



A ROADMAP FOR A 21ST CENTURY OUTDOOR RECREATION ECONOMY

SUPPORTING AMERICA'S OUTDOOR RECREATION ECONOMY WILL DRIVE A NATIONAL BUSINESS GROWTH AGENDA

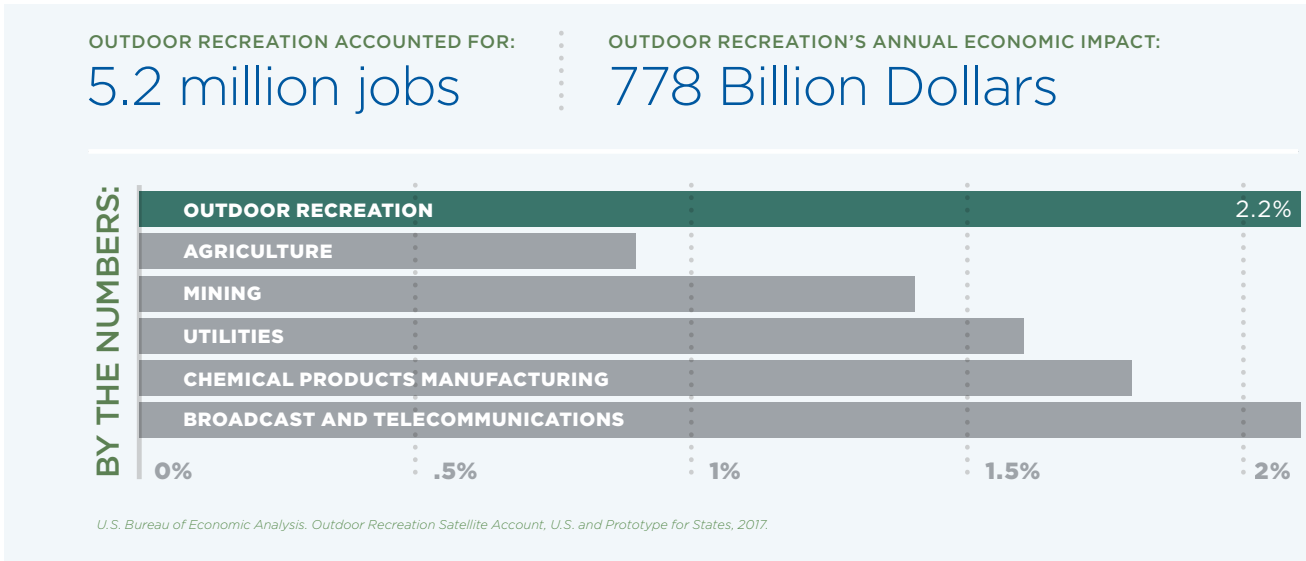
Whether you boat, ski, fish, hike, RV, camp, hunt, climb or enjoy off-roading, you are part of an economy that supports every aspect of the country from America's iconic natural landscapes to the strength of rural communities and U.S. manufacturing.

ORR is a partner providing life-changing outdoor experiences for everyone, while creating jobs, growing local economies and investing in the most important public asset we have — our shared lands and waters.

ORR has unified outdoor businesses around a shared goal of maximizing opportunities for outdoor recreation for every American by improving infrastructure and access for all forms of recreation.



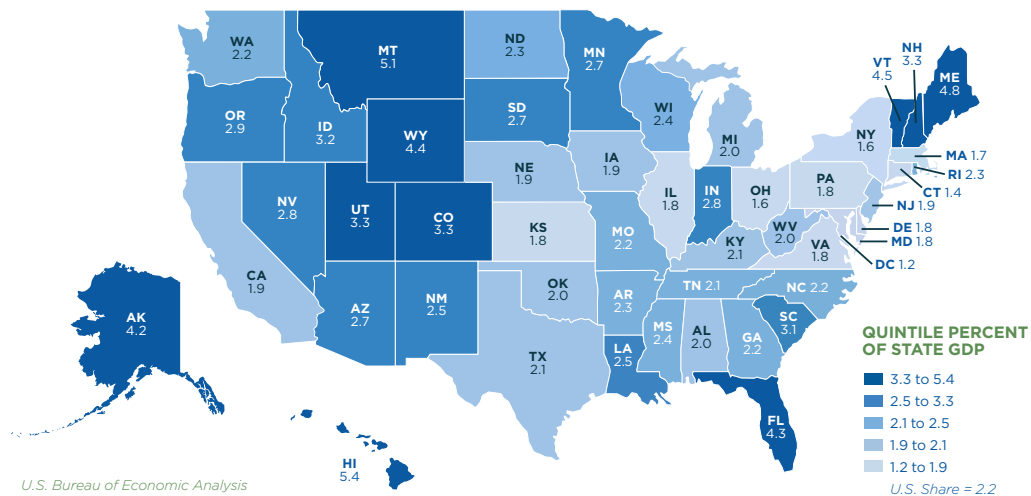
Our 32 national trade associations, representing more than 110,000 businesses nationwide, came together and agreed on priorities: to foster collaboration, remove barriers, prioritize accessibility and conservation, and ensure recognition of our economic power and potential.



Realizing the recreation economy is larger than many traditionally recognized industries, we used our collective power to move the national conversation.

- We emphasized the need for improved recreation infrastructure and access on public lands and waters with positive results like the passage of the Great American Outdoors Act;
- We gained influence and national recognition through the first-ever Bureau of Economic Analysis report on the industry and secured funding for ongoing annual national and state economic data;
- We supported the creation of 17 offices of outdoor recreation in states across the country;
- We moved the needle on prioritizing recreation on Capitol Hill holding seven recreation hearings in the last year alone and introducing the concept of a Recreation Package.

OUTDOOR RECREATION VALUE ADDED: PERCENT OF STATE GDP, 2017



IMPACTS OF COVID-19: NEW DEMAND AMIDST UNPRECEDENTED CHALLENGES

Our industry has been severely impacted by COVID-19. At the same time, we're seeing unprecedented growth among Americans who value and appreciate the outdoors. Prior to COVID-19 the recreation economy was growing faster than the economy as a whole in every indicator.

Communities need equitable, close-to-home access to recreation and we need your support to achieve our full potential and fully recover as an industry that drives economic growth, while supporting active people and communities, and the health of our planet.

89% OF OUTDOOR INDUSTRY BUSINESSES ARE EXPERIENCING DIFFICULTY WITH PRODUCTION AND DISTRIBUTION, WITH **68%** EXPERIENCING SIGNIFICANT IMPACTS.

79% OF THESE BUSINESSES HAVE LAID OFF OR FURLOUGHED A PORTION OF THEIR WORKFORCE, WITH **11%** CLOSING OR LAYING OFF MOST OF OR ALL OF STAFF.

89% OF OUTDOOR INDUSTRY BUSINESSES ARE EXPERIENCING A DECREASE IN SALES, WITH **39%** SEEING A DECREASE OF **50-75% OR GREATER**.

49% OF THE US POPULATION WAS PARTICIPATING IN OUTDOOR ACTIVITIES IN 2017

INCREASING DEMAND:

80% OF AMERICANS HAVE SPENT TIME OUTDOORS DURING THE CORONAVIRUS CRISIS, **32% OF WHICH FOR THE FIRST TIME**

REVITALIZE AMERICA THROUGH RECREATION

INVESTMENTS IN RECREATION INFRASTRUCTURE SUPPORT JOBS AND GROW LOCAL ECONOMIES

The outdoor recreation economy is made up of in-demand, high-growth industries, including those critical to restoring economic resiliency to our rural and under-resourced communities while employing millions of Americans across the country. However, businesses and outdoor enthusiasts face Eisenhower-era infrastructure systems, combined with years of insufficient resources and funding on our shared public lands and waters.

OUR PRIORITIES:

1. Tackling the \$20 billion maintenance backlog on our federally managed lands and waters and ensuring proper maintenance funding in the future.
2. Supporting the inclusion of recreation in comprehensive infrastructure solutions that support road systems on public lands as well as green and blue infrastructure.
3. Utilizing Youth and Veteran Conservation Corps to create an equitable and diverse future for the outdoor workforce with a better ROI for agency partners.
4. Promoting policies that provide technical and vocational training and partnerships with local community colleges and land grant universities in high-growth sectors like outdoor recreation.
5. Ensuring these investments extend into gateway communities boosting local economies and helping small businesses.



IMPROVED RECREATIONAL ACCESS DRIVES RURAL COMMUNITIES

Access to a boat ramp, campground or trail can be the lifeline for a rural community. To ensure access, we must partner with local, state and federal agencies to address issues around: outfitter-guide permitting, inter-agency coordination, overcrowding, ensuring equity and inclusion, and creating new opportunities for innovation and public-private partnerships.

OUR PRIORITIES:

1. Re-establishing the Federal Interagency Council on Outdoor Recreation to ensure efficiencies and coordination among federal land and water management authorities.
2. Creating a synchronized method for collecting visitor data from federal agencies so we can track how and where visitors are recreating and can then create better mechanisms for dispersing activities and connecting diverse communities to their shared resources.
3. Working with State Offices of Outdoor Recreation to streamline access issues on state and federal lands and engage outdoor businesses on shared access outcomes.



SOUND CONSERVATION POLICIES SUSTAIN RESILIENT RECREATION LANDSCAPES

Recreation access to our lands and waters must be balanced by ensuring resource protection and sustainable outdoor experiences for generations to come.

OUR PRIORITIES:

1. Creating a plan to mitigate climate change impacts on recreation assets and gateway communities that rely on robust outdoor recreation, and supporting quick recovery and restoration of these assets after a natural disaster.
2. Investing in natural solutions that allow for recreation while providing buffers during severe storms.



FREE AND FAIR TRADE IGNITES AMERICAN INNOVATION

The outdoor recreation industry, like most industries, relies on free and fair trade, global supply chains, and a stable business environment to remain competitive.

OUR PRIORITIES:

1. Removing tariffs on recreation products. Tariffs make U.S. businesses less globally competitive and increases the cost for consumers to recreate.
2. Supporting multilateral trade deals that reduce non-tariff barriers and ensure regulatory cooperation while promoting our “Made in America” products and workforce.



SUPPORT RECREATION'S ECONOMIC COMEBACK AND DRIVE AMERICA FORWARD

- Work with ORR to build and invest in sustainable recreation and conservation funding models for the 21st century
- Expand opportunities for gateway communities to thrive by supporting development of their recreation economies
- Establish sound conservation and climate change mitigation policies that secure recreation access for today, and generations to come
- Utilize the ORR CEO Roundtable as a sounding board for Administration policy discussions with the largest businesses in the sector

- A thriving outdoor recreation economy supports local communities across the country, millions of jobs, healthy people and healthier places.
- Recreation access for every American, and all activities, should be a national priority.

OUR MEMBERS

The Outdoor Recreation Roundtable is the nation's coalition of outdoor recreation trade associations, made up of 32 national association members representing more than 110,000 U.S. businesses. As the leading recreation entity, Outdoor Recreation Roundtable promotes the growth of the outdoor recreation economy and of outdoor recreation activities. We educate decision makers and the public on balanced policies that conserve public lands and waterways and enhance infrastructure to improve the experience and quality of life of outdoor enthusiasts everywhere. Advancing these values is critical to United States economic growth.

