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## *State of the Guiding Industry*





# GUIDES: A UNIQUE SORT

DO YOU THINK GUIDING IS A SUSTAINABLE CAREER?

50% YES 50% NO

80

CLIMBING WALL INSTRUCTORS

84

SKI GUIDES/ SKI MOUNTAINEERING

TYPE OF GUIDE

409

SINGLE PITCH INSTRUCTORS

86

ALPINE GUIDES

125

ROCK GUIDES

69

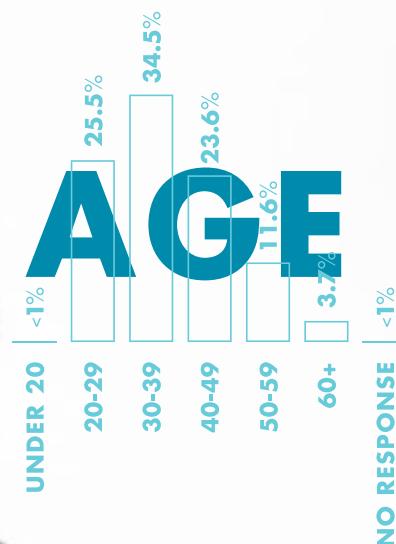
ROCK INSTRUCTORS

\*OF SURVEY RESPONDENTS

6-10 YEARS

MEDIAN YEARS GUIDING

8% HAVE BEEN GUIDING FOR 25+ YEARS



DO YOU BELIEVE AMGA CERTIFIED GUIDES MAKE MORE MONEY THAN NON CERTIFIED GUIDES?

72% YES 26% NO

In recent years, mountain guiding has begun to grow from a small network to an economic and social media engine. "Guide sports" like climbing and backcountry skiing are gaining popularity, and guides are instrumental in generating roughly \$3.2 billion in outdoor recreation sales. American Mountain Guides alone maintain a social network larger than most outdoor brands.

As National Geographic put it in May 2013: "guides are the portals to the outdoor world."

Still, the profession of mountain and ski guiding faces challenges. More than

two-thirds of guides work a second job, and only half report the profession as "sustainable." Members increasingly look to the AMGA to provide opportunity for growth, and development for the future of guiding. It's a responsibility we take seriously.

This first annual AMGA State of the Guiding Industry report takes a look at the guiding industry, guides' lifestyles, and the role the AMGA and its membership play in the recreation economy. It uses unique data gathered from the AMGA member survey, as well as current outdoor industry and recreation reports. It provides information for people

interested in guiding as a profession or who are curious about the impacts guides make on our lands and economy.

The AMGA is America's first and most influential climbing and skiing guides organization. For us, providing a snapshot of the industry's challenges and opportunities is crucial to our efforts to develop a culture of mountain craft in America and to support our members in their professional growth. We welcome your feedback: [info@amga.com](mailto:info@amga.com).

# guides vs. national average

*Unlike the average American, guides are less likely to own a home.*

## RENT VS. OWN



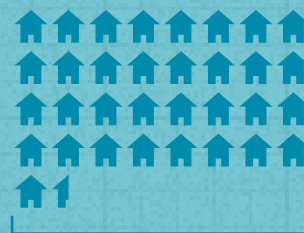
48%  
OWN



38%  
RENT



4.9%  
VEHICLE



67%  
OWN



32%  
RENT

*Like your average American, guides roughly make a daily wage of between \$150 & \$200.*

## WAGE



\$200-300  
(DESIRED WAGE)

\$200  
/DAY  
to  
\$126  
/DAY

\$191  
/DAY

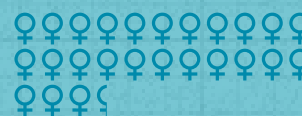
## GENDER



11%  
FEMALE



89%  
MALE



50.8%  
FEMALE



49.2%  
MALE

*Also, unlike your average American, guides are three times more likely to be college educated.*

## EDUCATION

### COLLEGE GRAD



52%



15%

### DOCTORATE



5%



2.95%

A 61-question online survey was conducted by the AMGA in which 825 AMGA members voluntarily reported survey answers. Survey results reflect some similarities and differences between the American Guide and the Average American.



# STEWARDS OF OUR LAND

## ***Who is managing the growth in outdoor recreation on public lands?***

*There is a national move to the great outdoors. More Americans participated in outdoor recreation in 2012 than any year recorded, beginning in 2006. The National Park Service expects an additional 1 million park visitations in 2014 from 2013.*



**Participation in outdoor recreation has never been higher ...**

**12.4 BILLION**

outdoor outings in 2012

**87.4**

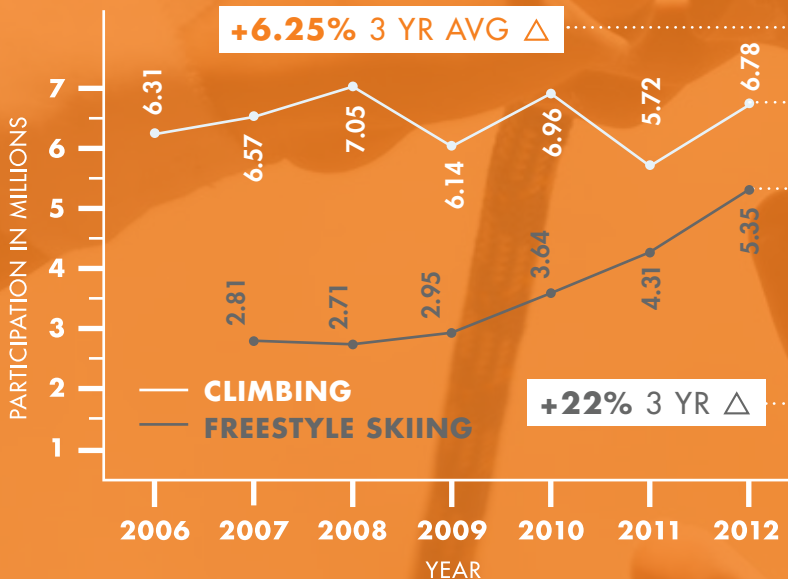
average outings per participant

**49.4%**

of the total population

**... especially in adventure sports like climbing and skiing.**

## OUTDOOR PARTICIPATION BY ACTIVITY



## DEVELOPED SKIING<sup>1</sup>

68 to **147%** growth



## UNDEVELOPED SKIING<sup>2</sup>

55 to **106%** growth



## CHALLENGE ACTIVITIES<sup>3</sup>

50 to **86%** growth

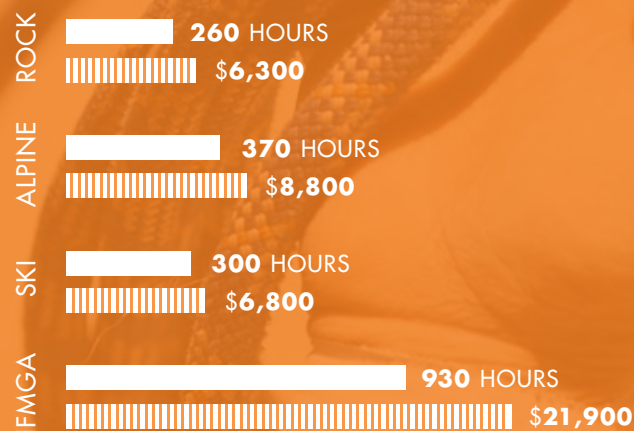


**Guides dedicate time & money to ensure safety & ethical use of land.**

**25% of AMGA members believe *standardization* is key to public lands use. Providing *proactive risk management, security, & confidence* to the public.**

Between its current **681** guides<sup>4</sup> (rock, alpine, ski mountaineering and IFMGA), AMGA guides have a combined **263,460** hours and **\$6.2 million** invested in their guiding education.

## TIME & MONEY INVESTED IN GUIDING EDUCATION



***"The AMGA sets high standards for all guides, and a structure for approaching land managers and government agencies with well developed, cohesive advocacy for conservation & access."***

**—AMGA member**

<sup>1</sup>Developed skiing: downhill or snowboarding

<sup>2</sup>Undeveloped skiing: cross-country skiing, snowshoeing

<sup>3</sup>Challenge Activities: includes caving, mountain biking, mountain @ rock climbing

<sup>4</sup>Certified guides have completed at least two AMGA courses and one exam.



# THE ECONOMIC IMPACT

*Guides are consumers and influencers.*



Spends **\$1,391** per year on guide related equipment and clothing.

There are **2,606** AMGA members.

That's a **\$3.6 MILLION** engine for all AMGA guides alone.

The guiding industry is growing at a rate of **10%** each year.

**40%** of guides believe the demand for guide services is growing year after year.

The average American spends **\$4614** on outdoor recreation annually.

That means our industry will have a **\$5.8 MILLION** economic impact in 2018.

If each AMGA client spent an avg. amount of money on outdoor recreation, that would make a **\$3.2 BILLION** sales impact.

**A \$5.2 BILLION** impact in 2018.

## THE SOCIAL IMPACT

*Social even in solitude.*



Interacts with **2.7** clients per guided session **100x** per year

That's **703,620** clients annually.

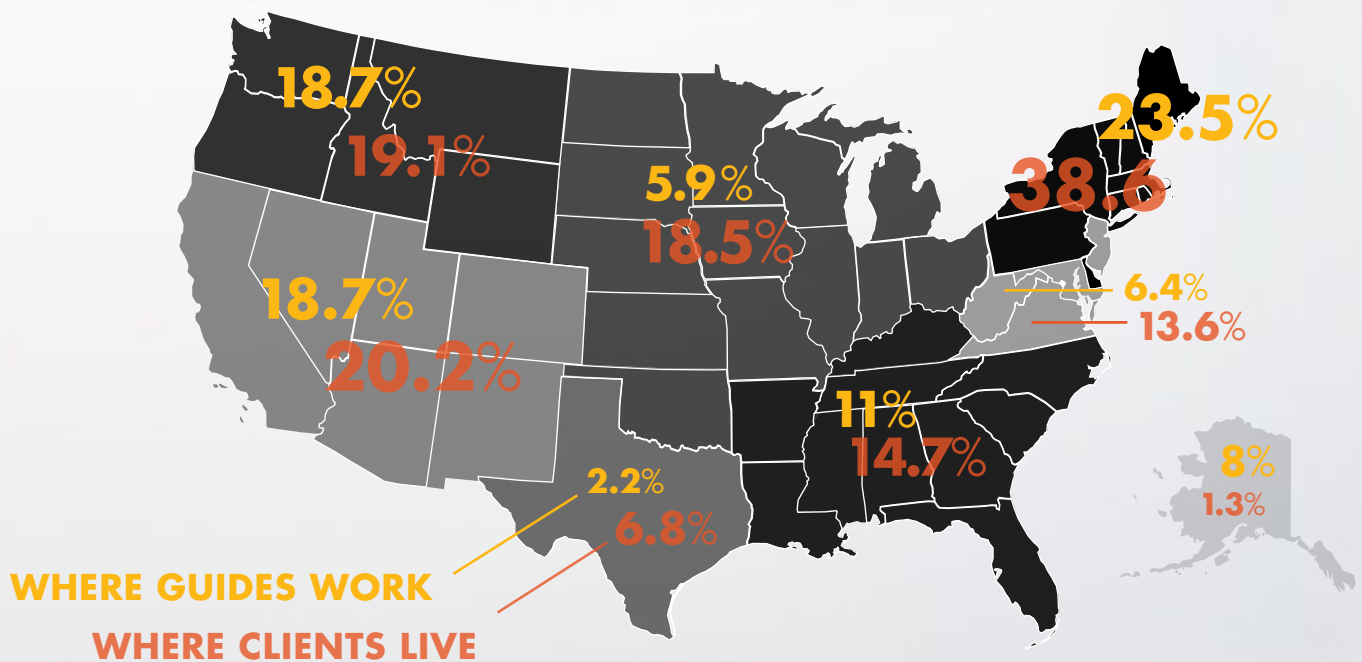
That's more than the number of Facebook fans of Patagonia, Goretex, Back Diamond, and Eddie Bauer—**COMBINED!**

If each one of these clients posted one photo on Facebook, that could be more than **91 MILLION** impressions.

**32%** of clients seek guides for a new experience.

**65%** of AMGA guides use Facebook to market themselves or outdoor rec.

# GUIDING: A \$3.2 BILLION INDUSTRY IN 2013



## SOCIAL IMPACT

**Guides have friends.** AMGA guides collectively interact with more people than the combined Facebook networks of Black Diamond, Eddie Bauer, Gore-tex and Patagonia. As experts in their fields, they encourage participation and influence consumption.

## ECONOMIC IMPACT

**Guides are consumers and influencers.** AMGA guides make a \$3.2 billion impact in outdoor industry sales annually. With a growth rate of 10% each year, the AMGA membership will contribute an additional \$2.0 billion by 2018.

## GEOGRAPHIC IMPACT

**Guides travel.** AMGA guides and their clients have huge geographic reach, serving as guerrilla marketers to their friends in the regions where they live and travel to. AMGA guides endorse brands they wear and gear they use.



## THANKS TO OUR PARTNERS

GORE-TEX  
Black Diamond  
Brooks Range Mountaineering  
Eddie Bauer  
Marmot  
Petzl America  
The North Face  
Arc'teryx  
Five Ten  
Mammut  
Millet  
Mountain Hardwear  
Outdoor Research  
Patagonia  
Baffin  
Deuter  
Dynafit  
La Sportiva  
Leki  
MSR  
Outdoor Prolink  
Prana  
Salewa

Scarpa  
Suunto  
Therm-a-Rest  
Trango  
Wild Things  
ABS  
Backcountry Access  
Bluewater Ropes  
Camp USA  
Forty Below  
Garmont  
Gregory  
K2  
Julbo  
Metolius  
MontBell America  
Omega Pacific  
Rab  
Red Ledge  
Sterling Rope Company  
Backcountry Magazine  
Rock and Ice Magazine  
Climbing Magazine

## ABOUT THE AMGA

**Our mission: To inspire and support a culture of American mountain craft.**

The American Mountain Guides Association is a 501c3 educational non-profit that is dedicated to supporting the American mountain guiding and climbing instructor community. As the leading organization of America's most vibrant, inspiring community of climbers and skiers, the AMGA offers cutting edge knowledge and hundreds of years of collective experience that no other climbing organization provides. Founded in 1979.

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## PHOTO CREDITS

The cover photo was courtesy of Mark Houston and inside photos courtesy of Ashley Davis Tilly.

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