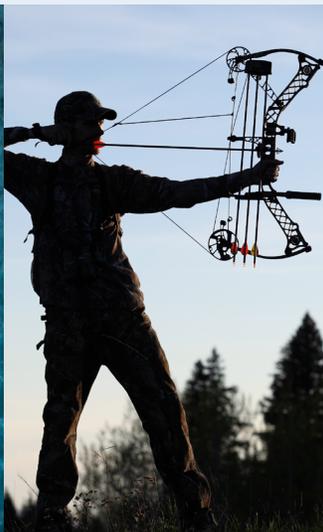


ANNUAL REPORT

2020

OUR MISSION

The Outdoor Recreation Roundtable (ORR) is the nation's leading coalition of outdoor recreation trade associations, made up of 33 national members serving 110,000 businesses. We promote the growth of the outdoor recreation economy and outdoor recreation activities, and educate decision makers and the public on balanced policies that conserve public lands and waterways while enhancing infrastructure to improve the experience and quality of life of all outdoor enthusiasts everywhere. Advancing these values is critical to growing outdoor recreation in the United States, which already accounts for \$788 billion in annual economic output and employs 5.2 million Americans.



LETTER FROM BOARD CHAIR AND EXECUTIVE DIRECTOR

We saw an incredibly collaborative and impactful year for outdoor recreation in 2020. In spite of the year's trials and tribulations, the outdoor recreation industry was able to come together like never before and help pass the largest piece of recreation legislation in decades, ensuring the survival of our industry and more. ORR members banded together to make sure PPP and other COVID relief helped more seasonal businesses, catalogued the [impact of COVID-19](#) on our industry, celebrated the [new BEA data](#), worked with federal agencies on their [operational plans](#) for recreation and [discussed ways](#) in which the pandemic was changing the landscape of outdoor recreation for better and for worse. We [provided grants](#) to support rural communities transitioning to outdoor recreation economies and surveyed the industry to come up with [200 recreation projects](#) in need of Land and Water Conservation Fund (LWCF) funding. We [shared best practices](#) around virtual trade shows and new ideas on engaging a diverse audience more reflective of our nation.

Recently we came together to provide a [recreation agenda](#) for the new administration and met with transition team officials to discuss the important role our sector has to play when it comes to creating jobs, growing economies, and supporting healthy people and communities in every corner of the country.

None of this would have been possible without ORR's staff and members. In the last two years, ORR has brought on Jessica Turner as the new Executive Director, Lindsey Davis as Vice President, and Freestone Strategies to help bolster our public relations capabilities. We also have a newly incorporated 501(c)(6), the Outdoor Recreation Roundtable Association (ORRA), to expand our advocacy capacity. ORR has continued to build our membership over the last year, adding new organizations and membership categories. With 33 national trade association members, we represent the full breadth of outdoor recreation.

In 2020, ORR welcomed five new members: the National Wild Turkey Federation, Outdoor Industry Association, Outdoor Writers Association of America, Professional TrailBuilders Association, and the Society of Outdoor Recreation Professionals. ORR also established a new membership category for state Offices of Outdoor Recreation. Seven states have joined so far, enabling state recreation leaders to connect directly with the recreation business and the NGO community for collaboration, education, and elevation of these offices.

None of this would have been possible without your support and engagement, and we look forward to another strong year of work together.



JESSICA TURNER,
EXECUTIVE DIRECTOR



PHIL INGRASSIA,
BOARD CHAIR

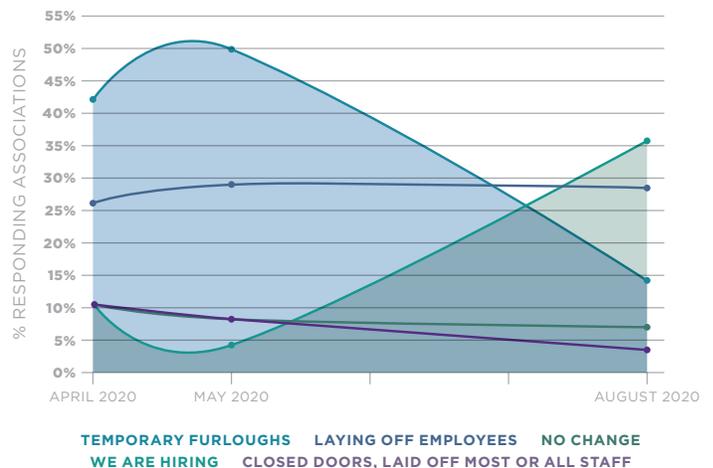
LEADING COLLABORATIVE INDUSTRY EFFORTS ON COVID-19 RESPONSE

Early in the COVID-19 crisis, ORR convened our members to better understand the collective impact the pandemic was having on our industry and the industry's needs to stay afloat. We immediately:

- Proposed fixes to the CARES Act to ensure outdoor businesses were eligible to receive loan forgiveness. Through weekly calls with the Small Business Administration (SBA) and Small Business Committees in Congress we were able to ensure outdoor recreation business needs were represented in relief discussions, and these changes were made in the Paycheck Protection Flexibility Act and official administration guidance through the SBA and the Department of the Treasury.
- Worked with the Oregon State University [Outdoor Recreation Economy](#) Initiative to track and quantify [industry disruptions and economic impact](#) through multiple surveys to all associations, accounting for 23,000 businesses. These numbers were frequently cited and used on Capitol Hill and in the press, and ORR held multiple press calls outlining this important data. While spring surveys showed devastating impacts, our August member survey showed the industry beginning to rebound. Examples of questions asked and data gathered are:

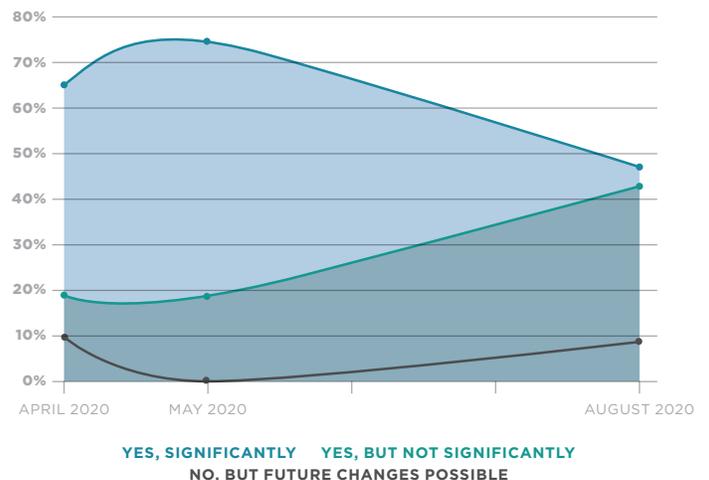
HOW HAVE INDUSTRY MEMBERS' EMPLOYMENT NEEDS CHANGED WHEN COMPARED TO LAST YEAR'S EMPLOYMENT NEEDS?

- 47 percent of our members' businesses have laid off or furloughed a portion of their workforce
 - 36 percent of businesses are reporting they are hiring and more employees are needed
- * This is the first uptick in hiring reported amongst our membership since the start of the pandemic



HAS THE GLOBAL CORONAVIRUS PANDEMIC DISRUPTED YOUR INDUSTRY'S SUPPLY CHAIN AND/OR DISTRIBUTION OF PRODUCT?

- 91 percent are experiencing difficulty with production and distribution
 - 48 percent experiencing significant impacts
- * A decrease from our previous survey in May.



- Led calls with the land management agencies and industry leadership on effective and safe ways to keep outdoor recreation assets open to the public, or how to limit closures' impacts on businesses and gateway communities. ORR partnered with member organization CHM Government Services to develop [recommendations](#) for the safe and effective reopening of public lands and waters, which were used by federal and state agencies to help guide their reopenings.
- Engaged governors in conversations around the importance of outdoor recreation as a healthy, safe method of exercise and stress relief during lockdowns.
- Convened discussions with the National Governors Association Outdoor Recreation Learning Network regarding the importance of recreation and how to safely reopen sites.
- Additionally, ORRA fought for, and succeeded in getting, 501(c)(6) organizations included in end-of-the-year COVID-19 relief legislation.

PROVIDING SUPPORT FOR RURAL ECONOMIC GROWTH

In December, ORR and The VF Foundation were thrilled to announce that [five rural communities](#) received the first round of funding in support of the [Recreation Economy for Rural Communities](#) (RERC) program to implement their economic revitalization plans. This implementation funding is in addition to technical assistance support these and other communities received from the federal agencies through the RERC assistance program in partnership with the Environmental Protection Agency, U.S. Forest Service, U.S. Department of Agriculture Rural Development, and Northern Border Regional Commission.

“Thank you for sharing project details, and moreover for supporting the work throughout. This sort of community-driven planning and technical assistance seems to be gaining traction, and will be even more critical in fire and post-COVID recovery — it’s awesome to have ORR support helping John Day be a shining example.”

Cailin O’Brien-Feeney

Director, Oregon Office of Outdoor Recreation

BRIDGING THE GAP BETWEEN FEDERAL AGENCIES AND THE OUTDOOR RECREATION INDUSTRY

ORR played a crucial role in 2020 connecting federal land and water management agencies with the outdoor recreation industry around COVID-19, the implementation of the Great American Outdoors Act (GAOA), and recreation management and use challenges and opportunities.

- ORR met with eight cabinet secretaries and agency leaders to convey the importance of the recreation economy to their work as land and water managers.
- ORR was among the first to meet with U.S. Forest Service (USFS) and Department of the Interior leadership on implementation of GAOA, and provided a framework to coordinate with the agency on deferred maintenance planning, strategy, and oversight of the projects.
- ORR developed a white paper detailing how the LWCF can be used for rural economic development, as well as improved equity and access.

“AMI and our Board of Directors are proud to take part in all of ORR’s accomplishments.”

Eric Kretsch
Association of Marina Industries

“The USDA Forest Service was proud to work with ORR and its members during the initial months of COVID-19. Together, we were able to ensure our nation’s forests and grasslands remained open to healthy, safe recreation wherever possible.”

Michiko J. Martin
Director, Recreation, Heritage & Volunteer Resources, U.S. Forest Service

“So proud of your work and Lindsey’s and all of our colleagues on GAOA! ORR is leading the industry in ways we just haven’t seen before.”

Lee Davis
Executive Director, Oregon State University Outdoor Recreation Economy Initiative

EDUCATING POLICY MAKERS & THE PUBLIC ON THE MYRIAD BENEFITS OF OUTDOOR RECREATION

The outdoor recreation industry made significant strides in 2020, and ORR and our members were at the forefront of these efforts. Through our work together, Congress held a record-breaking eight recreation-related hearings, PPP legislation was adjusted to help small outdoor businesses, the outdoor recreation industry took on a prominent role in committees outside of Natural Resources, the Great American Outdoors Act was signed into law, new recreation bills were introduced and moved through committees, and public lands and waters were able to safely reopen across the country and host more recreationists than ever.

- ORR initiated and led the effort to include the U.S. Forest Service, Bureau of Land Management and U.S. Fish and Wildlife Service in the newly introduced GAOA. ORR was instrumental in educating Congress on GAOA, gathering and disseminating important information from the agencies, coordinating Hill meetings and outreach from the industry, and ultimately supporting its clean and bipartisan passage through Congress.
- ORR organized over 130 cross-sector CEOs on a sign-on letter to Congress that was used on the Senate floor just before votes were called to help with the passage of this legislation.



“Great [video!](#) Thanks for everything you all did on this bill!”

Staffer
U.S. Senate

- ORR worked with our members to pass the Simplifying Outdoor Access for Recreation and Recreation Not Red-Tape Acts through the House Natural Resources Committee.
- Executive Director Jessica Turner testified before the Senate Energy and Natural Resources Committee on the impacts of COVID-19 to users of public lands and waters.
- In October, ORR held an [Outdoor Recreation Caucus briefing](#) featuring Senator Martin Heinrich (D-NM) and representatives from across the outdoor recreation industry with hundreds of Capitol Hill staff on how people are getting outdoors during COVID-19 and the recreation outlook for winter.

“I wanted to congratulate you on a great webinar. This is the second webinar in a row from ORR that really knocked it out of the park. It was not only really well organized, and the information useful, it flowed well and was engaging to listen to. I’d like other sectors to learn from and copy your approach here. Keep up the good work!”

Staffer

Senate Energy and Natural Resources Committee

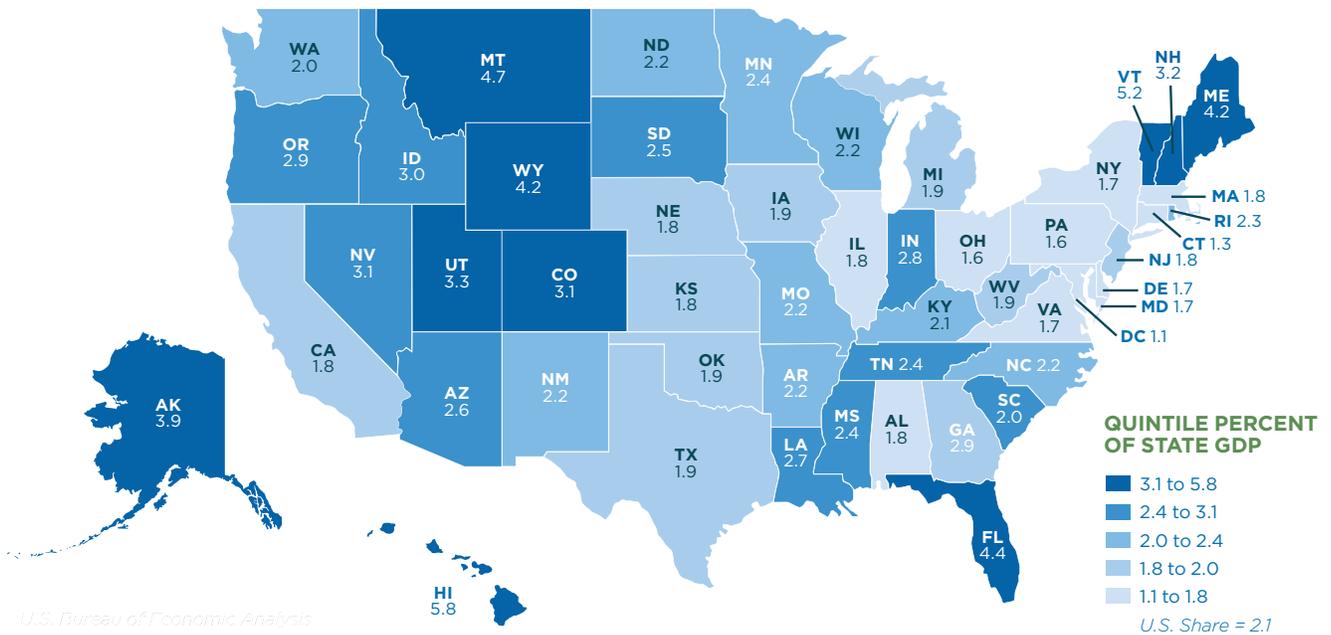
- To round out the year, ORR was instrumental in helping achieve numerous wins for the outdoor recreation industry in the end-of-year spending package including:
 - Trade association relief: 501(c)(6) organizations are eligible to receive PPP loans if they meet certain criteria.
 - BEA funding: Outdoor Recreation Satellite Account funding continues at \$1.5 million, and BEA is directed to continue working with the outdoor recreation industry, NGOs and other stakeholders to refine and develop national and state-level statistics.
 - EDA/EAA direction: The Economic Development Administration is directed to coordinate with regional development organizations to support projects that address rural economic development challenges and consider outdoor recreation projects that are consistent with a region’s Comprehensive Economic Development Strategy.
 - FLREA reauthorization: The Federal Lands Recreation Enhancement Act has been extended for one year.
 - WRDA passage: The Water Resources Development Act of 2020 continued the bipartisan tradition of the Transportation and Infrastructure Committee to move a new WRDA every two years.

RELEASING NEW DATA ON SIZE AND IMPACT OF THE OUTDOOR RECREATION INDUSTRY

In November, the Bureau of Economic Analysis (BEA) released new Outdoor Recreation Satellite Account data detailing the size and scope of the outdoor recreation industry at the state and national levels. The new numbers reaffirmed what we already knew: outdoor recreation is a driving force in the American economy. In 2019, outdoor recreation generated \$788 billion in real economic output, comprised 2.1% of U.S. GDP, accounted for 3.3 percent of American employees and supported 5.2 million jobs.

To help explain and promote this new information, ORR [convened leaders](#) from across the outdoor recreation industry and experts from BEA for a briefing on outdoor recreation’s national and state-level economic impacts for 2018 and 2019. ORR supported the effort to get this study funded and ensure BEA has the industry data it needs to accurately account for our economic power.

Percentage of State GDP Generated by Outdoor Recreation



“I just wanted you to know that NWF really values (and uses) this information. Thank you so much.”

Kevin Coyle

Counsel to the President & CEO, National Wildlife Federation

WORKING WITH STATES TO ENSURE SAFE ACCESS TO OUTDOOR RECREATION FOR GENERATIONS TO COME

We sponsored the National Governors Association Outdoor Recreation Learning Network network for a second year, bringing together representatives from 25 states appointed by their governors to discuss ways to enhance recreation economies in every corner of the country.

We established a new membership category for state Offices of Outdoor Recreation. Colorado, Maine, Montana, Nevada, New Mexico, North Carolina and Utah have joined so far, enabling state recreation leaders to connect directly with the recreation business and the NGO community for collaboration, education, and elevation of these offices.

To help keep existing OREC office movements alive during COVID-19, ORR State Working Group members presented to key stakeholder groups including the Minnesota Outdoor Recreation Task Force and the Georgia Outdoor Recreation Committee.

ORR also drafted and distributed letters to all 50 governors explaining why outdoor companies should be deemed essential businesses and were able to impact state closures of manufacturing and recreation facilities, with outdoor access maintained in over 75 percent of the states. State proclamations were also made on outdoor recreation with many governors and state Offices of Outdoor Recreation encouraging recreation and sharing best ways to safely get outside locally during COVID-19.

PUTTING LWCF DOLLARS TO WORK

In December, ORR conducted the first-ever, industry-wide Land and Water Conservation Fund (LWCF) survey in order to collect key projects in need of funding from the \$900 million in mandatory annual funding available thanks to the passage of the Great American Outdoors Act earlier in 2020. ORR put out a call for projects to outdoor recreation entities across the country and activity spectrum — including state Outdoor Recreation Directors, outdoor businesses and user groups — and received over [200 responses](#) in two weeks.

After evaluating these responses, ORR shared our '[Top 11](#)' list of outstanding projects that will create access in communities without recreation assets and help build recreation economies at a time when jobs and revitalization through the outdoors is needed most.

“You have done an absolutely incredible job of putting us on the map in a big way in a very short period of time. Kudos to you and your team!”

Matt Gruhn

President, Marine Retailers Association of the Americas



Rebuild ATV/ Snowmobile Trail from Dollar Bay to Lake Linden

Location: Houghton County

State: Michigan

Cost: \$250,000-\$500,000

Program: State and Local Assistance

Motorized Use
Snowmobile

The proposed project will repair and replace culverts and rebuild the trail where washouts occurred on the Lake Linden Trail between Hubbell and Lake Linden. The Lake Linden trail is a multi-use recreational trail that was severely damaged in 2018 as a result of a 500 year storm and serves as an important link for not only recreation but also alternative transportation between communities in the Keweenaw Peninsula.

Example of a top project we identified that would benefit from LWCF dollars

POSITIONING OUTDOOR RECREATION AS KEY TO BIDEN ADMINISTRATION PRIORITIES

ORR proposed an agenda — based on the Biden Administration’s four pillars including economic recovery, COVID-19, racial equity, and climate change — that will grow the recreation economy and its benefits to the nation. We hope to support national discussions around the critical importance of our economic sector that creates jobs, builds healthy communities, strengthens the health and well-being of Americans and of our public lands and waters for all to benefit from.

[Read the white paper](#)

“The outdoor recreation industry looks forward to working together on an economic growth agenda for the nation that focuses on diversity and inclusion, climate change solutions, and health through outdoor recreation, and is encouraged by President Biden’s choices. These positions are key to tackling harmful tariffs, public lands and waters access for all forms of recreation, and infrastructure and conservation funding so our industry can keep doing what we do best — support jobs, local communities, and the health of people, our natural resources and economies across the country.”

Jessica Turner
ORR Executive Director

ORR IN 2021 AND BEYOND

As we welcome 2021, much remains unknown, especially surrounding COVID-19. No matter what happens, ORR and our members remain devoted to fostering collaboration, removing barriers, securing access to recreational opportunities, conserving lands and waters, and ensuring the recognition of the outdoor recreation economy by:

- Promoting the growth of the outdoor recreation industry and the activities that more than 144 million outdoor enthusiasts enjoy;
- Educating decision makers, the public, and businesses on balanced policies that conserve public lands and waters and enhance infrastructure to improve the recreation experience;
- Connecting all sectors of the outdoor industry to advance and strengthen the Outdoor Recreation Economy and increase access to the outdoors; and
- Advocating through our 501(c)(6), the Outdoor Recreation Roundtable Association (ORRA), to ensure recreation is at the forefront of the national dialogue.

We are committed to revitalizing America through outdoor recreation. ORR and our members believe that:

- Investments in recreation infrastructure support jobs and grow local economies;
- Improved recreational access drives rural communities;
- Sound conservation policies sustain resilient recreation landscapes; and
- Free and fair trade ignites American innovation.

By focusing on these main pillars, we can continue to support recreation's economic comeback and drive our nation forward into a new era of prosperity for generations to come.

Thank you to all of our members and Board of Directors who made all of this work possible!

“Congratulations to you and the whole ORR team, Jess! Fantastic work, you overcame significant hurdles, and you did it straight through the most dynamic Congress I've ever seen. It was impressive to see you work through this campaign, capitalize on opportunities, and build massive momentum. On behalf of America's outfitters and guides, THANK YOU!”

Aaron Bannon

Executive Director, America Outdoors

ORR BOARD OF DIRECTORS AND OFFICERS

ORR Board of Directors (* indicates Executive Committee Member):

- **Lise Aangeenbrug**, *Outdoor Industry Association*
- **Mark Amaral**, *Association of Marina Industries*
- **Paul Bambei**, *National Association of RV Parks and Campgrounds*
- **Derrick Crandall**, *National Park Hospitality Association*
- **Jenn Dice**, *PeopleforBikes*
- **Chris Edmonston**, *Boat Owners Association of the United States (Secretary) **
- **Matt Gruhn**, *Marine Retailers Association of the Americas*
- **Frank Hugelmeyer**, *National Marine Manufacturers Association (Vice Chair) **
- **Glenn Hughes**, *American Sportfishing Association (Treasurer) **
- **Tom Ingram**, *Diving Equipment and Marketing Association*
- **Phil Ingrassia**, *National RV Dealers Association (Chair) **
- **Chris Kersting**, *Specialty Equipment Market Association*
- **Ed Klim**, *International Snowmobile Manufacturers Association*
- **Matt Kormann**, *Archery Trade Association (At-large member) **
- **Jay Landers**, *RV Industry Association (At-large member) **
- **Sandi Miller**, *NIC, Inc.*
- **Erik Pritchard**, *Motorcycle Industry Council (At-large member) **
- **Nick Sargent**, *Snowsports Industries America*
- **Mary Ellen Sprenkel**, *The Corps Network (At-large member) **

