

ECONOMIC VALUE OF OUTFITTED TRIPS TO CONSERVATION ORGANIZATIONS

An Eight-State Pilot Study

Report Produced by
Professional Outfitters and Guides of America

Edited by
Mac Minard, Executive Director, Montana Outfitters and Guides Association
Deb Moore, Executive Director, Alaska Professional Hunters Association
Kerrie Romero, Executive Director, New Mexico Council of Outfitters and Guides

August 2017

I. **Abstract**

Non-governmental conservation organizations fill an important role in wildlife conservation in the United States beyond that of State and Federal agencies. Funding of federal and state programs is primarily based on the sale of hunting and fishing licenses and federal excise taxes sporting equipment and some fuels. Non-governmental conservation organizations are funded primarily through private donations and fundraisers. Survey data from an 8-state coalition of Outfitter Associations reported 90% of outfitter businesses sampled donated to conservation organizations in 2016 totaling \$25.6 million to 44 organizations. Rocky Mountain Elk Foundation and Safari Club International received the greatest number of donations, 42.5% and 35.6% respectively.

Based on this data, it would appear that the outfitting industry, as a donor block, may be the largest source of revenue for conservation organizations that support hunting and fishing activities.

CONTENTS

1. Abstract.....	Page 2.
2. Introduction.....	Page 4.
3. Survey Objective.....	Page 4.
4. Approach.....	Page 5.
5. Estimation Procedure.....	Page 5.
6. Data Collection.....	Page 6.
7. Procedure & Timeline.....	Page 6.
8. Data Analysis.....	Page 7
9. Results	Page 7.
• Association Information and Survey Response	Page 7.
• Frequency of Response by State	Page 8.
• Frequency of Outfitter Donations	Page 9.
• Conservation Organizations Receiving Donations	Page 10.
• Estimated 2016 Values	Page 11.
• Estimated Retail Value of Outfitter Donations for POGA Member States..	Page 11.
• Estimated Retail Value.....	Page 12.
10. Discussion and Conclusions	Page 12.
11. Acknowledgements.....	Page 13.

II. Introduction

Wildlife Conservation is the practice of protecting wild plant and animal species and their habitats and we as sportsmen enjoy an amazing history of supporting that effort. Governmental agencies at the Federal and State levels are the principle authorities dedicated to wildlife research and management, and are primarily responsible for regulating the sustainable use of wildlife resources in the United States and are largely funded through sportsmen's license dollars and matching grants through the Federal Aid in Restoration program administered by the US Fish and Wildlife Service.

Unfortunately, the needs of wildlife conservation efforts far outstrip the financial resources currently available to federal and state agencies, and as a result, numerous independent non-profit organizations exist and promote various wildlife conservation causes beneficial to sportsmen, among them are Rocky Mountain Elk Foundation, Safari Club International, Wild Turkey Federation and Ducks Unlimited to name just a few.

Outfitter businesses provide substantial support to the conservation movement through their donation of trips which are auctioned and sold through established conservation organizations, the proceeds being used for a variety of conservation and education projects across the nation and internationally.

For this study, Conservation Organization is defined as an organization that is largely funded by non-tax dollars and seeks to enhance wildlife and its habitats and provide education services. Excluded are state and federal agencies that are funded through license revenue matching Federal Aid grants and general state and federal funds.

While conservation organizations like to proclaim their financial contributions to wildlife, when traced back, we find that it is the individual outfitter donating trips that collectively sustains a very large percentage of the conservation dollars that sustain these organizations. Established conservation organizations are reluctant to provide the actual financial impact of these donated trips to their bottom line, and as such, the outfitter community is all but forgotten in the credits for sustainable wildlife and habitat management.

Professional Outfitters and Guides of America (POGA) represents eight state guide and outfitter organizations who in turn represent individual outfitters who provide outdoor experiences. POGA membership includes eight states; Colorado, Idaho, Montana, Nevada, New Mexico, Wyoming as well as Maine and Alaska. Individual outfitter memberships among the 8-state coalition exceeds 1,900 outfitters and represents more than 4,000 outfitter businesses. POGA serves as an industry advocate and consultative group for national issues of conservation, public land permitting, as well as state regulation and tourism.

III. Survey Objective

To enhance the standing of POGA and the businesses they represent, it was deemed important to demonstrate the collective contribution that the outfitting industry generates for the benefit of

conservation organizations annually. The currency estimate used in this study is retail value of donated trips.

Objective: To estimate the financial contribution from trip donations to habitat and wildlife conservation organizations by Outfitters represented in 8-member states that make up POGA

IV. Approach

From August 1 – August 6, 2017, POGA administered a simple survey to outfitter-business leaders from 8 affiliated states to serve as a pilot program. This report details the findings of the survey.

The estimate developed applies across the eight states represented in POGA and to hunting and fishing operations knowing that in some states the two entities are not regulated separately or, in the case of the New Mexico fishing industry, not at all; therefore, the estimates of donated values provided in this report should be accepted as conservative minimum values.

Considerations factored into the estimation procedure:

- Retail value of trips donated was estimated at the Guide and Outfitter business level – i.e. the donation value as recorded by the business entity for income tax reporting.
- It is understood that retail value and net value are not the same, however it was not possible to collect the net values generated from conservation organization auctions.
- Values and estimates were limited to a single year (2016).
- Estimates were limited to that part of the industry where the exact number of licensed service providers are known. In the case of Maine, the total number of outfitter businesses are unknown, thus the minimum estimate was limited to the membership of the Maine Professional Guide Association.

V. Estimation Procedure

To obtain a gross estimate of the contribution to conservation organizations across the 8 states of POGA, the data was stratified at the state level and subsequently a sum was generated. Individual state estimates were calculated as:

(Average Outfitter Contribution by state) X (Number of Outfitters in that states) = Total Value donated to conservation organizations by state.

Where:

- Average Outfitter Contribution is estimated in dollars from a sampled portion of Association memberships (by state) and used to estimate the average dollar amount of donated trips within that state.
- Total number of individual outfitters businesses operating in each state is the number of licensed outfitter businesses (fishing and hunting).

- Total Amount donated to Conservation organizations is the amount in retail value provided to conservation organization by outfitters who provide outfitting services in the 8-state POGA membership.

Therefore, this model relies on individual state averages of contributions multiplied by the total number of outfitter/guide businesses to yield an estimate of total economic donation for each state. The aggregate for the 8-state POGA membership is the sum of these 8 independent estimates.

A minimum of 30 responses for each state entity was sought so that variance estimates could be calculated and evaluated. These calculations are not covered by this report and will be studied in a more detailed analysis that will take place later to help guide and refine the survey tool and procedure.

VI. Data Collection

To develop estimates as described, the following data inputs were required:

- 1) How many licensed outfitter/guide businesses offering services exist in each POGA member state.
- 2) From the Survey, we asked four questions:

Question 1: What state do you provide Outfitted/Guided services?

Alaska
Colorado
Idaho
Maine
Montana
New Mexico
Nevada
Wyoming
Other

Question 2: Did you donate to one or more habitat and/or wildlife conservation organization(s) in 2016?

Yes
No

Question 3: If so, what was the total retail value of your combined donation(s) in 2016?

Question 4. Please identify the conservation organization(s) you donated to in 2016

VII. Procedures & Timeline

- Survey instrument was developed using SurveyMonkey in a four-question template, this was completed July 28, 2017.

- Initial communication was sent via email to POGA members, through their representatives, announcing the coming survey and inviting participation.
- Surveys were provided to respective POGA members through their state association. Survey links were limited to a single IP address. Surveys were distributed at 6:00 am on Monday July 31, 2017.
- Multiple reminders were sent via email, through association representatives, encouraging participation in the survey for gaining responses during the survey period.
- Each business was limited to a single response by IP address.
- The survey collector was closed at 6:00 pm Sunday August 6, 2017.

VIII. Data Analysis

- Survey responses were exported to EXCEL and sorted by state.
- Mean contributions by state were calculated.
- Estimates were derived by state, in the manner previously described, by multiplying average donation by total number of outfitters by state.
- POGA member contributions were summed across states.
- Frequency of donations to conservation organizations were pooled across all states.

Notes

1. Idaho produced only a single survey response. A mean calculated for Colorado, Montana, and Wyoming was used as a surrogate.
2. Unlike the other states, the state of Maine does not report the total number of outfitters operating. Therefore, the voluntary membership of the Maine Professional Guides Association was used as the total number of businesses. This is likely a conservative estimate.

IX. Results

a) Association Information and Survey Response

The survey was distributed to 1,884 outfitter businesses across 8 states. A total of 207 (11%) surveys were completed. Collectively, the 8 associations represent nearly 4,000 individual Outfitter businesses.

Table 1. Association information and response.

State	Members	Survey Responses	Licensed Outfitter/Guide Businesses		
			Hunting	Fishing	Total
Alaska	130	33	360 Combined		360
Colorado	134	32	836 Combined		836

Idaho	100	1	300 Combined		300
Maine	1100	14	N/A	N/A	1100
Montana	187	58	400	500	700
Nevada	33	12	100	25	125
New Mexico	85	37	243	N/A	243
Wyoming	115	20	335 Combined		335
Total	1884	207	Total Licensed Businesses = 3999		

b) Response to question 1. What state do you provide outfitted/guided services in?

Figure 1 illustrates that seven of the eight states sampled were well represented in the responses with 30 or more surveys received from Montana: 58 surveys (28% of total response), New Mexico: 37 surveys (18% of total response), Alaska: 33 surveys (16% of total response), Colorado: 32 surveys (15% of total response). Those with less than 30 responses were Wyoming: 20 surveys (10% of total response), Maine: 14 surveys (7% of total response) Nevada: 12 surveys (6% of total response) and Idaho: 1 survey (<1% of total response).

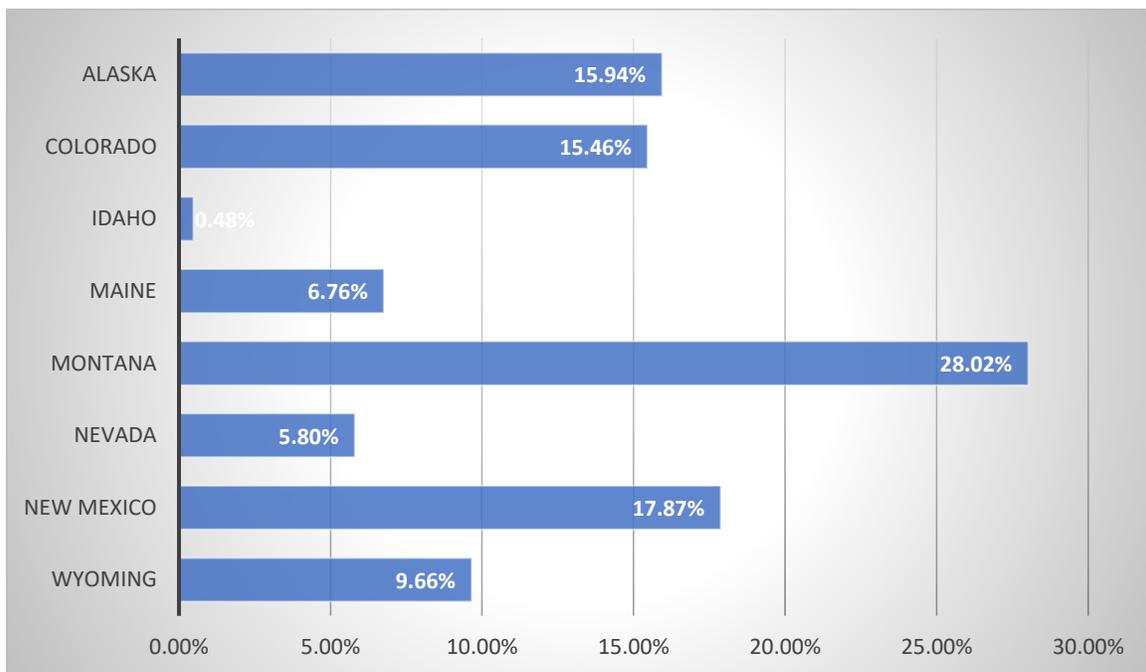


Figure 1. Distribution of Outfitter response to survey by state.

c) Frequency of Outfitter Donations

POGA membership donated to conservation organizations at a very high rate with over 87% of the individual respondents reporting that they donated to one or more organizations in 2016. (Figure 2).

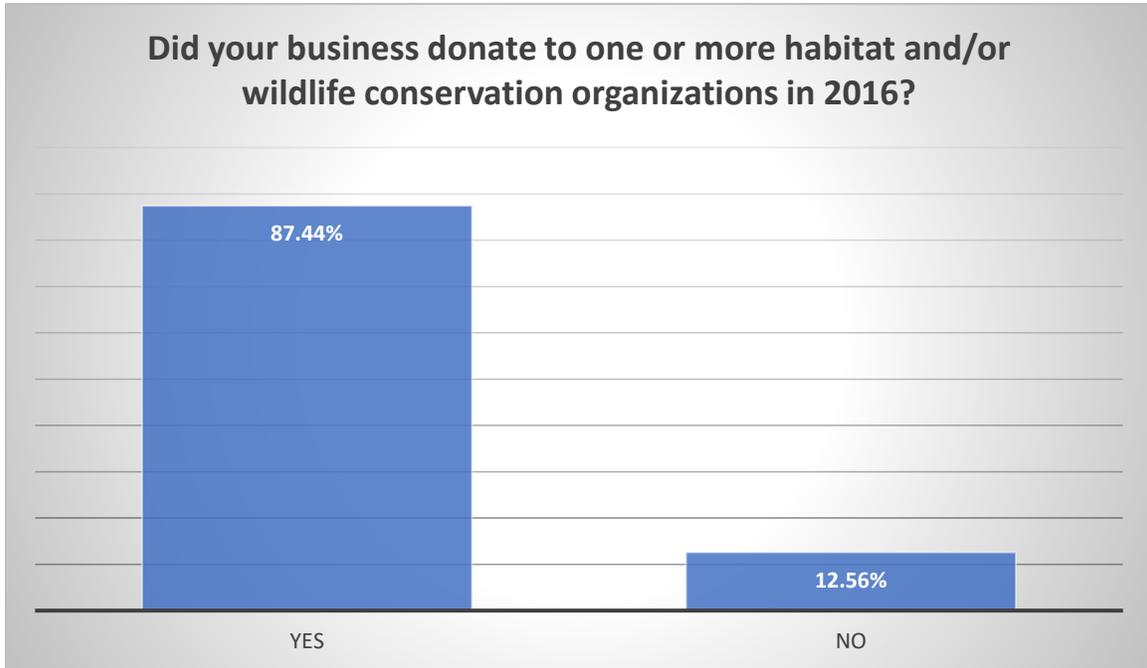


Figure 2. Frequency of outfitter donations to Conservation Organizations across all 8 states sampled.

d) Conservation Organizations Receiving Donations

There were 44 individual Conservation Organizations that received donated trips from POGA members in 2016. Rocky Mountain Elk Foundation and Safari Club International received the greatest number of donations with outfitter businesses sampled reporting 42.5% and 35.6% respectively (Figure 3).

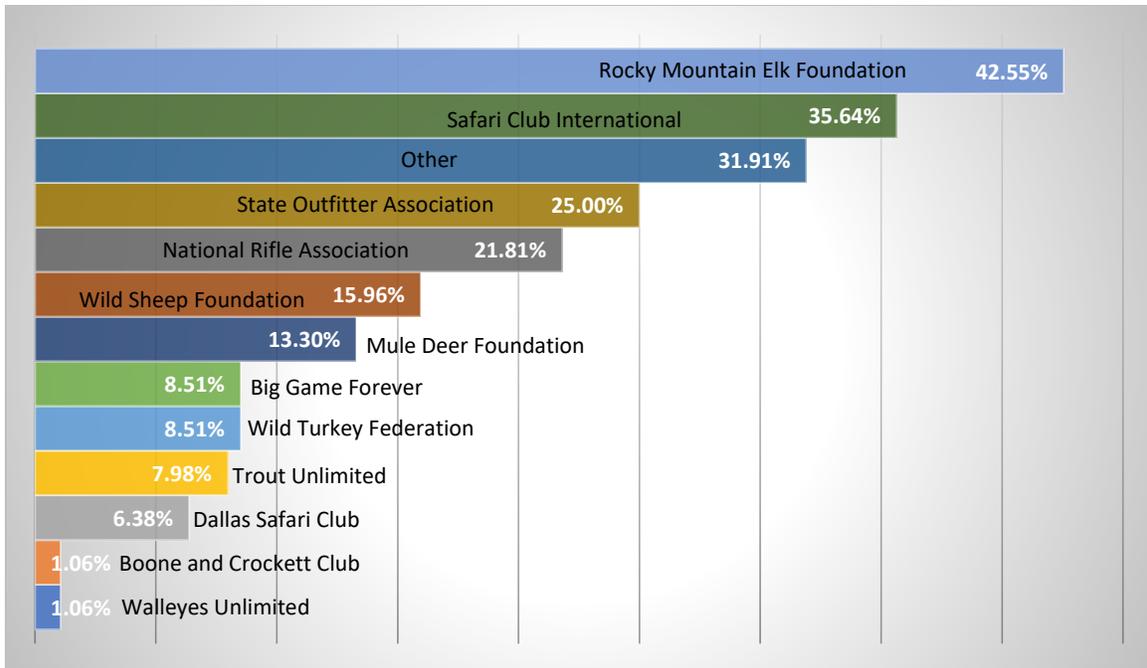


Figure 3. Frequency of donation by Conservation organization

“Other” organizations made up 32% of the total donations and included (in alphabetical order):

- | | |
|---|-------------------------------------|
| Back in the Maine Stream | Montana Wilderness Association |
| Belgrade Regional Conservation Alliance | Muley Fanatics Foundation |
| Big Hearts under the Big Sky | Nevada Bighorns Unlimited |
| California Deer Association | Nevada chukar |
| Coalition for Nevada's Wildlife | Pope and Young |
| Costal Conservation Association, San Antonio | Quality Deer Management Association |
| Duck Unlimited | Ruff Grouse Society |
| Forest Society of Maine Save the Everglades | Sportsman’s Alliance of Maine |
| Freedom Hooves Horse Therapy | Teton, MT County Weed District |
| Friends of the NRA | United States Forest Service |
| Grand Slam Club/Ovis | Wounded Warrior Project |
| Land Trusts, State Conservation Organizations | Wyoming Outdoorsmen |
| Lions club | Youth Hunts |
| Madison River Foundation | |

e) Estimated 2016 Values

The average estimated 2016 values donated on an individual outfitter basis by state ranged from \$21,093 in Alaska to \$1,054 per outfitter in Maine (Figure 4). With only one response for Idaho it was not possible to make an assessment.

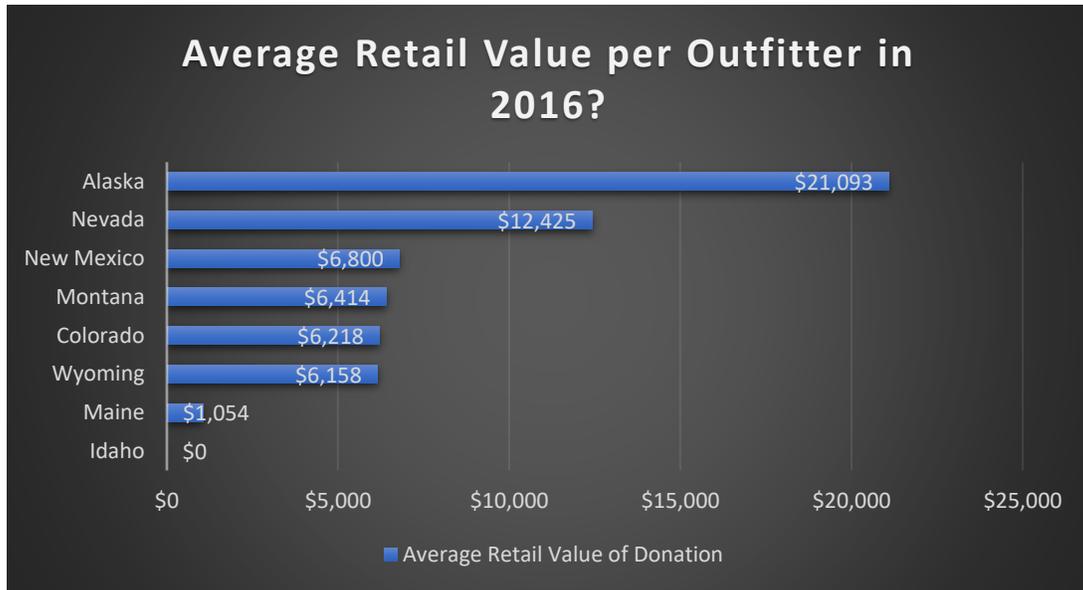


Figure 4. Average outfitter donation (retail value) in 2016.

f) Estimated Retail Value of Outfitter Donations for POGA Member States

When average value per outfitter by state are multiplied by the number of outfitters in each state and summed we find the eight states that make up POGA contributed \$25.6 million to conservation organizations in 2016 (Table 2).

This is likely a conservative estimate since the estimate does not include all the Maine outfitters, it does not apply to fishing outfitters in New Mexico, and it uses an average of Montana, Wyoming, and Colorado as a surrogate for the state of Idaho. Rafting businesses, a significant percentage of the Idaho Outfitter and Guide Association membership and who also donate to conservation efforts, were excluded from the survey.

Table 2. Estimated retail value of donated trips to conservation organizations in 2016.

State	Association Members	Donation Average	Total Outfitters Statewide	Estimated Value
Alaska	130	\$21,093	360	\$7,593,480
Colorado	134	\$ 6,218	836	\$5,198,248
Idaho	100	\$ 6,300	300	\$1,890,000
Maine	1100	\$ 1,054	1100	\$1,159,400
Montana	190	\$ 6,414	700	\$4,489,800
Nevada	33	\$12,425	125	\$1,553,125

New Mexico	85	\$ 6,800	243	\$1,652,400
Wyoming	115	\$ 6,158	335	\$2,062,930
Total Donation Value = \$25,599,383				

Alaska accounted for one-third (\$7.6 million) of the estimated \$25.6 million POGA contribution followed by Colorado (20% or \$5.2 million), and Montana (18% or \$4.5 million). Statewide donations ranged from \$7.6 million in Alaska to \$1.2 million in Maine. (Figure 5).

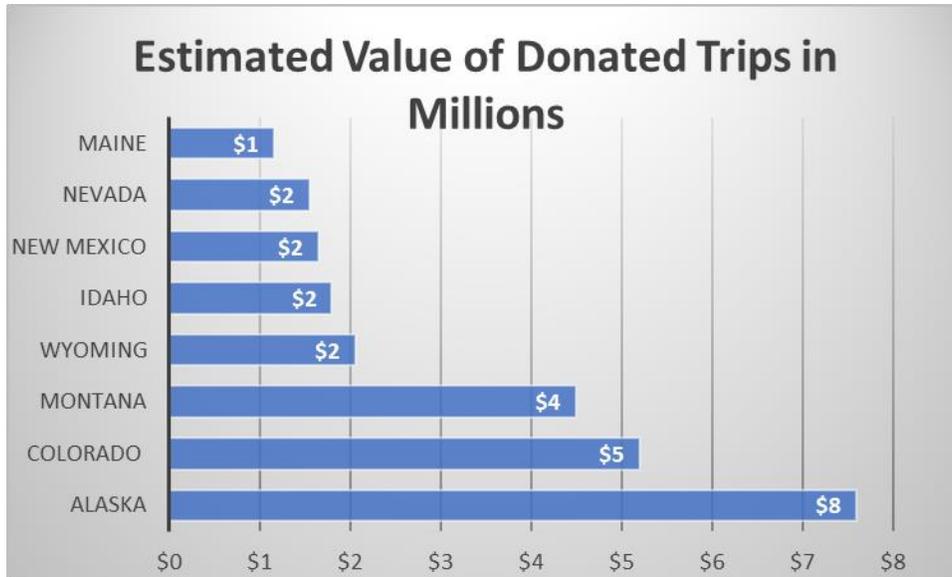


Figure 5. Estimated retail value of donated trips by POGA members in 2016.

X. Discussion and Conclusions

The role of non-governmental conservation organizations in supporting habitat and wildlife management is expanding as traditional state and federal agencies struggle to maintain adequate funding. An important distinction can be made between the traditional funding sources for fish and wildlife management through license sales and Federal Aid in Restoration programs which support state and federal agency activities and funding for conservation organizations that enhance overall conservation efforts.

Results from this study clearly demonstrate that Outfitters, as a donor block, are a very significant, possibly the largest, source of revenue for Conservation Organizations that support hunting and fishing activities. The frequency with which Outfitters donated to these organizations was nearly 90% and their collective donations were substantial.

In conclusion, the pilot study conducted by POGA, on behalf of the 8-state membership, finds that the outfitting industry contributes substantially to the funds generated by conservation organizations for helping to conserve wildlife and habitat within the United States of America.

Further, POGA members would like for the outfitter industry to be recognized by conservation organizations as well as state wildlife agencies for their substantial conservation efforts. Without the generous donations of the businesses providing hunting and fishing experiences to sportsmen, conservation organizations would not have the ability to fund on the ground conservation efforts at the level which they proclaim.

As reported, this study is a highly-conservative estimate of the contributions provided by the outfitting industry. Further analysis will be conducted by POGA in the near future to obtain a more technically-accurate estimate regarding the economic contributions of the outfitting industry.

XI. Acknowledgements

This report was produced by the Professional Outfitters and Guides of America. An 8-state membership that consists of the following outfitter and guide associations:

Alaska Professional Hunters Association
Colorado Outfitters Association
Idaho Outfitters and Guides Association
Maine Professional Guides Association
Montana Outfitters and Guides Association
Nevada Outfitters and Guides Association
New Mexico Council of Outfitters and Guides
Wyoming Outfitters and Guides Association



We would like to recognize and thank the leadership of Safari Club International for the support they have provided to develop and sustain POGA as part of their Guide and Outfitter program.

