

The
2022 Economic
Contributions of the
Outfitters and Guides
Industry on *IDAHO*

August 2023

Economic Contributions Idaho Outfitters and Guides Factsheet¹

- **The U.S. travel, tourism, and outdoor recreation sectors are vibrant, emerging, and important U.S. industries nationally, at the state level, and for local economies.**
- **Idaho Outfitter and Guides are a key component of the tourism and recreation industries in the state and have significant economic contributions on the economy.**

- **U.S. (2021)**
 - U.S. Travel and Tourism Direct Contributions: \$502.2 billion in Gross Domestic Product (GDP) and 4,807,000 direct jobs
 - U.S. Outdoor Recreation Direct Contributions: \$454.0 billion in Gross Domestic Product (GDP) 4,542,903 direct jobs

- **Idaho (2021)**
 - Idaho Travel and Tourism Direct Contributions: Tourism was the state's 3rd largest industry directly employing 49,800 jobs and generating \$4.8 billion in direct spending or \$13.1 million per day and supporting \$376 million in state and local tax revenues.
 - Idaho Outdoor Recreation Direct Contributions: \$2.78 billion in Gross State Product (GSP) and 32,478 direct jobs

- **Idaho Outfitters and Guides Base Case (2022)**
 - 450 Idaho outfitters and guides
 - 586,957 total client days
 - 749 number of clients per outfitter
 - **\$772 Expenditures per client day**
 - \$355 Client
 - \$417 Outfitter and guide

- **Economic Contributions Outfitters and Guides (including the multiplier effects:**
 - **Total output (sales) contributions are \$592.7 million.**
 - Gross state product is \$416.8 million.
 - Total compensation (payroll) is \$166.4 million.
 - **Total jobs created are 4,925.**
 - **Total state and local taxes - \$50.2 million.**
 - Property taxes - \$16.9 million,
 - State sales/excise taxes - \$23.7 million,
 - Income taxes - \$6.8 million

¹ This study was sponsored by Guidetime and conducted by Jimmy Bulgar et.al. and Steven Peterson Advisor, Vandal Impact Center. Contact information: stevenp@uidaho.edu.

The 2022 Economic Contributions of the Outfitters and Guides Industry on IDAHO

Sponsored by Guidetime

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August 10, 2023

Executive Summary

Introduction

This study is a contribution assessment of the Idaho Outfitters and Guides Industry for 2022. The study was sponsored by Guidetime.² The student coauthors are contributors from the Vandal Impact Center in the College of Business and Economics at the University of Idaho. The faculty advisor is Steven Peterson³, Clinical Associate Professor, Economics. Student contributors include Jimmy Bulger, Reilly Dahlquist, Mason Drum, and Cody Stattner. The study was begun in the late fall 2021 and completed August 2023.

Travel and Tourism Industry (U.S. and Idaho)

U.S. Travel, Tourism, and Outdoor Recreation

The U.S. travel, tourism, and outdoor recreation sectors are vibrant, emerging, and important U.S. industries nationally, at the state level, and for local economies. They are a significant component of the overall economy as measured by the Bureau of Economic Analysis (BEA) Travel and Tourism Accounts⁴ and the BEA Outdoor Recreation Accounts.

U.S. Travel and Tourism Direct Contributions

- In 2021 the industry created:
 - \$502.2 billion in Gross Domestic Product (GDP)
 - 4,807,000 direct jobs
 - \$265.3 billion in total compensation
 - Averaging \$55,180 per job

U.S. Outdoor Recreation Direct Contributions

- In 2021 the industry created:
 - \$454.0 billion in Gross Domestic Product (GDP)
 - 4,542,903 direct jobs
 - \$224.3 billion in total compensation
 - Averaging \$49,366 per job

U.S. Outdoor Direct Outfitter and Guides Industry Direct Contributions

Direct outfitter and guide company GDP expenditures (i.e., from company expenditures):

- \$33.0 billion in 2021 (*Outdoor Recreation Satellite Accounting Framework*).
 - \$19.2 billion *-Air and Land Guided Tours/Outfitted Travel*
 - \$13.8 billion *Water Guided Tours/Outfitted Travel including Boating/Fishing Charters*

²² [Book a Guided Trip | Fishing, White Water, Scenic, And More | GuideTime \(guidetimebooking.com\)](#)

³ The results and conclusions of this study are those of the authors, Steven Peterson etc., and *do not* necessarily represent any other individuals, organizations, or the University of Idaho.

⁴ [Tourism Satellite Accounts Data Sheets | U.S. Bureau of Economic Analysis \(BEA\)](#)

Idaho Travel and Tourism Direct Contributions

- Tourism was the state's 3rd largest industry in 2021, only ranking behind agriculture and technology, according to the Idaho Department of Commerce.
- *Tourism* directly employed 49,800 jobs and generated \$4.8 billion in direct spending or \$13.1 million per day.
- *Tourism* supported \$376 million in state and local tax revenues.
- *Tourism* brings new monies to Idaho from nonresident visitor dollars. Approximately 84% of tourism-related expenditures is from nonresidents.ⁱ

Idaho's Outdoor Recreation State Rankings

- Idaho's outdoor recreation industry ranked 9th in the nation as a percentage of GDP (2.9%), and 11th in the nation in terms of jobs (3.9%). The U.S. outdoor recreation industry represented 2.9% of GDP, in comparison (BEA Outdoor Recreation Satellite Accounts).

Idaho Outdoor Recreation Direct Contributions

- In 2021 the industry created:
 - \$2.78 billion in Gross State Product (GSP)
 - 32,478 direct jobs
 - \$1.37 billion in total compensation
 - Averaging \$42,268 per job
- *Conventional Outdoor Recreation* contributed \$1.21 billion in Idaho's GSP in 2021. The largest category is RVing (23%), followed by multiuse apparel and accessories (20%), hunting (19%), and boating and fishing (14%).
- *Other Outdoor Recreation*, which totals \$323.3 million in 2021. The largest category was game areas including golf and tennis (23%), Other⁵ (19%), and productive activities including gardening (17%).
- *Supporting Outdoor Recreation* includes mostly tourist-visitor support such as accommodations, eating and drinking, retail trade, and government. *Travel and Tourism* was the largest category at 67% and local trips were second at 20% of the total.

Idaho Outfitters and Guides Results

Study Approach and Methodology

Guidetime provided primary and secondary data throughout the study.ⁱⁱ An Idaho State IMPLAN input-output model was created to fit the needs of the analysis. Various databases were employed including IMPLAN (Impact Analysis for Planning), Lightcast (formally Emsi), and databases provided by the Bureau of Economic Analysis (BEA).

⁵ BEA definition of *Other Outdoor Recreation Activities*: Agritourism, augmented reality games, beachgoing, disc golf, hot springs soaking, kite flying, model airplane/rocket/UAV, paintball, photography, stargazing/astronomy, swimming, therapeutic programs,

Outfitter Survey

Guidetime hosted a survey of outfitters and guides from March 2022 to May 2022 on the *Survey Monkey* online platform.

- Total visitors, visitor days, and gross receipts were based on a sample of 23 respondents. Total reporting gross receipts were \$12,298,250 which average \$534,707 per outfitter. There was a considerable range in revenues per outfitter, from a low of \$5,000 to a high of \$3,000,000.
- Total annual clients for the respondents were 17,219, averaging 749 clients per outfitter. The largest had 7,500 clients and the smallest had 20 clients. There was a total of 29,498 (about 30,000) client days, averaging 1,283 per outfitter. The highest outfitter had 9,060 client days and the smallest was 20.
- Estimated Client and Outfitter Expenditures
 - Total average *per person* daily spending (i.e., per client day) was assumed to be \$355 in 2023 dollars (not including guide and outfitter expenditures).
 - Total outfitters and guides revenues/expenditures were \$417 per client day.
 - Total spending (expenditures) per client day from both client and outfitter was \$772.
 - Total expenditures for 30,000 client days from client and outfitters expenditures were \$23,155,549.

The Idaho Outfitters and Guide Industry creates up to \$600 million in output, supports nearly 5,000 jobs, and contributes \$50 million in state and local taxes annually.

Economic Contributions (Including the Multiplier Effects)

- *Scenario from 23 Surveyed Outfitters and Guides:* The total sales contributions are \$30.3 million. Gross state product is \$21.3 million. Total compensation is \$8.5 million. Total jobs created are 252. Finally, property taxes are \$861,171, state sales/excise taxes are \$1,212,528, income taxes \$348,342, and total taxes are \$2,564,667.
- *Scenario from 275 Outfitters and Guides:* The total sales contributions are \$362.2 million. Gross state product is \$254.7 million. Total compensation is \$101.7 million. Total jobs created are 3,009. Finally, property taxes are \$10.3 million, state sales/excise taxes are \$14.5 million, income taxes \$4.2 million, and total taxes are \$30.7 million.
- *Scenario from 450 Outfitters and Guides:* The total sales contributions are \$592.7 million. Gross state product is \$416.8 million. Total compensation is \$166.4 million. Total jobs created are 4,925. Finally, property taxes are \$16.9 million, state sales/excise taxes are \$23.7 million, income taxes \$6.8 million, and total taxes are \$50.2 million.

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Main Report

Introduction

This study is a contribution assessment of the Idaho Outfitters and Guides Industry for the year 2022. The study was sponsored by Guidetime.⁶ The student coauthors are contributors from the Vandal Impact Center in the College of Business and Economics at the University of Idaho. The faculty advisor is Steven Peterson⁷, Clinical Associate Professor, Economics. Student contributors include Jimmy Bulger, Reilly Dahlquist, Mason Drum, and Cody Stattner. The study was begun in the late fall 2021 and completed August 2023.

Overview of the Outfitters and Guides Industry

Idaho has vast rural and pristine geographic regions with abundant wildlife. The state also has thousands of miles of rivers with great outdoor water-related recreational opportunities. These factors have created a thriving outfitters and guides industry. There are at least 418 outfitters⁸ based out of the state of Idaho today, guiding tens of thousands of residents and out of state visitors each year in a host of different outdoor activities.

Idaho has become one of the fastest growing states in the country, many of which are drawn to Idaho's great outdoors. The state is also a popular vacation destination for many outdoor enthusiasts throughout the U.S. and worldwide.

The economic contributions of the outfitters and guides industry in Idaho have not been fully evaluated. The last full report was (reportedly) was a study conducted in the late 1990s. Recently, the Idaho Outfitters and Guide Association (IOGA) has been doing research on the economic contributions of the industry with a broad detailed survey that will be released late 2023 or early 2024. This study is intended to complement IOGA's research. Early indicators are that their results will be larger than the estimates of this study.

Early outfitting and guiding in Idaho revolved heavily around hunting, primarily big game hunting, and dates as far back as the 19th centuryⁱⁱⁱ. Idaho's first game laws in Idaho were established in 1864, twenty-six years before Idaho was admitted to the Union as a state.^{iv} Throughout the years the outfitters and guiding industry has evolved into a major part of Idaho's broader tourism industry, contributing millions of dollars annually from residents and

⁶⁶ [Book a Guided Trip | Fishing, White Water, Scenic, And More | GuideTime \(guidetimebooking.com\)](#)

⁷ The results and conclusions of this study are those of Steven Peterson etc. and do not necessarily represent any other individuals or organizations or the University of Idaho.

⁸ The effective number of guides and outfitters (or equivalent operations) could be higher given the limited available data, state licensing requirements, and restrictions.

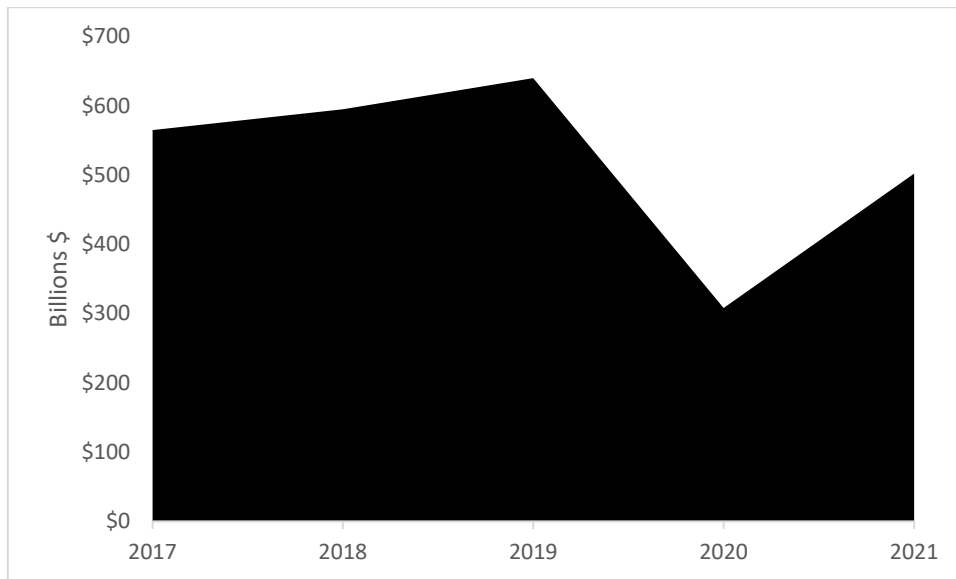
nonresident visitors. Whitewater rafting and fishing now rival big game hunting in popularity for guided tours. According to raftecho.com the first commercial whitewater trips took place on the Salmon River in June of 1940.^v

Overview of the U.S. Tourism Industry

In 2021 (*the most recent year available*), the U.S. travel and tourism industry generated about \$502 billion dollars in GDP (Figure 1). During the COVID-19 pandemic year of 2020, tourism-related GDP fell by 52% from 2019. The industry is rebounding sharply and will likely fully *recover* by 2023. These estimates are generated from the BEA U.S. Travel and Tourism Satellite Accounts and while they make an excellent contribution, they may understate some of the tourism revenues and expenditures.^{vi} More research is needed in the future.

Total tourism and travel related jobs were 4.81 million in 2021, down from 6.4 million jobs in 2019 before the pandemic.

Figure 1: U.S. Travel and Tourism (Measured by GDP) 2017 to 2021



Summary: Travel and Tourism Direct Contributions

- In 2021 the industry created:
 - \$502.2 billion in Gross Domestic Product (GDP)
 - 4,807,000 direct jobs
 - \$265.3 billion in total compensation
 - Averaging \$55,180 per job

Overview of the U.S. Outdoor Recreation Industry

Outdoor Recreation Industry the makes a substantial contribution to the U.S. economy. The Bureau of Economic Analysis (BEA) measures these contributions through its *Outdoor Recreation Satellite Accounting* Framework.^{vii} While they make an excellent contribution, they may also understate some of the outdoor recreation revenues and expenditures. The outdoor recreation accounts are mostly (but probably not entirely) a subset of the travel and tourism accounts. More research is needed in the future.

The total U.S. industry supports 4.54 million direct jobs, equivalent to more than 2.3 times the population of Idaho (1.939 million).

Summary: Outdoor Recreation Direct Contributions

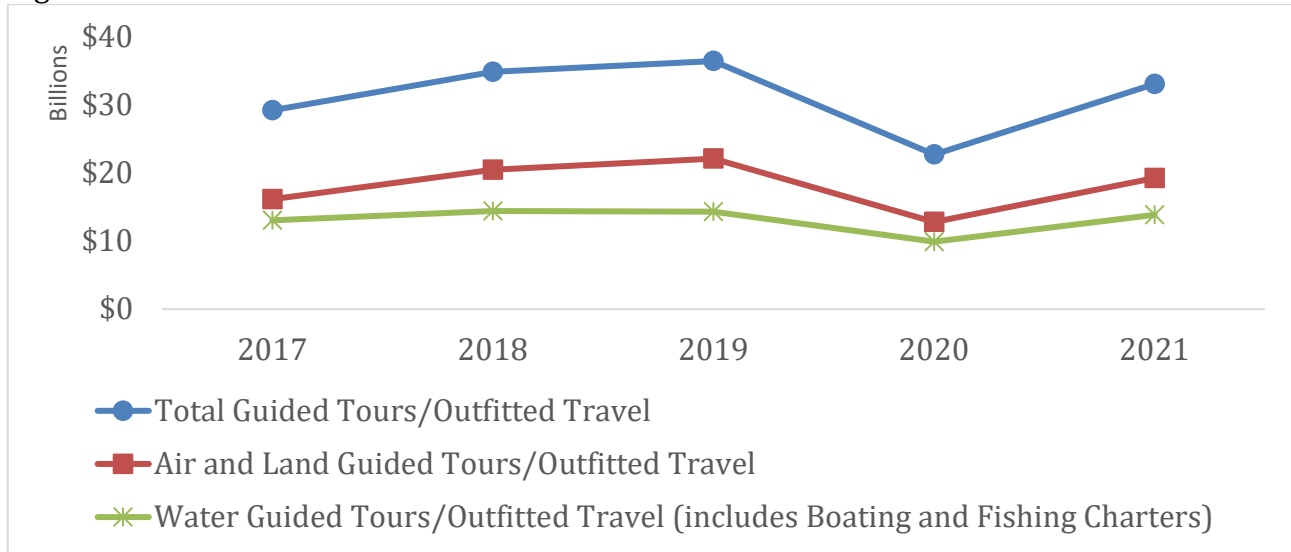
- In 2021 the industry created:
 - \$454.0 billion in Gross Domestic Product (GDP)
 - 4,542,903 direct jobs
 - \$224.3 billion in total compensation
 - Averaging \$49,366 per job

Overview of the U.S. Outfitters and Guide Industry

Direct outfitter and guide company-related expenditures that contributed to GDP was \$33.0 billion in 2021 of which \$19.2 billion was from *air and land guided tours/outfitted travel*, and \$13.8 billion was from *Water Guided Tours/Outfitted Travel including Boating and Fishing Charters (Outdoor Recreation Satellite Accounting Framework)*.

These represent a narrow (i.e., very conservative) contribution of the U.S. outfitters and guides and does not include client-related spending (Figure 2). COVID-19 pandemic created a substantial reduction in recreation and travel in 2020, and negatively affected tourism across the U.S. The industry will likely be fully recovered by 2023.

Figure 2: Direct Contribution of U.S. Outfitters and Guides to GDP



Idaho Tourism and Outdoor Recreation Industry

Overview of Idaho Tourism

According to the Idaho Department of Commerce, tourism was the state's 3rd largest industry in 2021, only ranking behind agriculture and technology. Tourism directly employed 49,800 jobs and generated \$4.8 billion in direct spending or \$13.1 million per day. The industry created \$376 million in state and local tax revenues. Approximately 84% of tourism-related expenditures is from nonresidents.^{viii}

Idaho Outdoor Recreation Industry

According to the BEA, Idaho's outdoor recreation industry creates \$2.78 billion in gross state product (GSP), \$1.37 billion in total compensation, and 32,478 direct jobs at \$42,268 per job. The BEA classifies outdoor recreation into three categories: 1) *Conventional Outdoor Recreation* which includes bicycling, boating, hiking, snow-related activities, etc. 2) *Other Outdoor Recreation* (which includes amusement parks, concerts, guided tours, and golf/tennis etc.), and 3) *Supporting Activities* which includes visitor-related spending such as accommodation, eating and drinking, shopping, transportation, construction, and local trips etc.

Conventional Outdoor Recreation contributed \$1.21 billion in Idaho's GSP in 2021 (Figure 2). The largest category is RVing (23%), followed by multiuse apparel and accessories (20%), hunting (19%), and boating and fishing (14%).

Figure 2: Idaho 2021 Conventional Outdoor Recreation (Millions \$)

Conventional Outdoor Recreation	\$1,210.1	%
Bicycling	\$18.2	2%
Boating/Fishing	\$165.2	14%
Climbing/Hiking/Tent Camping	\$24.7	2%
Equestrian	\$87.4	7%
Hunting/Shooting/Trapping	\$225.6	19%
Motorcycling/ATVing	\$53.8	4%
Recreational Flying	\$4.1	0%
RVing	\$276.3	23%
Snow Activities	\$53.7	4%
Other Conventional Outdoor	\$60.9	5%
Multi-use Apparel and Accessories	\$240.2	20%

Figure 3 presents the Idaho GDP contributions for *Other Outdoor Recreation*, which totals \$323.3 million in 2021. The largest category was game areas including golf and tennis (23%), Other⁹ (19%), and productive activities including gardening (17%).

Figure 3: Other Idaho 2021 Outdoor Recreation (Millions \$)

Other Outdoor Recreation	\$323.3	%
Amusement Parks/Water Parks	\$36.5	11%
Festivals/Sporting Events/Concerts	\$9.7	3%
Field Sports	\$15.5	5%
Game Areas (includes Golfing and Tennis)	\$75.7	23%
Guided Tours/Outfitted Travel	\$51.5	16%
Productive Activities (includes Gardening)	\$54.0	17%
Other Outdoor Recreation Activities	\$61.2	19%
Multi-use Apparel and Accessories (Other)	\$19.2	6%

The category *Supporting Outdoor Recreation* includes mostly tourist-visitor support such as accommodations, eating and drinking, retail trade, and government. Travel and Tourism was the largest category at 67% and local trips were second at 20% of the total (Figure 4).

⁹ BEA definition of *Other Outdoor Recreation Activities*: Agritourism, augmented reality games, beachgoing, disc golf, hot springs soaking, kite flying, model airplane/rocket/UAV, paintball, photography, stargazing/astronomy, swimming, therapeutic programs,

Figure 4: Supporting Outdoor Recreation (Millions \$)

Supporting Outdoor Recreation	\$1,243.2	%
Construction	\$30.0	2%
Local Trips	\$243.5	20%
Travel and Tourism	\$833.4	67%
Food and Beverages	\$147.6	-
Lodging	\$309.5	-
Shopping and Souvenirs	\$184.6	-
Transportation	\$191.7	-
Government Expenditures	\$136.4	11%

Idaho National Rankings

Idaho's outdoor recreation industry ranked 9th in the nation as a percentage of GDP (2.9%), and 11th place in the nation in terms of jobs (3.9%). The U.S. outdoor recreation industry represented 2.9% of GDP in comparison.

Hawaii's outdoor recreation industry ranked 1st in the nation at 4.8% of GDP and Washington DC ranked last at 0.9%. In terms of covered employment, Hawaii ranked 1st at 7.1% of employment and Washington DC ranked last at 1.7%.



Study Approach and Methodology

Sources of Data

Guidetime provided primary and secondary data throughout the study.^{ix} An Idaho State IMPLAN input-output model was created to fit the needs of the analysis. IMPLAN (Impact Analysis for Planning) is the most widely used and cited economic impact software and data (IMPLAN Group LLC)^x. Lightcast (formally Emsi) labor force and industrial account data were utilized in this study.^{xi} Databases provided by the Bureau of Economic Analysis (BEA) reported in the *U.S. Travel and Tourism Satellite Accounts* and the *Outdoor Recreation Satellite Accounts* were included in this study.

Outfitter Survey

Guidetime hosted a survey of outfitters and guides from March 2022 to May 2022 on Survey Monkey.^{xii} Twenty-four outfitters and guides responded to the questionnaire of which twenty-three provided data .

Home Counties of Respondents

The Idaho State home counties of the respondents included Bingham, Bonneville, Boundary, Clearwater, Custer, Fremont, Idaho, Lemhi, Teton, Valley, and Washington. In addition, three outfitters with Idaho operations listed their home counties as Asotin, Washington, Clackamas, Oregon, and Hubbard, Minnesota.

Gross Receipts of Respondents

Total visitors, visitor days, and gross receipts were based on a platform of 23 respondents. Total reporting gross receipts were \$12,298,250 which average \$534,707 per outfitter. There was a considerable range in revenues by outfitter, from \$5,000 to \$3,000,000.

Clients and Visitor Days of Respondents

Total annual clients for the respondents were 17,219, averaging 749 per outfitter. The largest was 7,500 and the smallest was 20. There was a total of 29,498 client days, averaging 1,283 per outfitter. The highest outfitter had 9,060 client days and the smallest was 20.

Focus Groups

In addition to the surveys, several focus groups were conducted to validate the data. The average gross receipts per outfitter, average clients, and client days were carefully vetted to support their inclusion in the analysis and results. The assumptions of average outside (i.e., community) client spending was also evaluated.

Client Day Expenditures

Figure 5 presents the per visitor spending day. The estimates were derived using the benefit-transfer approach (with adjustments) from three sources: The 2017 Montana outfitting study,^{xiii} ECONorthwest Washington State trail study,^{xiv} and from feedback from outfitter focus groups. Total average *per person* daily spending was \$355 in 2023 dollars.

Figure 5: Daily Client Average Expenditures (2023 \$)

Food and Drink	\$58
Lodging	\$100
Gasoline/Rental	\$69
Retail	\$45
Fees/Permits	\$65
Other	\$18
<hr/>	
Sub-Total	\$355
Guide Expenditures	\$417
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Total	\$772

There were about a total of 30,000 client days from the outfitter survey results. Total client expenditures (excluding outfitter and guide expenditures) were \$10,645,549. Total outfitters and guides revenues/expenditures were also measured on a per client day basis at \$417 per client day. It totaled \$12,510,000 per 30,000 client days. Total expenditures for 30,000 client days from client and outfitters expenditures were \$23,155,549.

Scenarios

Three scenarios were conducted for the results. 1) Economic contributions of the survey sample of 30,000 visitor days. 2) A low estimate of 275 equivalent outfitters and 3) A *base-case* estimate of 450 equivalent outfitters. Outfitter and guide feedback suggests that the base-case is the most accurate of the two scenarios and the primary assumption used in this study's results.

Economic Base Assessment

Overview of Base Assessment

This analysis is founded on economic base theory. A local or regional economy has two types of industries: base industries and non-base industries. Any economic activity that brings money into the local economy from the outside is considered a base industry. A base industry is sometimes identified as an export industry, which is defined as any economic activity that brings new monies into the community from outside. For example, base industries can include high-technology companies, medical services, retail trade services, federal government operations, as well as other manufacturing, agriculture, and service firms. Firms providing services to individuals living outside the region's trade

center, such as medical and legal services, are included in the region's base. Payments from state and federal governments (including Social Security, Medicare, university funding, and welfare payments) are sources of outside income to businesses and residents. These are counted as part of the economic base. Import substitution can also be basic under certain circumstances.

Non-base industries are defined as economic activity within a region that supports local consumers and businesses. They re-circulate expenditures and incomes within the region. Such activities include shopping malls that serve the local population, business and personal services consumed locally, medical services consumed locally, and local construction contracts.

Base industries are sometimes confused with non-base industries. For example, some county economies have large retail trade sectors that produce a paradox: they employ a substantial percentage of the workforce but contribute little economic impact because most of the retail sales are local. They bring little new money into the community. Thus, it appears from the size effect that the retail trade sector contributes a large amount of employment and earnings to the economy. In reality, most of this employment and earning activity is allocated or attributed to other local "export" industries that bring revenues into the community from outside. From a "size" perspective, the retail trade sector appears large. However, from an economic base perspective which determines the economic "drivers" of the economy, the retail trade sector is actually much smaller. Only the retail trade activities serving visitors from outside the area can be counted as economic base activity and employment.

Economic base analysis is important for identifying the vital export industries of a region. Non-base industries, on the other hand, are important for keeping money within a region and stimulating local economic activity for residents. In this respect, non-base industries can function in the same manner as an export industry. For example, suppose an Idaho patient elects surgery at a local hospital instead of traveling to a medical center in Salt Lake City, Utah. The substitution of local services for an imported service represents an increase in the demand for local business services. Keeping income in the community enhances the multiplier effects of the export industries. The overall effect of import substitution can be viewed as an analogous increase in demand for an export industry. Our economic models are founded on economic base theory.

Defining and Explaining Economic Impacts

Economic impacts measure the magnitude or importance of the expenditures of basic (export) industries. Our economic model estimates multipliers for each industrial and service sector. The output or sales multiplier in this study is 1.42. Every dollar of direct expenditure creates \$1.42 dollars of total new spending in the community economy.

Impacts are apportioned into two levels. The first level is the direct impact of hospital or health care expenditures on each respective county economy – the jobs, payroll and earnings, value-added, and sales that are directly created by the outfitters and guides industry as export businesses. The second is comprised of two parts: a) the impacts on other regional businesses that provide goods or services to outfitters and guides - the indirect impacts - and b) the effect of employee and related consumer spending on the economy - the induced impacts. The indirect and induced impacts are the so-called “ripple” or multiplier effects of the outfitters and guides in each respective economy. The multiplier or ripple effects are driven by the exports of an economy. Exports, the new money coming into an economy, set off a web of transactions as each business seeks to fulfill the demands of their customers. A health care provider’s impact upon the economy is thus comprised of the magnitude of the multiplier(s) and the magnitude of the exports. The sum of the direct, indirect, and induced effects measures the total impact of an industry to an economy.

Outfitter and Guides as Base Activities

We assumed that outfitters and guides activities are base activities. Most of the paying clients are nonresidents. However, even the resident clients are engaging in the equivalent of a “high end” vacation and budgeting accordingly. There are competing venues for outdoor recreation activities in Montana, Wyoming, Utah, Nevada, Oregon, Washington, and elsewhere. It was assumed that in the absence of these opportunities in Idaho, these expenditures would leak out of the state because of the clients seeking outdoor vacations elsewhere.

Multipliers

The IMPLAN modeling framework is robust and capable of modeling changes in the expenditures affecting any specific industry or any multiple industries at the same time. The IMPLAN model will create an effective average output (sales) multiplier for each expenditure pattern under analysis.

Results

Summary Results

The reported economic impacts include the direct impacts of the outfitters and guides operations and visitor spending as well as the backward linkages of that spending as it circulates throughout the economy, i.e., the multiplier effects. It also includes the impacts of consumer spending relating to this economic activity. The following economic model outputs were reported:

- Direct (actual) annual employment (not including the multiplier effects)

- Sales transactions– reflects the total transactions from all sources in dollars by direct, indirect, and induced economic activity (i.e., including the multiplier effects).
 - Gross Regional Product – the overall net contribution to the economy (a subset of sales transactions) from the outfitters and guides related serves. Gross regional product includes employee compensation, proprietor income, other property income, and indirect taxes.
 - Total Compensations (payroll) – (a subset of gross regional product) includes wage, salary, proprietor income payments, and fringe benefits (i.e., supplements) to workers (including the multiplier effects).
- Total Employment – represents the total employment resulting from economic activity (including the multiplier effects).
- Local and State Taxes – includes local property taxes, sales taxes and excise taxes, and all other state taxes (including the multiplier effects).

Economic Impacts of the Idaho Outfitters and Guide Industry

There were three economic contribution scenarios. The first scenario was the estimation of the contributions of the 23 outfitters and guides company survey respondents. The second was a “low estimate” based on scaling up to 275 outfitters. The third was scaling up to 450 outfitters and guides which is our *base case* for the report. The actual estimated Idaho outfitters and guides is about 418 but this may be low due to data gaps and under reporting (Figure 5 and Figure 6).

- *Scenario from 23 Surveyed Outfitters and Guides:* The total sales contributions are \$30.3 million. Gross state product is \$21.3 million. Total compensation is \$8.5 million. Total jobs created are 252. Finally, property taxes are \$861,171, state sales/excise taxes are \$1,212,528, income taxes \$348,342, and total taxes are \$2,564,667.
- *Scenario from 275 Outfitters and Guides:* The total sales contributions are \$362.2 million. Gross state product is \$254.7 million. Total compensation is \$101.7 million. Total jobs created are 3,009. Finally, property taxes are \$10.3 million, state sales/excise taxes are \$14.5 million, income taxes \$4.2 million, and total taxes are \$30.7 million.
- *Base Case: Scenario from 450 Outfitters and Guides:* The total sales contributions are \$592.7 million. Gross state product is \$416.8 million. Total compensation is \$166.4 million. Total jobs created are 4,925. Finally, property taxes are \$16.9 million, state sales/excise taxes are \$23.7 million, income taxes are \$6.8 million, and total taxes are \$50.2 million.

Figure 5: Economic Contribution Scenarios of the Outfitters and Guide Industry

Scenario	Sales	Gross State Product	Total Compensation	Jobs
Survey Respondents	30,295,635	21,304,524.00	8,507,145.00	252
Low Estimate 275 Guides	\$362,230,418	\$254,728,004	\$101,715,864	3,009
Base Case 450 Guides	\$592,740,685	\$416,827,643	\$166,444,141	4,925

Figure 6: Tax Contribution Scenarios of the Outfitters and Guide Industry

Activity	Taxes Total	Taxes Property	Sales/Excise Taxes	Income
23 Outfitters and Guides	\$2,564,667	\$861,171	\$1,212,528	\$348,342
275 Outfitters and Guides	\$30,664,497	\$10,296,610	\$14,497,617	\$4,164,959
450 Outfitters and Guides	\$50,178,267	\$16,848,998	\$23,723,374	\$6,815,387



Terminology

- **Export activity:** Any product or service whose sales bring money into a community from the outside. Sales of products to firms or consumers in other states are examples of export activity. Other examples include nonresident tourist spending, federal government payments, and income transfers.
- **Sales:** Total dollar transactions from direct, indirect, and induced economic activity.
- **Earnings:** Wage, salary, and other income payments including all fringe benefits to workers.
- **Value-added (gross regional product):** This is a measure of gross domestic product at the local or regional level. Value added is a measure of total net production and activity.
- **Jobs:** Total employment resulting from economic activity. The economic model reports these as full-time and part-time jobs.
- **Indirect taxes:** All taxes generated from economic activity excluding personal and corporate income taxes. These consist of mostly sales taxes and property taxes.
- **Base industries:** Any economic activity that brings money into the local economy from the outside is considered a base industry. For example, Ada County base industries include high-technology companies, medical services, retail services, federal government, and other manufacturing and service firms.
- **Non-base industries:** Any economic activity within a region that support's local consumers and businesses re-circulating incomes generated within the region. These activities include shopping malls that the local population, business and personal services consumed locally, and local construction contracts. Non-base industries support the base industries.
- **Economic impacts:** Economic impacts measure the magnitude or importance of the expenditures of base (export) industries. Our economic model estimates multipliers for each industry. If you have a multiplier of 1.61, for example, every dollar of base expenditures creates \$1.61 dollars of new spending in the community. The total multiplier has three components: direct effects, indirect effects, and induced effects.
- **Direct effects (spending):** This represents the actual sales, income, and jobs from airport operations.
- **Indirect effects:** These are the downstream economic effects on sales, payroll, jobs, and indirect taxes that results from direct spending in the regional economy. For example, an airport purchases community goods and services which supports other area businesses. These firms, in turn, purchase even more goods and services as the effects ripple throughout the economy. They are part of the overall multiplier effects.
- **Induced effects:** These are downstream economic effects of employee and consumer spending on the economy. They are part of the multiplier effects.
- **Full-time equivalent jobs:** The gross number of hours worked in a firm or entity from all employees divided by the maximum number of allowable hours for a single employee in a work year— usually 2,080 hours. The economic model is measuring total full-time and part-time job.



Contact and Limitations

This study was sponsored by Guidetime, and prepared by Steven Peterson, Research Economist and Clinical Associate Professor, College of Business and Economics, with assistance from students associated with the Vandal Impact Center, College of Business and Economics, University of Idaho. Student Contributors: Jimmy Bulgar, Reilly Dahlquist, Mason Drum, and Cody Stattner. The results and opinions in the study are those of the authors alone and do not reflect on any associated institutions or the University of Idaho. The authors may be reached for questions or comments at stevenp@uidaho.edu.

This analysis has several important limitations. First the sample of outfitters and guides was small, totaling 23 companies. It is believed, however, that this sample was a good representation of the outfitters and guides industry. Several focus groups with outfitters and guides were held to discuss the results of the survey. Secondly, the total universe of outfitters and guides in Idaho is not fully known. Third, the visitor spending was estimated using the benefit transfer approach of using metrics from other similar studies and adapting the results to this analysis.

Recently, the Idaho Outfitters and Guide Association (IOGA) has been doing research on the economic contributions of the industry with a broad detailed survey that will be released late 2023 or early 2024. This study is intended to complement IOGA's research. Early indicators are that their results will be larger than the estimates of this study

What is GuideTime?

GuideTime is a booking platform that creates seamless connections between guides, outfitters, and outdoor enthusiasts for the adventure tourism industry. The company started in Idaho and Montana in 2020, and now has more than 600 guides in 25 states with 860 adventures to choose from like fly fishing, whitewater rafting, hunting, wildlife viewing, lodging, mountain biking, and backcountry skiing. The vision is to fulfill outdoor enthusiasts' dream experiences while enabling guides and outfitters to spend more time on the water or in the mountains doing what they love. To learn more about the rapidly growing company visit www.guidetimebooking.com.

Appendix 1: An Overview of the Outfitters and Guide Industry

1- Introduction

Introduction: The Exploding Growth of the Idaho Outfitter Industry

The outfitter industry in Idaho has experienced incredible growth in recent decades, with tens of thousands of visitors flocking to the Gem State each year to enjoy world-class hunting, fishing, and guided whitewater tours. According to our impact assessment, there are more than 400 licensed outfitters in Idaho, offering everything from big-game hunting to fly-fishing expeditions. This industry has become one of the most important drivers of local economies across the state, creating jobs and supporting small businesses.

What is an Outfitter?

Before exploring the outfitter industry in Idaho, it's important to define what an outfitter is. According to IOGA, an outfitter is someone who offers guided trips for compensation. While the guide is an employee of the outfitter who provides the guiding service to the customers.

In conclusion, the outfitter industry in Idaho is a thriving and important component of the state's economy. With ample opportunities for both employment and recreation, this industry offers something for everyone. Whether you're an experienced guide or a first-time visitor, exploring Idaho's outfitter industry can be an incredible and rewarding experience.

2- History of Idaho Outfitter Industry

The Idaho outfitter industry has a rich history that has gone through a significant evolution over time. At one point, the industry was mainly focused on hunting and guiding big-game in the rugged terrain of the Rocky Mountains. However, over the years, the industry has transformed to include various activities such as fishing, fly fishing, scenic tours, and whitewater rafting. Today, with countless breathtaking wilderness areas and rivers, Idaho is a hotspot for adventure seekers across the globe.

The Idaho outfitter industry has faced several challenges, including the threats posed by increased regulations and changing climatic conditions. Alongside these challenges, the industry has also benefited from several opportunities presented by innovative trends, and technological advancements in the equipment used for guiding and outfitting. Despite these challenges, the industry continues to thrive, thanks to the unwavering commitment of outfitters and guides who are passionate about sharing the beauty of Idaho's outdoors.

Evolution of the Idaho Outfitter Industry

The Idaho outfitters industry has undergone significant changes since its inception. In the early years, it was primarily focused on hunting and guiding big-game, and it wasn't until the 1960s that other activities such as fishing, and whitewater rafting were added. Today, outfitters are offering a diverse range of activities such as horseback riding, snowmobiling, and even eco-tourism. As the industry continues to evolve, the demand for unique and exciting experiences is pushing outfitters to innovate and offer more to their clients.

Current Trends and Future Opportunities

The Idaho outfitter industry continues to grow, with more and more people seeking out unique and memorable outdoor experiences. The use of technology, such as GPS tracking and specialized equipment, has become increasingly popular among outfitters, providing an opportunity to streamline operations and enhance safety. Additionally, there is a growing interest in eco-tourism and sustainable practices, which bodes well for the future of the industry. With vast wilderness areas, pristine lakes, and rivers, Idaho's short and long-term potential for the outfitter industry is vast.

3- Types of Outfitting Jobs in Idaho

Idaho's outfitter industry is thriving, providing ample opportunities for adventure seekers and outdoors enthusiasts. There are four main types of outfitter jobs in Idaho: fishing, fly fishing, hunting, and whitewater tours. Each job has its own unique set of requirements, pay rates, and job descriptions.

1. Fishing Outfitters: Fishing outfitters take clients on fishing expeditions on rivers, streams, and lakes. They provide clients with all the necessary equipment and help them hone their fishing skills. Most fishing outfitters in Idaho require a guide to have a valid state fishing license, first aid certification, and CPR training. A fishing guide's pay rate varies based on experience, location, and demand for services.

2. Fly Fishing Outfitters: Fly fishing outfitters offer specialized fly-fishing trips on rivers and streams throughout Idaho. They help clients select the right gear, teach them how to cast and present their fly, and take them to prime fishing spots. A fly-fishing guide in Idaho must have a state fishing license, first aid and CPR certification, and a solid knowledge of fly-fishing techniques. The average pay rate for fly fishing guides in Idaho ranges from \$200 to \$500 per day, depending on experience and location.

3. Hunting Outfitters: Hunting outfitters in Idaho provide guided hunts for big game, such as elk, mule deer, and bear. They help clients navigate the wilderness, set up camp, and track game. A hunting guide in Idaho is required to have a valid state hunting license, first aid and CPR certification, and a good knowledge of their hunting area. Hunting guides in Idaho can earn anywhere from \$150 to \$750 per day, depending on experience and location.

4. Whitewater Tour Outfitters: Whitewater tour outfitters in Idaho offer thrilling guided tours

down rivers such as the Snake, Salmon, and Clearwater. They provide clients with all necessary equipment, including helmets and life jackets, and give safety instructions before setting out. A whitewater guide in Idaho must have first aid and CPR certification, and knowledge of how to safely navigate rapids. Pay rates vary based on experience, location, and demand for services.

4- Top Outfitting Destinations in Idaho

Idaho is known for its beautiful natural landscapes and abundant wildlife, making it a prime destination for outdoor enthusiasts. If you're looking for a thrilling adventure in the Gem State, you'll want to check out these top outfitter destinations.

1. McCall

Nestled in the heart of the Payette National Forest, McCall is a popular spot for outdoor activities like fishing, hunting, and skiing. Known for its picturesque lake and surrounding mountains, McCall offers a wide range of outfitter services to visitors, including guided fishing trips and pack horse adventures.

2. Stanley

Located in the rugged Sawtooth Mountains, the town of Stanley offers a gateway to some of Idaho's most remote and pristine wilderness areas. If you're up for a challenge, you can join a guided backpacking trip through the mountains or embark on a thrilling rafting excursion down the Salmon River.

3. Ketchum/Sun Valley

Home to some of the state's most luxurious resorts and spas, the Ketchum/Sun Valley area offers a unique blend of adventure and relaxation. Whether you're interested in fly fishing, bird hunting, or mountain biking, you'll find plenty of outfitter options to choose from in this scenic mountain town.

4. Snake River

If you're in search of a true whitewater adventure, look no further than the Snake River. Stretching more than 1,000 miles through Idaho, the Snake River boasts some of the West's most challenging rapids and stunning canyon scenery. Guided rafting trips are available for both beginners and seasoned paddlers.

5- Regulations and Licenses for Outfitting in Idaho

When it comes to outfitting in Idaho, it's important to have a thorough understanding of regulations and licenses required by authorities. This not only helps outfitters to operate legally but it also ensures the safety of clients. Below is a breakdown of the permits, licenses, and certifications required for fishing, fly fishing, hunting, and whitewater tours in Idaho.

1. Fishing Permits: Every outfitter who offers fishing tours in Idaho must obtain a Fishing Outfitter's Permit from the Idaho Outfitters and Guides Licensing Board. This ensures that the outfitter is qualified, experienced and meets safety standards.

2. Fly Fishing Permits: Outfitters who want to offer fly-fishing tours must also have an additional

Fly Fishing Outfitter's permit, which is also issued by the Idaho Outfitters and Guides Licensing Board, in addition to the Fishing Outfitter's Permit. Idaho's Department of Fish and Game also requires outfitters to have a valid outfitting license.

3. Hunting Permits: Hunting outfitters in Idaho must obtain an outfitter license from the Idaho Division of Professional-Technical Education. They must also have all necessary tags, permits, and licenses required by the Idaho Department of Fish and Game.

4. Whitewater Permits: To offer whitewater tours in Idaho, outfitters must apply for permits through the Bureau of Land Management or the U.S. Forest Service. The regulations and requirements vary depending on the location and class of the river.

5. Equipment and Safety Measures: Additionally, outfitters must maintain proper safety equipment, emergency supplies, and first-aid supplies on site. They're also required to have a safety plan, which outlines emergency procedures and safety measures in case of accidents or natural disasters.

It's important to note that all outfitters in Idaho must comply with the rules and regulations set by the state. Any breach of these rules may lead to license revocation or suspension, and even a loss of reputation. Therefore, it's paramount for outfitters to understand and adhere to these regulations.

6- Challenges and Opportunities in Idaho Outfitting Industry

The outfitter industry in Idaho faces several challenges and opportunities to grow and stay competitive in today's market. Climate change has had a significant impact on hunting and fishing patterns, and outfitters must adapt to these changes while maintaining their customer base. Technological advancements have also reshaped the industry, with more consumers booking tours and experiences online. As a result, outfitters must optimize their websites and social media presence to capture these prospective clients. Additionally, customer expectations for personalized and sustainable experiences continue to grow, and outfitters must match these demands through innovative services and environmentally conscious practices. Despite these obstacles, the outfitting industry in Idaho has shown growth potential, with new outfitters joining the market annually.

One potential area for growth is in the whitewater tours market. Idaho holds some of the best rafting and kayaking opportunities in North America, offering different levels of difficulty and scenic routes. As a result, more outfitters are starting to offer personalized customized tours

to attract adventure seekers. The competition, however, is fierce, and outfitters must distinguish themselves on the quality of their equipment, guides, customer service, and marketing strategies.

7- Conclusion

Looking towards the future, the Idaho outfitters industry shows promising prospects for growth, and there are several recommendations that could help ensure its continued success. One key factor is maintaining a focus on sustainable tourism practices, such as promoting catch-and-release fishing and minimizing the use of motorized vehicles. Additionally, continued collaboration between outfitters, landowners, and government agencies can help ensure the responsible use of public lands for outdoor recreation. In conclusion, Idaho is one of the most popular states for hunting, fishing, and camping. And, as the state's economy continues to grow, so does the outfitting industry.



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