

## **The Forum on Tennessee's Great Outdoors**

### **HB1871/SB1832**

#### **Executive Summary**

In Tennessee, the great outdoors is big business and a long-standing part of our heritage. Tennessee's mountains, rivers, plains and wildlife have shaped who we are as a people and a culture, and have supported our rural and industrial economies for generations.

In Tennessee alone, forestry, hunting, fishing, boating, wildlife watching and state parks generate collectively 193,000 jobs resulting in approximately \$8.7 billion in salaries and wages. These activities also produce an annual economic output of a little more than \$30 billion dollars and direct expenditures of more than \$8.6 billion dollars; generate more than \$400 million in state and local taxes; and provide recreation opportunities for more than 11.8 million people annually. In addition to these direct economic benefits, these activities also provide critical and significant health and quality of life benefits.

To protect and grow the outdoor recreation industry, we must have a well-managed and healthy natural resource base. Today there are increasing challenges and new opportunities impacting our state's land, streams, rivers, wildlife, forests, fields, air and lakes. These challenges and opportunities, if not managed wisely, can and do negatively impact our natural resources and the outdoor recreation economic sector that depends upon them. This reality also prevents us from seizing on new outdoor recreation opportunities that can help rural economies.

Our state agencies do a good job of managing our natural resources, however these new and increasing challenges and opportunities are outstripping their resources. This means our state cannot adequately address the challenges facing many of our natural resources, nor can it take advantage of new opportunities that stand to increase our outdoors recreation opportunities that benefit rural economies.

For Tennessee to maintain and expand the benefits that our great outdoors provides, HB1871/SB1832 has been introduced to create a Forum on Tennessee's Great Outdoors. This Forum will provide a new and comprehensive review of the health and status of our state's natural resources and our outdoor recreation needs and opportunities. It is designed to provide a comprehensive approach, working through multiple disciplines and areas of focus. This in turn will help us to determine how best to maintain our traditional ties with the outdoors, foster the economic benefits of outdoor recreation activities, and protect our streams, forests, grasslands, shorelines, wildlife, and urban parks for the enjoyment of future generations.

To accomplish this HB1871/SB1832 brings together Tennessee's citizen leaders and professionals who have a passion for the great outdoors and who can lead the Forum to develop results driven solutions to the challenges and opportunities we face.

Tennessee can become a leading world-class destination for outdoor recreation if we leverage the collective experience and knowledge of the public and private sector and focus it upon addressing opportunities that lay before us.

## **Why HB1871/SB1832 is needed and what it does**

HB1871/SB1832 establishes a high level discussion and evaluation of what Tennessee's natural resources and outdoor recreation will require over the next twenty years to ensure that they grow and remain healthy. This bill accomplishes this overall goal through the following steps.

- Establishes a 12 person forum comprised of ten (10) citizens, one (1) member of the Tennessee House of Representatives and one (1) member of the Tennessee Senate.
- Appointing authorities are the Governor (4 appointments), the Lt. Governor (4 appointments) and the Speaker of the House (4 appointments). Also requires members of the forum to attend at least 50% of the scheduled meetings in a 6 month period.
- Establishes the following purposes and goals of the forum to:
  - Evaluate and compile a list of five (5) major challenges to Tennessee's natural resources;
  - Evaluate and compile a list of recommended solutions aimed at addressing the five (5) major challenges facing Tennessee's natural resources;
  - Examine the status, quality, and needs of Tennessee's natural resources, including, but not limited to, private and public lands in this state, surface waters, fish and wildlife, forests, grasslands, wetlands, scenic resources, and ground water supplies;
  - Examine trend data and information concerning population, leisure, transportation, and other factors as they relate to the status of Tennessee's natural resources, including conducting an inventory of outdoor recreation resources and opportunities; and
  - Examine factors affecting the current and anticipated future supply and demand of outdoor recreation opportunities, including issues related to available land and facilities; outdoor recreation-related policies at the federal, state, and local levels; and funding available for the purchase of new, and maintenance of existing, land and facilities, for adequate staffing, for the development and implementation of recreation programs, and for the enforcement of recreation-related laws and regulations.
- Has a term for the forum beginning July 1, 2016, with a final report due to the Governor and General Assembly December 31, 2017, after which the forum is terminated and the statute is repealed. Also establishes meetings no less that two (2) times per quarter during life of forum.
- Establishes members of the forum to represent outdoor recreation; natural resource conservation; forests; history and historic preservation; river, lakes and streams; fish and wildlife; agriculture; parks; public land and land management; and natural resource based tourism.
- Establishes a technical advisory committee comprised of representatives from the departments of agriculture, division of forestry; economic and community development; environment and conservation; tourist development; the Tennessee Wildlife Resources Agency; and the Tennessee historic commission to support and assist the forum.

## Supporting and Growing Tennessee’s Economy and Jobs

Tennessee’s natural resources are the backbone of our state’s economy and Tennessean’s quality of life and health. This simple fact places their proper management and conservation as a priority.

In Tennessee, our great outdoors are big business, and investments therein provide remarkable economic returns. Take for example recent research from the University of Georgia that shows the economical recreation value of public access trout fishing in north Georgia to be over \$200 million annually.

<b>Annual Economic Impacts of Select Outdoor Recreation Activities based upon Tennessee’s Great Outdoors</b>							
	Number of people who participate	Total Direct Expenditures	Total Economic Multiplier Effect	Salaries and Wages	Jobs	State & Local Taxes	Federal Taxes
Wildlife Watching	1,955,000	\$942,573,000	\$1,767,482,300	\$670,860,077	23,256	\$131,825,603	\$134,167,350
Fishing	826,000	\$1,279,223,286	\$2,051,674,603	\$690,098,985	17,542	\$112,094,480	\$149,376,195
Hunting	375,000	\$505,208,456	\$835,585,578	\$281,406,658	8,847	\$54,841,175	\$64,885,376
Boating	265,306 boats	\$1,200,000,000	\$2,970,000,000	\$978,100,000	23,512	Not available	Not available
TN State Parks	8,450,000*	\$725,000,000	\$1,600,000,000	\$909,100,000	18,678	\$106,300,000	Not available
Forestry	N/A	Not available	\$21,010,000,000	\$5,163,000,000	101,768	Not available	Not available
<b>Total</b>	<b>11,871,306</b>	<b>\$4,652,004,742</b>	<b>\$30,234,742,481</b>	<b>\$8,692,565,720</b>	<b>193,603</b>	<b>\$405,061,258</b>	<b>\$348,428,921</b>

Sources: National Marine Manufacturers Association, U.S. Fish and Wildlife Service, University of Tennessee, TN Department of Agriculture, Division of Forestry

\*State Parks participation number reflects the number of visitors, not individuals

Similarly, specific analyses of investments made at federal fish hatcheries and their positive impacts to economies in their respective states show that Tennessee’s Dale Hollow Federal Fish Hatchery has an annual economic impact in Tennessee of \$150 million. The Chattahoochee Federal Fish Hatchery in Georgia supports the creation of more than 333 jobs, \$8.6 million in salary and wages, retail sales of more than \$16 million, and a total economic output of \$30.3 million. For every \$1 spent on the hatchery, \$40 in economic output is generated.

These economic realities are why Bass Pro Shops and Gander Mountain will soon have a total of seven (7) outdoor megastores in Tennessee.

In addition to these realities, many of Tennessee’s most productive economic sectors rely heavily upon our state’s natural resources. Recently completed strategic plans completed for agriculture and tourism focus strongly on jobs and economic development, but rely heavily on Tennessee maintaining healthy natural resources.

## The Challenge

In managing Tennessee's natural resources, there is a "golden rule" that states: if you take care of the resource, it will always produce a sustainable and renewable bounty that Tennesseans can enjoy for generations upon generations. By following this rule, Tennessee can become a leading world-class outdoor recreation destination.

Today there exist modern day threats that require new approaches and innovative solutions to prevent them from negatively impacting our state's natural resources. In some cases, the scale of the problem is too large for our current capacities to overcome. In other cases, the complexity of the threat is overwhelms a single solution. Overall, these solutions require cross-disciplinary collaborative approaches that cannot be developed successfully in a silo or vacuum.

For example, the Asian-longhorned beetle is close to Tennessee, as its infestation is in Ohio. This beetle feeds on maple and 29 other species of trees, many of which occur in Tennessee. If we are not properly prepared, this beetle could have a devastating economic impact on our tourism and forest industries by destroying maple trees that provide Tennessee's signature fall colors, and other trees that support our timber products. This would also produce a destructive domino effect by destroying wildlife habitat; that in turn negatively impacts the hunting and wildlife-watching industries.

Additionally, water quantity and quality are two major challenges facing the entire Southeast for the foreseeable future. With Middle Tennessee projected to add an additional one million residents over the next 10-20 years, the demand for water will increase exponentially, placing great pressure upon our streams, rivers and reservoirs. If not properly planned for and managed, this demand for water will deleteriously impact the waters that Tennesseans use for fishing, boating and recreation and subsequently the rural economies that rely upon these uses.

These are just two of several large and complex challenges facing Tennessee's great outdoors.

And while these challenges are demanding attention, more Tennesseans are looking to recreate outdoors, and have a high quality experience doing so. Several of our public spaces are being overused, and as a result the experience at these areas greatly diminished. To sustain quality outdoor tourism and recreation, access to the necessary well-managed natural resources is a critical problem.

These impacts work to lower the quality of life Tennesseans, and negatively impact rural economies.

Given these realities, the time is right for – and circumstances require – a renewed strategic examination of the challenges and needs facing Tennessee's natural resources and the development of solutions to meet those challenges and needs. Only then can our natural resources be used wisely and sustainably to support outdoor recreation, tourism and other needs for the benefit of our state and its citizens. Tennessee's lands, water and wildlife are the foundation upon which many of our state's economic engines are built. It is therefore proper and important that we provide leadership to facilitate a process to address these challenges.