

ECONOMIC VALUATION STUDY FOR PUBLIC LANDS IN THE CENTRAL CATSKILLS

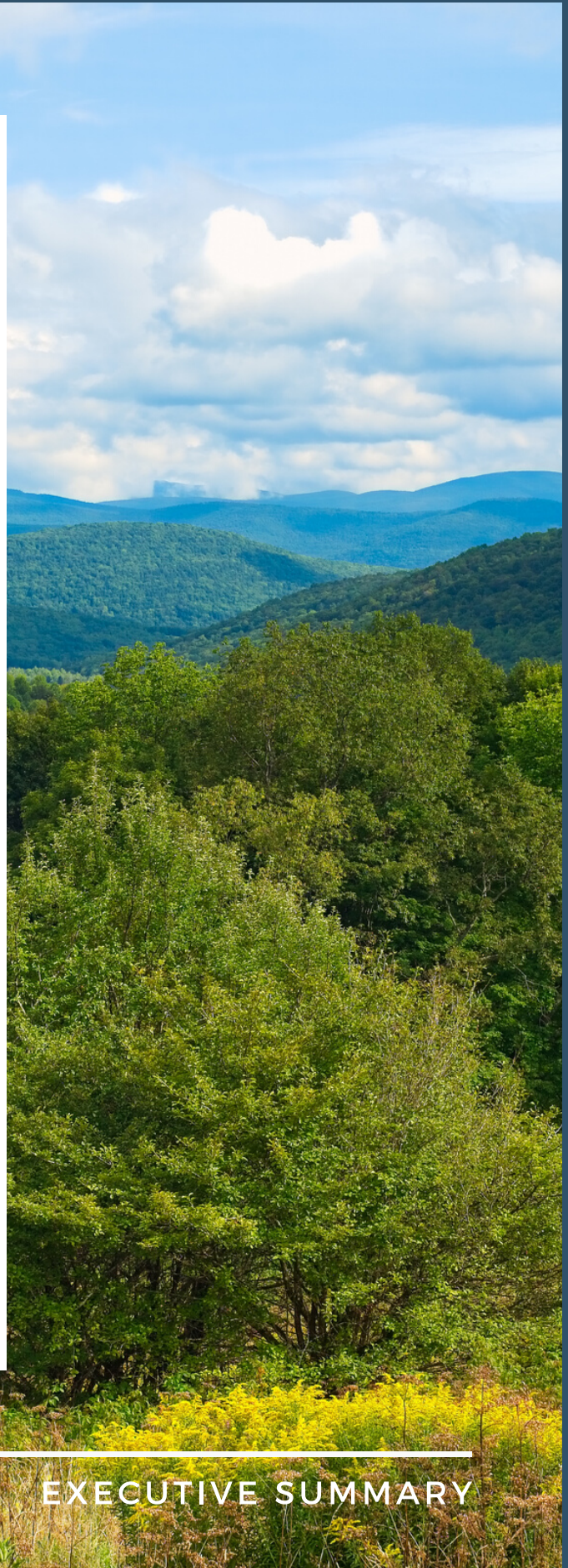
ECONOMIC IMPACT FROM OUTDOOR
RECREATIONAL ACTIVITIES

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ON BEHALF OF

THE CATSKILL CENTER
CATSKILL MOUNTAINKEEPER
THE CATSKILL HERITAGE ALLIANCE
CATSKILL 3500 CLUB
CATSKILL MOUNTAIN CLUB
NEW YORK-NEW JERSEY TRAIL
CONFERENCE
WOODSTOCK LAND CONSERVANCY



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EXECUTIVE SUMMARY

ECONOMIC IMPACT FROM OUTDOOR RECREATIONAL ACTIVITIES FOR THE PUBLIC LANDS OF THE CENTRAL CATSKILLS

A study commissioned by the Catskill Center, Catskill Mountainkeeper, the Catskill Heritage Alliance, the Catskill 3500 Club, the Catskill Mountain Club, the New York-New Jersey Trail Conference, and the Woodstock Land Conservancy was conducted to quantify the economic value for surrounding communities generated by recreational activities in the Central Catskills. This report updates a prior study completed in 2012. Prior to the 2012 study, there had never been a comprehensive analysis done to determine the number of annual outdoor recreational visitors to the Catskills. The following results were generated by this analysis:

- Outdoor recreational activities that rely on public and protected lands attracted a total of **1,765,969 visitors**. These visitors spent an estimated **\$75,473,830** in the local area, had an estimated economic impact on the region's economy of **\$55,082,946** (value added) and supported **846 jobs**.
- All outdoor recreational activities, including both those that rely on public and protected lands and those that rely on private lands, attracted a total of **2,711,937 visitors**. These visitors spent an estimated **\$170,031,580** in the local area, had an estimated economic impact of **\$123,889,686** (value added) on the region's economy and supported **1882 jobs**.

Economic impacts generated by recreational activities in the Catskills were estimated using economic impact models. The 2012 study estimated economic impacts using visitor numbers for 2010 and the Money Generation (MGM) economic impact model. Due to the death of the developer of the MGM model, this model is no longer available for estimating impacts. As such, updating the prior report was done using economic impact estimates developed by employing the Regional Input-Output Modeling System (RIMS). The RIMS model relies on the same data that provided the basis for the MGM model and it is widely used in both the public and private sectors. For the purpose of this study, the Central Catskills Region is defined to include the lands inside the Catskill Park and the Catskill-Delaware Watershed. Economic impacts pertained to Delaware, Greene, Sullivan and Ulster Counties. The updated impacts compared to the results generated in the 2012 study are as follows:

Catskills: Outdoor Recreational Visitors Relying on Public/Protected Lands

	<u>2010</u>	<u>2018</u>
Total Visitors	1,717,927	1,765,969
Total Visitor Spending	\$62,426,000	\$75,473,830
Average Spending/Visitor	\$36.34	\$42.74
Economic Impact (Value Added)	\$46,207,000	\$55,082,946
Jobs Supported	980*	846

**Note: number of jobs supported is estimated at 700 using RIMS multipliers.*

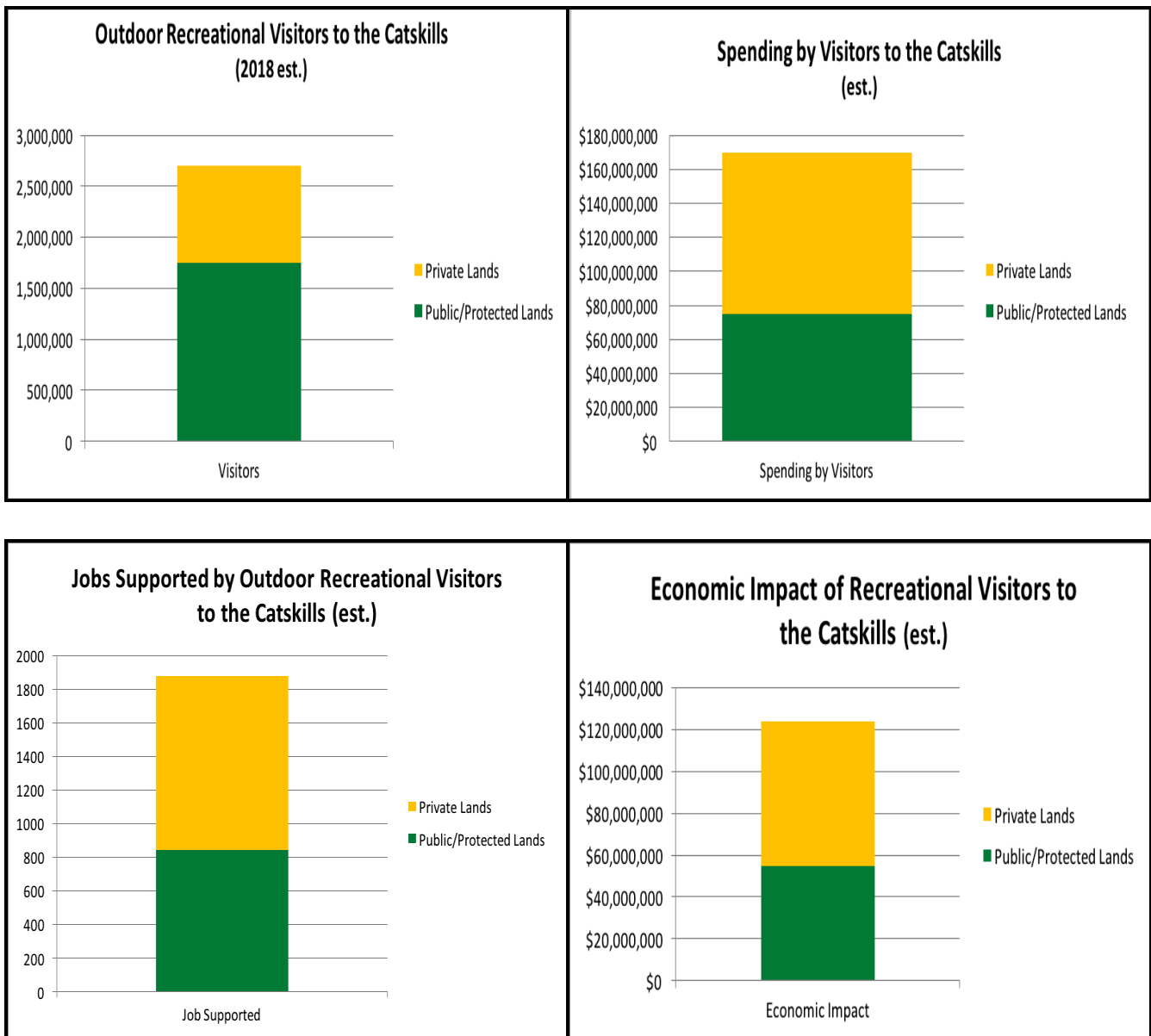
Catskills: All Outdoor Recreational Visitors

	<u>2010</u>	<u>2018</u>
Total Visitors	2,496,753	2,711,937
Total Visitor Spending	\$148,534,000	\$170,031,580
Average Spending/Visitor	\$59.49	\$62.70
Economic Impact (Value Added)	\$114,768,000	\$123,889,686
Jobs Supported	2413*	1882

**Note: number of jobs supported is estimated at 1643 using RIMS multipliers.*

Overall, the number of visitors to the Catskills showed a modest increase from the previous study results, with the increased number of visitors to the New York State Department of Environmental Conservation (DEC) trails and ski areas offsetting declines in hunters, anglers and campers. As a result, the economic impact of visitors also showed an increase. The estimate of the number of jobs supported showed a decline, but this was due to the use of the RIMS model, which has been shown to generate more conservative estimates of jobs supported, compared to the MGM model previously used.

IMPACT OF OUTDOOR RECREATIONAL VISITORS ON THE CATSKILLS



Prepared by Brian Zweig of Business Opportunities Management Consulting, December 2019.