Roadmap for the 21st Century Outdoor Recreation Economy
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Introduction

The Outdoor Recreation Roundtable (ORR) is America’s leading coalition of outdoor recreation trade associations and organizations working to promote the policy and legislative reforms needed to enhance the outdoor recreation economy.

ORR members represent the thousands of businesses that produce vehicles, equipment, gear, apparel and services for the 144 million Americans who enjoy our national parks, waterways, byways, trails and outdoor spaces. The various outdoor recreation business sectors produce a combined $734 billion output for the U.S. economy and support 4.5 million direct jobs.

We work to enhance the experience of America’s outdoor recreation enthusiasts by advocating for solutions that will responsibly improve America’s public lands, waters and infrastructure while conserving them for future generations.

The policy agenda presented on the following pages serves as a roadmap for advancing the reforms needed to grow the outdoor recreation economy, promote outdoor recreation activities, support balanced policies that conserve public lands and waterways and enhance infrastructure to improve the experience of outdoor enthusiasts everywhere.
In 2018, the Bureau of Economic Analysis (BEA)—the government agency responsible for calculating U.S. GDP—released the first-ever formal report demonstrating the major economic impact of the outdoor recreation sector. The report, commissioned under the BEA’s Outdoor Recreation Satellite Account (ORSA), found what the industry has long known: outdoor recreation is a leading economic driver in America, ranking with many of the nation’s largest sectors and growing faster than the U.S. economy as a whole. The findings are the latest evidence of why outdoor recreation needs to be a policy priority in Washington and states across the country.

The outdoor recreation economy accounted for 2.2% of U.S. GDP in 2016, making it one of the nation’s largest economic engines and growing faster than the economy as a whole.
Wage growth grew at 4.3% from 2015 to 2016, compared to 2.7% in the overall U.S. economy.

**OUTDOOR RECREATION ECONOMIC CONTRIBUTION TO OTHER INDUSTRIES (2016)**

- Arts, Entertainment, Recreation, Accommodation & Food Services
- Retail Trade
- Manufacturing
- Wholesale Trade
- Transportation & Warehousing

Outdoor recreation’s annual gross output was calculated at: **$734 BILLION**

BEA reports that outdoor recreation accounted for: **4.5 million jobs** in 2016, similar to the employment levels of the hospital, transportation & warehousing and nondurable goods manufacturing industries.

**2019 Policy Agenda**

**RECREATION INFRASTRUCTURE PACKAGE**

Congress should make it a priority to protect our public lands and waterways while delivering needed reforms to enhance the outdoor recreation experience.

At 2.2 percent of the U.S. GDP, producing $734 billion in economic output and supporting 4.5 million direct jobs, it’s time Congress focuses on recreation management in the form of a comprehensive recreation infrastructure package to continue to grow this thriving part of the economy and protect recreation opportunities for generations to come.

Included in any infrastructure package should be the following list of bipartisan and bicameral bills that have the support of our industry sectors and the broader recreation community.

- **Restore Our Parks & Public Lands**
  Legislation that offers a thoughtful solution to the growing problem of deferred maintenance on our public lands. Much of this backlog affects recreation, and without swift action, it will continue to have a negative effect on our nation’s iconic recreation assets and the millions of outdoor enthusiasts who enjoy them each year.

- **Recreation Not Red-Tape Act**
  The RNR Act offers sensible, non-controversial proposals for identifying and appropriately managing important places for sustainable outdoor recreation across the country. If passed, this bipartisan and bicameral bill will update processes and policies on our national public lands and waters to improve the outdoor recreation experience for all forms of outdoor recreation.

- **Land and Water Conservation Authorization and Funding Act**
  Permanent Reauthorization and full-funding for the Land and Water Conservation Fund (LWCF). Congress allowed a 50-year conservation legacy to expire on September 30, 2018. The LWCF has funded recreation access projects across the country and is one of the most widely supported tools to conserve and protect America’s outdoor heritage. LWCF has supported recreation access projects in almost every county in the country, and our member businesses and customers need certainty that this program will be around in the future to support the growing outdoor recreation economy.
**21st Century Conservation Service Corps Act**
The 21CSC is a bold national initiative to annually engage 100,000 young adults and veterans in service on public lands throughout the country. The 21CSC organizations are grounded in the community; they leverage private funds, spur local economic development and support the outdoor recreation economy, all while helping young adults and veterans obtain in-demand skills for the growing recreation, natural resource and restoration economies.

**Every Kid Outdoors Act**
Our public lands are some of the best venues for children to experience the outdoors and participate in healthy outdoor recreation. This legislation will provide all fourth graders with free access to public lands and waters. These students can request an annual pass, which will allow them to have free access for themselves and up to three adults accompanying them, expanding the opportunity for children and their families to begin to experience and appreciate our iconic public lands and waters.

**Public Lands Recreational Opportunities Improvement Act**
This legislation improves the outfitter and guide permitting systems of the federal land agencies to help more Americans gain access to the outdoors and share in the legacy of America’s public lands through facilitated outdoor recreation experiences. PLROIA will positively impact a wide range of organizations that deliver facilitated outdoor recreation, including for-profit outfitters and guides, non-profit outfitters and guides, university recreation programs and volunteer-based clubs.

**RTP Full Funding Act**
RTP is a user-pay, user-benefit program that benefits all recreationists and serves as the primary funding mechanism for thousands of motorized and non-motorized trail opportunities. This legislation would provide authorizing committees with an accurate assessment of what trail users pay into HTF and help inform Congress in continuing to authorize the program.

**Target Practice & Marksmanship Training Support Act**
Amends the Pittman-Robertson Trust Fund formula to give state fish and wildlife agencies more flexibility to use the excise tax dollars for construction and maintenance of public shooting ranges.

**Help for Wildlife Act**
Legislation that establishes several important government conservation programs and reauthorizes existing wildlife legislation. This bill also provides for regulatory clarity for sportsmen and supports building and expanding public target ranges, restoration and protection of the Chesapeake Bay Program and commonsense conservation policies.
TRADE

TARIFFS & FAIR TRADE
Outdoor recreation relies on free and fair trade to sustain the thousands of businesses that make up the industry.

The current administration’s practice of levying tariffs on a wide variety of products has uniquely and unfavorably targeted the recreational community. From backpacks to boats to RVs, recreation is being caught in the crosshairs.

Outdoor recreation is facing tariffs on raw materials such as aluminum, fiberglass and upholstery to component parts essential to radar, transport and engineering. In addition, our allies have retaliated against key American-made recreational products, with devastating export tariffs. Recreation is being squeezed at both ends, with higher input costs and lost export sales.

Ultimately the consumer will pay the price as most manufacturers are unable to absorb all the tariff costs. This will make outdoor recreation less affordable to the average American and could stymie economic growth in a vibrant manufacturing and retail sector.

ORR supports the protection of intellectual property rights and leveling the playing field to unfair competition, but this trade war misses the mark and has escalated to a tit-for-tat tax fight, leaving consumers to foot the bill and hurting a robust outdoor economy.

APPROPRIATIONS

FUNDING FOR THE OUTDOOR RECREATION SATELLITE ACCOUNT
In 2018, the Department of Commerce’s Bureau of Economic Analysis (BEA) published its first-ever Outdoor Recreation Satellite Account (ORSA) report illustrating the significant economic impact of outdoor recreation.

This landmark report marked a critical step forward for the outdoor recreation industry by formally recognizing its economic influence. ORSA measures the size of the outdoor recreation economy and the link between outdoor recreation and the broader United States economy.

The supply-use tables provide a detailed look at the relationships among industries and how each industry contributes to Gross Domestic Product (GDP).

In practice, ORSA is a rearrangement of the published supply-use tables that isolates outdoor recreation spending and production. Initial funding of $1 million was supplied under an agreement between the Department of Commerce and the Department of the Interior.

The FY19 Senate Commerce, Justice and Science appropriations measure included:

$1.5 MILLION

for BEA to continue its publication of ORSA annual reports and develop corresponding state and regional data on the economic impact of outdoor recreation.
The entire outdoor recreation community supports continued funding for this ORSA account, with additional detail for national and state economics. These data are important indicators and guideposts for the Administration and Congress as they put together overall priorities.

ORR EXPECTS FUNDING NEEDS FOR ORSA TO REMAIN AT $1.5 MILLION ANNUALLY UNTIL FY2021 WHEN THEY WILL BEGIN TO DECLINE TO APPROXIMATELY $500,000 ANNUALLY

ANALYSIS OF FEDERAL SPENDING ON OUTDOOR RECREATION

With the release of the first ever government report on the outdoor recreation economy, outdoor recreation is now formally recognized as a leading contributor to the national economy. Because public lands are the backbone of the industry, it is vital that America’s Great Outdoors receives the attention and resources it so richly deserves to ensure the outdoor recreation economy continues to grow.

ORR encourages Congress to direct the Government Accountability Office to conduct a thorough review of all federal spending on outdoor recreation assets. Such a report would bring transparency to how much the government is allocating toward sustaining our public lands, and would be an important resource that compliments continued ORSA reporting to best inform Congress and the Administration on responsible and appropriate funding of public lands.