

ANNUAL REPORT

2022

OUR MISSION

The Outdoor Recreation Roundtable is the leading business coalition advancing a sustainable and growing outdoor recreation economy for the benefit of all Americans.



TABLE OF CONTENTS

LETTER FROM BOARD CHAIR AND PRESIDENT.....	4
OUR WORK WITH FEDERAL AGENCIES.....	5
RURAL ECONOMIC DEVELOPMENT.....	8
WORKFORCE MODULE AND CONVENINGS.....	10
POLICYMAKERS AND THE PUBLIC.....	12
STATE WORK.....	13
TOGETHER OUTDOORS.....	14
ECONOMIC IMPACT.....	15
ORR IN 2023 AND BEYOND.....	16

WHAT WE DO:

Ensure recognition of our sector’s contributions as the cornerstone of healthy, resilient, and sustainable economies and communities.

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Guarantee quality access and conservation for the sustainable future of the recreation industry.

Act on the most pressing issues facing the future of outdoor recreation for the benefit of our economy, communities, health, and environment.

.....

Foster infrastructure innovation and modernization to support a 21st century economy.

HOW WE DO IT:

Convening: Bringing industry, government, and other stakeholders together to identify solutions and solve problems.

.....

Curating: Gathering the best data and information, filling the research gaps.

Educating: Sharing information with stakeholders, elected and appointed officials, partners and allies, and media.

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Advocating: 501(c)(6), the Outdoor Recreation Roundtable Association (ORRA).



LETTER FROM BOARD CHAIR AND PRESIDENT

Congratulations and thank you to the outdoor recreation industry for another year of collaboration, innovation, and impact! We are now 44 members strong, representing all segments of the dynamic \$862 billion outdoor recreation economy. In November, we gathered to celebrate the newest government data showing our industry grew an incredible 19% from 2020-2021 compared to a robust growth rate of 6% for the overall U.S. economy. Expanding at three times the pace of the American economy, as well as driving 13% job growth compared to 3% overall, highlights the critical importance of outdoor recreation to the nation. And these powerful economic benefits do not even account for the vital health benefits that attract millions of Americans each year to the outdoor lifestyle.

Nationally, our roundtable was instrumental in the formation of the Federal Interagency Council on Outdoor Recreation - a critical cross-agency cooperation that will ensure recreation is prioritized at the national level. At the state level, we educated policymakers on the outdoor recreation economy at the National Conference of State Legislatures. We also celebrated the creation of a new Office of Outdoor Recreation in Massachusetts, and a new program that will help our membership connect with State Directors across the country and support their work to grow regional recreation economies.

ORR championed the first-ever Recreation Package that passed unanimously through the Senate Energy and Natural Resources Committee and developed outdoor inclusion efforts through the Together Outdoors Resource Hub. Our workforce education efforts were elevated with the development and publication of Career Modules showcasing real people in diverse outdoor jobs. And we welcomed three new members in 2022: the Arkansas Office of Outdoor Recreation, Maine Outdoor Brands, and Michigan Office of Outdoor Recreation Industry.

None of this would have been possible without ORR's talented and dedicated staff, members, and Board of Directors. To the incredible and inspirational outdoor recreation business community, thank you for your support and engagement. We are honored to ensure the growth and success of the outdoor recreation economy and look forward to another year of connecting Americans to all the outdoors has to offer!

Sincerely,



JESSICA TURNER,
PRESIDENT OF ORR



FRANK HUGELMEYER,
PRESIDENT OF NMMA,
BOARD CHAIR OF ORR

OUR WORK WITH FEDERAL AGENCIES

ORR WAS CRUCIAL TO THE ESTABLISHMENT OF FICOR

One of the biggest successes of 2022 for ORR and our entire sector was the Biden Administration's renewal of the Federal Interagency Council on Outdoor Recreation (FICOR). ORR had been [advocating for this convening body's solidification](#) since the beginning of the administration and was instrumental in its renewal. In July, ORR President Jessica Turner spoke at a White House event celebrating FICOR's formal establishment with Secretary of the Interior Deb Haaland, Secretary of Agriculture Tom Vilsack, Administrator of the National Oceanic and Atmospheric Administration Dr. Richard Spinrad, Assistant Secretary of the Army Mike Connor, and Chair of the Council on Environmental Quality Brenda Mallory.

Since FICOR's re-formation, ORR members have met with agency leadership to discuss how the outdoor industry and FICOR can work together to increase access, modernize infrastructure, prepare for future technologies, and help traditionally underserved communities access public lands and waters and the benefits of time outdoors. As a result of these discussions, ORR has developed several ["Big Ideas"](#) for FICOR centered around modernizing visitation data, next generation technologies, funding, and the health benefits of recreation. These "Big Ideas" will help FICOR identify challenges and opportunities they can only solve by crossing agency silos, and that each agency wouldn't be able to tackle on its own.

"Outdoor recreation not only boosts the American economy, it boosts Americans' health, but many trails and public lands suffer from maintenance backlogs and infrastructure work delays. Reviving FICOR can help federal agencies work together to address these needs, improving and expanding recreational access to millions of Americans. The powersports industry applauds the Biden administration's commitment to helping more Americans enjoy the outdoors."

Erik Pritchard

President and CEO of the Motorcycle Industry Council, Recreational Off-Highway Vehicle Association, and Specialty Vehicle Institute of America



CONVENING THE FIRST-EVER INDUSTRY SUMMIT ON ELECTRIFICATION AND NEXT GEN TECH

ORR held the first-ever cross-sector discussion on Electric Vehicles & Next Generation Technologies in Washington, DC, with policymakers and industry leaders from around the country. Discussions, panels, and demonstrations focused on the new products coming to market throughout various segments of the bike, motorcycle, RV, and marine industries, the growing need for strategic deployment of EV charging to support this emerging technology, and the electric vehicles that recreationists are using to get to their favorite outdoor locations. ORR showcased special guests such as Austin Brown, Senior Director of Transportation Emissions at the White House; Senator Martin Heinrich (D-NM); Principal Deputy Assistant Secretary of the Interior for Land and Minerals Management Laura Daniel-Davis; and Kampgrounds of America, Inc. President and CEO Toby O’Rourke.

The event included panel discussions with speakers from outdoor recreation businesses like Brunswick Corporation, QuietKat, THOR Industries/Airstream, Winnebago Industries, and Zero Motorcycles, federal and state agencies, and partner organizations that will be key to the outdoor recreation industry’s successful integration of next-generation technologies. We educated policymakers on the unique challenges with EV technology in the outdoor sector, other next-generation technologies entering the outdoor recreation market, and how charging infrastructure for people recreating can be created and installed efficiently, sustainably, and equitably.

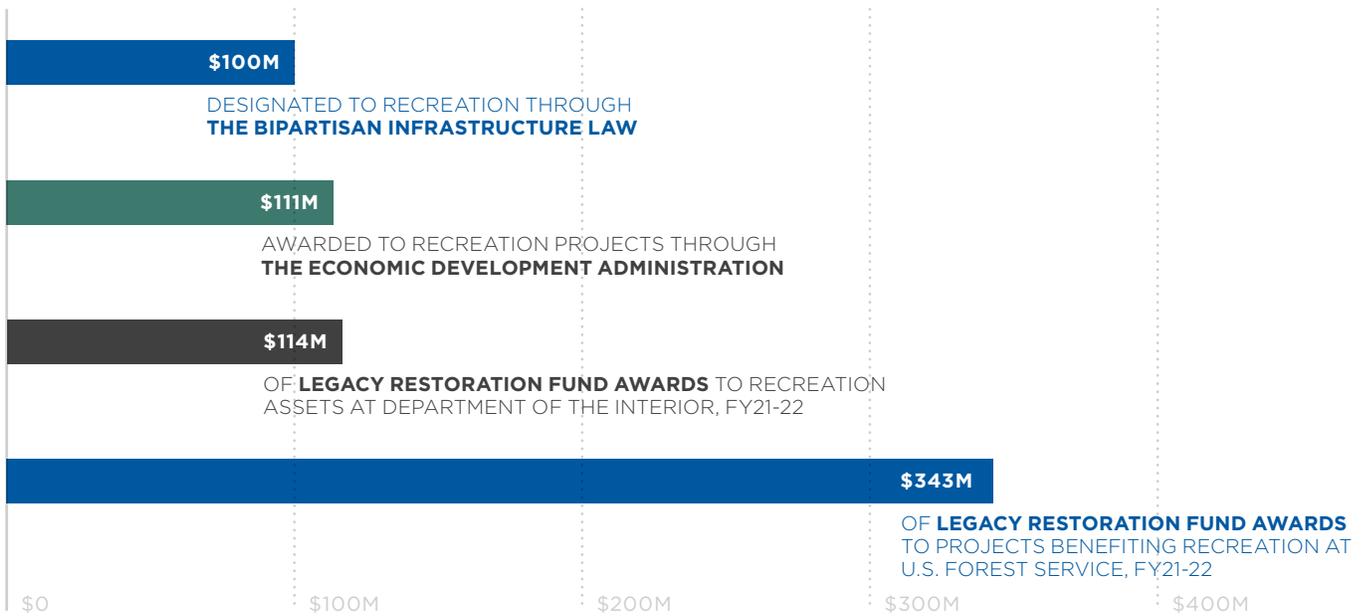
“With so many of our favorite places facing severe climate threats, the outdoor recreation community has a compelling reason to lead the way in implementing climate solutions and accelerating our transition toward a clean energy-powered and electrified economy. A major part of that equation is going to be the adoption of electric vehicles and charging infrastructure and other clean and carbon pollution-free technologies. This summit is a real testament to the recreation industry’s eagerness to take concrete actions that will allow us to pass on the outdoor places we all love to our children and future generations.”

Senator Martin Heinrich
(D-NM)



TRACKING FEDERAL RECREATION FUNDING

In the past two years, Congress and the administration have designated multiple important sources of funding for outdoor recreation infrastructure, including the Legacy Restoration Fund (LRF) and Land and Water Conservation Fund (LWCF) through the Great American Outdoors Act (GAOA), as well as new funding for resilient recreation infrastructure through the Bipartisan Infrastructure Law (BIL). From this new pot of BIL funding, in May the Department of the Interior announced \$68 million in ecosystem restoration funding, nearly \$8 million of which was designated for recreation infrastructure. In September the U.S. Forest Service announced \$37 million in funding for recreation infrastructure, historic sites, and cabins. This funding is in addition to new investments in outdoor recreation from the U.S. Economic Development Administration (described later in this report).



RURAL ECONOMIC DEVELOPMENT

ORR HELPED SECURE MILLIONS FOR RURAL COMMUNITIES

[ORR worked to ensure funding](#) for outdoor recreation as part of the Economic Development Administration's (EDA) American Rescue Plan (ARPA) funding. In their funding announcement, EDA specifically designated [\\$750 million in funding for Travel, Tourism, and Outdoor Recreation projects](#), helping grow the recreation economy nationwide.

From the \$240 million in competitive grant funding, ORR uniquely [researched and aggregated](#) the recreation-specific projects that EDA has chosen to fund. In total, over \$110 million in direct EDA funding has gone to recreation infrastructure, with nearly \$40 million paired with local match, making for a meaningful investment in our nation's outdoor recreation future. EDA is utilizing ORR's project list to illustrate the recreation-specific projects in their ARPA communications.

“Thank you, Jessica, and the ORR team for helping secure the EDA funding for tourism and outdoor recreation. Based on the number and amount of applications there is no doubt a huge demand and I only hope the EDA continues to fund these types of projects. These two projects are big steps forward for West Virginia. We are fortunate to work with so many great communities, RPDs, the state, non-profits, etc. Both of these projects are a credit to those groups coming together.”

Danny Twilley

*Assistant Vice President of Economic, Community and Asset Development,
West Virginia University Outdoor Economy Development Collaborative*



WORKING WITH THE ADMINISTRATION TO GROW RURAL ECONOMIES

[ORR was highlighted](#) by the Biden Administration as a leading partner in supporting rural communities with technical assistance and industry partnerships when the Administration announced 25 new communities that will receive technical assistance in the second cohort of the Recreation Economy for Rural Communities program. ORR plans to continue working with the Biden Administration and Congress to build the program so it can serve all communities looking for support to establish and grow a thriving and sustainable outdoor recreation economy. Notably, thanks to new support from the Appalachian Regional Commission, the program was able to more than double its cohort size from round one. ORR's [Rural Economic Development Toolkit](#) has been widely regarded as an essential tool to help communities develop and grow authentic outdoor recreation plans and has been put into practice in rural communities to evaluate their efforts.

“The Recreation Economy for Rural Communities program is exactly what rural America needs to harness the high demand for outdoor recreation and develop sustainable economies that benefit locals and visitors alike. The \$862 billion outdoor recreation economy benefits greatly from continued government investment in programs like these that work on the ground and positively impact people, place and planet.”

Jessica Turner

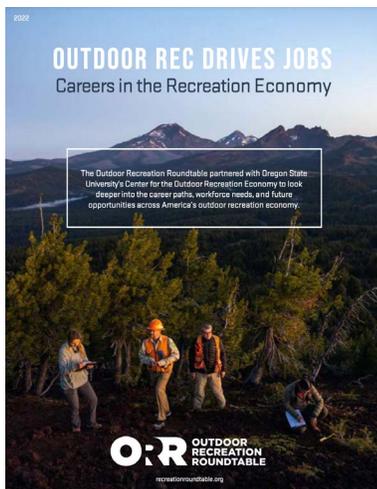
President, Outdoor Recreation Roundtable



WORKFORCE MODULE AND CONVENINGS

REDEFINING WHAT IT MEANS TO WORK IN OUTDOOR RECREATION

ORR released [a new report](#) on career opportunities in the \$862 billion outdoor recreation sector to help industry leaders, policymakers, and prospective workers understand how these jobs provide outstanding quality of life, support conservation goals, strengthen local economies, and connect Americans to the great outdoors. Along with the report, ORR shared a new [Career Path module](#) which features professionals across the outdoor recreation industry telling their stories about how they arrived in their current roles, describing what they appreciate about their work/life balance, and sharing advice to prospective workers who want to emulate their journeys. The report was released in partnership with the Oregon State University Center for the Outdoor Recreation Economy.



“We’ve been working to grow the outdoor rec economy in the rural #pawilds for close to 20 years, with winning results, yet as this report notes, here and elsewhere “there are lingering misconceptions in the public and with policymakers about the types and diversity of jobs in the outdoor recreation economy.” So appreciate this new report by the Outdoor Recreation Roundtable which does the best job I’ve seen yet to describe the diversity of jobs that make up the outdoor rec workforce.”

Ta Enos
Executive Director, Pennsylvania Wilds

THE FUTURE OF THE OUTDOOR WORKFORCE

With the support of the VF Foundation, ORR is also convening key industry partners across public, private, and nonprofit organizations to discuss the future of the outdoor workforce. As a newly organized sector including well over 110,000 small, medium and Fortune 500 businesses across America, many professional and technical careers in the outdoors are unseen or unknown by the public. Additionally, most participants in outdoor recreation activities only interact with consumer-facing employees and may be unaware of the millions of professional and technical full-time positions across the sector that are lesser known and provide competitive wages and meaningful careers. These convenings are intended to address these opportunities and more by bringing together the brightest minds around outdoor recreation workforce development.

“While professionals from across the country are carving out roles in this exciting industry that supports a conservation ethos and enables high quality of life, we also know that there is a growing skills gap in the outdoor workforce and that there are thousands of open jobs (for example, 31,000 in the marine industry alone) available for people seeking life-long and meaningful careers.”

Lee Davis

Executive Director, Oregon State University Center for the Outdoor Recreation Economy (CORE)



POLICYMAKERS AND THE PUBLIC

LEADING THE CHARGE ON THE FIRST-EVER RECREATION PACKAGE

In 2022, ORR and Outdoor Recreation Roundtable Association continued to lead the way on educating members of Congress on the important policies that would make it easier for all Americans to enjoy outdoor recreation on their public lands and waters. Chief among those bills is the America’s Outdoor Recreation Act (AORA), which unanimously passed the Senate Energy and Natural Resources Committee. This bipartisan, commonsense legislation includes important initiatives such as:

- Streamlining the permitting processes for outdoor excursions
- Supporting rural communities by building sustainable local economies
- Creating partnerships to update infrastructure and keep recreation areas open
- Extending outdoor recreation seasons
- Ensuring equitable access to the outdoors
- Improving visitation data on public lands
- Making updates to obsolete reservation and permitting systems
- Providing more tools for public land managers to plan for sustainable and responsible recreation for the future for everyone.

All of this would come at no additional cost to the taxpayers.

To help move this legislation forward, ORR rallied more than 140 members of our organization and small businesses from across the country to send a [letter to House and Senate leadership](#) asking that they pass AORA before the end of the 117th Congress. Throughout the year ORR and our members met with Senators and Representatives from both sides of the aisle, as well as their staffs, to drive this effort forward.

GREAT OUTDOORS MONTH® GETS MILLIONS OF PARTICIPANTS OUTDOORS

2022 marked the 25th consecutive proclamation of Great Outdoors Month® by the White House and the 6th consecutive year it has been unanimously declared by the Senate. It was also tweeted about by the President! This nationwide celebration featured millions of participants engaging in [thousands of events](#).



“As part of my Administration’s efforts to advance equity, diversity, and inclusion, we are committed to ensuring that everyone can access and enjoy America’s great outdoors. Outreach efforts — including the National Park Service’s Rivers, Trails, and Conservation Assistance program — expand trails, conserve rivers, and restore green space so that more people can benefit.”

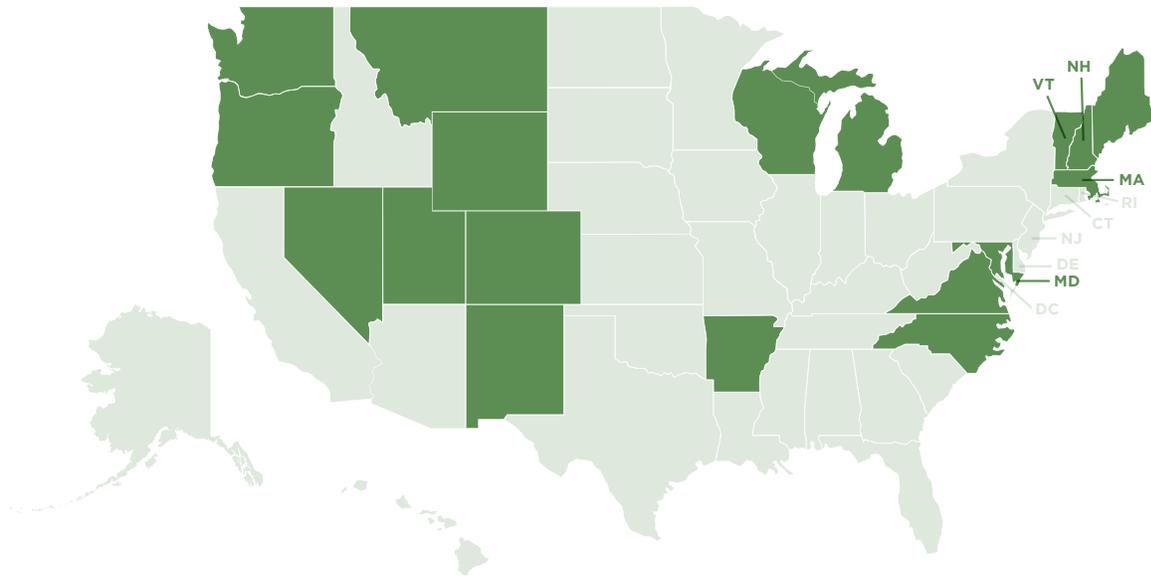
President Joe Biden

STATE WORK

WORKING WITH STATES TO EXPAND OUTDOOR RECREATION

Eighteen states now have Offices of Outdoor Recreation (OREC), including the most recent – Massachusetts – which was [created by Governor Charlie Baker and Lieutenant Governor Karyn Polito](#) in December. These offices serve as central champions for the outdoor recreation economy and its associated benefits within a state, and work on important issues such as economic development initiatives, stakeholder outreach, conservation and stewardship of public lands and waters, youth engagement, and unifying the business voice to engage diverse public and private stakeholders. ORR is committed to growing the number of these offices in 2023, with the ultimate goal of having an office in all 50 states. In December, Alabama [announced a new](#) Council on Outdoor Recreation and Outdoor Recreation Advisory Roundtable to provide recommendations for the utilization of Alabama’s recreational assets as innovative economic development tools.

STATES WITH OFFICES OF OUTDOOR RECREATION



ORR FORGES NEW PARTNERSHIPS

This year ORR expanded its working relationships with other organizations dedicated to growing economies at the state and regional levels, including the National Association of Counties, National Association of Development Organizations, and National Conference of State Legislatures (NCSL), who [published a LegisBrief](#) for all state lawmakers on the outdoor recreation economy. ORR staff spoke at conferences across the country, and coordinated a panel for state lawmakers on growing the outdoor recreation economy at NCSL’s Legislative Summit in Denver, CO.

ORR and Outdoor Industry Association are also teaming up to support the Confluence of States and its efforts to grow state outdoor recreation efforts with the generous support of The VF Foundation and REI. Over the coming year, ORR will be supporting the Confluence and other state leaders with resources, research, data, and education to advance state outdoor recreation efforts in unison.

TOGETHER OUTDOORS

GROWING DIVERSITY IN THE OUTDOORS

TOGETHER OUTDOORS DEBUTS NEW RESOURCE HUB

Together Outdoors, a coalition of over 100 organizations across the outdoor recreation economy seeking to build more welcoming recreation experiences, entered its second year. To support professionals and members of the public who are seeking access to high-quality resources around diversity, equity, and inclusion in the outdoors, Together Outdoors debuted a new [Resource Hub](#) to help educate the industry on how to build an outdoor community where everyone belongs. These materials include books, articles, research reports, data, videos, podcasts, and toolkits, and present academic, industry, and grassroots perspectives. Additionally, the hub includes a directory of inclusion-related outdoor organizations, a grant opportunity directory, and the ability to host web-based training programs.

FIRST ROUND OF GRANT RECIPIENTS ANNOUNCED

This year, Together Outdoors announced the nine recipients of its pilot round of grants totaling \$54,000. Eighty-four proposals requesting a total of \$775,000 were submitted for this inaugural grant cycle from a broad range of inclusion-focused initiatives designed to build a more accessible and welcoming outdoor ecosystem. Funding for the grant program is made possible by contributions from partner organizations including THOR Industries, Airstream, and Winnebago Industries Foundation. After seeing the need, Airstream generously added another \$25,000, more than doubling grant funding during the inaugural cycle.



ECONOMIC IMPACT

OUTDOOR RECREATION POSTS BIGGEST YEAR EVER IN 2021

ORR worked closely with the Bureau of Economic Analysis (BEA) to release the fifth consecutive year of data from the [Outdoor Recreation Satellite Account](#) showcasing the size and impact of our sector at the national and state levels. The new numbers – the largest ever – show that in 2021, the outdoor recreation economy grew three times the rate of the national economy. ORR’s [webinar](#) releasing the data featured White House Council on Environmental Quality Chair Brenda Mallory, as well as industry CEOs, Department of Commerce officials, state Office of Outdoor Recreation directors, and more.



In addition to an informational webinar releasing the record-breaking numbers with federal agency leadership and leading industry CEOs, ORR held a reception featuring comments by Senators Mike Braun (R-IN), Martin Heinrich (D-NM), and Joe Manchin (D-WV). The celebration also featured Deputy Assistant Secretary of Commerce for Travel and Tourism Mark Keam and Maryland Office of Outdoor Recreation Director Daryl Anthony.



ORR IN 2023 AND BEYOND

LOOKING TO THE FUTURE

This year the ORR team and Board completed the design and approval of the organization's new 3-year operational and development plan. With this unanimously approved and in place, ORR is set up to drive new growth in staffing and programs, as well as the development of national events and diversified revenue streams. We have strong goals for the evolving recognition of the recreation economy and look forward to continuing to edify the organization in this next big stage of growth and development. In 2023, ORR will bring on two new staff members to execute program implementation and development goals, bringing our in-house roster to a team of 6. 2023 will no doubt be another big year for ORR.

ORR BOARD OF DIRECTORS AND OFFICERS

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

- **Mark Amaral**, Executive Director, *Association of Marina Industries*
- **Paul Bambei**, President and CEO, *ARVC - National Association of RV Parks & Campgrounds*
- **Derrick Crandall**, Counselor, *National Park Hospitality Association*
- **Jenn Dice**, President & CEO, *PeopleForBikes*
- **Kent Ebersole**, Interim Executive Director, *Outdoor Industry Association*
- **Chris Edmonston***, Vice President of Government Affairs, *BoatU.S.*
- **Dan Forster**, Vice President & Chief Conservation Officer, *Archery Trade Association*
- **Matt Gruhn**, President, *Marine Retailers Association of the Americas*
- **Frank Hugelmeyer***, President, *National Marine Manufacturers Association*
- **Glenn Hughes***, President, *American Sportfishing Association*
- **Daniel Ingber**, VP, Government and Legal Affairs, *Specialty Equipment Market Association*
- **Tom Ingram**, President & CEO, *Diving Equipment & Marketing Association*
- **Phil Ingrassia***, President, *RV Dealers Association*
- **Ed Klim**, President, *International Snowmobile Manufacturers Association*
- **Jay Landers***, Vice President, Government Affairs, *RV Industry Association*
- **Sandi Miller**, Vice President Outdoor Recreation, *NIC Federal*
- **Kelly Pawlak**, President, *National Ski Areas Association*
- **Erik Pritchard***, President, *Motorcycle Industry Council*
- **Nick Sargent**, President, *Snowsports Industries America*
- **Mary Ellen Sprenkel***, President, *The Corps Network*

OUR MEMBERS

