Data: Opportunities

Existing Data Assets

- Data is available from destination marketing organizations, the U.S. Forest Service, and other federal agencies, providing a starting foundation for regional analysis
- Existing data from partners including Tahoe National Forest, State Parks, and SYRCL already demonstrates strong visitation and economic impact
- Visit California provides extensive county-level data through annual modeling-based reports, including a powerful macro-level figure: California leads the nation in outdoor recreation economic output at $87.87 billion
- Several tourism-heavy cities within Orange County maintain their own detailed data, demonstrating the potential value of more systematic investment
- Reasonable visitation data exists for national forests and parks, and good data is available on rural communities outside park and forest boundaries

High-Value Locally Collected Data

- A river ambassador nonprofit collects high-quality data on visitor counts, origins, and activities — a model worth sustaining and expanding
- SBTS conducts surveys at each event using consistent questions, building a proprietary dataset over time and maintaining control over what gets measured
- US Forest Service road user data, originating from a master's thesis project, demonstrates that locally initiated data collection can produce usable, credible results
- Business surveys and trailhead tabling are accessible methods for generating specific, on-the-ground visitor data
- In small towns, direct observation by board members, city officials, and business owners confirms and contextualizes what data already shows
- The San Diego Arts Council and Economic Development Corporation have strong data on economic impact, with arts and culture generating approximately $10 billion regionally
- San Diego Tourism Authority maintains excellent data on visitor numbers, origins, activities, and spending, providing a solid macro-level foundation for advocacy and planning

Emerging Technology & Tools

- Emerging tools like Placer.ai and Buxton offer potential to track visitor behavior and spending patterns affordably
- Cities like Eureka and Ukiah have already invested in Placer.ai subscriptions, yielding detailed visitor data — Friday night markets drawing 6,000–7,000 visitors — demonstrating the tool's practical value
- Phone-based location data is emerging as a useful and relatively accessible tool for tracking trail visitation

Data: Opportunities - *continued*

Data as an Advocacy Tool

- Economic data is a powerful tool for community buy-in — Everett Memorial Highway data showing $5,000–$25,000/day in economic activity successfully made the case for road plowing when county officials resisted
- Outdoor industry economic forecasts from comparable recreation destination towns provide useful benchmarks for regional advocacy
- State funding for simultaneous economic impact analyses across multiple rural communities could produce comparable, regionally useful data efficiently

Systemic Improvements Within Reach

- Improved data-sharing agreements across agencies could significantly strengthen the advocacy and grant-making case for trail investment
- A shared regional dashboard integrating multiple metrics is conceptually viable given existing data assets — the gap is capacity and coordination, not data absence

Data: Challenges

Fragmentation & Inconsistency

1. **Data is fragmented across multiple organizations and agencies** — Forest Service, State Parks, nonprofits — and is not regularly updated
2. **No shared dashboard or standardized metrics exist** to aggregate data into a coherent regional picture
3. **Data is highly uneven**: well-resourced cities are "lanterns in a dark night" against a largely dark regional backdrop
4. **Geographic boundaries between Visit California regions and Jobs First regions do not align**, creating mismatches between visitor data and economic development planning
5. **Orange County has no county-wide tourism data infrastructure**; data is siloed within individual cities with no aggregation or shared metrics
6. Competition between coastal cities for tourism dollars intensifies the need for detailed local data, but the **capacity to produce it does not exist at that scale**

Outdated & Incomplete Data

7. **US Forest Service data is 3–5 years old**, and the agency stopped systematic economic impact collection in the early 2000s
8. US Forest Service's National Visitor Use Monitoring process only runs every five years, **creating significant gaps in user behavior data**
9. **Trail counters for bike trails were supposed to be installed by the Forest Service**, but their status is unknown
10. Campground usage and **visitor number data gaps impede effective design and planning decisions**
11. Bike industry and outdoor companies either **do not have or will not share sales data that could help demonstrate recreation's economic footprint**

Access & Ownership Barriers

12. Collecting data on federal land requires permits and permissions from local rangers, with approval depending on personal relationships built over 5–10 years — **land managers control access to data collection, not just data ownership**
13. Data ownership and **access across agencies remain unclear, limiting sharing and use**
14. Visit California is perceived to hold larger datasets but **does not prioritize rural regions in how that data is shared or applied**
15. **Visit California's data resources are not well known** among trail-focused organizations, suggesting a significant outreach and awareness gap
16. **Purchased data lacks the granularity and community specificity needed for local advocacy**; locally collected data is more useful but requires capacity and funding that most rural organizations lack

Data: Challenges - *continued*

Capacity & Analysis Gaps

17. **The primary challenge is not data existence but getting data to the people who need it** and providing the capacity for meaningful analysis
18. Rural regions frequently make decisions based on intuition rather than systematic data due to **time and capacity constraints**
19. Capacity to build a recreation economy dashboard with multiple **integrated metrics does not currently exist**
20. **Quantifying trail project benefits beyond anecdotal evidence** and partner letters remains a persistent challenge, weakening grant applications and policy advocacy
21. **Surveys are rare due to funding constraints**, leaving user behavior data severely lacking
22. **Survey fatigue among visitors is limiting the ability to gather behavioral data** on what activities tourists engage in

Vulnerable & At-Risk Data

23. **Paper records are vulnerable to loss during office cleanings and closures**, and historic Forest Service maps face disposal risk
24. **Indigenous tribes lack the administrative capacity funding** needed to share ethnographic, cultural, and geographic data that would significantly enrich regional projects

Gaps in Specific Areas

25. **Strava data is of limited usefulness** — not all trail users participate, and activity is heavily concentrated in certain areas, skewing the picture
26. **Connecting weather disruption data to visitation impact data is methodologically difficult**, making it hard to quantify climate costs to the recreation economy
27. The **fragmented data landscape** makes it difficult to tell a compelling regional story to funders or policymakers
28. Without comprehensive, current visitation data, **grant applications are difficult to substantiate, and community impact is hard to demonstrate**
29. **Neighborhood-level data for small business planning is needed** for places like downtown, Pacific Beach, Mission Beach, La Jolla, and Del Mar