

ESTIMATED ECONOMIC VALUE OF TRIPS DONATED BY OUTFITTERS

A 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

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I. **Abstract**

- Surveys were distributed to 1,884 outfitter businesses across 8 states (Alaska, Colorado, Idaho, Maine, Montana, Nevada, New Mexico, and Wyoming). These associations make up the membership of the Professional Outfitters and Guides of America (POGA). A total of 207 surveys were completed. Collectively the 8 state associations represent nearly 4,000 individual Outfitter businesses.
- Thirty, or more, surveys were received from Montana: 58 surveys (28% response), New Mexico: 37 surveys (18% response), Alaska: 33 surveys (16% response), Colorado: 32 surveys (15% response). Those with less than 30 responses were Wyoming: 20 surveys (10% response), Maine: 14 surveys (7% response) Nevada: 12 surveys (6% response) and Idaho: 1 survey (0.05% response).
- An estimated \$25.6 million was donated to conservation organizations, by the 8 state members of POGA, in 2016.
- Alaska accounted for 30% of the estimated \$25.6 million 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.
- The average estimated values donated on an individual outfitter basis by state ranged from \$21,093 in Alaska to \$1,054 in Maine. With only one response from Idaho it was impossible to make an assessment.
- 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, 42.5% and 35.6% respectively.
- 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.

CONTENTS

1. Abstract.....	Page 2.
2. Introduction.....	Page 4.
3. Survey Objective.....	Page 4.
4. Approach.....	Page 4.
5. Estimation Procedure.....	Page 5.
6. Data Collection.....	Page 5.
7. Procedure & Timeline.....	Page 6.
8. Data Analysis.....	Page 6.
9. Results	Page 7.
• Table 1. Response Rate	Page 7.
• Figure 1. Frequency of Response by State	Page 8.
• Figure 2. Frequency of Outfitter Donations	Page 8.
• Figure 3. Donations to Conservation organization	Page 9.
• Figure 4. Average outfitter donation in 2016	Page 10.
• Table 2. Estimated retail value of donated trips	Page 11.
• Figure 5. Estimated Retail Value.....	Page 11.
10. Conclusion	Page 11.

II. Introduction

The conservation movement seeks to protect natural resources including wildlife and their habitat for the future generations. There are many hunting centered conservation organizations which provide monetary contributions to state wildlife agencies annually. Outfitter businesses donate substantially to the conservation movement through their donation of trips which are auctioned and sold through established conservation organizations.

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 generated by 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 8 state guide and outfitter organizations who in turn represent individual outfitters who provide outdoor experiences. POGA membership includes five western 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 generated through the sale of trip donations to benefit conservation organizations by outfitters represented by 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 8 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 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 actual value are not the same, however it was not possible to collect the actual data generated from conservation organization auctions at this time.
- Date sample was limited to a single year (2016).
- Date sample was 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.
- Sampling points reported by states are an average contribution by business entity.

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 Amount 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.
- 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 at a later date to help guide the refine the survey tool and procedure.

VI. Data Collection

Given this approach the following data inputs were required:

- 1) How many licensed outfitter/guide businesses offering services exist in each POGA member state.

2) Outfitter survey:

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?**

VII. Procedures & Timeline

- Survey instrument was developed using SurveyMonkey in a four-question template. 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. 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.
3. If sufficient responses are received from each state (over 30). 8 independent estimates can be generated and that sum would be a more technically correct way to approach the total estimate.

X. 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 rates.

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 thirty, or more, surveys were received from Montana: 58 surveys (28% response), New Mexico: 37 surveys (18% response), Alaska: 33 surveys (16% response), Colorado: 32 surveys (15% response). Those with less than 30 responses were Wyoming: 20 surveys (10% response), Maine: 14 surveys (7% response) Nevada: 12 surveys (6% response) and Idaho: 1 survey (0.05% response).

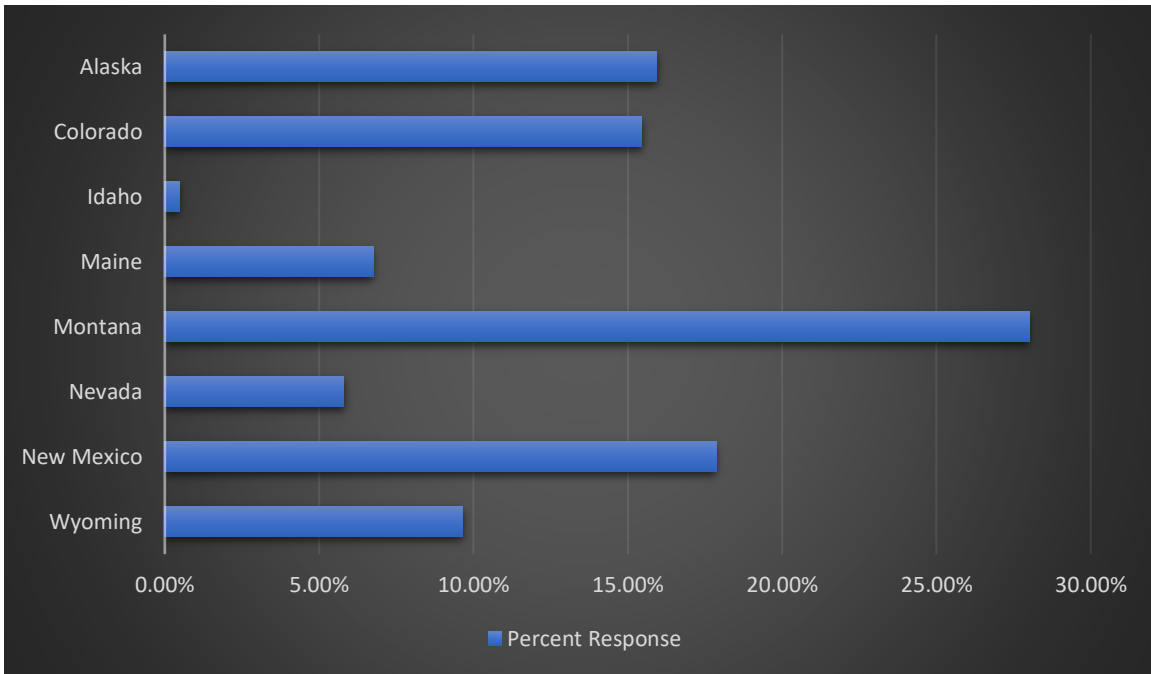


Figure 1. Frequency of outfitter response to survey by state.

c) Frequency of Donation

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).

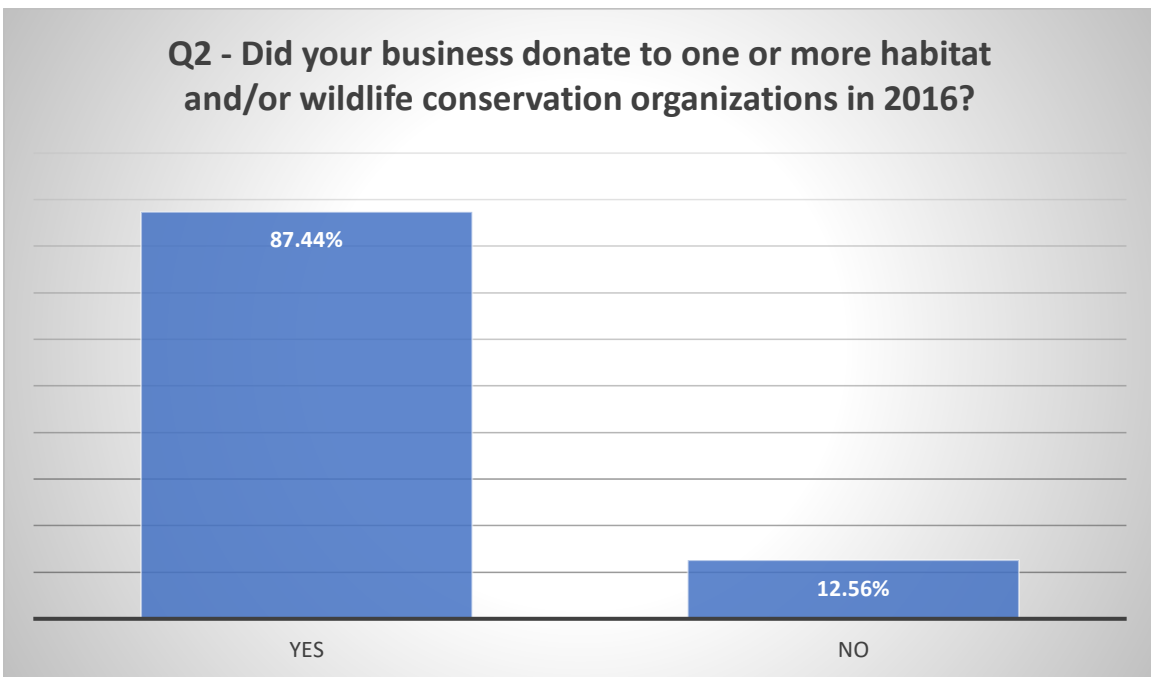


Figure 2. Frequency of outfitter donations to Conservation Organizations across all 8 states sampled.

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 42.5% and 35.6% respectively (Figure 3).

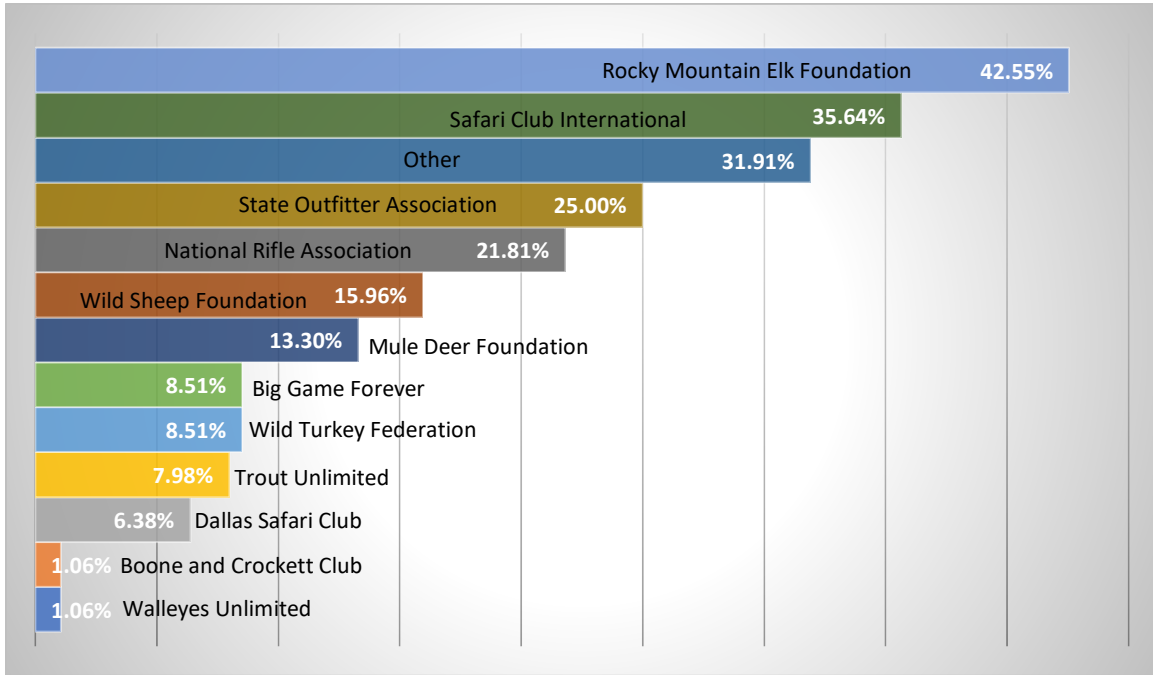


Figure 3. Frequency of donation by Conservation organization

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

- Back in the Maine Stream
- Belgrade Regional Conservation Alliance
- Big Hearts under the Big Sky
- California Deer Association
- Coalition for Nevada's Wildlife
- Costal Conservation Association, San Antonio
- Duck Unlimited
- Forest Society of Maine Save the Everglades
- Freedom Hooves Horse Therapy
- Friends of the NRA
- Grand Slam Club/Ovis
- Land Trusts, State Conservation Organizations
- Lions club
- Madison River Foundation,
- Montana Wilderness Association
- Muley Fanatics Foundation
- Nevada Bighorns Unlimited
- Nevada chukar
- Pheasants forever

Pope and Young
 Private
 Quality Deer Management Association
 Ruff Grouse Society
 Sportsman’s Alliance of Maine
 Teton, MT County Weed District
 United States Forest Service
 Wounded Warrior
 Wyoming Outdoorsmen
 Youth hunts

e) Estimated Values

The average estimated 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.

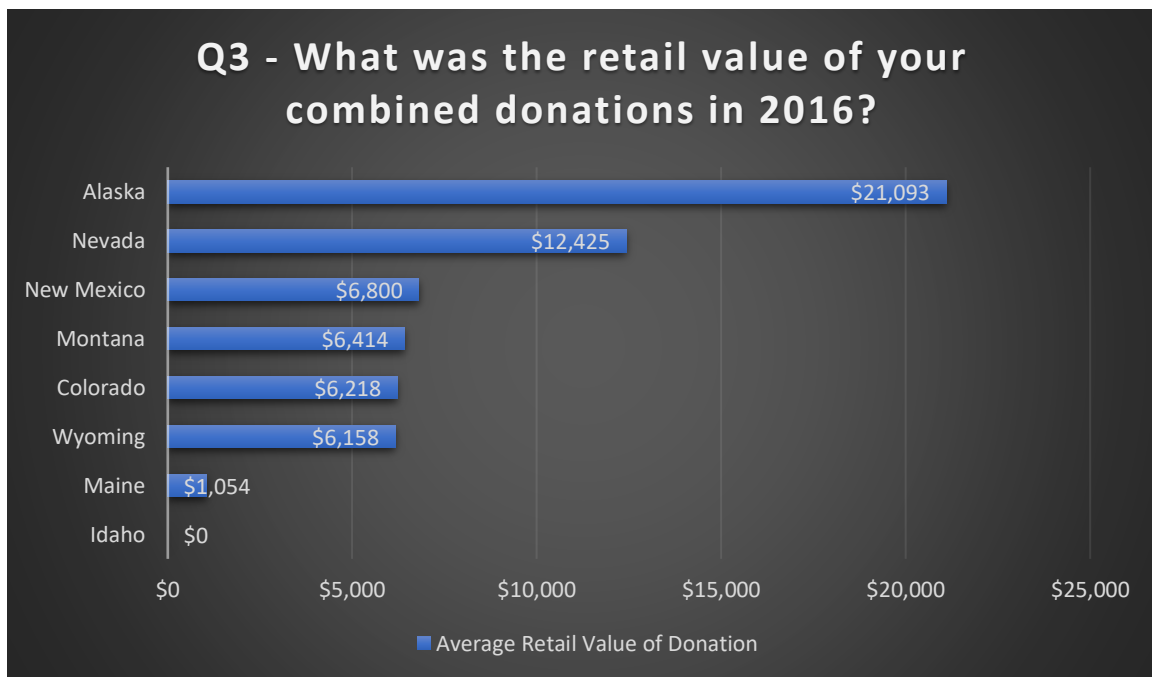


Figure 4. Average outfitter donation (retail value) in 2016.

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

Collectively the eight states that make up POGA contributed \$25.6 million to conservation organizations in 2016 (Table 2). This is likely a conservative estimate based on the fact that 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 30% of the estimated \$25.6 million 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).

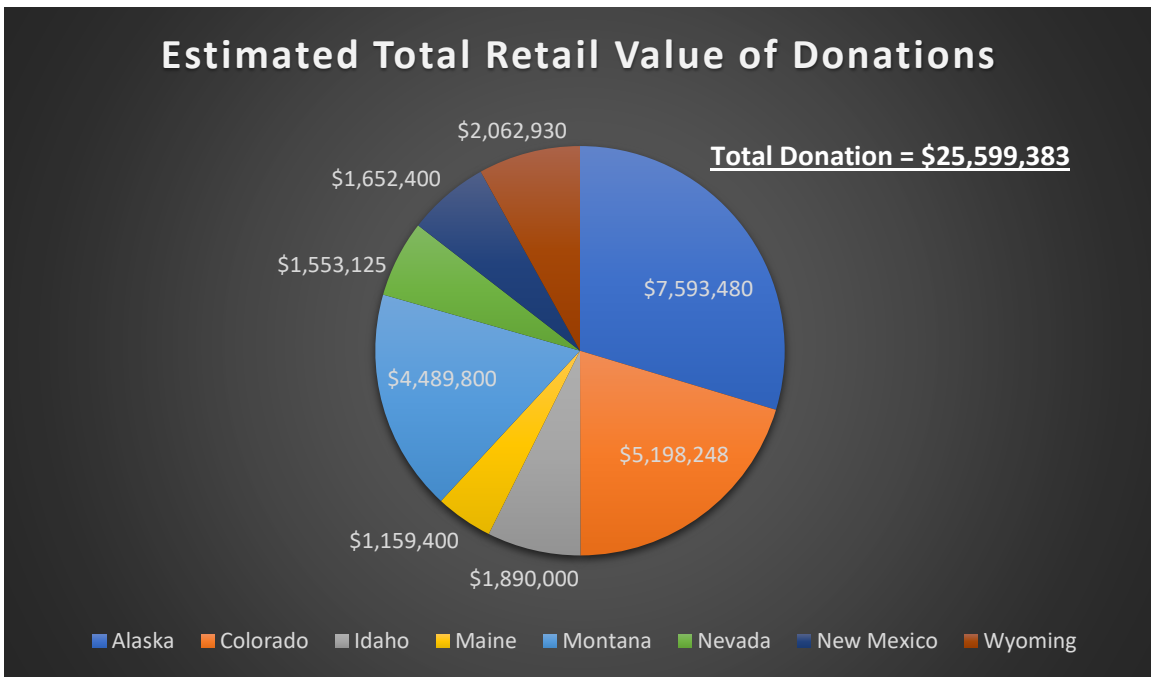


Figure 5. Estimated retail value of donated trips by POGA members in 2016.

XI. Discussion and Conclusions

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 the purpose of 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.

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

