesses make purchases within their supply chains.
- **Induced Effects:** Activity from household spending by employees whose wages are supported by direct and indirect effects.

Key Economic Output Metrics

The IMPLAN analysis generates five standard economic indicators that collectively measure the magnitude and scope of economic activity:

- **Total Economic Output:** Total dollar value of goods and services produced.
- **GDP (Value-Added):** Net economic value created after subtracting input costs.
- **Jobs:** Number of employment positions supported, both full-time and part-time, including independent contractors and self-employed persons.
- **Labor Income:** Total worker compensation including wages, salaries, and benefits.
- **Tax Revenues:** Government tax collections at federal, state, and local levels.

Geographic Resolution of Impact Results

Impacts were initially calculated at the county level using county-specific multipliers, then systematically disaggregated and reported for Nevada's congressional districts, state legislative districts, tourism regions, local communities, and the entire Tahoe Basin, ensuring all figures consistently sum to appropriate totals.

Valuation of Nonmarket Benefits

While outdoor recreation generates substantial market-based economic activity, its full value extends beyond direct spending and job creation. This section explores the significant nonmarket benefits associated with outdoor recreation in Nevada and the Tahoe Basin, including improved public health and the personal value individuals derive from their experiences in nature. By quantifying these benefits, such as consumer surplus and avoided healthcare costs, the analysis provides a more holistic view of outdoor recreation's societal contributions.

Direct Impacts

Visitors spend money on recreation goods and services such as lodging, food and drink, gear rental, and guide services.

E.g., A family at Lake Tahoe pays for a cabin stay, fills up with fuel, eats at restaurants, and rents paddleboards.

*This visitor spending creates **direct impacts** in Nevada's outdoor recreation businesses.*

Indirect Impacts

Businesses buy inputs to serve visitors, including supplies, maintenance, inventory restocking.

E.g., A nearby restaurant orders produce from a Nevada distributor and gets its delivery van serviced locally.

*This supply chain spending creates **indirect impacts** across Nevada businesses.*

Induced Impacts

Employees spend wages in the local economy on housing, groceries, entertainment, and other everyday needs.

E.g., A park attendant uses earned wages to pay rent, buy groceries, and get a haircut.

*These are **induced impacts**, the ripple effect from higher household income.*

The sum of direct, indirect, and induced impacts gives the total economic footprint of initial visitor spending.

Image Courtesy of: TRPA

Consumer Surplus Estimation

Beyond direct spending, individuals receive added economic value when the personal satisfaction they derive from an outdoor recreation experience exceeds the costs they incur. This additional value is captured by the concept of consumer surplus, which measures the difference between what someone is willing to pay and what they actually spend on a trip. For instance, if a person values a day of hiking and would be willing to spend up to $120 for that specific trip (considering travel, time, and enjoyment), but their actual expenses for fuel, entry, and the value of their time only amount to $40, they receive $80 in consumer surplus. This “extra value” or net benefit is a well-established economic concept. Formally, it represents the economic measure of the difference between what a visitor would have been willing to pay for that recreational opportunity and the costs they incurred. Understanding consumer surplus is key to recognizing a tangible component of outdoor recreation’s overall value to individuals and society that is not captured in a market transaction (i.e., non-market) like the purchase of a post-hike lunch.

The consumer surplus methodology is as follows:

1. **Data Foundation and Site Categorization:** The analysis utilized anonymized mobile location data to understand visitor travel patterns to approximately 1,500 outdoor recreation sites, which were categorized by primary management authority (e.g., Federal, State, Local, Non-Governmental Organization, Lakes and Rivers, or ‘unspecified’).

2. **Calculating Individual Travel Costs:** For each observed visit, individual travel costs were calculated to serve as a proxy for willingness to pay. These costs encompassed direct monetary expenses based on estimated travel distance and standard vehicle operating costs, plus the monetized opportunity cost of the time spent traveling (derived from regional income data).

3. **Estimating Per-Visit Consumer Surplus by Management Category:** A demand curve for recreation was constructed for each site management category using these individual travel costs. To ensure estimates were based on representative travel patterns for different types of recreational opportunities and to exclude extreme outliers, category-specific distance-based cutoffs were empirically derived and applied before the average consumer surplus per visit was estimated from these refined demand curves.

4. **Calculating Total Annual Consumer Surplus:** Finally, the estimated average consumer surplus per visit for each management category was multiplied by independent estimates of the total annual visitation to all sites within that respective category.

Health Benefits Valuation

The economic value of health benefits stemming from outdoor recreation, calculated as avoided medical costs due to physical activity, was quantified using a Cost of Inactivity (COI) approach. This methodology involved several key steps:

First, a per-minute dollar value for physical activity was established. This value represents the estimated healthcare cost savings associated with each minute of engagement in moderate to vigorous physical activity. This value was calculated as follows:

- Janssen (2012) found that 3.7% of Canada's national healthcare costs are attributable to physical inactivity.[14]
- Assuming the same percentage applies in Nevada and using state-specific healthcare spending data ($29.1 billion for the total adult population), the total cost of physical inactivity was estimated at $1.1 billion annually.[15]

This $1.1 billion cost was distributed among the 53.1% of Nevada adults not meeting physical activity guidelines (approximately 1.36 million people), resulting in an additional $790 in healthcare costs per inactive adult each year.[16]

- Dividing $790 by the recommended 7,800 minutes of annual physical activity (150 minutes/week) yields an estimated economic value of $0.1013 per minute of moderate to vigorous physical activity.

Second, the total volume of physical activity generated by outdoor recreation in the study area was estimated. This involved:

- Utilizing standardized Metabolic Equivalent (METs) values for a comprehensive range of outdoor activities (sourced from the "2024 Compendium of Physical Activities").[17]
- Combining these METs values with estimated participation levels in these different activities (informed by overall visitation patterns and survey data on activity preferences and duration of engagement).

Finally, the total estimated minutes of physical activity derived from outdoor recreation were multiplied by the established per-minute dollar value of physical activity. The resulting figure represents the estimated total annual avoided healthcare costs attributable to outdoor recreation in the study area.

Limitations of the Study

While this study was designed to be comprehensive and rigorous, the analysis has several inherent limitations that should be considered when interpreting the results. These considerations are standard for large-scale economic modeling and are noted here to ensure full transparency.

- Spending Data Source: The visitor spending estimates in this report are based on profiles derived from survey data and existing economic literature, not on direct transactional data (e.g., credit card records). This approach was chosen because transactional data cannot reliably differentiate expenditures by outdoor recreationists from those of other consumers (e.g., business travelers or local non-recreating shoppers).
- Mobile Location Data: While mobile location data provides strong detail at the geographic and temporal scale, it has inherent limitations. Coverage can vary by provider, device type, and user permissions, potentially leading to underrepresentation in remote areas with poor service. The advanced filtering and machine learning models used in this study were designed to mitigate these factors.
- Economic Model (IMPLAN) Assumptions: The IMPLAN model operates on a static snapshot of the economy. It assumes fixed prices, no supply-side constraints (e.g., labor shortages), and that regional economic structures are constant. This means that whatever dollars are injected into the region, are assumed to be consumed at a constant rate. This analysis places constraints to reduce potential misrepresentations of local economic activity.
- Single-Year Analysis: The analysis is based on data from calendar year 2023. While this provides a detailed and current snapshot, a single year may not be fully representative of long-term trends. The study does not capture year-over-year trends.
- Attribution of Multi-Purpose Trips: It can be challenging to attribute spending definitively to outdoor recreation on trips that have multiple purposes. For example, a visitor may attend a conference in Las Vegas and also take a day trip to Red Rock Canyon. While our spatial modeling links spending to travel patterns associated with a recreation visit, the initial motivation for the trip can be complex.

The Market Impacts Of Outdoor Recreation

This section details the significant and quantifiable market-based economic activity generated by outdoor recreation across the Total Study Area (Nevada and the California portions of the Tahoe Basin), with a primary focus on the impacts within the State of Nevada. These contributions are driven by visitor spending and the subsequent ripple effects throughout the economy, supporting businesses, generating employment, and contributing to public revenues. The nonmarket values of outdoor recreation, such as health benefits and consumer surplus, are discussed in a subsequent section.

Image Courtesy of: TRPA

Foundations of Economic Impact: Visitation and Spending Patterns

To understand the scale and scope of outdoor recreation's economic contributions, this analysis first examines the foundational factors: the patterns of visitation across Nevada's diverse landscapes and counties, and the associated spending behaviors of visitors. These elements — visitation and spending — are the direct inputs that ripple through the economy, generating the broader market impacts detailed later in this chapter.

Outdoor Recreation Visitation Across Nevada Counties by Land Management Type

The level and nature of visitor engagement with Nevada's diverse outdoor landscapes are fundamental to quantifying the sector's economic footprint. Identifying which types of lands attract visitors and in which counties this activity is most concentrated provides crucial context for understanding local and regional economic effects.

Methodology Snapshot (Visitation by Land Manager)

The visitation estimates presented in this report were derived using mobile location data analysis and modeling techniques, as detailed in the "Methodology" chapter. These estimates were subsequently attributed to specific land manager categories within each county (Federal Lands, State Lands such as State Parks and State Wildlife Areas), Local/Regional Parks, lands managed by Non-Governmental Organizations (NGOs), and Lakes and Rivers not directly associated with a land manager, to provide a nuanced view of recreational use. A complete description of the visitation modeling process can be found in the accompanying Technical Appendix.

Statewide Overview of Visitation by Land Management Type

Aggregating visitation across all counties provides a statewide perspective on the primary land management types drawing outdoor recreators in Nevada. Federal Lands, for instance, often account for a substantial portion of visitation due to their vast acreage and iconic destinations. Significant use of Local/Regional Parks is also typical, particularly in more populated areas, while State Lands, Lakes and Rivers not directly associated with a land manager, and NGO-managed lands play vital roles in providing diverse recreational opportunities.

County-Level Visitation Details by Land Management Type

The composition of outdoor recreation visitation, particularly the proportion of local versus nonlocal participants, varies across Nevada's counties and by different land management types. For the purposes of this analysis, "local visitors" are defined as individuals living within a 35-mile straight-line (Euclidean) distance of the recreation site, which roughly corresponds to a 50-mile travel distance commonly used in similar analyses. This distribution between local and nonlocal visitors is shaped by factors such as the types of recreational amenities offered, proximity to population centers, and the specific appeal of various landscapes.

Table 5 presents the CY 2023 distribution of outdoor recreation visitation by these local and nonlocal segments. It details these percentages for various land management categories within each county and includes an "All Rec. Lands" column, which provides an overall local/nonlocal visitor mix for all recreation lands combined within that county. The values are presented as "Local % / Nonlocal %".

The data in Table 5 reveals distinct patterns in the origin of visitors engaging with Nevada's outdoor recreation offerings. The "All Rec. Lands (County Overall)" column, for example, indicates that counties such as Carson City (85% local), Clark (79% local), Storey (82% local), and Washoe (80% local) see outdoor recreation visitation that is primarily composed of local residents. Even on Federal Lands within Clark and Washoe counties, local users represent a majority or near-majority (66% and 53%, respectively).

Table 5. Annual Outdoor Recreation Visitation Distribution by County and Land Type (Local/Nonlocal %; CY 2023)

County	Federal Lands	State Lands	Local Parks	Lakes and Rivers	NGO Lands	All Rec. Lands
Carson City	59/41	69/31	88/12	55/45	*	85/15
Churchill	14/86	61/39	77/23	58/42	*	63/37
Clark	66/34	70/30	82/18	63/37	*	79/21
Douglas	54/46	52/48	84/16	47/53	55/45	55/45
El Dorado, CA	38/62	42/58	46/54	29/71	*	38/62
Elko	22/78	76/24	79/21	60/40	*	66/34
Esmeralda	6/94	*	*	*	*	12/88
Eureka	15/85	*	*	*	*	15/85
Humboldt	57/43	*	67/33	55/45	*	61/39
Lander	13/87	*	80/20	*	*	43/57
Lincoln	47/53	14/86		25/75	*	47/53
Lyon	34/66	51/49	86/14	43/57	*	56/44
Mineral	14/86	*	*	*	*	14/86
Nye	63/37	16/84	83/17	10/90	*	65/35
Pershing	20/80	12/88	*	12/88	*	18/82
Placer, CA	40/60	34/66	36/64	42/58	*	39/61
Storey	*	*	83/17	*	*	82/18
Washoe	53/47	73/27	86/14	75/25	78/22	80/20
White Pine	52/48	32/68	81/19	31/69	*	52/48
Overall	55/45	57/43	83/17	57/43	58/42	74/26

* Insufficient data

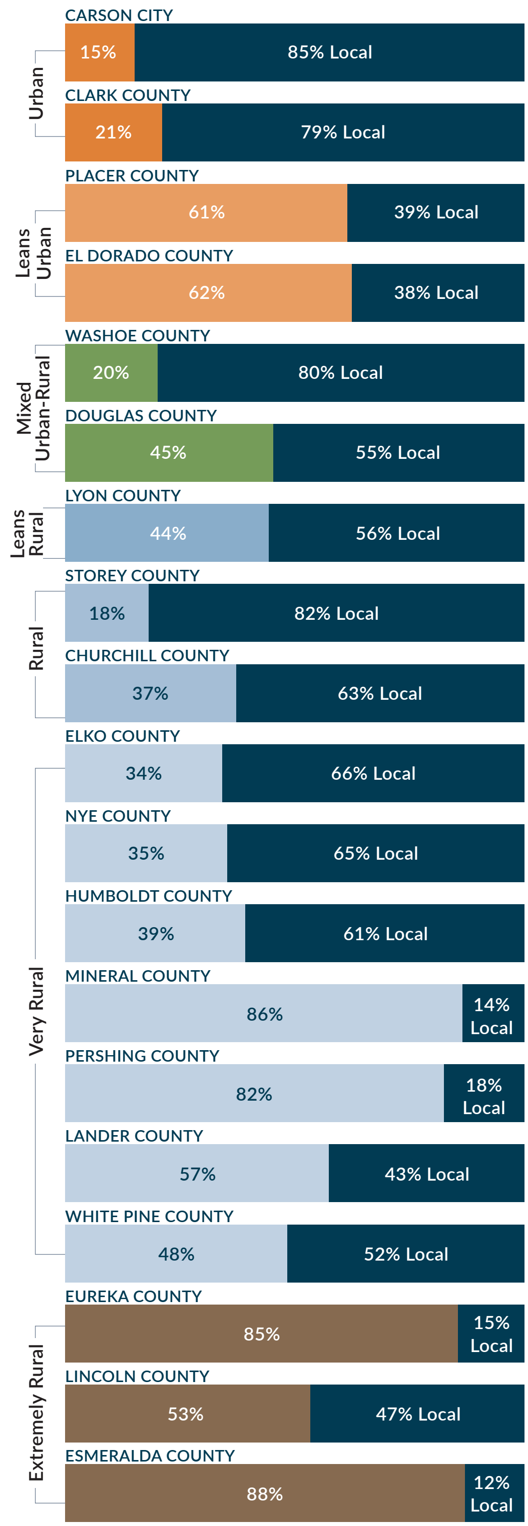
This contrasts with several other counties where the overall outdoor recreation activity, and particularly that on Federal Lands, shows a greater proportion of nonlocal visitors. For instance, Esmeralda County (12% local / 88% nonlocal overall), Eureka County (15% local / 85% nonlocal overall), Mineral County (14% local / 86% nonlocal overall), and Pershing County (18% local / 82% nonlocal overall) exhibit a high share of nonlocal visitation. This reliance on nonlocal visitors is often most pronounced on Federal Lands within these and other counties like Churchill (14% local / 86% nonlocal on Federal Lands) and Elko (22% local / 78% nonlocal on Federal Lands). These patterns should be interpreted with caution in low-population counties, where even modest visitor volumes can significantly skew the local/nonlocal percentages. For example, communities like Austin, NV, with populations under 200, may show a very low share of "local" users despite steady use by regional or statewide visitors.

A consistent observation across most counties is the high percentage of local users at Local Parks (e.g., 88% local in Carson City, 82% in Clark County, 86% in Washoe County). Given that local park systems often accommodate a substantial volume of total recreation visits, particularly in populous areas like Clark County due to the number of facilities and resident users, this high local use percentage confirms their foundational role in day-to-day community recreation and well-being. State Lands and Lakes and Rivers present more varied local/nonlocal distributions, influenced by the specific attractions and accessibility of sites within each county.

It is also important to note that different types of Federal Lands likely serve different user bases. For example, National Park Service (NPS) units tend to attract a larger proportion of nonlocal and out-of-state visitors, while U.S. Forest Service (USFS) and Bureau of Land Management (BLM) lands are often used more heavily by nearby residents and regional users. Disaggregating these federal land types in future analysis could further clarify patterns of recreational use.

The "Overall" row for the entire study area indicates that Local Parks are the most locally utilized land type (83% local), while Federal Lands attract a more balanced mix of visitors (55% local / 45% nonlocal). Across all recreation lands combined, visitation within the study area is predominantly local (74% local / 26% nonlocal).

This segmentation of visitation by origin (local versus nonlocal) is a key input for estimating localized visitor spending, as these two groups typically exhibit different expenditure patterns.



Recreation Activity Participation Patterns

Understanding the specific activities that draw visitors to Nevada's outdoor recreation lands provides essential insight into the diverse ways people engage with the state's natural resources. This activity-level analysis reveals both the popularity of different recreational pursuits and the interconnected nature of outdoor recreation experiences, as most participants engage in multiple complementary activities during their visits.

Table 6. Recreation Activity Participation and Co-Activity Patterns in Nevada

Activity (percent of population engaged in)	Co-activity 1	Co-activity 2	Co-activity 3	Co-activity 4
Tent camping **(7.0%)**	(45.2%)	(40.1%)	(32.2%)	(26.6%)
RVing (including motorhomes and tow-behind trailers/campers) **(2.4%)**	(36.1%)	(31.1%)	(27.9%)	(27.9%)
Hiking **(15.1%)**	(31.7%)	(26.0%)	(20.8%)	(20.0%)
Off roading (4x4s, ATVs, side-by-sides, dirt-bikes, etc.) **(3.3%)**	(32.9%)	(31.8%)	(28.2%)	(27.1%)
Backpacking **(4.1%)**	(57.1%)	(41.9%)	(37.1%)	(33.3%)
Hunting **(2.3%)**	(65.5%)	(53.4%)	(46.6%)	(37.9%)
Running/jogging **(5.2%)**	(53.4%)	(31.3%)	(29.0%)	(23.7%)
Mountain biking **(3.3%)**	(53.0%)	(37.3%)	(31.3%)	(28.9%)
Road biking **(2.4%)**	(50.0%)	(37.1%)	(32.3%)	(27.4%)
Downhill skiing and snowboarding **(1.1%)**	(37.9%)	(34.5%)	(27.6%)	(24.1%)
Cross-country skiing, snowshoeing **(0.6%)**	(37.5%)	(31.2%)	(31.2%)	(31.2%)
Snowmobiling **(0.6%)**	(50.0%)	(43.7%)	(43.7%)	(37.5%)
White water rafting **(1.3%)**	(43.7%)	(34.4%)	(34.4%)	(31.2%)
Kayaking, canoeing, tubing, SUP **(2.0%)**	(46.0%)	(44.0%)	(42.0%)	(34.0%)
Motorized boating (e.g., fishing boat, speed boat, jet skiing) **(2.0%)**	(53.8%)	(32.7%)	(30.8%)	(30.8%)
Photography **(8.2%)**	(48.1%)	(46.6%)	(33.2%)	(27.4%)
Horseback/mule riding **(1.5%)**	(44.7%)	(34.2%)	(28.9%)	(28.9%)
Rock climbing, Bouldering, Mountaineering, Canyoneering **(1.7%)**	(59.5%)	(42.9%)	(40.5%)	(40.5%)
Rock Hounding **(1.3%)**	(58.8%)	(50.0%)	(50.0%)	(50.0%)
Fishing **(7.8%)**	(35.9%)	(35.4%)	(25.8%)	(24.7%)
Water play (swimming, snorkeling, scuba diving, etc.) **(4.9%)**	(35.5%)	(33.9%)	(33.9%)	(32.3%)
Viewing night skies / Astronomy **(6.3%)**	(47.8%)	(45.3%)	(42.9%)	(35.4%)
Wildlife/Bird watching **(5.0%)**	(55.1%)	(44.9%)	(37.8%)	(32.3%)
Scenic driving **(10.6%)**	(45.4%)	(36.1%)	(27.1%)	(18.2%)

Note that some survey respondents appear to have interpreted the question as asking about activities throughout the year rather than during the same trip. For example, skiers reporting camping likely did so on separate occasions.

The survey data reveals significant variation in participation rates across different outdoor recreation activities. Hiking emerges as the most popular single activity, with 15.1% of the population participating, followed by scenic driving (10.6%) and photography (8.2%). Fishing (7.8%) and tent camping (7.0%) round out the top five most popular activities. Mid-tier activities, each attracting between 4% and 6% of the population, include water play activities (4.9%), running and jogging (5.2%), viewing night skies and astronomy (6.3%), and wildlife and bird watching (5.0%). Specialized activities like mountain biking (3.3%), various water sports (approximately 2% each), and winter sports show lower participation rates, often reflecting equipment requirements, seasonal constraints, or specialized skill demands.

The data reveals strong patterns of co-participation, demonstrating that outdoor recreation experiences are typically multi-faceted rather than focused on single activities. [Table 6] shows the most common secondary activities associated with each primary pursuit. Hiking consistently appears as a dominant co-activity across virtually all primary activities, serving as the top co-activity for backpacking (57.1%), rock climbing and related activities (59.5%), rock hounding (58.8%), wildlife and bird watching (55.1%), and hunting (53.4%). This pattern underscores hiking's role as a foundational activity that enables access to Nevada's diverse outdoor recreation opportunities.

Tent camping frequently appears as a major co-activity for overnight or multi-day experiences, while photography emerges as a common complement to scenic and wildlife viewing activities. Scenic driving shows notable co-participation rates across multiple activities, particularly those involving landscape exploration, indicating that vehicle-based access serves as both a standalone activity and an enabling component of other recreation experiences.

Visitor Spending Profiles

Visitor spending is not uniform across the study; it is influenced by visitor type (with "local visitor" defined as living within a 35-mile straight-line distance of the recreation site) and trip characteristics. The type of land being visited — be it a remote national forest, a state park with developed campgrounds, or a neighborhood urban park — can shape spending behavior due to differences in amenities, typical activities, and trip duration.

The spending profiles detailed on the following pages represent average expenditures per visitor per day and are averaged across all visitors within a specific segment (e.g., all local visitors to Federal Lands for that trip type). It is important to understand that not every visitor spends money in every category. For example, in the "Hotels" category, some visitors may stay overnight while others do not. The average shown includes both those who spent money on hotels and those who did not, so the number reflects an overall average for the entire group.

Methodology Snapshot (Spending Profiles)

As detailed in the "Methodology" chapter, these visitor spending profiles were primarily developed based on a synthesis of existing economic literature and a custom Nevada visitor survey to fill where profiles did not exist, with distinct profiles created for local and nonlocal visitors. This section provides examples of how these average per-day spending patterns vary when considering different land management types, helping to appreciate the complexities of outdoor recreation spending.

Federal Lands Visitor Spending Profile

Visitors to federally managed lands, which often encompass vast areas and may be remote, exhibit distinct spending patterns. Nonlocal visitors, in particular, incur higher average per-day costs, largely driven by lodging and services catering to longer stays or more intensive recreational pursuits.

On Federal Lands, nonlocal visitors spend an average of $237.47 per person per day, nearly three times the $81.47 average for local visitors. For nonlocals, key average expenditures include Hotels ($58.63), Restaurants ($35.99), Entertainment/Recreation ($32.77), and Retail ($34.07). The average spending by local visitors on Hotels ($11.94) and Other Lodging ($4.71) suggests that some trips by residents to these federal sites involve overnight stays. Fuel ($20.05) is the largest single average expense category for local visitors to Federal Lands.

Table 7. Spending Profile – Federal Lands Visitors (Average Per Person Per Day)

Expenditure Category	Local Visitors	Nonlocal Visitors
Entertainment/ Recreation	$5.59	$32.77
Fuel	$20.05	$24.87
Government Fees (Federal)	$4.13	$9.40
Groceries	$12.65	$18.90
Hotels	$11.94	$58.63
Other Lodging	$4.71	$11.95
Other Transportation	$2.77	$10.90
Restaurants	$10.28	$35.99
Retail	$9.34	$34.07
Total	$81.47	$237.47

State Lands Visitor Spending Profile

State lands, such as State Parks, often offer a mix of developed facilities and natural experiences. Average per person per day expenditures here are generally lower than on Federal lands for both visitor types.

Nonlocal visitors to State Lands spend an average of $123.58 per person per day, more than double the $54.91 average for locals. Lodging (Hotels averaging $26.95) remains a primary element of nonlocal average spending, followed by Restaurants ($20.76) and Fuel ($20.05). For local visitors, Fuel ($11.88), Retail ($9.43), and Groceries ($9.23) are the top average spending categories. Average government fees for state lands are comparable for both visitor types.

Table 8. Spending Profile – State Park Visitors (Average Per Person Per Day)

Expenditure Category	Local Visitors	Nonlocal Visitors
Entertainment/ Recreation	$3.27	$6.76
Fuel	$11.88	$20.05
Government Fees (State)	$3.38	$3.56
Groceries	$9.23	$13.71
Hotels	$4.25	$26.95
Other Lodging	$3.69	$6.58
Other Transportation	$1.48	$8.84
Restaurants	$8.29	$20.76
Retail	$9.43	$16.38
Total	$54.91	$123.58

Local/Regional Parks Visitor Spending Profile

Visits to local and regional parks are typically characterized by the lowest average per person per day expenditures for both visitor types. This is consistent with their common use for shorter, more frequent recreational outings that less often involve extensive travel or overnight lodging.

Average per person per day spending at Local/Regional Parks is markedly low, with locals averaging $8.91 and nonlocals $27.53. Even with these low totals, "Hotels" represents the largest average expenditure category for nonlocal visitors ($7.82). This suggests that some nonlocal visitors utilizing these parks may be general tourists staying nearby for other reasons, making incidental use of local park facilities. For locals, average spending is minimal across all categories, led by Fuel ($2.10). The very low average expenditures associated with local parks indicate that many visitors, especially local visitors, report $0 in expenditures for most categories, which makes sense given that a trip or walk to the local park doesn't typically require any purchases.

Table 9. Spending Profile – Local/Regional Park Visitors (Average Per Person Per Day)

Expenditure Category	Local Visitors	Nonlocal Visitors
Entertainment/ Recreation	$0.55	$2.46
Fuel	$2.10	$3.64
Government Fees (Local)	$0.43	$0.96
Groceries	$1.38	$2.26
Hotels	$1.13	$7.82
Other Lodging	$0.36	$1.24
Other Transportation	$0.10	$0.84
Restaurants	$1.47	$5.25
Retail	$1.40	$3.05
Total	$8.91	$27.53

Lakes and Rivers Visitor Spending Profile

Recreation at lakes and rivers often supports specialized activities and can attract visitors for trips that generate high average per person per day spending, particularly from nonlocals.

Nonlocal visitors to Lakes and Rivers show the highest average per person per day spending in this analysis, at $246.17. This average is driven by expenditures on Hotels ($60.03), Entertainment/Recreation ($39.35 – the highest for this category across all land types), Restaurants ($38.93), and Retail ($37.22). Local visitors also have a relatively high average per-day spending of $76.11 at these sites, with Fuel ($21.12 – their highest average fuel expenditure) and Groceries ($13.09) as top categories, suggesting more resource-intensive day trips or provisioning for water-based activities.

Table 10. Spending Profile – Lakes and Rivers Visitors (Average Per Person Per Day)

Expenditure Category	Local Visitors	Nonlocal Visitors
Entertainment/ Recreation	$3.89	$39.35
Fuel	$21.12	$24.98
Government Fees (Federal)	$4.51	$9.97
Groceries	$13.09	$17.68
Hotels	$8.80	$60.03
Other Lodging	$3.97	$8.92
Other Transportation	$2.19	$9.09
Restaurants	$9.77	$38.93
Retail	$8.78	$37.22
Total	$76.11	$246.17

NGO Lands Visitor Spending Profile

Lands managed by Non-Governmental Organizations (NGOs) (e.g., The Nature Conservancy) can offer unique attractions or experiences. The spending profiles suggest they attract trips with higher average expenditures for both local and nonlocal visitors, including notable local average spending on lodging.

Visitors to NGO-managed lands show high average per person per day spending for both segments: $238.21 for nonlocals and $88.77 for locals. This local per person per day average is the highest observed for local visitors across all land types. For nonlocals, Hotels ($66.35 – the highest average hotel spend) and Restaurants ($39.29) are major expense categories. A key finding for NGO lands is the local average expenditure on Hotels ($19.74), also the highest for locals in this category, suggesting these sites may encourage overnight trips even for some residents living within a 35-mile radius. Average fee expenditures are also notable for both groups.

Table 11. Spending Profile – NGO Lands Visitors (Average Per Person Per Day)

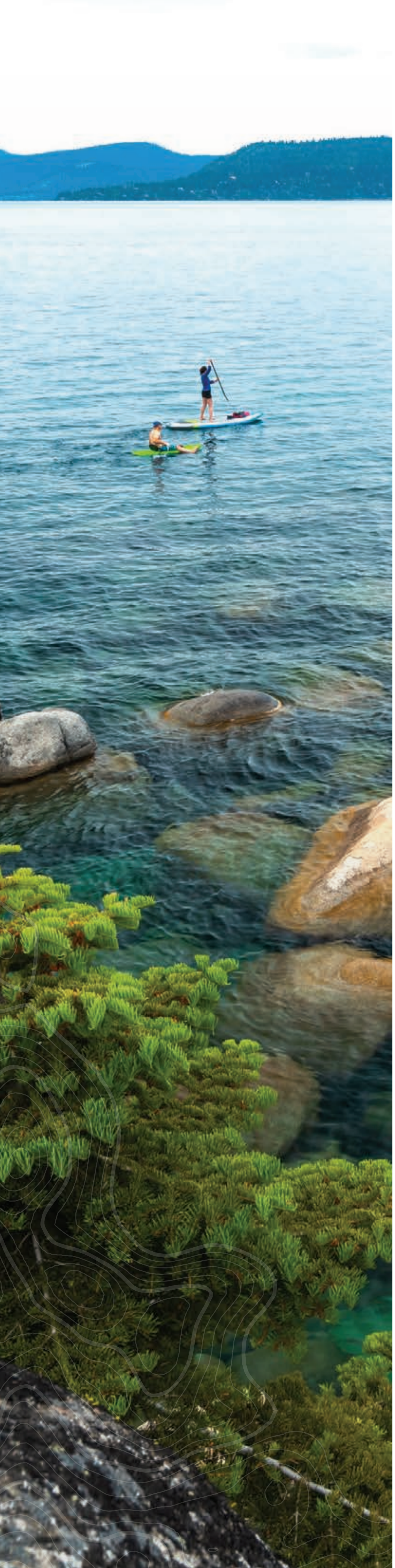
Expenditure Category	Local Visitors	Nonlocal Visitors
Entertainment/ Recreation	$4.40	$12.44
Fuel	$12.69	$30.62
Fees	$8.77	$9.18
Groceries	$12.83	$25.59
Hotels	$19.74	$66.35
Other Lodging	$4.40	$8.03
Other Transportation	$2.29	$12.44
Restaurants	$11.71	$39.29
Retail	$11.94	$34.26
Total	$88.77	$238.21

Significance of Differentiated Spending

These profiles demonstrate that average per-day spending, and thus the direct economic injection per visitor day, varies based on visitor origin and the type of land management associated with a recreation site. Nonlocal visitors consistently spend more per person per day on average than local visitors, with lodging, food, and transportation often being key differentiators in their average expenditure profiles. Among nonlocals, average per person per day spending is highest at Lakes and Rivers ($246.17), NGO Lands ($238.21), and Federal Lands ($237.47). These are considerably higher than averages at State Lands ($123.58) and substantially greater than at Local/Regional Parks ($27.53).

Local visitor average per person per day spending is highest at NGO Lands ($88.77) and Federal Lands ($81.47), sites where the average local spending profiles also include lodging-related expenditures. This suggests certain sites within these categories encourage trips that, for at least a portion of local visitors, involve overnight stays or are otherwise more expenditure-intensive. Understanding these variations is valuable for land managers in planning services and infrastructure, and for communities in developing strategies to cater to different recreator segments and trip types. While this study uses aggregated local and nonlocal spending profiles for its primary economic impact calculations, these more granular spending profiles offer insights for targeted management and economic development.

Image Courtesy of: TRPA



Estimated Direct Visitor Spending by County

The county-level visitation estimates, segmented by local and nonlocal visitors, are combined with the respective average visitor spending profiles (detailed above and in the Methodology chapter) to calculate the total direct spending attributable to outdoor recreation within each Nevada county. This direct spending represents the initial injection of funds into local economies by visitors.

Overview of Direct Visitor Spending by County

Table 11 summarizes the estimated total direct visitor spending from outdoor recreation for CY 2023 in each county, broken down by local visitors, nonlocal visitors, and all visitors combined.

Table 12. Estimated Direct Visitor Spending from Outdoor Recreation by County (CY 2023)

County	Local Visitor Spending (Millions/$)	Nonlocal Visitor Spending (Millions/$)	All Visitor Spending (Millions/$)
Carson City	$56.5	$64.2	$120.7
Churchill	$19.3	$77.1	$96.4
Clark	$1,124.8	$980.1	$2,104.9
Douglas	$99.2	$183.0	$282.1
El Dorado*	$127.4	$383.1	$510.5
Elko	$85.9	$93.1	$178.9
Esmeralda	$2.2	$7.5	$9.6
Eureka	$6.2	$8.9	$15.2
Humboldt	$42.5	$55.9	$98.4
Lander	$16.2	$14.3	$30.5
Lincoln	$30.6	$106.2	$136.8
Lyon	$32.0	$48.1	$80.1
Mineral	$5.6	$30.7	$36.3
Nye	$62.9	$112.6	$175.5
Pershing	$4.8	$16.0	$20.8
Placer*	$42.4	$149.6	$192.0
Storey	$5.3	$9.2	$14.4
Washoe	$430.7	$618.6	$1,049.3
White Pine	$82.1	$228.7	$310.7
Total Spending	$2,276.4	$3,186.8	$5,463.2

* California county within the Lake Tahoe Basin study area.

The direct spending data presented in Table 11 highlights key patterns across the study area. Overall, outdoor recreation visitor spending totals $5.46 billion. Nonlocal visitors account for $3.2 billion (approximately 58.3%) of this total, a larger share compared to local visitors, who contributed $2.3 billion (approximately 41.7%).

Certain counties emerge as primary recipients of this direct spending. Clark County leads with $2.1 billion in total direct spending, followed by Washoe County at $1 billion. El Dorado County (California, Tahoe Basin) also shows substantial spending at $510.5 million.

The composition of spending varies by county:

- In Clark County, local visitor spending ($1.1 billion) is higher than nonlocal spending ($980.1 million), indicating a strong local recreation economy.
- Conversely, Washoe County sees a larger contribution from nonlocal visitors ($618.6 million) than local visitors ($430.7 million).
- Many counties, particularly rural ones or those with major destination assets, show a notable reliance on nonlocal visitor spending. For example, in Lincoln County, nonlocal spending ($106.2 million) is approximately 3.5 times that of local spending ($30.6 million). Similar patterns, where nonlocal spending is significantly higher, are observed in White Pine County (nonlocal $228.7 million vs. local $82.1 million – about 2.8 times higher) and Churchill County (nonlocal $77.1 million vs. local $19.3 million – nearly 4 times higher).
- Smaller counties like Mineral County, where nonlocal spending ($30.7 million) is over five times local spending ($5.6 million), and Esmeralda County (nonlocal $7.5 million vs. local $2.2 million – about 3.4 times higher), also derive a clear majority of their direct outdoor recreation spending from nonlocal visitors.

$2.1
BILLION

Clark County leads in total direct spending

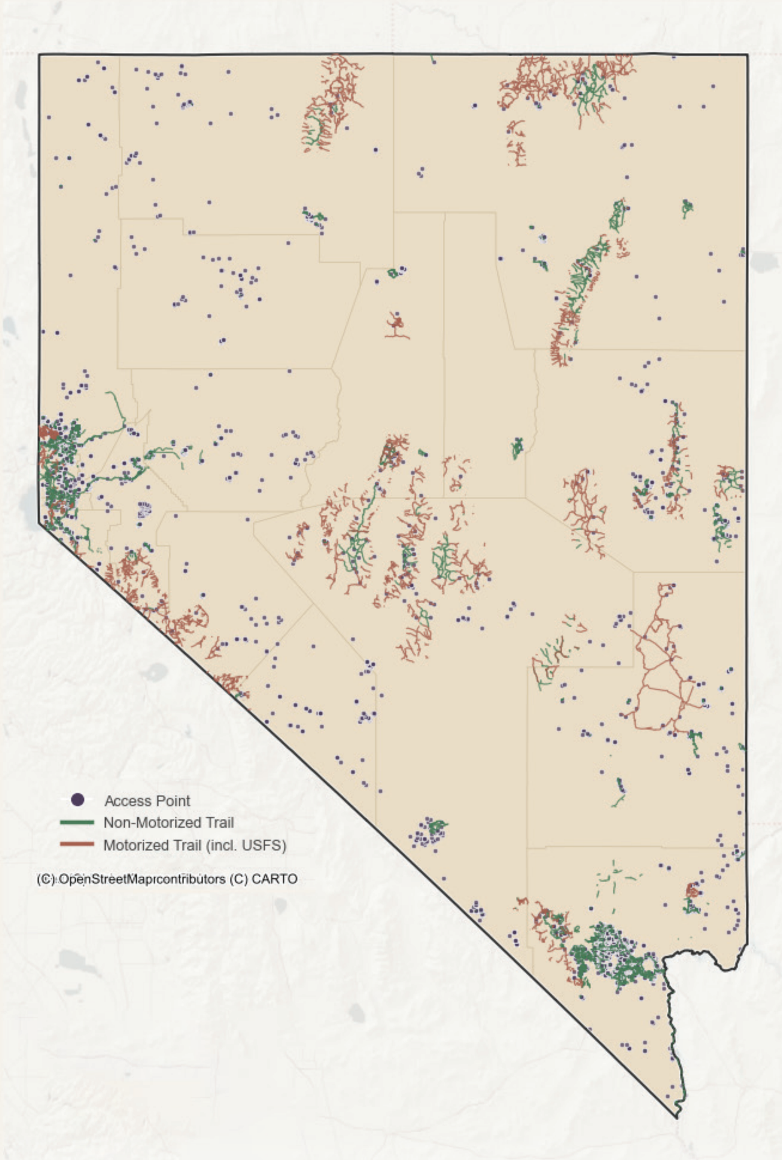
$1
BILLION

in Washoe County spending; 59% from nonlocal visitors

$30.7
MILLION

Mineral County leads in nonlocal spending share (85%)

This county-level direct spending data, distinguishing between local and nonlocal visitor contributions, is informative. It forms the basis for the geographically explicit economic impact modeling, which includes total output, jobs, labor income, and tax revenues. These aspects are discussed in the remainder of this chapter and detailed further in the "Geographic Distribution of Impacts" chapter. These initial expenditures set the stage for understanding the broader economic contributions of outdoor recreation to each county and the state of Nevada as a whole.



Alignment of Recreation Assets and Local Economic Activity

NDOR is currently leading an ongoing effort to collect data on physical features that support public access to outdoor areas as part of the Statewide Comprehensive Outdoor Recreation Plan (SCORP). Although this mapping effort is separate from the current analysis, available data have been used here to describe existing conditions across the state.

As of the most recent update, about 7,400 recreation access points have been identified. These include trailheads, restrooms, parking areas, and other facilities that help people reach public lands. The inventory also includes over 5,400 miles of non-motorized trails and about 670 miles of managed motorized trails. In total, more than 27 million acres of land have been identified as being managed for recreation by federal, state, and local agencies.

The map on this page shows where these access points and trails are located, and the table on the next page provides a summary by county. These numbers reflect the most current information available and may be updated as the mapping effort continues. It is important to note that this dataset is preliminary, is still under review by land managers, and does not yet include assets on tribal lands.

To better understand how recreation infrastructure and economic activity align across Nevada, a Recreation Opportunity Score was developed for each county. This score draws on available data related to access points, trail mileage (motorized and non-motorized), and in-county visitor spending estimates. Counties with lower scores (1–4) tend to have both well-developed infrastructure and relatively strong levels of visitor-related spending. Counties with higher scores (5–10) may have visible recreation infrastructure but lower observed spending, which could suggest opportunities to strengthen the connection between outdoor access and the local economy. The score is intended as a high-level screening tool to help identify areas for further assessment; it is not designed as a performance rating. The table on the next page presents county-level scores alongside selected indicators of infrastructure and spending.

Table 13. County-Level Recreation Infrastructure, Estimated Visitor Spending, and Recreation Opportunity Scores

County	Recreation Access Points	Non-Motorized Trail Miles	Motorized Trail Miles	Output (Millions/$)	Recreation Opportunity Score (1 = High Infrastructure & Spending, 10 = High Opportunity for Growth)
Carson City	188	274	45	$120.70	2.1
Churchill County	125	82	-	$96.38	1
Clark County	3,671	1,631	321	$2,104.95	1.3
Douglas County	262	259	146	$282.13	1
Elko County	202	632	1,089	$178.92	5.3
Esmeralda County	76	8	29	$9.62	6.9
Eureka County	18	71	51	$15.17	4.5
Humboldt County	121	109	439	$98.41	3.3
Lander County	71	188	343	$30.51	10
Lincoln County	179	175	400	$136.77	2.7
Lyon County	299	191	393	$80.08	5.9
Mineral County	48	1	424	$36.32	6.5
Nye County	299	538	1,204	$175.49	5.8
Pershing County	65	1	-	$20.76	1.8
Storey County	30	53	-	$14.44	2.9
Washoe County	1,479	834	250	$1,049.32	1.2
White Pine County	263	354	615	$310.73	1.8

The Recreation Opportunity Score was calculated by dividing estimated in-county spending by a weighted infrastructure index: 40% access points, 30% motorized trails, and 30% non-motorized trails.

Image Courtesy of: Remi Warren

Economic Implications of Activity Patterns

The participation patterns revealed in this analysis have direct implications for local economic impacts, as different activities are associated with varying levels of visitor spending. The figure below categorizes activities by their typical expenditure levels, ranging from low-spending activities like general fitness and walking to high-spending pursuits such as off-highway vehicle travel, hunting, fishing, and various cycling disciplines.

High-spending activities, while representing a smaller share of overall participation, contribute disproportionately to economic impacts due to their equipment-intensive nature and longer trip durations. Activities like hunting, mountain biking, and off-roading require substantial investments in specialized equipment, maintenance, and often guided services or access fees. Winter sports, despite very low participation rates in Nevada, also fall into the high-spending category due to equipment costs, lift tickets, and accommodation requirements.

Medium-spending activities encompass many of the most popular pursuits, including hiking, camping, and photography. These activities strike a balance between accessibility and economic contribution, often involving moderate equipment purchases, fuel costs for travel to recreation sites, and expenditures on food and supplies. The high participation rates in these medium-spending activities, combined with their moderate per-participant expenditure levels, likely generate substantial aggregate economic contributions across Nevada's outdoor recreation economy.

$ Low Spending	$ $ Moderate Spending	$ $ $ High Spending
Gardening	Astronomy, Stargazing	Bicycling, Mountain Biking
General Fitness/Exercise	Camping	Bicycling, Road Cycling
Playfield Sports	Picnicking and Family Gatherings	Bicycling, Gravel Biking
Walking	Rock Climbing, Bouldering, Mountaineering	Horseback Riding
	Hiking	Off-Highway Vehicle Travel (ATV, Dirt Bikes, Side-by-Side)
	Jogging/Running	Off-Highway Vehicle Travel Other (Jeeping, Rock Crawling, Overlanding)
	Outdoor Photography, Painting, Drawing	Winter Skiing, Snowboarding; At a Resort
	Wildlife Viewing	Winter Skiing, Snowboarding; Backcountry
	Boating	Other Winter Snow Sports (Sledding, Snow Mobiling, Snow Shoeing, etc.)
	Paddle Sports (Canoe, Kayak, Paddleboard)	Fishing
	Swimming	Hunting

Hunting's Role in Nevada's Outdoor Economy

Hunting contributes about $380 million each year to Nevada's economy. In 2020, hunters spent $260 million on equipment and $120 million on travel, lodging, and other trip costs. In Elko County, where 78 percent of visitors to public lands are nonlocal, much of the local recreation economy is tied to hunting, fishing, and backcountry use. Hunters also support wildlife conservation through license fees, federal excise taxes, and donations to groups like Nevada Bighorns, the Rocky Mountain Elk Foundation, and Ducks Unlimited. As wildlife populations change over time, agencies and partners are investing in habitat projects to help maintain hunting access and economic activity in rural areas.

Resident Expenditures on Outdoor Recreation Equipment

While this analysis largely focuses on quantifying trip-related expenditures, a complete assessment of the economic impact of outdoor recreation must also account for spending on the durable goods that enable these activities—purchases typically made outside the context of a specific trip. A 2024 statewide survey of Nevada residents, conducted by UNR, measured these purchases of clothing, equipment, and related gear. The survey found that annual expenditures by Nevada residents on outdoor recreation equipment and gear are estimated at $3.7 billion.

This aggregate spending is distributed across several key retail and manufacturing sectors. The table below details the allocation of these expenditures by industry, with sporting goods stores, clothing stores, and motor vehicle dealers capturing the largest shares. In the absence of detailed purchase data, allocation percentages were based on reasoned assumptions informed by the Outdoor Industry Association's estimates of equipment spending by recreation activity type. [18]

Table 14. Estimated Spending on Outdoor Recreation Equipment by Nevada Residents

IMPLAN Industry	Percent	(Millions/$)
Retail - Sporting goods, hobby, musical instrument, and bookstores	38%	$1,413.37
Retail - Clothing and clothing accessories stores	24%	$886.16
Retail - General merchandise stores	3%	$114.43
Wholesale trade	11%	$427.71
Retail - All other miscellaneous store retailers	9%	$328.55
Retail - Motor vehicle and parts dealers	15%	$559.27
Total Spending on Equipment and Gear		$3,729.50

Image Courtesy of: Travel Nevada

Overall Economic Contributions of Outdoor Recreation

The direct spending from both visitor trips and resident outdoor recreation equipment purchases, as detailed in the preceding sections, serves as the initial catalyst for a broader wave of economic activity. These overall contributions comprise three types of effects: Direct effects from initial visitor spending at businesses; Indirect effects from supply chain purchases made by those businesses to support their operations; and Induced effects that result from the spending of wages by employees whose jobs are supported by this direct and indirect activity. This section details these comprehensive economic contributions.

We use the term "economic contributions" rather than "economic impact" in this analysis because it includes spending by both local and nonlocal visitors. While "impact" typically refers to new or outside money entering a region, "contributions" more accurately reflect the total economic activity supported by outdoor recreation, regardless of the visitor's origin.

Total Study Area (Nevada & California Portion of the Tahoe Basin)

Visitors engaging in outdoor recreation and purchasing related equipment across the entire study area generated $9.2 billion in direct spending. This initial spending stimulated a total economic output of $13.7 billion. This activity supported 75,223 jobs, providing $3.8 billion in labor income (including wages, salaries, and benefits) to workers. The sector contributed $8.8 billion to the GDP in the form of value-added. Furthermore, this economic activity generated an estimated $2.3 billion in total tax revenues, benefiting federal, state, and local governments. This tax revenue includes $1.2 billion at the federal level, $700 million in state taxes, and $468 million in combined county and local taxes.

$9.2
BILLION

generated by visitors engaging in outdoor recreation and purchasing related equipment

The overall economic contributions for the Total Study Area are further broken down by effect:

- **Direct Effects:** The $9.2 billion in initial visitor spending directly accounted for an estimated $9.2 billion in economic output, supporting an estimated 57,745 jobs, $2.7 billion in labor income, and $6 billion in GDP.
- **Indirect Effects:** The ripple effect through the supply chain generated an additional estimated $2.5 billion in economic output, supporting an estimated 9,883 jobs, $609 million in labor income, and $1.3 billion in GDP.
- **Induced Effects:** The spending of wages by employees in directly and indirectly supported jobs resulted in a further estimated $2 billion in economic output, supporting an estimated 7,595 jobs, $475 million in labor income, and $1.3 billion in GDP.

Nevada

Within the State of Nevada alone, outdoor recreation is a significant economic force. Visitor spending specific to Nevada reached $8.5 billion. This direct infusion into the state's economy generated a total economic output of $12.7 billion. This economic activity supported 68,385 jobs for Nevadans, underscoring the sector's role as a major employer within the state's broader leisure and hospitality industry. This activity further resulted in $3.4 billion in labor income. The contribution to Nevada's GDP (value-added) was a substantial $8.1 billion.

This economic engine also generated $2.2 billion in total tax revenues within Nevada, comprising $1.1 billion in federal taxes, $657 million in Nevada state taxes, and $432 million in county and other local taxes. These tax contributions help fund essential public services across Nevada, from education and infrastructure to public safety and conservation efforts, directly benefiting residents and communities statewide.

The overall economic contributions within Nevada are further broken down by effect:

- **Direct Effects in Nevada:** Initial visitor spending directly accounted for an estimated $8.5 billion in economic output, supporting an estimated 52,585 jobs, $2.4 billion in labor income, and $5.6 billion in GDP.
- **Indirect Effects in Nevada:** The ripple effect through the supply chain generated an additional estimated $2.3 billion in economic output, supporting an estimated 8,858 jobs, $557 million in labor income, and $1.3 billion in GDP.
- **Induced Effects in Nevada:** The spending of wages by employees in directly and indirectly supported jobs resulted in a further estimated $1.9 billion in economic output, supporting an estimated 6,942 jobs, $433 million in labor income, and $1.25 billion in GDP.

California Portion of Tahoe Basin

For context within the Total Study Area, the California portion of the Tahoe Basin also saw substantial economic activity from outdoor recreation, with visitor spending of $703 million leading to $1 billion in economic output, supporting 6,838 jobs, and generating $162 million in total tax revenues throughout the study area. These figures represent direct effects in the California counties of the Tahoe Basin as well as the secondary effects occurring throughout the entire study area. The estimates also stem from trip-related purchases alone and do not include any expenditures on equipment.

The economic contributions within the California portion of the Tahoe Basin are further broken down by effect:

- **Direct Effects:** The $703 million in direct spending directly supported 5,160 jobs, generated $298 million in labor income, contributed $462 million in GDP (value-added), and resulted in $703 million in initial economic output.
- **Indirect Effects:** Inter-industry activity generated an additional $218 million in economic output, supporting 1,024 jobs, $52 million in labor income, and $92 million in GDP across the study area.
- **Induced Effects:** The re-spending of wages generated a further $143 million in economic output, supported 654 jobs, $43 million in labor income, and $92 million in GDP.

Image Courtesy of: Travel Nevada

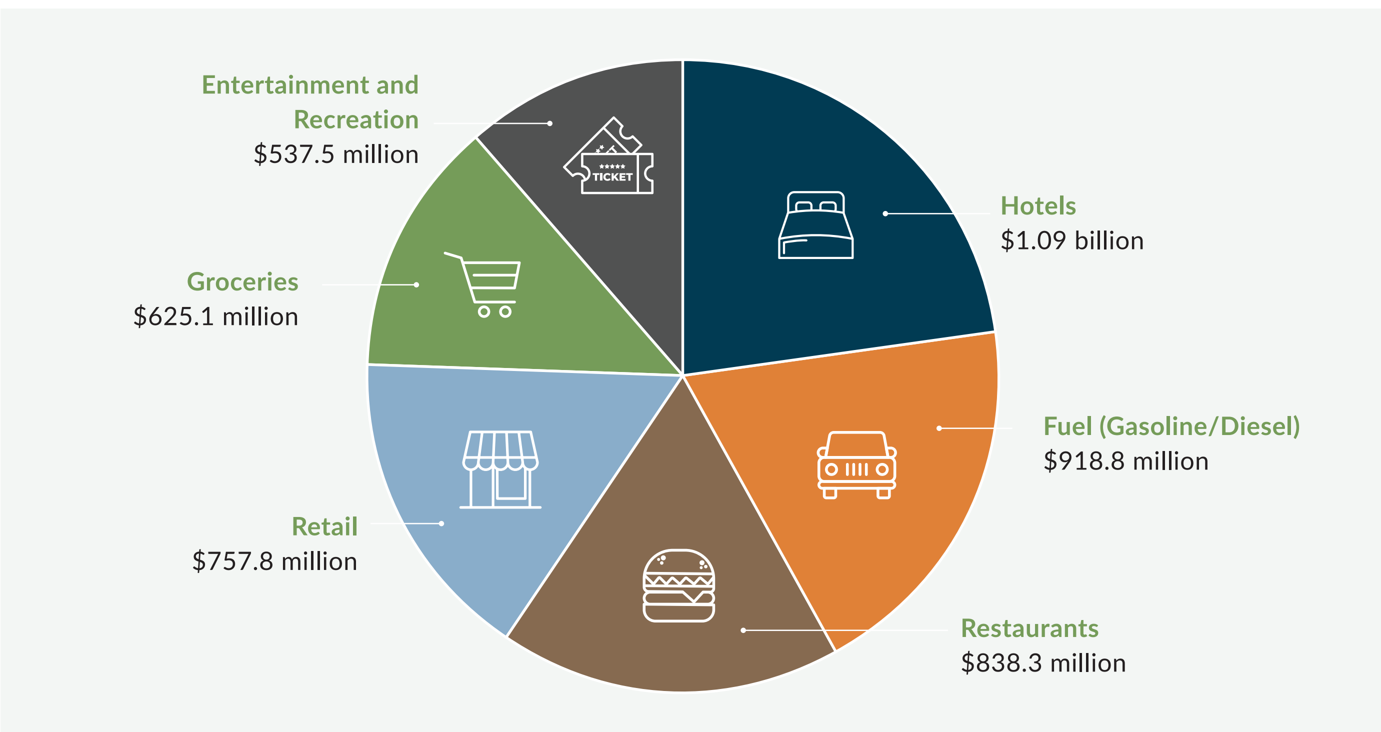
Economic Contributions of Trip-Related Expenditures

Understanding where visitors spend their money reveals the primary channels through which outdoor recreation fuels economic activity. The following breakdown details spending by category across the Total Study Area and its associated impacts:

- **Hotels** emerged as the leading category for visitor spending, with $1.09 billion. This translated into economic output of $1.46 billion and supported approximately 8,369 jobs.
- **Fuel (Gasoline/Diesel)** was the second-highest spending category at $918.8 million, generating $1.08 billion in economic output.
- **Restaurants** captured $838.3 million in visitor spending, making it a major job creator with 8,658 jobs supported and contributing $1.21 billion to economic output.
- **Retail** was another significant category, with $757.8 million in spending. This category was the largest contributor to employment, supporting 11,793 jobs, and generated $1.18 billion in economic output.
- **Groceries** accounted for $625.1 million in spending, supporting approximately 7,040 jobs.
- **Entertainment and Recreation** services saw $537.5 million in spending, supporting 6,773 jobs.

Other notable spending categories included Other Lodging ($269.3 million), Government Fees (Federal, State, and Local combined totaling approximately $239.7 million), and Other Transportation ($202.1 million). Electric Vehicle (EV) Charging, while a smaller portion ($43,371), was also tracked. The breadth of these leading spending categories underscores how outdoor recreation spending permeates and supports a wide array of businesses.

Trip-Related Spending by Industry



Geographic Distribution of Trip-Related Impacts within Nevada

While outdoor recreation generates economic benefits across all of Nevada's diverse counties, this section focuses specifically on trip-related spending, which shows a significant geographic concentration of impacts in the state's primary metropolitan areas. The state's two major population hubs, Clark and Washoe counties, are the primary engines of the outdoor recreation economy in absolute terms. Clark County leads with $3.04 billion in total economic output and 18,912 jobs supported, while Washoe County generates $1.66 billion in economic output and supports 10,170 jobs. Beyond these metropolitan centers, outdoor recreation provides a vital economic foundation for numerous gateway and rural counties, such as Douglas County ($494.5 million in output), White Pine County ($354.3 million in output), and Elko County ($230.4 million in output).

However, the most compelling finding from this geographic analysis emerges when comparing economic distribution to population distribution. While Clark and Washoe counties contain approximately 90% of Nevada's population, they capture approximately 62% of the total economic output generated by outdoor recreation. This indicates that a substantial portion, nearly 40% of the economic output, is realized in the state's more rural counties, which are home to only 10% of the population.

This disproportionate distribution highlights a profound economic function of outdoor recreation: it serves as an effective vehicle for exporting economic activity from urban areas to rural communities. Residents of Las Vegas and Reno, along with nonlocal tourists who start their trips there, travel to Nevada's rural counties to recreate, injecting significant spending into local economies that are actively seeking diversification. The widespread distribution of these benefits demonstrates that investing in recreational infrastructure and access is a key strategy for fostering economic development across the state.

Table 15. Economic Impacts of Outdoor Recreation by County (CY 2023); Trip Related Spending

County	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)
Carson City	$271.5	1,620	$80.7	$141.2
Churchill	$122.0	1,019	$46.4	$69.2
Clark	$3,031.6	18,852	$1,089.2	$1,828.8
Douglas	$493.8	3,147	$175.3	$295.6
El Dorado*	$518.7	3,797	$219.6	$341.2
Elko	$230.3	1,684	$69.7	$128.9
Esmeralda	$10.4	119	$2.4	$4.6
Eureka	$17.5	166	$4.5	$9.0
Humboldt	$123.4	1,016	$37.0	$67.9
Lander	$36.8	311	$11.3	$20.2
Lincoln	$161.7	1,558	$42.4	$80.5
Lyon	$112.1	860	$37.5	$64.7
Mineral	$42.1	391	$13.3	$23.0
Nye	$219.1	1,718	$63.3	$116.9
Pershing	$23.3	228	$7.0	$12.4
Placer*	$196.6	1,428	$82.6	$128.6
Storey	$30.8	206	$10.2	$15.4
Washoe	$1,660.7	10,160	$609.0	$1,030.5
White Pine	$354.0	2,888	$113.0	$200.2
Total Visitor Spending Impact	$7,656.4	51,171	$2,714.4	$4,578.9

* California county within the Lake Tahoe Basin study area.

Image Courtesy of: Travel Nevada

Economic Contributions of Outdoor Recreation Equipment

Nevada households' expenditures of approximately $3.7 billion on outdoor recreation equipment create substantial economic ripple effects throughout the state. Overall, equipment-related spending supports an estimated total of 24,052 jobs statewide, including approximately 15,808 direct retail and wholesale jobs. The remaining 14,889 jobs are created through secondary ripple effects, demonstrating that the economic benefits extend far beyond the initial retail purchase. These impacts support a surprisingly diverse range of professions, creating thousands of jobs in sectors such as real estate, warehousing, and finance, as well as in high-wage professional fields like company management, legal services, and healthcare. This economic activity contributes to a total output of approximately $6.1 billion, generating around $1.1 billion in labor income. Additionally, this spending produces substantial state and local tax revenues, estimated at nearly $613 million in 2023, as well as $560 million in federal taxes.

It is important to distinguish these equipment-related impacts, exclusively driven by Nevada residents, from the broader trip-spending analysis, which includes both resident and out-of-state visitor expenditures. Equipment purchases predominantly occur within Nevada's urban and regional retail hubs, contributing significantly to local economic vitality. Unlike the broader study area, this specific analysis of equipment expenditures focuses solely on the state of Nevada and does not include the California portion of the Lake Tahoe Basin.

Nonmarket Value Assessment –

The Broader Societal Benefits Of Outdoor Recreation

Introduction: Beyond the Marketplace – Understanding Nonmarket Values

The economic contributions of outdoor recreation, detailed in the previous chapter, capture important market-based activity. However, the total value of outdoor recreation to society extends beyond these direct financial transactions. Many significant benefits, such as personal well-being derived from experiences in nature, or improved public health due to physical activity, are not typically bought and sold in markets. These are known as nonmarket values. Understanding and, where possible, quantifying these nonmarket values is important for a comprehensive understanding of outdoor recreation's overall importance. They represent considerable societal benefits that support individual quality of life, community health, and the intrinsic worth of natural landscapes. This chapter focuses on two significant categories of nonmarket values generated by outdoor recreation: Consumer Surplus and Health Benefits.[iv]

iv. Outdoor recreation landscapes also generate a suite of ecosystem services, including water supply, flood and drought risk reduction, carbon storage, and habitat for biodiversity. These services provide critical ecological and economic benefits. While an important component of Nevada's outdoor recreation economy, the assessment of ecosystem services was outside the scope of this analysis.

Image Courtesy of: TRPA

Consumer Surplus: The Added Personal Value of Recreational Experiences

When individuals participate in outdoor recreation, they often receive a level of satisfaction and enjoyment that exceeds what they actually paid in terms of travel costs, entrance fees, or equipment. This "extra value" or net benefit is termed consumer surplus. It represents the difference between what a visitor would have been willing to pay for a recreational experience and the actual costs they incurred. Consumer surplus is a well-established economic concept used to measure the welfare or personal well-being people derive from goods and services, including access to recreational opportunities.

How Far People Travel to Outdoor Recreation Sites

To estimate consumer surplus, it's important to understand how far people typically travel to different types of recreation areas, while excluding extreme outliers that can inflate values on the upper end. The table below shows travel distances at the 50th, 75th, 80th, 85th, 90th, and 95th percentiles for each land management type. Percentiles indicate the distance traveled by a given share of visitors; for example, the 75th percentile means 75 out of 100 visitors traveled that distance or less. These thresholds reflect typical travel patterns and highlight where distances begin to stretch into irregular or infrequent behavior marked by sudden spikes in travel range.

Local parks draw mostly nearby visitors, with a sharp increase in distance after the 83rd percentile (not shown but calculated). Federal and state lands see a broader distribution of travel, with many visitors coming from farther away. NGO-managed sites and water-based recreation areas show similar patterns, with long-distance travel becoming more pronounced around the 85th percentile. Above the 95th percentile, travel distances often surge by hundreds of miles from one percentile to the next—an effect that does not reflect common user behavior and would overstate the value of a visit if included.

Table 16. Travel Distance Percentiles by Land Management Type

Land Management Type	P50 (Median)	P75	P80	P85	P90	P95
Local	5.1 mi	12.5 mi	17.0 mi	110.0 mi	292.5 mi	562.3 mi
State	18.9 mi	113.4 mi	152.3 mi	220.5 mi	371.1 mi	1153.7 mi
Federal	22.2 mi	183.9 mi	246.0 mi	347.8 mi	470.8 mi	1106.0 mi
NGO	16.1 mi	87.7 mi	112.5 mi	165.8 mi	381.6 mi	1422.4 mi
Lakes and Rivers	24.2 mi	100.9 mi	154.5 mi	209.6 mi	344.5 mi	603.2 mi

These travel distributions informed the thresholds used in the consumer surplus model. For each land type, a cutoff was selected just before the steepest percentile-to-percentile jumps in distance—typically between the 80th and 90th percentile. This helped isolate reasonable travel behavior while reducing the influence of edge cases unlikely to reflect typical visitation patterns.

Quantifying Consumer Surplus in the Study Area

This study estimates that outdoor recreation across the Total Study Area generates $8.20 billion annually in consumer surplus. This value is derived from an estimated 159.4 million visits in 2023 to the diverse array of recreation sites included in this analysis. On average, this translates to a consumer surplus of $51.44 per visit across all site types, signifying the personal value recreators place on these experiences.

Consumer Surplus by Land Management Type

The value individuals derive per visit can vary depending on the type of recreational setting and the experiences offered. Table 13 breaks down the estimated consumer surplus by the primary land management entity responsible for the recreation sites.

Table 17. Annual Consumer Surplus from Outdoor Recreation by Land Management Type

Land Management Level	Total Annual Visits	Consumer Surplus Per Visit	Total Annual Consumer Surplus (Millions/$)
Local	122,979,692	$18.62	$2,289
Federal	22,428,581	$185.43	$4,159
State	8,601,823	$129.11	$1,111
Lakes and Rivers	4,907,476	$121.79	$598
NGO	486,952	$87.21	$42
Total	159,404,523	$51.44	$8,199.056

Key insights from this breakdown include:

Federal Lands generate the largest share of total consumer surplus, at nearly $4.16 billion annually. This is driven by a high average consumer surplus of $185.43 per visit, likely reflecting the unique and highly valued recreational opportunities available on these lands.

Local Sites (e.g., city and county parks) contribute $2.29 billion in annual consumer surplus. While the average value per visit is lower ($18.62), the high volume of visits (approximately 123 million annually) underscores the important role these accessible, close-to-home sites play in providing regular well-being benefits.

State Lands (e.g., State Parks) and Lakes and Rivers also provide significant value, with total consumer surpluses of $1.11 billion ($129.11 per visit) and $597.7 million ($121.79 per visit) respectively.

The Significance of Consumer Surplus

The $8.2 billion in annual consumer surplus is a monetary representation of the personal well-being, satisfaction, and enjoyment individuals derive from their outdoor recreation experiences in the study area. It signifies that the perceived value of these opportunities to users far exceeds their direct financial outlays. This figure highlights an important, often overlooked, component of outdoor recreation's contribution to society.

Health Benefits: Outdoor Recreation’s Contribution to Well-being and Healthcare Cost Savings

Participation in many forms of outdoor recreation involves physical activity, a cornerstone of physical and mental health. The health benefits of outdoor recreation, in an economic context, can be understood as the avoided healthcare costs attributable to the increased physical activity levels of individuals who recreate outdoors. A more active population generally experiences lower rates of chronic diseases, leading to reduced demand for medical services.

Quantifying Health Benefits in the Study Area

This study estimates that outdoor recreation in the Total Study Area contributes $2.06 billion in annual health benefits, realized as avoided healthcare costs.

Basis of Valuation (Briefly)

This valuation is derived from established methodologies that connect physical activity to economic savings. As detailed in the “Methodology” chapter, the approach involved estimating the total amount and intensity of physical activity undertaken during outdoor recreation. This activity level was then translated into a monetary value based on published research that quantifies the average per-minute value of physical activity in terms of reduced healthcare expenditures. This method captures the economic dividend of a more active populace facilitated by access to outdoor recreation.

The Significance of Health Benefits

The estimated $2.06 billion in annual health benefits represents a considerable economic advantage for society. These are savings that can accrue to the healthcare system, to businesses through potentially increased productivity and reduced absenteeism, and to individuals through lower personal medical expenses and improved quality of life. This finding underscores the important role that investment in parks, trails, and open spaces plays as a preventative healthcare strategy, contributing to public health objectives and the well-being of those who live in and visit Nevada and the Tahoe Basin.

Image Courtesy of: TRPA

Policy and Investment Implications

Recognizing these nonmarket values has notable implications for policy and investment:

- It provides a more comprehensive justification for public and private investment in creating, maintaining, enhancing, and ensuring access to outdoor recreation facilities, public lands, and natural landscapes for all Nevadans.
- These values should be considered in cost-benefit analyses for projects related to recreation, conservation, and land-use planning, ensuring that decisions reflect the full spectrum of benefits.
- Understanding the scale of consumer surplus and health benefits reinforces the importance of outdoor recreation to the overall quality of life for residents, a factor in attracting and retaining a skilled workforce and fostering vibrant communities.
- It highlights the value of policies that encourage outdoor activity and promote the stewardship of natural resources that underpin these benefits.

The $8.20 billion annual consumer surplus and $2.06 billion annual health benefits quantified for the Total Study Area represent significant, though often underappreciated, contributions of outdoor recreation. These nonmarket values, which are comparable to the market-based economic impacts, paint a more complete picture of the sector's true importance. They demonstrate that investments in Nevada's outdoor recreation infrastructure and natural heritage are not just costs but are investments in public well-being, individual satisfaction, and the long-term health of residents.

Policy Recommendations for Nevada's Outdoor Recreation Economy

This analysis confirms that outdoor recreation is a significant component of Nevada's economy and an important contributor to the quality of life within Nevada and the Lake Tahoe Basin. The data reveal a sector with considerable activity – generating economic output, supporting employment, contributing to public revenues, and generating nonmarket benefits such as improved health, personal well-being, and ecosystem services. This assessment highlights the current importance of outdoor recreation in the state and its potential to continue fostering economic development and enhancing the lives of residents and visitors. Put another way, Nevada's natural landscapes and recreational opportunities are key economic and societal assets, warranting strategic focus and ongoing conservation and stewardship.

However, the outdoor recreation sector faces significant challenges that could threaten its continued development and success. To realize its current potential and ensure its benefits continue, the state and its partners must proactively address existing and emerging challenges.

This chapter presents a framework of policy recommendations that directly address these identified challenges while capitalizing on potential opportunities. These recommendations aim to support an environment where outdoor recreation in Nevada achieves continued growth and long-term sustainability. We offer these recommendations as a starting point to initiate informed discussion and guide collaborative efforts. Specifically, we organize these recommendations around key strategic areas, each designed to advance different aspects of Nevada's outdoor recreation economy.

Summary of Policy Recommendations

Infrastructure Funding & Finance

1. Modernization of Nevada's Core Outdoor Recreation Facilities: Undertaking phased reinvestment in campgrounds, trails, and visitor amenities to enhance accessibility, sustainability, and improve the overall visitor experience.

2. Dedicated Outdoor Recreation Trust Fund for Nevada: Creating a permanent state trust fund for consistent, long-term funding of recreation infrastructure, maintenance, and accessibility.

3. Resilient Recreation Infrastructure Initiative: Investing in infrastructure upgrades to reduce vulnerability to wildfire, heat, drought, and extreme weather events.

Data & Technology Enhancements

4. Statewide Visitor Management and Dispersal Program: Launching an initiative – leveraging modern technology – that uses real-time information and managed access tools to reduce overcrowding and distribute visitation more evenly.

Economic & Workforce Development

5. Building a structured workforce development pipeline through expanded partnerships with secondary and post-secondary education, working closely with universities, workforce agencies, corps programs, and certification programs (e.g., trail design, construction, and maintenance).

6. Outdoor Recreation Business Accelerator Program: Supporting outdoor-focused entrepreneurs, especially in rural areas, through targeted business development, mentorship, and seed funding.

7. Expansion of Concession & Partner-Operated Services in High-Use Areas: Streamlining policies to enhance visitor amenities at busy public lands through well-managed concessions and partnerships.

Community Engagement & Partnerships

8. Community-Led Stewardship & Education Grants Program: Creating a microgrant program to fund local groups for habitat restoration, trail care, and culturally relevant recreation messaging.

Policy Recommendations

1. Modernize Nevada's Core Outdoor Recreation Facilities

Action Category: Infrastructure Modernization

Challenge: Many of Nevada's core outdoor recreation facilities, including campgrounds, trailheads, and visitor centers (e.g., at Red Rock Canyon NCA, Great Basin NP, Spring Mountains NRA/Mount Charleston), are aging, face significant deferred maintenance backlogs, and often lack modern amenities such as reliable broadband connectivity or Electric Vehicle (EV) charging stations. In addition, extreme weather events have disrupted access to key recreation sites; for example, Hurricane Hilary caused extensive damage to trails, roads, and campgrounds on Mount Charleston, with some areas expected to take up to a decade to fully restore. At the same time, many of these sites are experiencing increased visitation and growing demand for improved infrastructure and services.

Recommendation: Modernize outdated campgrounds, trailheads, OHV staging areas, and visitor amenities through phased reinvestment in core infrastructure, prioritizing accessibility, sustainability, and the visitor experience. Aligning state capital improvements with federal programs offers a timely opportunity to address deferred maintenance while improving service delivery. Assisting counties and communities with strategic recreation planning can help define long-term trail connectivity goals and identify each area's recreation niche to support economic vitality.

Expected Impact: Improved visitor experiences and satisfaction, increased capacity to sustainably manage visitation levels, enhanced accessibility for users of all abilities, reduced operational energy and water costs, and a modernized public image for Nevada's recreation offerings.

Examples:

- **Michigan:** Utilized $250 million in federal American Rescue Plan Act relief funds to modernize state park campgrounds, repave roads, upgrade sanitation facilities, and add accessible features, significantly improving safety and addressing extensive maintenance backlogs across its park system.[19]
- **New York (NY Parks 2020 Initiative):** A multi-year, $900 million public/private investment in state parks and the 750-mile Empire State Trail reportedly contributed to a 34% increase in state park visitation by 2020, enhancing recreational opportunities and local economies.[20]

2. Establish a Dedicated Outdoor Recreation Trust Fund for Nevada

Action Category: Sustainable Funding

Challenge: Funding for Nevada's state and local parks, trail systems, conservation efforts, and rural recreation initiatives is often inconsistent, heavily reliant on fluctuating general fund appropriations or competitive grant cycles, leaving many critical areas under-resourced for operations, maintenance, and new development. Recent federal program cuts and uncertainty further exacerbate this challenge.

Opportunity & Recommendation: Create a permanent, diversified state trust fund to provide consistent, long-term funding for outdoor recreation infrastructure and maintenance. Drawing from tourism-related revenue sources and modeled on proven approaches in other states, the fund could reduce fiscal volatility and strengthen grant competitiveness.

Expected Impact: Stable and predictable multi-year funding for identified outdoor recreation and conservation priorities, reduced operational volatility for managing agencies, increased capacity for stewardship and infrastructure planning and development (especially in rural counties), and an enhanced ability to leverage other state, federal, and private funding sources.

Examples:

- **Colorado (Great Outdoors Colorado - GOCO):** Constitutionally dedicated state lottery proceeds have invested over $1.4 billion (as of recent figures) in thousands of projects, protecting over a million acres and enhancing parks, trails, and open spaces without relying on general tax funds.[21]
- **Missouri (Parks, Soils, and Water Sales Tax):** A dedicated one-tenth-of-one-percent sales tax generates approximately $90-100 million annually for state parks and soil/water conservation, allowing all 92 state parks to remain free to enter for residents and visitors.[22]
- **Texas (Proposition 5, 2019):** Constitutionally directs revenue from the existing state sales tax on sporting goods to the Texas Parks and Wildlife Department and the Texas Historical Commission, providing tens of millions annually to address significant state park maintenance backlogs and support local park grants.[23]

3. Resilient Recreation Infrastructure Initiative

Action Category: Infrastructure Resilience and Risk Mitigation

Challenge: Nevada's recreation infrastructure faces growing risks from natural hazards, including more frequent and intense wildfires, prolonged drought, extreme heat, and unpredictable snowpack. These conditions threaten visitor safety, shorten recreation seasons, and increase maintenance burdens (e.g., wildfire-related closures in the Tahoe area, declining lake access at Lake Mead, shortened ski seasons).

Recommendation: Invest in infrastructure upgrades that reduce vulnerability to natural disasters and environmental stressors across Nevada's high-use recreation sites. Design improvements should prioritize durability, user safety, and operational efficiency. Nevada's State Shared Stewardship Agreement—an interagency partnership between state and federal entities—provides a framework to align funding, coordinate planning, and deliver projects more effectively.

Expected Impact: Greater infrastructure durability, lower long-term repair and maintenance costs, enhanced safety and comfort for visitors, and sustained recreation access in the face of environmental risks.

Examples:

- **Houston, TX:** Buffalo Bayou Park was redesigned with elevated trails, water-resistant materials, and "overflow" green spaces to absorb storm surges; it successfully withstood Hurricane Harvey with minimal damage, avoiding an estimated $2 million in damages.[24]
- **Maui, HI:** Post-Lahaina wildfire, the U.S. Department of Transportation accelerated the West Maui Greenway project. The greenway was recognized not only as a recreational corridor, but also as a dual-purpose asset: an emergency evacuation route and a fuel break to reduce wildfire risk.[25]
- **California:** The California State Parks Foundation's "Building Climate Resilient Parks" grants (2022) funded diverse projects, including coastal scrub habitat restoration at Leo Carrillo State Beach to improve ecosystem resilience against climate impacts like erosion and wildfire.[26]

4. Statewide Visitor Management and Dispersal Program

Action Category: Visitor Experience & Safety

Challenge: Iconic and easily accessible recreation areas such as Red Rock Canyon NCA, Valley of Fire State Park, and sites within the Spring Mountains NRA (Mount Charleston) frequently experience overcrowding during peak seasons, which can damage natural and cultural resources, degrade visitor experiences, strain infrastructure, and challenge emergency services.

Opportunity & Recommendation: Launch a statewide initiative that uses real-time information, strategic messaging, and managed access tools to reduce overcrowding at popular sites and distribute visitation more evenly across the state. Technology and targeted outreach can improve visitor experiences while safeguarding natural and cultural resources. Clear public messaging should emphasize improved efficiency, reduced stress, and a higher-quality experience. Phased implementation and alternative access options can support broader adoption.

Expected Impact: More evenly distributed visitation across the state and throughout the year, reduced environmental and social pressure on traditionally popular "hotspots," protection of sensitive ecosystems and cultural resources, improved and more satisfying visitor experiences statewide, and enhanced public safety and emergency response efficiency.

Supporting Better Trail Stewardship through Mapping

Tools like NvTrailFinder.com help federal and state partners monitor, map, and maintain Nevada's designated trail network. This supports efforts to direct recreation to appropriate areas, reduce the impact of social trails, and enhance conservation and stewardship outcomes.

Examples:

- **Utah (Zion National Park & Arches National Park):** Zion's mandatory shuttle system (since 2000) reduced traffic, protected vegetation, and restored tranquility to Zion Canyon. Arches National Park's timed-entry pilot program (2022) significantly reduced peak-hour traffic and congestion while improving visitor experience.[27,28]

- **Hā'ena State Park, HI:** Implemented a daily visitor cap (900 visitors), a mandatory shuttle system, and advanced reservations, dramatically reducing traffic congestion, illegal parking, and environmental damage on the Kalalau Trail and surrounding areas.[29]

- **Colorado (Statewide Destination Stewardship Planning):** The Colorado Tourism Office actively works with regional partnerships to develop and promote responsible travel itineraries and lesser-known destinations to help manage high visitation levels and disperse visitors more broadly.[30]

5. Nevada Outdoor Careers Pathways Program

Action Category: Workforce Development

Challenge: The Nevada outdoor recreation sector experiences seasonal staffing shortages, particularly in remote and rural areas where housing can be scarce and costly. It also faces challenges with volunteer burnout and lacks clearly defined, structured career pipelines to attract and retain youth and diverse populations in outdoor professions.

Opportunity & Recommendation: Build a structured workforce pipeline for outdoor recreation and conservation careers by expanding partnerships with schools, workforce agencies, nonprofits, and corps programs. Investments in training, housing, and youth engagement can address staffing gaps while expanding and professionalizing Nevada's outdoor sector.

Expected Impact: A more robust and skilled talent pipeline for outdoor professions; reduced staffing gaps in public agencies and private businesses; increased opportunities and engagement of local youth (especially from rural and underserved communities) in outdoor careers and stewardship; and enhanced professionalism and service quality within the sector.

Examples:

- **Outdoor Adventure Leadership program:** In partnership with the Nevada Division of Outdoor Recreation, and through the Nevada Shared Stewardship Agreement, the University of Nevada, Reno (UNR) has recently launched two programs: a specialization in Sustainable Outdoor Recreation Management (within Environmental Science) and a minor in Outdoor Adventure and Leadership (ODAL). The former focuses on blending environmental science with business principles for management roles, while the latter provides hands-on leadership and technical skills training, directly addressing the industry's diverse workforce needs.

- **Northwest Arkansas Community College (Trail Technician Program):** Northwest Arkansas Community College offers hands-on certifications in trail building and maintenance, including training in GIS, heavy equipment operation, and sawyer skills. Based in a major mountain biking region, the program was designed to meet local workforce needs and has become a strong example of how community colleges can support trail-related careers.

- **New Hampshire (Outdoor Recreation CTE Pathway):** A high school Career and Technical Education (CTE) program offers outdoor recreation industry certifications in partnership with local land managers and businesses, leading to a reported 30% increase in graduates employed in local outdoor fields within one year.[31]

- **Maryland (Conservation Jobs Corps):** Hires youth for paid conservation work on public lands, providing accredited training, certifications, and support services, with many alumni subsequently entering natural resource careers or further education.[32]

6. Outdoor Recreation Business Accelerator Program

Action Category: Economic Innovation & Support

Challenge: Rural and some urban areas of Nevada often lack a critical mass of local outfitters, guides, gear rental shops, agri-tourism ventures, and other tourism-related entrepreneurs needed to fully capture visitor spending, broaden local economies, and develop a vibrant local recreation ecosystem. Aspiring entrepreneurs may lack access to specialized business training, mentorship, or start-up capital.

Opportunity & Recommendation: Support outdoor-focused entrepreneurs, especially in rural and underserved areas, through targeted business development, mentorship, and seed funding. A dedicated accelerator program can grow Nevada's recreation economy from the ground up by strengthening local ownership and innovation. Nevada already participates in the Generation Green program in partnership with the USFS, which connects youth to conservation and outdoor recreation career pathways; a new business accelerator could expand on this foundation by supporting local entrepreneurship and business development across the sector.

Expected Impact: Stimulation of new outdoor recreation-related businesses, particularly in underserved and rural areas; creation of diverse local jobs and entrepreneurial pathways; enhanced quality and availability of visitor services (guides, rentals, tours, unique experiences); increased local capture of visitor spending; and a more dynamic and resilient entrepreneurial ecosystem within Nevada's outdoor sector.

Examples:

- **North Carolina (Waypoint Accelerator by Mountain BizWorks):** Mountain BizWorks provides early-stage companies with intensive startup curriculum, tailored mentorship from over 80 advisors, and access-to-capital support, all without requiring business equity.[33]
- **New Mexico ("ActivatOR" Outdoor Recreation Business Accelerator, launched 2024):** Selected 15 startups for an intensive 12-week workshop and mentoring program, aiming to boost local outdoor entrepreneurship with a focus on innovation and community impact.[34]
- **West Virginia (Ascend WV Remote Worker Program):** While not solely an accelerator, this program attracts talent and offers entrepreneurial support, indirectly boosting local economies including outdoor recreation businesses, by providing incentives for remote workers (some of whom start businesses) to relocate to recreation-rich areas.[35]

7. Expand Concession & Partner-Operated Services in High-Use Areas

Action Category: Public-Private Partnerships

Challenge: Public land management agencies (federal, state, local) often lack the dedicated staffing, operational budgets, or specialized expertise to provide a full suite of desired visitor amenities (e.g., equipment rentals, food services, educational programs, specialized guided tours, retail operations, modern campground management) at busy state and federal recreation sites.

Opportunity & Recommendation: Streamline policies to expand the use of well-managed concessions, nonprofit partnerships, and commercial use authorizations (CUAs) that enhance visitor amenities at busy public lands. This opportunity complements related recommendations by creating on-the-ground opportunities for local entrepreneurs to operate on public lands, while addressing critical service gaps for land managers. Prioritizing local and sustainable operators can improve services while generating reinvestment revenue for land managers.

Expected Impact: Improved availability and quality of visitor amenities and services at popular recreation sites; increased revenue generation for land management agencies (which can be reinvested in park maintenance and improvements); creation of new small-business ownership and local employment opportunities for Nevadans; and potentially reduced operational burdens on agency staff, allowing them to focus on core resource management duties.

Examples:

- **National Park Service (NPS) Concessions Program:** Nationwide, the NPS partners with over 500 concessioners operating diverse services from lodging and food to retail and guiding, generating significant revenue for the NPS and providing essential visitor services.[36]
- **Hāʻena State Park, HI:** A local community-based nonprofit (Hui Makaʻāinana o Makana) co-manages aspects of the park, including its shuttle system, reservations, and visitor orientation, generating revenue for stewardship and creating dozens of local jobs while controlling access to sensitive areas. [37]
- **Hanging Lake, CO (White River National Forest):** A permit and shuttle system, often operated by a local outfitter or transportation concessionaire, effectively caps daily visitors at 615 (with a fee), virtually eliminating previous issues with illegal parking, overcrowding, and trail erosion.[38]

8. Community-Led Stewardship & Education Grants Program

Action Category: Natural Resource Stewardship & Education

Challenge: High visitation levels and diverse recreational uses can, without proper management and public education, inadvertently threaten Nevada's fragile desert and mountain ecosystems, wildlife habitats, water quality, and sensitive cultural sites. Land management agencies often lack sufficient dedicated capacity to manage all impacts effectively on their own or conduct extensive public outreach.

Opportunity & Recommendation: Create a microgrant program to fund local groups, nonprofits, and volunteers leading stewardship and outdoor education initiatives across Nevada. Small, flexible grants can expand capacity for habitat restoration, trail care, and culturally relevant recreation messaging at low cost to the state. This program could be funded through a variety of mechanisms such as allocating a percentage of revenue from a statewide Outdoor Recreation Trust Fund (proposed above), a voluntary donation checkbox on vehicle registrations or state park pass purchases, or through direct legislative appropriation and public-private partnerships with corporate sponsors.

Expected Impact: Healthier and better-maintained landscapes, trails, and aquatic resources; reduced vandalism, litter, and resource damage from recreational use; a stronger public stewardship ethic and increased responsible recreation behaviors; greater community engagement in conservation and outdoor education; cost-effective augmentation of agency management and outreach efforts; and enhanced protection of Nevada's irreplaceable natural and cultural heritage.

Examples:

- **New York (Park & Trail Partnership Program grants):** Administered by Parks & Trails New York in partnership with State Parks, this program has awarded $9.9 million since 2015, with recipient organizations leveraging over $3.6 million in matching private funds. Grants have supported trail maintenance, habitat restoration, equipment purchases, and the creation of new visitor events and educational programs at state parks and historic sites.[39]

- **National Environmental Education Foundation (NEEF) Grants:** Offers various grants that support local organizations in conducting environmental education and stewardship projects on public lands, often engaging diverse communities and youth (e.g., "Restoration & Resilience" grants).[40]

- **Arizona State Parks & Trails (Heritage Fund Grants):** Funded by Arizona Lottery proceeds, this fund provides grants to local communities and organizations for a variety of purposes, including trail development, outdoor ethics education, and historic preservation projects related to recreation.[41]

Conclusion:

Forging A Prosperous and Sustainable Future for Outdoor Recreation in Nevada

This report has detailed the contributions of outdoor recreation to the State of Nevada and the Lake Tahoe Basin. The analysis provides clear evidence of outdoor recreation as an economic driver, a pillar for community well-being, and an element of the Silver State's identity. The value generated by engagement with Nevada's diverse natural and recreational assets influences both its present economic structure and its future potential. The findings herein confirm that strategic focus on and investment in this sector are warranted for the continued growth and diversification of Nevada's economy and for enhancing its residents' quality of life.

The study reveals the scale of outdoor recreation's economic footprint alongside its nonmarket values. Annually, this sector generates $13.7 billion in economic output, supports 75,223 jobs across various industries, and contributes over $2.3 billion in tax revenues that support public services. These market impacts demonstrate the sector's role as an employer and a catalyst for economic activity in urban centers and rural communities, offering a means for economic diversification. Beyond these direct economic metrics, this report has quantified nonmarket benefits. Nevadans and visitors derive consumer surplus, valued at $8.2 billion, reflecting the value placed on their recreational experiences, which often exceeds their expenditures. Furthermore, the physical and mental health benefits fostered by outdoor activity translate into an estimated $2.06 billion in avoided healthcare costs and improved well-being. When combined, these market and nonmarket contributions, which amount to $24 billion, establish outdoor recreation as a significant element of Nevada's socioeconomic landscape, benefiting personal lives and contributing to the state's economy and well-being.

While the current contributions of outdoor recreation are considerable, maintaining and expanding this vitality requires proactively addressing certain challenges. This report's analysis has identified critical areas requiring attention, including:

- The pressing need to modernize aging core facilities and develop climate-resilient recreation infrastructure capable of withstanding environmental stressors and meeting future demand.
- The complexities of establishing sustainable, long-term funding mechanisms for recreation and conservation, coupled with the necessity for proactive visitor management strategies and enhanced stewardship capacity to protect Nevada's valuable natural and cultural resources amidst growing use.
- The impacts of weather on natural landscapes, water availability, and the length and quality of recreational seasons require adaptive solutions and water mitigation strategies to ensure continued access and safety
- The imperative to cultivate a skilled outdoor workforce, foster local entrepreneurship in the recreation sector—particularly in rural areas—and create defined career pathways to support industry growth.
- The fundamental commitment to ensure access to outdoor experiences and their associated health and well-being benefits for all Nevada communities, by actively dismantling pathways to participation.

These challenges, however, also present significant opportunities for innovation, collaboration, and strategic action. Growing public demand for outdoor experiences, alongside new federal funding avenues and increased societal recognition of recreation's multifaceted benefits, creates an environment conducive to proactive initiatives. By addressing these challenges with focused effort, Nevada can realize additional potential within its outdoor recreation sector, ensuring its benefits are expanded and broadly distributed for generations to come.

Image Courtesy of: Remi Warren

This report, therefore, offers an actionable path forward. The policy recommendations detailed in the preceding chapter provide a framework designed to address the identified challenges and capitalize on emerging opportunities. These recommendations — covering infrastructure, sustainable funding, workforce development, climate adaptation, stewardship, and policy coordination — are based on analysis, informed by successful strategies from other states, and tailored to Nevada's public lands context and regional needs. They advocate for an approach that leverages immediate opportunities, such as federal grants, while concurrently building long-term institutional capacity, exemplified by proposals for dedicated state trust funds and the strengthening of coordinating bodies like the Nevada Division of Outdoor Recreation (NDOR). The strategies encourage innovation within the private sector, promote deeper community engagement through nonprofit partnerships, and underscore the importance of collaboration across all levels of government, with Tribal Nations, and among other interested parties. They also recognize the value of local communities working with agencies like NDOR to develop long-term outdoor recreation strategic plans that align with broader state goals. This framework is offered as a guide to assist policymakers, industry leaders, and community advocates in collaborating towards shared objectives.

The vision for outdoor recreation in Nevada and the Lake Tahoe Basin is one of economic contribution, ecological integrity, and broad public enjoyment. It is a future where this sector is recognized as a key pillar of a resilient and diversified state economy, where Nevadans from all backgrounds and abilities can access and benefit from the state's landscapes, and where Nevada can serve as an example for sustainable stewardship and effective recreation management. Achieving this future requires sustained, collective commitment. It requires leadership from elected officials, strategic investments from public and private entities, action from land managers and businesses, and the engagement of community organizations and individual citizens. The existing collaboration evident in numerous initiatives across the state provides a foundation upon which to build. The path forward involves investing in natural and recreational assets, stewarding resources effectively in the face of evolving environmental conditions, and working intentionally to ensure that the benefits of outdoor recreation — economic, social, and personal — are accessible to residents and visitors alike. The findings and recommendations of this report offer tools and strategic direction for this endeavor. By embracing this collaborative effort with foresight and determination, Nevada can ensure that its outdoor areas not only continue to provide inspiration and rejuvenation but also serve as a source of sustainable economic growth, community health, and a high quality of life for all who call the Silver State home and all who visit. Nevada's vast public lands, more than any other state in the lower 48, provide a uniquely expansive and varied landscape that continues to draw residents and visitors seeking not just opportunity, but quality of life. The future of outdoor recreation in Nevada holds promise, and its continued success represents an investment in the future of Nevada itself.

Appendix A:

Detailed Economic Contribution Tables

This appendix presents the detailed tabular results of the economic contribution analysis, broken down by various geographic and political jurisdictions.

Economic Contributions by County

Table A.1: Economic Contributions of Outdoor Recreation by County

County	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
Carson City, NV	$120.7	$271.5	1,620	$80.7	$141.2	$17.7	$16.4
Churchill County, NV	$96.4	$122.0	1,019	$46.4	$69.2	$4.5	$10.1
Clark County, NV	$2,104.9	$3,031.6	18,852	$1,089.2	$1,828.8	$187.1	$256.5
Douglas County, NV	$282.1	$493.8	3,147	$175.3	$295.6	$34.1	$37.5
El Dorado County, CA	$510.5	$518.7	3,797	$219.6	$341.2	$47.5	$45.7
Elko County, NV	$178.9	$230.3	1,684	$69.7	$128.9	$20.4	$18.1
Esmeralda County, NV	$9.6	$10.4	119	$2.4	$4.6	$1.2	$0.4
Eureka County, NV	$15.2	$17.5	166	$4.5	$9.0	$1.7	$0.6
Humboldt County, NV	$98.4	$123.4	1,016	$37.0	$67.9	$11.1	$9.0
Lander County, NV	$30.5	$36.8	311	$11.3	$20.2	$3.0	$2.0
Lincoln County, NV	$136.8	$161.7	1,558	$42.4	$80.5	$16.8	$8.7
Lyon County, NV	$80.1	$112.1	860	$37.5	$64.7	$10.9	$7.9
Mineral County, NV	$36.3	$42.1	391	$13.3	$23.0	$4.8	$3.0
Nevada County, CA	$2.8	$2.8	20	$1.2	$1.8	$0.2	$0.2
Nye County, NV	$175.5	$219.1	1,718	$63.3	$116.9	$21.1	$16.2
Pershing County, NV	$20.8	$23.3	228	$7.0	$12.4	$2.6	$1.0
Placer County, CA	$192.0	$196.6	1,428	$82.6	$128.6	$17.4	$17.1
Storey County, NV	$14.4	$30.8	206	$10.2	$15.4	$1.8	$1.9
Washoe County, NV	$1,049.3	$1,660.7	10,160	$609.0	$1,030.5	$122.4	$135.9
White Pine County, NV	$310.7	$354.0	2,888	$113.0	$200.2	$29.0	$23.7
Visitor Spending Impacts	**$5,466.0**	**$7,659.2**	**51,191**	**$2,715.5**	**$4,580.7**	**$555.3**	**$612.0**
Equipment Purchases	$3,729.5	$6,933.4	24,052	$1,105.6	$4,182.9	$612.9	$560.4
Total Economic Impact	**$9,195.5**	**$14,592.6**	**75,243**	**$3,821.1**	**$8,763.6**	**$1,168.2**	**$1,172.4**

Appendix A cont.

Nevada Tourism Territory

Table A.2: Economic Contributions of Outdoor Recreation by Nevada Tourism Territory

Tourism Territory	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
Nevada Silver Trails	$358.2	$451.9	3,898	$127.9	$236.2	$44.8	$30.0
Pony Express Territory	$437.6	$539.2	4,377	$179.9	$305.9	$37.9	$38.2
Cowboy Country	$339.2	$431.5	3,336	$133.2	$241.6	$38.2	$32.1
Reno-Tahoe	$1,520.8	$2,168.9	14,044	$802.3	$1,338.2	$169.5	$174.9
Las Vegas	$2,104.9	$3,001.7	18,676	$1,078.8	$1,810.8	$185.7	$253.7
CA Portion of Tahoe Basin	$705.3	$1,066.0	6,859	$393.4	$648.0	$79.2	$83.2
Visitor Spending Impacts	**$5,466.0**	**$7,659.2**	**51,191**	**$2,715.5**	**$4,580.7**	**$555.3**	**$612.0**
Equipment Purchases	$3,729.5	$6,933.4	24,052	$1,105.6	$4,182.9	$612.9	$560.4
Total Economic Impact	**$9,195.5**	**$14,592.6**	**75,243**	**$3,821.1**	**$8,763.6**	**$1,168.2**	**$1,172.4**

U.S. Congressional Districts

Table A.3: Economic Contributions of Outdoor Recreation by U.S. Congressional District

Congressional District	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
1	$724.6	$1,031.1	6,358	$368.8	$620.6	$64.5	$86.6
2	$2,296.4	$3,137.9	21,748	$1,114.7	$1,884.6	$245.5	$245.0
3	$508.5	$725.6	4,516	$260.7	$437.5	$44.4	$61.3
4	$1,231.3	$1,698.7	11,711	$577.9	$989.9	$121.6	$135.8
CA Portion of Tahoe Basin	$705.3	$1,066.0	6,859	$393.4	$648.0	$79.2	$83.2
Visitor Spending Impacts	**$5,466.0**	**$7,659.2**	**51,191**	**$2,715.5**	**$4,580.7**	**$555.3**	**$612.0**
Equipment Purchases	$3,729.5	$6,933.4	24,052	$1,105.6	$4,182.9	$612.9	$560.4
Total Economic Impact	**$9,195.5**	**$14,592.6**	**75,243**	**$3,821.1**	**$8,763.6**	**$1,168.2**	**$1,172.4**

Nevada State Assembly Districts (Lower House)

Table A.4: Economic Contributions of Outdoor Recreation by Nevada State Assembly District (Lower House)

State Assembly District	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
1	$102.0	$145.3	903	$52.1	$87.5	$9.0	$12.2
2	$100.2	$142.6	876	$50.9	$86.0	$9.3	$12.0
3	$103.2	$146.2	892	$51.9	$88.2	$10.5	$12.2
4	$95.0	$135.7	846	$48.8	$81.9	$8.4	$11.5
5	$168.6	$239.8	1,478	$85.6	$144.6	$15.9	$20.1
6	$121.5	$171.9	1,047	$60.9	$103.4	$12.2	$14.2
7	$102.4	$146.2	908	$52.5	$88.2	$9.0	$12.4
8	$95.4	$135.7	839	$48.5	$81.7	$8.8	$11.4
9	$56.7	$80.9	502	$29.0	$48.8	$5.2	$6.8
10	$89.9	$127.7	784	$45.5	$77.1	$8.7	$10.7
11	$62.6	$89.2	553	$32.0	$53.7	$5.5	$7.5
12	$77.5	$110.3	681	$39.4	$66.3	$7.0	$9.3
13	$294.7	$418.0	2,616	$153.4	$258.3	$32.5	$33.9
14	$301.8	$402.2	2,950	$136.1	$236.1	$33.3	$30.0
15	$243.6	$345.5	2,160	$126.9	$213.6	$26.9	$28.1
16	$498.6	$731.6	4,618	$269.0	$445.4	$56.0	$58.1
17	$526.3	$718.0	5,376	$264.4	$433.9	$54.5	$57.4
18	$166.0	$235.0	1,455	$84.3	$141.9	$15.8	$19.6
19	$940.9	$1,191.9	9,313	$372.5	$664.9	$98.0	$86.1
20	$459.1	$658.7	4,166	$238.8	$398.9	$38.7	$56.5
21	$154.7	$221.0	1,372	$79.8	$132.1	$10.9	$18.6
CA Portion of Tahoe Basin	$705.3	$1,066.0	6,859	$393.4	$648.0	$79.2	$83.2
Visitor Spending Impacts	**$5,466.0**	**$7,659.2**	**51,191**	**$2,715.5**	**$4,580.7**	**$555.3**	**$612.0**
Equipment Purchases	$3,729.5	$6,933.4	24,052	$1,105.6	$4,182.9	$612.9	$560.4
Total Economic Impact	**$9,195.5**	**$14,592.6**	**75,243**	**$3,821.1**	**$8,763.6**	**$1,168.2**	**$1,172.4**

Nevada State Senate Districts (Upper House)

Table A.5: Economic Contributions of Outdoor Recreation by Nevada State Senate District (Upper House)

State Senate District	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
1	$45.2	$64.1	394	$22.8	$38.4	$4.2	$5.3
2	$57.2	$81.3	503	$29.1	$49.0	$5.2	$6.8
3	$53.7	$76.1	466	$27.1	$46.0	$5.4	$6.4
4	$80.4	$114.1	705	$40.8	$68.9	$7.6	$9.6
5	$38.2	$54.3	335	$19.4	$32.7	$3.6	$4.6
6	$28.7	$40.9	255	$14.7	$24.7	$2.6	$3.5
7	$66.3	$94.7	591	$34.1	$57.2	$5.8	$8.0
8	$34.8	$49.7	309	$17.8	$29.9	$3.0	$4.2
9	$22.4	$31.9	197	$11.4	$19.2	$2.0	$2.7
10	$49.5	$70.1	427	$24.8	$42.2	$5.0	$5.8
11	$30.3	$43.0	264	$15.3	$26.0	$2.9	$3.6
12	$96.2	$137.2	847	$49.5	$81.5	$6.3	$11.5
13	$85.6	$120.9	750	$43.5	$73.0	$8.2	$10.1
14	$58.5	$83.8	525	$30.3	$50.5	$4.6	$7.1
15	$39.6	$56.1	338	$19.8	$34.1	$4.4	$4.7
16	$50.2	$71.7	445	$25.7	$43.1	$4.2	$6.0
17	$56.8	$81.2	509	$29.3	$49.0	$4.8	$6.9
18	$62.9	$89.7	555	$32.2	$54.1	$5.6	$7.6
19	$337.7	$485.1	3,077	$176.1	$293.7	$28.4	$41.7
20	$39.5	$56.5	353	$20.4	$34.1	$3.3	$4.8
21	$41.8	$59.3	365	$21.1	$35.7	$3.9	$5.0
22	$76.7	$108.8	666	$38.7	$65.5	$7.5	$9.1
23	$121.4	$173.6	1,089	$62.7	$105.2	$10.3	$14.8
24	$155.7	$221.4	1,395	$81.6	$137.4	$17.4	$18.1
25	$117.3	$166.0	1,035	$60.9	$102.4	$12.8	$13.4
26	$346.0	$491.5	3,108	$182.0	$305.7	$37.9	$40.4
27	$126.3	$179.5	1,125	$66.0	$111.2	$14.1	$14.6
28	$69.9	$99.5	612	$35.5	$60.0	$6.4	$8.4
29	$91.9	$131.0	812	$46.9	$79.1	$8.4	$11.1
30	$139.0	$196.6	1,221	$71.8	$120.9	$15.1	$15.8
31	$58.3	$82.6	516	$30.2	$51.0	$6.5	$6.7
32	$243.6	$319.6	2,434	$105.9	$185.1	$26.9	$23.3

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Appendix A cont.

Table A.5: Economic Contributions of Outdoor Recreation by Nevada State Senate District (Upper House)

33	$694.4	$853.0	6,974	$257.8	$468.6	$75.4	$58.3
34	$62.9	$89.1	544	$31.6	$53.5	$6.1	$7.4
35	$27.7	$39.5	244	$14.1	$23.8	$2.5	$3.3
36	$246.5	$338.9	2,338	$114.7	$196.3	$22.5	$27.7
37	$58.5	$82.8	502	$29.2	$49.8	$6.1	$6.9
38	$224.0	$296.4	2,431	$103.0	$165.7	$21.1	$22.6
39	$302.2	$421.6	2,945	$161.4	$268.2	$33.3	$34.9
40	$152.6	$240.1	1,509	$87.0	$139.8	$18.1	$17.8
41	$35.7	$51.0	316	$18.3	$30.7	$3.1	$4.3
42	$34.3	$49.0	305	$17.6	$29.6	$3.2	$4.1
CA Portion of Tahoe Basin	$705.3	$1,066.0	6,859	$393.4	$648.0	$79.2	$83.2
Visitor Spending Impacts	**$5,466.0**	**$7,659.2**	**51,191**	**$2,715.5**	**$4,580.7**	**$555.3**	**$612.0**
Equipment Purchases	$3,729.5	$6,933.4	24,052	$1,105.6	$4,182.9	$612.9	$560.4
Total Economic Impact	**$9,195.5**	**$14,592.6**	**75,243**	**$3,821.1**	**$8,763.6**	**$1,168.2**	**$1,172.4**

The Lake Tahoe Basin

This analysis includes the entire Tahoe Basin, both the Nevada and California portions, treating it as a single recreational entity despite spanning two states. As a result, the results show how visitor spending in the Basin generates economic impacts within the Tahoe Basin (direct effects) as well as across the broader study area (total effects).

Two tables are presented:

- **Direct effects** show the economic activity occurring within the counties that make up the Tahoe Basin.
- **Total effects** reflect the full economic contribution of that spending, including indirect and induced impacts occurring throughout Nevada and the Basin counties.

Table A.6: Economic Contributions of Outdoor Recreation in the Tahoe Basin; Direct Effects

County	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
Carson City, NV	$8.9	$8.90	63	$4.12	$5.92	$0.80	$0.82
Douglas County, NV	$119.6	$119.58	951	$49.80	$80.64	$11.15	$10.68
El Dorado County, CA	$510.5	$510.52	3,755	$216.86	$336.45	$47.06	$45.18
Placer County, CA	$192.0	$191.98	1,405	$81.11	$125.81	$17.18	$16.80
Washoe County, NV	$144.3	$144.25	1,030	$55.84	$90.40	$13.34	$11.89
Tahoe Basin Visitor Spending Impacts	$975.2	$975.25	7,204	$407.73	$639.23	$89.53	$85.37

Appendix A cont.

The Lake Tahoe Basin

Table A.7: Economic Contributions of Outdoor Recreation in the Tahoe Basin; Total Effects

County	Spending (Millions/$)	Output (Millions/$)	Job Years	Labor Income (Millions/$)	GDP (Millions/$)	State and Local Tax (Millions/$)	Federal Tax (Millions/$)
Carson City, NV	$8.9	$98.75	532	$18.14	$41.45	$4.71	$3.96
Churchill County, NV	$0.0	$0.59	2	$0.17	$0.31	$0.03	$0.04
Clark County, NV	$0.0	$0.63	3	$0.19	$0.38	$0.05	$0.05
Douglas County, NV	$119.6	$249.22	1,515	$84.81	$144.58	$16.01	$17.92
El Dorado County, CA	$510.5	$518.67	3,797	$219.57	$341.25	$47.52	$45.73
Elko County, NV	$0.0	$0.53	2	$0.20	$0.32	$0.02	$0.04
Esmeralda County, NV	$0.0	$0.01	0	$0.00	$0.00	$0.00	$0.00
Eureka County, NV	$0.0	$0.31	0	$0.04	$0.16	$0.01	$0.01
Humboldt County, NV	$0.0	$0.55	2	$0.14	$0.31	$0.03	$0.04
Lander County, NV	$0.0	$0.85	1	$0.15	$0.44	$0.05	$0.04
Lyon County, NV	$0.0	$6.57	30	$1.43	$4.10	$0.59	$0.41
Mineral County, NV	$0.0	$0.00	0	$0.00	$0.00	$0.00	$0.00
Nye County, NV	$0.0	$0.45	1	$0.08	$0.22	$0.02	$0.02
Pershing County, NV	$0.0	$0.18	0	$0.06	$0.07	$0.01	$0.01
Placer County, CA	$192.0	$196.63	1,428	$82.62	$128.58	$17.44	$17.11
Storey County, NV	$0.0	$7.91	39	$2.89	$3.72	$0.11	$0.52
Washoe County, NV	$144.3	$325.62	1,853	$116.70	$202.19	$21.12	$26.46
White Pine County, NV	$0.0	$0.05	0	$0.01	$0.02	$0.00	$0.00
Tahoe Basin Visitor Spending Impacts	$975.2	$1,407.5	9,206	$527.2	$868.1	$107.7	$112.4

Appendix B:
About the Nevada Division of Outdoor Recreation (NDOR)

The Nevada Division of Outdoor Recreation (NDOR) was established in 2019 to support the growth of Nevada's outdoor recreation economy while stewarding the natural landscapes that make these opportunities possible. As a division within the Nevada Department of Conservation and Natural Resources, NDOR serves as a statewide resource for outdoor recreation planning, investment, and coordination.

NDOR's mission is to advance and promote sustainable, world-class outdoor recreation opportunities throughout Nevada. This includes helping communities enhance access to public lands, supporting local businesses and tourism, and encouraging responsible recreation practices that preserve the character of Nevada's outdoors for future generations.

Since its founding in 2019, the Nevada Division of Outdoor Recreation has become a national leader in connecting communities to nature, growing the state's outdoor recreation economy (which generates $9.2 billion in direct annual spending and supports over 75,000 jobs), and ensuring that conservation and recreation go hand in hand. From building new trails and funding youth programs to launching Nevada's first Dark Skies certification Program in 2024 and boosting rural tourism, NDOR is delivering results statewide.

Nevada's identity is rooted in its natural landscapes and wide-open spaces. People move to and stay in the state for the chance to work, play, and live in a place where outdoor recreation is part of everyday life. These opportunities contribute to a unique quality of life that defines the Nevada experience.

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