

## ANNUAL REPORT

2021

### 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.



## 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.

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**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

2021 was another incredible year for the outdoor recreation industry, full of challenges, opportunities, and cross-sector collaboration. ORR and our members were able to provide breakthrough innovation, greater access, and critical infrastructure reform at a time when Americans' desire to get outdoors was at its peak. COVID-19 has given policymakers and the public a deeper understanding of not just the economic impacts of outdoor recreation, but its benefits to mental and physical health and society as a whole.

ORR members continued to elevate recreation in the national dialogue with record sales and participation numbers, as well as movement on key recreation priorities with the Biden Administration, with Congress and rural communities throughout the country. Recreation showed up in the bipartisan infrastructure package in a major way, with critical funding provided to our nation's green and blue infrastructure. We also made significant progress on a potentially transformative recreation package with hearings, markups and dozens of bipartisan bills gaining national attention and support.

ORR teamed up with the Bureau of Economic Analysis for their release of 2020 recreation economy data. This annual release not only showcased the impact that COVID-19 had on our sector, but also the resiliency of our businesses and the important role our industry has played in our national recovery and in the lives of millions of Americans. ORR led the way at the state level where two new Offices of Outdoor Recreation were created in Arkansas and Maryland, and several new states joined the National Governors Association's Outdoor Recreation Learning Network, which we sponsor.

We continued to support rural communities working to transition to more sustainable recreation economies, especially through a new \$750 million funding stream from the Economic Development Administration, a new ally in outdoor recreation economy development. And we educated the public and lawmakers on recreation's relationship to climate change, pandemic recovery, workforce development and more. We also ramped up the important work of creating a more equitable and inclusive outdoors through the new Together Outdoors program. All of these efforts and more are outlined in and guided by our new board-approved three-year strategic plan.

None of this would have been possible without ORR's staff, members, and Board of Directors. In 2021, we welcomed new members including the Association of Outdoor Recreation and Education, National Ski Areas Association, the New Hampshire Office of Outdoor Recreation Industry Development and Oregon State University's Center for the Outdoor Recreation Economy. To the incredible outdoor recreation business community, thank you for your support and engagement. We are honored to ensure the growth and success of outdoor recreation and look forward to another year of limitless possibilities when we work together!



**JESSICA TURNER,**  
PRESIDENT



**FRANK HUGELMEYER,**  
PRESIDENT OF NMMA,  
BOARD CHAIR OF ORR

## BRIDGING THE GAP BETWEEN FEDERAL AGENCIES AND THE OUTDOOR RECREATION INDUSTRY

One of ORR's goals is to be better partners to the federal agencies by bringing our collective voice to important issues with clear policy objectives and win-win scenarios that make the recreation pie bigger. By hosting listening sessions on the Great American Outdoors Act, we were able to bring public-private partnership solutions to the federal agencies. We played an active role in the rollout of the Biden Administration's "America the Beautiful" (AtB) Initiative, and were able to achieve a focus on recreation access. ORR released its framework for implementation of AtB, which outlines strategies to ensure that outdoor recreation plays a leading role in federal and local decisions to expand and conserve public lands and waters. ORR presented this framework on an interagency call with agency and White House leadership.

"Jessica – on behalf of the Forest Service, I want to express our deep appreciation to you and your staff for the terrific GAOA engagement session that you hosted on Tuesday. You fostered great interactions and conversation that will help all of us as we move forward. We look forward to continuing our partnership and engagements as we work together on GAOA and a variety of other issues in the Forest Service. Thank you again!"

**Jennifer Eberlien,**

*Associate Deputy Chief for the National Forest System*

"(Jess and Lindsey) have done outstanding work, your strategic efforts have greatly enhanced outdoor recreation access and opportunity for all. You have deepened the understanding of the value, benefits and importance of outdoor recreation for the nation. I appreciate your leadership, collaboration and innovation - and bringing diverse voices to the table."

**Bob Ratcliffe,**

*Conservation and Recreation Programs Division Manager, National Park Service*

ORR's Partners Outdoors 2021 had the highest attendance in decades with participation from across the industry and land and water management agencies. The virtual event featured keynote speakers including Secretary of Agriculture Tom Vilsack, BLM Acting Director Nada Culver, USFS Chief Vicki Christiansen, NOAA Sanctuaries Director John Armor, White House Director of Digital Strategy Rob Flaherty and KOA CEO Toby O'Rourke.

"You all did an excellent job with the conference overall - I learned so much, made some great connections, and really absorbed a lot that I will incorporate into this next round of RERC. Making a virtual conference happen is no small task, and you all did a great job. I appreciated Ben's prep for all of us speakers, Jess' and Lindsey's leadership and facilitation throughout the event, and Chris' excellent small group facilitation and insightful questions that made for powerful breakouts. Hats off to you, and I look forward to continued work together!"

**Stephanie Bertaina,**  
*U.S. Environmental Protection Agency*



"Great sessions today. Amazing speakers and such new topics we are addressing. Thank you for keeping the Partners Outdoors Session vibrant and relevant to today's recreation needs."

**Marilyn Reese,**  
*Executive Director, National Forest Recreation Association*

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

ORR worked closely with the Bureau of Economic Analysis (BEA) to release the fourth consecutive year of data from the Outdoor Recreation Satellite Account showcasing the size and impact of our sector. The report showed once again how the outdoor industry, despite the impact of widespread public lands and business closures, suspended trips and travel, gathering restrictions, supply chain issues and more in 2020, continued to support communities across the country during the pandemic. ORR's webinar releasing the data was attended by 400 participants and resulted in great media for ORR members.

“Travel and tourism play such an important role in local economies across New Hampshire and the country. I am grateful for the Outdoor Recreation Roundtable’s collaboration to ensure our recreation economy continues to support local businesses and attract visitors and tourists. I’ll keep working to deliver the resources needed to support the vital businesses and jobs fueling outdoor recreation in our state, particularly as we recover from the economic impacts of the COVID-19 pandemic.”

**Senator Jeanne Shaheen**  
(D-NH)



## EDUCATING POLICY MAKERS AND THE PUBLIC ON THE MYRIAD BENEFITS OF OUTDOOR RECREATION

ORR was proud to be in attendance at the White House to celebrate the signing of the Infrastructure Investment and Jobs Act, a clear demonstration of the important role recreation played in the infrastructure discussions and a proud accomplishment culminating the industry’s efforts over the past several years.

### WHAT’S IN THE BILL?

- \$100 million for recreation sites
- Reauthorization of the Sport Fish Restoration and Boating Trust Fund
- Reauthorization of the Recreational Trails Program
- Increased funding for roads and trails on public lands

ORR convened experts from our membership, as well as the public and private sectors to host key Capitol Hill briefings for thousands of participants on the 21st century recreation agenda throughout the year, with topics including economic impacts and recovery from COVID and the role of outdoor recreation, new participation trends, and the implementation of the Great American Outdoors Act. Participants who joined our convenings represented federal agencies, members and committee staff, local and national press, and state representatives.

“The collaboration within the outdoor recreation community represented on this call is key! Congrats on that!”

**Jim Bedwell,**  
*Bedwell Consulting Resources, USFS Retired*

“Very informative – and all the panelists did a great job – excellent messaging on the issues.”

**Phil Ingrassia,**  
*President, National RV Dealers Association*

To cap off the year, ORR President Jessica Turner led the movement on the first ever recreation package by [testifying in front of the Senate Energy and Natural Resources Committee in December](#) on a package of recreation bills that promise to streamline and improve recreational opportunities around the United States. Turner’s testimony was praised by senators and staff on both sides of the aisle.



“Great job today in the committee hearing. Such great conversations and support for outdoor rec. You did a fantastic job representing outdoor rec.”

**Pitt Grewe,**  
*Director, Utah Office of Outdoor Recreation*

## PROVIDING SUPPORT FOR RURAL ECONOMIC GROWTH

Amid the backdrop of the COVID-19 pandemic, outdoor recreation played a critical role in communities around the United States as a strategy to build and maintain diversified and resilient economies, particularly in rural America. In recognition of the need for more education about how these economies are formed and develop over time, ORR led the way on rural economic development initiatives at the federal, state, and local level.

- Created [Rural Economic Development Toolkit](#) from interviews with over **60** practitioners across the country
- [Webinar launch](#) of the toolkit yielded over **800** registrants and the toolkit has been viewed over **5,400** times
- Helped incorporate and implement **\$750 million** in Economic Development Administration (EDA) recovery efforts targeted specifically at travel, tourism, and outdoor recreation, an unprecedented investment
- Hosted **dozens** of webinars for members and rural communities on EDA grants and ORR toolkit
- Launched our first-ever rural development grant program, in partnership with the VF Foundation, providing **\$20,000** in micro-implementation grants to five communities that developed recreation plans through technical assistance from the Recreation Economies for Rural Communities (RERC) Program

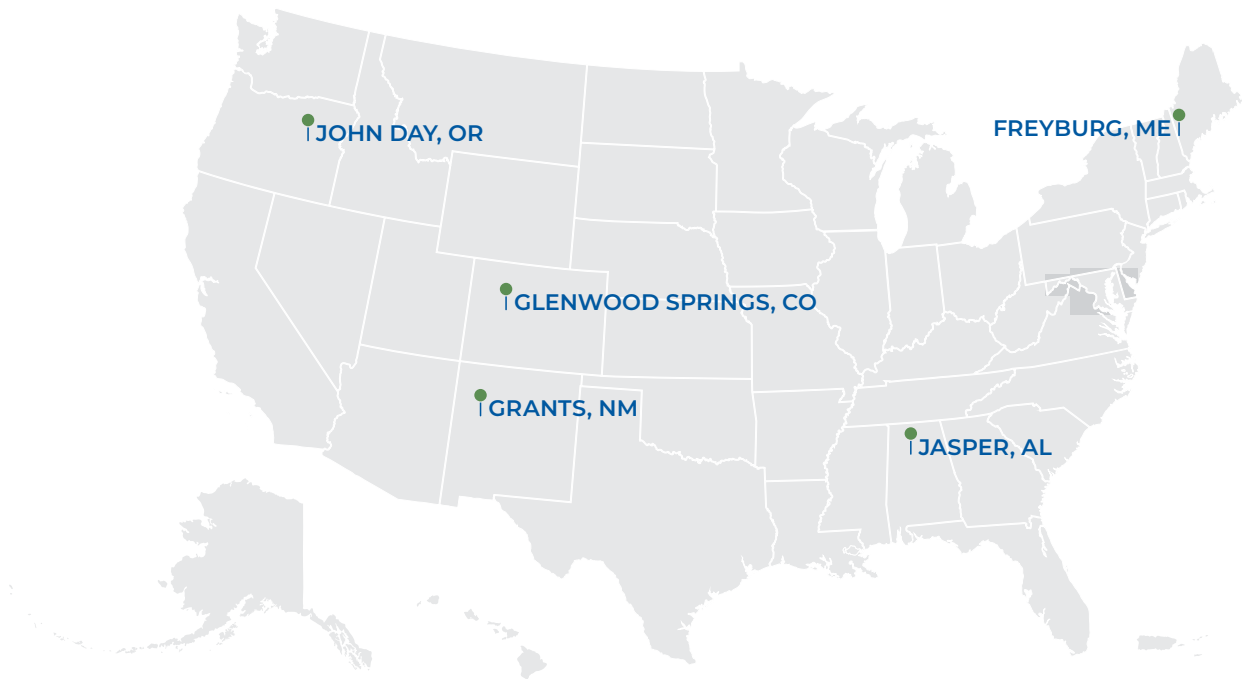
“This is a real knock-out of a toolkit! You’ve brought together so much great content. I appreciate that it talks about destination management in contrast to destination marketing.”

**Donald Leadbetter,**  
*Tourism Program Manager, National Park Service*

“This toolkit serves as a revolutionary aide for diversifying local and regional economies through outdoor recreation. The lessons and perspectives collected here will help communities across the U.S. - from those just beginning to embrace outdoor recreation and its very real economic, social, and environmental benefits, to communities already implementing thoughtful strategies to expand their outdoor economy. A resource this expansive, and scalable to reflect the unique values and specific challenges of communities, is critical to building a more resilient rural America.”

**Nathan Fey,**  
*Director, Colorado Outdoor Recreation Industry Office*





*Communities that received ORR's grants to deliver on their economic development strategies. In John Day, ORR's grant, in combination with technical assistance from RERC, helped unlock millions of dollars in state grants to support outdoor recreation infrastructure.*

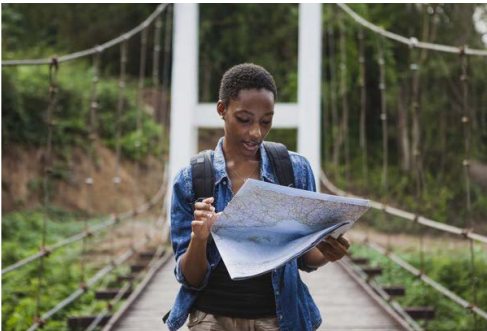
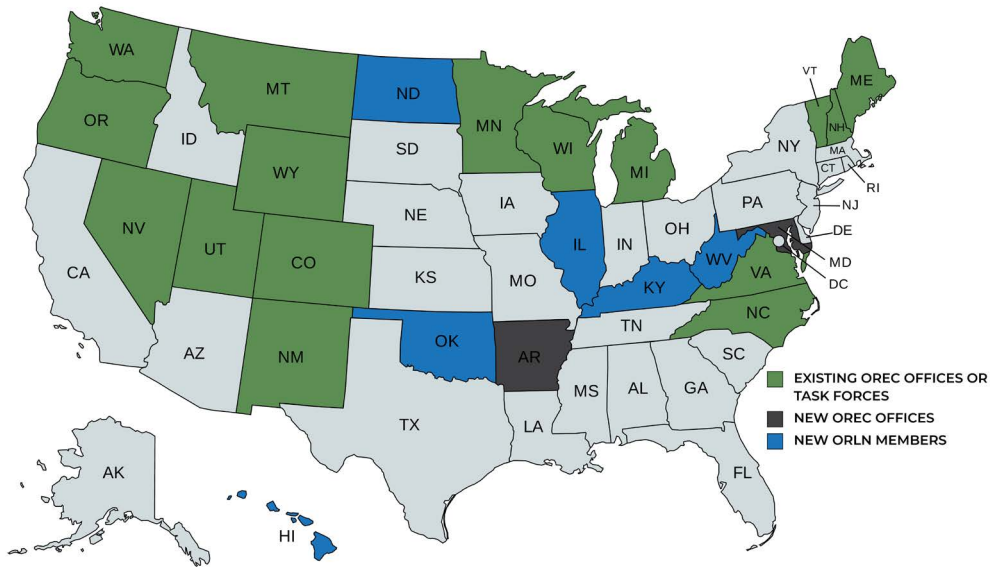
“Fantastic work, Chris and team! I almost cried reading that letter and seeing all the signatories. For those who weren't able to attend, the training that OSU/ORR provided on Tuesday for EDA western region staff was simply fantastic-well done.”

**Toby Bloom,**  
*National Program Manager for Travel, Tourism and Interpretation,  
U.S. Forest Service*



# RECREATION PRIORITIES AT THE STATE LEVEL

As a consequence of the pandemic, 2021 saw states across the country invest in outdoor recreation to support public health and economic development for residents and visitors alike. States recognized the importance of outdoor recreation through billions of dollars in investments in state parks systems, trail networks, marinas, and other outdoor recreation infrastructure, connecting businesses to address supply chain issues and turned to ORR for guidance - through meetings and [“Value of State Offices of Outdoor Recreation”](#) - and partnership to help make the most of their opportunities. ORR was heavily involved in creating new Offices of Outdoor Recreation and helping connect them with the outdoor recreation industry. ORR also continued its sponsorship of the National Governors Association’s Outdoor Recreation Learning Network, which added several members in 2021, and worked alongside the Michigan Office of Outdoor Recreation Industry to bring together ORR members with Michigan-based suppliers, manufacturers and stakeholders to solve supply chain issues.



## BUILDING A MORE INCLUSIVE OUTDOORS

In partnership with THOR Industries, ORR launched Together Outdoors, an initiative aimed at making outdoor recreation more inclusive and representative of the diversity of the United States. Together Outdoors works to identify and overcome systemic issues that contribute to barriers to the outdoors for historically marginalized groups through the development of education, partnerships, and action for participants. Through this work, Together Outdoors helps ensure that all Americans feel a sense of belonging in the outdoors.

To date, Together Outdoors has united 100 leading outdoor businesses, national and regional land management agencies, and nonprofits in a shared commitment to helping outdoor recreation grow and meet the needs of diverse participants. Under the leadership of Coalition Lead Gerry Seavo James, these coalition members started a 7-month educational journey that exposes them to module-based webinars, resources, best practices, diverse perspectives, and data-driven evaluation tools, with the goal of catalyzing change both internally within their organizations and in the field where they interact with the public.

Additionally, the [Together Outdoors Governance and Advisory Councils](#) were formed this year to help design and implement education programs, communications, fundraising, partnerships, and efforts to increase equitable access.

“We’ve listened and heard many of the deep and long-running concerns and obstacles underrepresented groups face when pursuing outdoor adventure. Enjoying and appreciating nature is important for health and mental well-being and should be welcoming places for everyone. THOR is committed to helping advance outdoor equity and inclusion, so all feel welcome to Go Everywhere and Stay Anywhere.”

**Bob Martin,**  
*President and CEO, THOR*

## TOGETHER OUTDOORS



## ORR IN 2021/2022 AND BEYOND

With close to 40 press releases and op-eds published, almost 30 letters sent to the House, Senate and Administration, multiple pieces of testimony offered, dozens of meetings held with members of Congress and their staffs, and over a thousand press mentions reaching an audience of over 618 million, it has been an amazing building year for the team and membership of ORR. We started 2021 by welcoming Jess's daughter into the world alongside the new Congress and Biden Administration and watched the ORR team and our members support the organization during this time. We grew our team by hiring Chris Perkins. Perkins supported our LWCF and Rural Development work prior to coming on board. We also contracted Gerry Seavo James as the Coalition Lead for our new program, Together Outdoors.

Over the summer, ORR celebrated accomplishing its first 3-year strategic plan, and convened members of the Board of Directors to establish a new 3-year plan at Trinchera Ranch in Colorado. Our new plan, which focuses on ORR's unique capabilities to convene and support the entire industry will guide the next 3 years of the organization. The ORR staff is enthusiastic about building out the next important growth phase of the organization with emphasis on industry thought-leadership and convenings, ensuring recognitions of the recreation economy and policy development at all levels that support a healthy business environment, for the growth of the entire recreation economy and all Americans. This next year will be critically important for both our organization and the recreation economy at large and we are excited to dive into another year of dedication to the outdoors.

Thank you to our members and [Board of Directors which can be viewed here.](#)

