

Jessica (Wahl) Turner
Executive Director, Outdoor Recreation Roundtable

Energy and Natural Resources Committee: Hearing to Examine the Impacts COVID-19 on Users of Public Lands, Forests, and National Parks

Thursday, July 23, 2020; 10:00am; Dirksen Senate Office Building 366

Statement for the Record Outdoor Recreation Roundtable

Dear Chairman Murkowski, Ranking Member Manchin and Members of the Committee:

The Outdoor Recreation Roundtable (ORR) is the nation's leading coalition of outdoor recreation associations – now totaling 32 national members, representing more than 110,000 American outdoor businesses and the full spectrum of recreation activities. Outdoor recreation is a major force in the American economy. Prior to the pandemic, our industry generated \$778 billion annually in economic output, comprised 2.2 percent of the United States GDP and supported 5.2 million jobs. At a time of unprecedented economic growth, we were growing faster than the economy as a whole in every indicator, surpassing other key sectors such as petroleum, coal, and computer and electronic products.

However, our industry has dramatically changed this year. With months of closures, entire supply chains have been disrupted, including manufacturing, retail, service (campgrounds, marinas, hospitality, ski resorts, guides and outfitters, etc.), distribution and more. Meanwhile, local, state and federal public lands and waters that serve as the backbone of our industry and allow people to experience the outdoors have been closed due to necessary efforts to mitigate the spread of the coronavirus. While the overall impact of the outdoor recreation economy is large in scale, the sector includes thousands of small businesses vital to the health and economic well-being of their communities, many of which are in rural areas. These businesses have gone through unprecedented downturns and many are still in danger of permanent closure. Outdoor businesses often rely on seasonal trips and travel and should have seen a busy spring and early summer, but instead were shuttered. They also rely on accessibility to public lands and waters, adequate recreation infrastructure, and the certainty of distribution, manufacturing, retail and trade — all of which have been impacted.

ORR — in partnership with Oregon State University — conducted a survey in May of 21 participating national outdoor recreation trade associations, representing over 23,000 businesses with nearly 2 million employees.¹ The impacts are startling:²

- Of the businesses the survey represents, all are experiencing difficulty with production and distribution, with 79 percent experiencing significant impacts;
- 88 percent of these businesses have laid off or furloughed a portion of their workforce;
- 94 percent of outdoor industry businesses are experiencing a decrease in sales with 24 percent seeing a decrease of 50 percent or greater compared to one year ago; and
- 95 percent of outdoor industry trade associations are seeing a decrease in revenue with 26 percent seeing a decrease of 50 percent or greater compared to one year ago.

¹ Outdoor Recreation Roundtable: COVID-19 Economic Impact Study (June 9, 2020)
<https://recreationroundtable.org/orr-launches-dashboard/>

² Outdoor Recreation Roundtable: COVID-19 Economic Impact Study (June 9, 2020)

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According to the U.S. Census Bureau, 75 percent of small businesses in the category that includes recreation are reporting large and negative effects. Overall, our category has been hit 31 percent harder than the national average, making our industry the second most affected sector in the country behind “food and accommodation.” Additionally, as many outdoor businesses were deemed “nonessential” and forced to temporarily close, small shop owners watched large retailers like Amazon, Target and Walmart gain market share on tents, bikes, camping equipment and more.

Despite these hardships, outdoor recreation companies across the country stepped up to aid first responders, healthcare workers and law enforcement. The **RV industry** provided mobile medical clinics, staging units, and living quarters for medical personnel and essential workers, many of whom are on the front lines of this pandemic. **Airstream** donated Nest travel trailers to hospitals. **Campgrounds** are providing temporary accommodations and essential products and services including food, water, laundry, fuel and more for traveling medical personnel. **Marine, motorcycle and powersports manufacturers** donated their supplies of N95 masks to local healthcare facilities, and many **marinas** are offering their slips to law enforcement to ensure swift response on the water. **Outdoor ski and snowboard brands like Burton and gear and apparel manufacturers like Outdoor Research** converted their production lines to produce masks, gowns and PPE. **The North Face** created a Resilience Fund to support rural communities dependent on recreation by providing emergency economic support, guidance, and resources for impacted businesses and nonprofits. Since its launch, more than 120 local businesses have applied for loans, and the program has returned 160 people to work in an area where unemployment was approaching 25 percent.

While businesses have been reeling from economic shock, Americans’ lives and communities have also changed dramatically this year. With schools, movie theatres, malls and more temporarily closed, Americans are turning to the outdoors to provide a necessary reprieve from the intense mental and physical stress caused by this crisis and the vital efforts to combat it.

Less than 50 percent of Americans enjoyed an outdoor experience last year³. However, a May survey found that 81 percent of Americans spent time outside during the pandemic, with 32.5 percent turning to outdoor recreation for the first time.⁴ A recent McKinsey survey on changing behaviors due to COVID-19 found 18 percent of people surveyed are spending more time outdoors, where transmission rates of the virus are lower.⁵ Metro areas experienced significant increases in park visitation. Eighteen of the 25 areas measured saw increases ranging from 6 percent (San Antonio) to 145 percent (Detroit) between mid-May and mid-July.⁶

We are also seeing increases in outdoor equipment purchases. Leisure bike sales rose 121 percent over 2019 levels in the month of March.⁷ Camping is viewed by consumers — including

³ Outdoor Foundation Study; Participation Report (January 29, 2020)

⁴ Footwear News (May 14, 2020); survey conducted by communications and public relations firm CGPR

⁵ MedRxiv “Closed environments facilitate secondary transmission of coronavirus disease 2019”

⁶ Detecting Change in Human Mobility in Parks in top 25 US metro areas; Conservation Innovation Center, Chesapeake Conservancy; Google COVID-19 Mobility Report

<http://covidmobilitymetros.cicapps.org/>

⁷ New York Times (May 18, 2020) <https://www.nytimes.com/2020/05/18/nyregion/bike-shortage-coronavirus.html>; N.P.D. Group Market Research

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campers and non-campers — as the safest way to travel, with the ease of social distancing, and the desire to spend time with family and friends some of the biggest factors drawing people to the activity.⁸ This interest in safely recreating outside is reflected in RV sales. Ninety-eight percent of RVs sold in the U.S. are produced domestically,⁹ and many dealers set sales records in May and June as they watch the demographic simultaneously shift to younger first-time buyers.

The boating and fishing industries have also experienced an encouraging rebound. According to the National Marine Manufacturers Association, boat sales were up 59 percent in May compared to April, and up nine percent from pre-pandemic levels (on a seasonally-adjusted basis), reaching single-month levels not seen since 2007.¹⁰ This is especially relevant, as 95 percent of powerboats sold in the U.S. are made in America.¹¹ Fishing license sales in states across the country are also surging. In June, the Wisconsin Department of Natural Resources reported that 100,000 more licenses have been sold to residents in 2020 than 2019.¹² In Colorado, that number is more than 90,000 new licenses over last year.¹³ In Vermont alone, sales of fishing licenses have increased 50 percent. These sales continue to contribute to important conservation funding.

These new trends throughout the industry are painting a clearer picture of what Americans value during a global pandemic. Similar to past recessions, Americans focus on their priorities, and the outdoors is clearly among them. People want to safely be outside with their families, and there is no better place than on a river, in a boat, camping in an RV, hiking, off-roading or biking. While impactful, this recent good news for the industry doesn't come close to undoing the economic damage of the spring months, and many are worried about an increase in COVID-19 cases causing another round of closures and hardships.

One of the largest looming issues is product distribution for manufacturers and the uncertainty of items like bikes being available from overseas. Some retailers in the fishing and biking space are completely out of inventory. A small RV dealer in Iowa is out of motorhomes at the same time he could be selling dozens a day. These shortages combined with overall business uncertainty and the cost of operating in safe and socially distanced workplaces are straining small businesses like never before. These businesses are the backbone of our industry and range from specialty retailers, apparel, gear and vehicle manufacturers, outfitters and guides to campground and marina operators, and are often foundational to a community's economy. This lack of product and uncertainty of resupply timelines also severely impacts the ability of the American people to enjoy responsible outdoor recreation at a time when it may be the safest form of exercise, travel, and social interaction available.

The industry has put out best practices for business safety, from manufacturers to dealers, retailers and service providers, and is at the forefront of efforts to ensure their customers recreate responsibly, especially when visiting public lands and waters. Outdoor sectors have placed ads and op-eds and distributed new public-facing guidance to ensure we are all doing what we can to

⁸ Kampgrounds of America 2020 North American Camping Report Special Report (May 11, 2020)

⁹ RV Industry Association, 2019 State Legislative Agenda

¹⁰ Boating Industry (July 16, 2020); National Marine Manufacturers Association

¹¹ National Marine Manufacturers Association, 2017 U.S. Recreational Boating Statistical Abstract, 2016 Recreational Boating Participation Study

¹² WMTV-15 (6/29/2020); Wisconsin Department of Natural Resources

¹³ Colorado Public Radio (July 19, 2020); Colorado Parks and Wildlife

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limit further spread of the virus and that new recreationists know about important practices like powersports safety and Leave No Trace etiquette. Fundamentally, we see the outdoors as part of the public health solution and are making sure we are not part of the problem.

With rising unemployment and more Americans than ever are participating in outdoor recreation and recognizing the value of time spent outdoors, investments in our industry's core infrastructure – public lands and waters – will allow outdoor businesses to get back to what they do best: stimulate local economies, put people back to work, and allow Americans to benefit from time spent outside. This is why the entire outdoor recreation industry was thrilled with the recent bipartisan passage of the Great American Outdoors Act, which fully funds the Land and Water Conservation Fund and provides billions of dollars for backlogged maintenance on our public lands and waters, which we hope will revitalize communities across the country.

This spring, as Governors restricted travel and encouraged residents to use their local communities for recreation, the realization that more than 100 million people are not within ten minutes of a park or green space¹⁴ became increasingly apparent. As we look at the overcrowding of some federal lands, we must weigh that against the many communities who could not access the outdoors during a time when they needed it the most. Looking at park size and density shines a light on the disparity in access to green space. Of 14,000 cities and towns analyzed, parks serving a majority of people of color average half the size (45 acres compared to 87 acres) while serving five times as many people per acre.¹⁵

With more people heading outside, more equitable investments in access and infrastructure are needed to ensure all Americans can benefit from the mental and physical health aspects of outdoor recreation, while practicing social distancing and ensuring the safety of gateway communities and cities. The Founder and CEO of Outdoor Afro, Rue Mapp, summed it up well by saying, "I'm hoping that after this pandemic, the priority to have a connection to nature in our communities will emerge like never before. We've had a lot of park closures, but I've never seen as many people in my neighborhood walking — not just the dog walking — but whole families out walking together. This is an opportunity for us to rethink public lands and to get people out of the mind-set that nature is somewhere that you have to drive to."¹⁶ More investments in local recreation and conservation are needed so all Americans can reap the health benefits of time spent outdoors while staying close to home, and small outdoor businesses can continue to provide needed jobs and economic growth in their communities.

The outdoor industry urges you to continue to support resilient federal lands and waters, communities, economies, and healthy people by reinvigorating this once vibrant, and now struggling industry in the coming months. Our greatest needs are putting Americans back to work in the outdoor industry; increasing partnerships with federal agencies on permits, leases, contracts and data collection; ensuring small and seasonal businesses access their fair share of federal support; and improving recreation access and infrastructure. Action is needed on smart policies and investments so we can truly harness this surge in outdoor recreation and provide opportunities for improved health and quality of life for generations to come.

¹⁴ Trust For Public Land ParkScore Index (May 21, 2020) <https://www.tpl.org/parkscore>

¹⁵ Trust For Public Land ParkServe; <https://www.tpl.org/parkserve/about>

¹⁶ Trust For Public Land Special Report: Parks and the Pandemic (2020)

Recommendations to put Recreation Businesses back on an Economic Growth Trajectory

1) Repair Crumbling Infrastructure, Invest in U.S. Manufacturing and Curb Rising Unemployment through Expanded Conservation Corps and a National Outdoor Workforce Development Consortium

To help address the rise in unemployment stemming from the COVID-19 pandemic and ensure the stability of our communities, our country needs a Corps movement similar in scale and purpose to the Civilian Conservation Corps of the New Deal Era to employ young Americans and Veterans on public lands and waters in communities across the country.

To achieve this, we can expand the nation's existing conservation corps and build upon the work this committee did to pass the John S. McCain III 21st Century Conservation Service Corps Act (21CSC Act) last year. The legislation included new authorities to partner with more federal land and water management agencies and established the Indian Youth Service Corps to engage native youth on projects that benefit their tribes and communities. We recommend identifying and funding appropriate shovel-ready projects for Corps, additional resources for Corps run by and/or engaging underserved and underrepresented populations, and targeted investments in youth and workforce development to prepare participants for future employment.

Efforts should also be made to create a National Workforce Development Consortium for the Outdoor Recreation Economy. This Consortium would be aimed at providing research, national education and training standards, curriculum development, and life-long learning opportunities to support the outdoor recreation economy. This infrastructure will accelerate innovation and progress for businesses, stimulate U.S. manufacturing and strengthening rural communities. Like the Corps, the Consortium would strive to be a model of inclusivity, supporting workforce development strategies that grow equity and diversity within the outdoor industry, leading to more welcoming outdoor spaces and businesses for all. A special focus would be on retraining workers whose jobs have been eliminated or displaced due to transitioning local economies or COVID-19 in skillsets that would support a sustainable outdoor economy.

2) Waive Fees on Public Lands and Waters and Extensions of Contracts/Permits

Congress should provide the Secretaries of the Interior and Agriculture flexibility in their administration of contracts, permits, and other authorizations of public recreational facilities and/or services on lands and waters such as fee deferrals and waivers, contract and permit extensions, operational flexibility, and other appropriate measures to mitigate the impacts of COVID-19 on businesses who rely on these partnerships. This change would help countless small businesses and continue to connect Americans to safe and memorable outdoor experiences.

Passing the Recreation Not Red-Tape Act (RNR), the Simplifying Outdoor Access for Recreation Act (SOAR) and the Ski Area Fee Retention Act (SAFR), would solve many of these issues and prevent future business harm from restrictions due to COVID-19 lasting another season.

3) Allow Seasonal Businesses to Apply for Retroactive PPP Assistance

During the initial months of PPP, program rules lacked flexibility to account for different peak seasons of businesses like ski areas, guides and outfitters, and more. Businesses were instructed

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to pick a recent 12-week period to determine payroll, which in turn determined how much assistance they were eligible for. Many seasonal businesses were at a low point during this period. On May 3, SBA and Treasury released new guidance allowing seasonal employers to use a 12-week period between May 1, 2019 and September 15, 2019 to calculate a maximum PPP loan. Unfortunately, seasonal businesses who had already applied for loans and whose Form 1502 had already been filed by their lender were unable to take advantage of this very important change. Seasonal businesses that find themselves in these circumstances should be able to apply for additional PPP assistance consistent with the amount they would have been allotted under the most recent guidance. The continued operation of these businesses supports employment and participation in outdoor recreation for Americans across the country.

4) Revitalize Rural Communities through Recreation by Expanded Technical and Rural Development Assistance

The 2018 Farm Bill report clarified an existing authority that Rural Development grants could be used to support the growth of recreation economies and utilized for recreation projects, technical and financial assistance, infrastructure, business loans and marketing. Similarly, the Economic Development Agency's Economic Adjustment Assistance Program 'Implementation Grants' should be used for recreation infrastructure projects (e.g. parks/trails development and renovation, playgrounds, public pools, ballfields, lodging/lodging camping facilities, etc.).

Additionally, the United States Forest Service, along with three other federal agencies, is providing assistance to 10 rural communities aimed at growing their economies through outdoor recreation. Considering that 170 communities applied for support, this bold initiative should be expanded and replicated to address the needs of distressed rural communities coming back from the pandemic, including economic development and diversification, increased quality of life, and improved public health outcomes for under-resourced communities.

5) Streamline Data Collection of Federally-Managed Lands and Waters

Federal land and water management agencies have historically conducted surveys to measure outdoor recreation visitation specific to their individual agency and have occasionally used these to estimate economic impact and jobs supported by recreation. Agencies also have broken down recreation on their lands into specific categories, but these categories are not standardized across the agencies. Because of this, a gap exists in understanding the economic impacts and jobs supported by recreation, as well as an overall picture of outdoor recreation occurring on our federal lands. This could be especially difficult for management during a pandemic where we want as many Americans as possible to enjoy time outside but need to have a more accurate depiction of what, when, and where they are participating in recreation to maintain resources and safe capacity for social distancing and positive experiences.

If an alignment existed between the federal agencies on how they surveyed for outdoor recreation and subsequent impacts, federal land managers could confidently determine where restoration for overuse is most needed, what wildlife populations need to be more closely monitored or places the federal government should focus on encouraging more visitation and communities they should connect with to support engagement. This is critical for future funding and management determinations, especially throughout the pandemic and in the aftermath with many new users hoping to enjoy the myriad of benefits our public lands and waters offer.

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Outdoor recreation has been a major force in the American economy. In order to recover from this economic recession, all efforts should be taken to support this key industry that can help communities recover, create American jobs and continue to ensure Americans' connection with the outdoors and the natural world. There has never been a better time to consider a Recreation Package made up of critical management policies like RNR, SOAR, SAFR, and Conservation Corps and workforce expansion to ensure the federal government is investing in places and tools that can revitalize not just our economy, but also our spirit.

Thank you for holding this important hearing and please consider ORR a partner in supporting public lands and waters, and the user community, throughout the pandemic and beyond.

Sincerely,

A handwritten signature in black ink, appearing to read "Jessica Wahl". The signature is fluid and cursive, with the first name "Jessica" being more prominent than the last name "Wahl".

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