



ORR OUTDOOR
RECREATION
ROUNDTABLE

The nation's leading coalition of outdoor recreation trade associations, made up of 33 national associations representing 110,000 businesses



Outdoor recreation is a crucial part of the American economy. Prior to the pandemic, the outdoor recreation industry:

- Generated \$778 billion in economic output
- Comprised 2.2 percent of U.S. Gross Domestic Product
- Supported 5.2 million jobs
- Contributed more to the economy than industries like Agriculture, Mining, Utilities, Chemical Products Manufacturing and Broadcast/Telecommunications



Today's Topics:

- Who are these new consumers, what are they buying and how do we retain them?
- New ways to access the outdoors through virtual passes and platforms
- Increased participation calls for more education around recreation sustainability
- Outlook for winter recreation and year ahead
- New challenges and opportunities and impacts on economy job growth, business needs for labor and trade and investments in public lands and waters



Speakers:

- Nicole Vasilaros, Senior Vice President, Government and Legal Affairs, *National Marine Manufacturers Association*
- Sandi Miller, Vice President for Outdoor Recreation, *NIC, Inc.*
- Karen Redfern, Vice President for Brand Marketing & Communications, *RV Industry Association*
- Scott Schloegel, Senior Vice President of Government Relations, *Motorcycle Industry Council*
- Taldi Harrison, Government & Community Affairs Manager, *REI*
- Jennifer Mazur, Senior Director of Outreach and Education, *Archery Trade Association*
- Chris Steinkamp, Director of Government Affairs and Climate, *Snowsports Industries America*
- Ed Klim, President, *International Snowmobile Manufacturers Association*
- Moderator: Jessica Turner, Executive Director, *Outdoor Recreation Roundtable*



An aerial photograph of a boat moving through the ocean, leaving a large, white, foamy wake that curves across the frame. The water is a deep, dark blue. The boat is visible in the lower right quadrant, moving towards the top right.

Nicole Vasilaros
Senior Vice President, Government and Legal Affairs
National Marine Manufacturers Association



MARINE ECONOMY

\$373 BILLION

IN GROSS OUTPUT

SUPPORTS 2.3 MILLION JOBS

TOURISM AND RECREATION

LARGEST CONTRIBUTING SECTOR

(\$143 BILLION)

Q1 Marine CEO Sentiment Survey

81% of marine manufacturers reported business declines

61% expect business conditions to worsen over next six months

15% of manufacturers permanently closed facilities or locations

70% of marine dealers have cash-flow to stay open < 2 months

\$16 - \$22 billion expected total losses in economic activity

Q2 Marine CEO Sentiment Survey

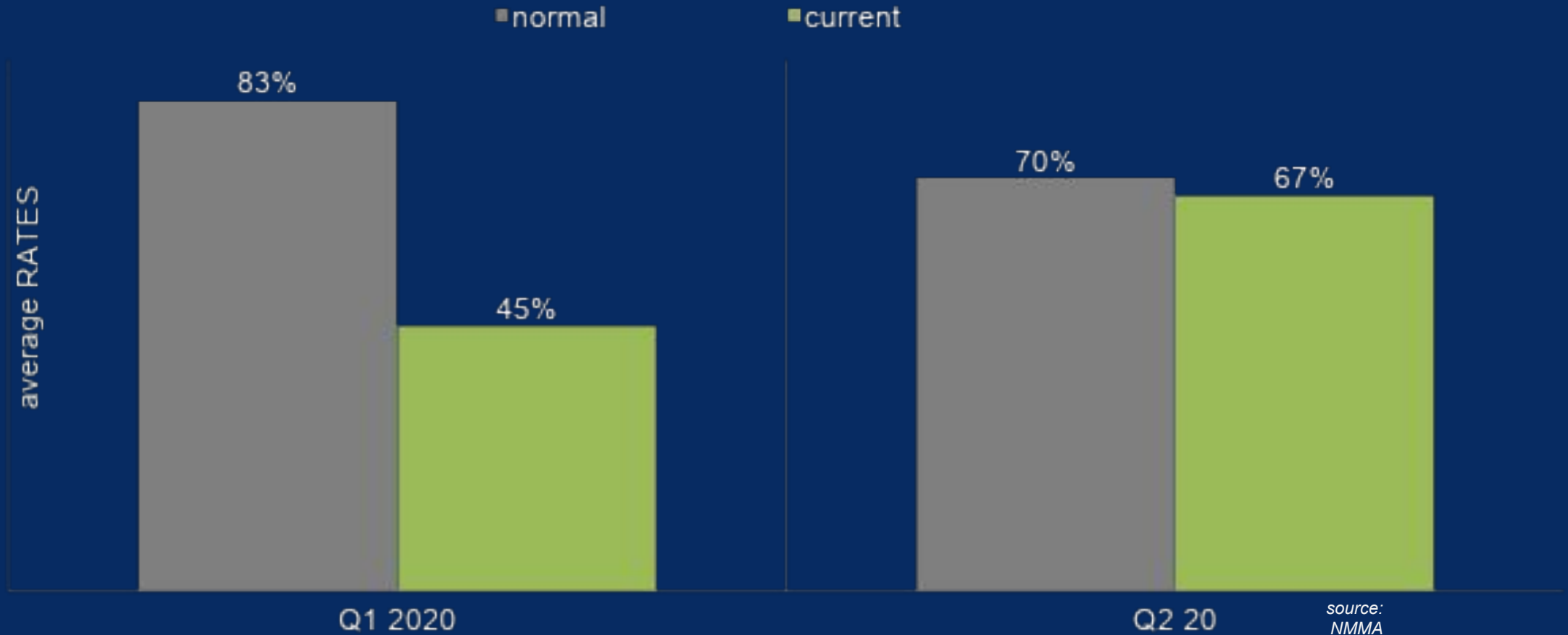
51% reported sales were up or on par with Q2 2019

47% reported new orders were up compared to a year ago

49% reported current business conditions were stable, another 39% reported business was expanding

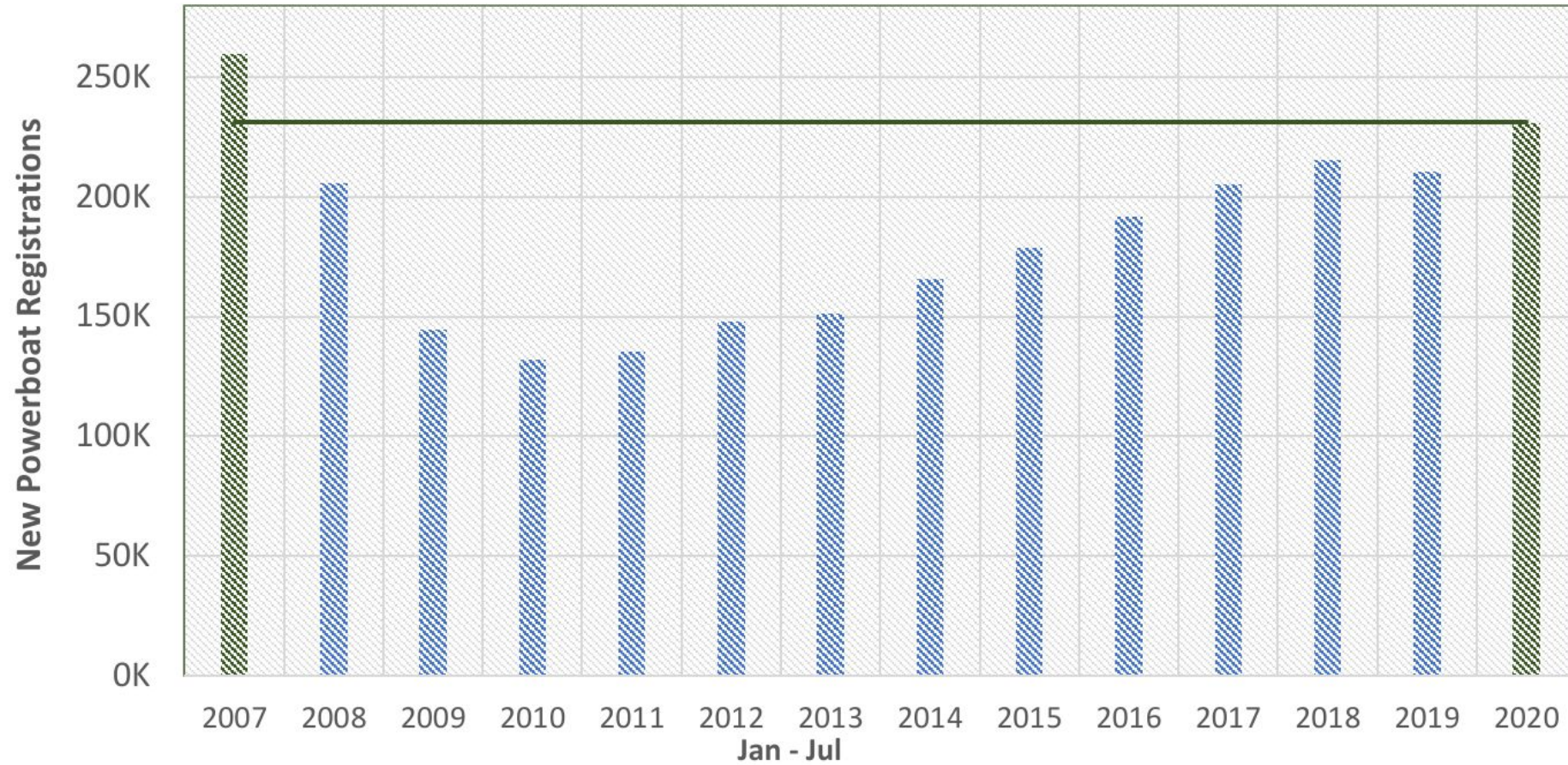
37% of manufacturers actively hiring in the last quarter, 44% sustaining their normal staffing levels, and 19% reporting job cuts

Manufacturing Operations Getting Back Online



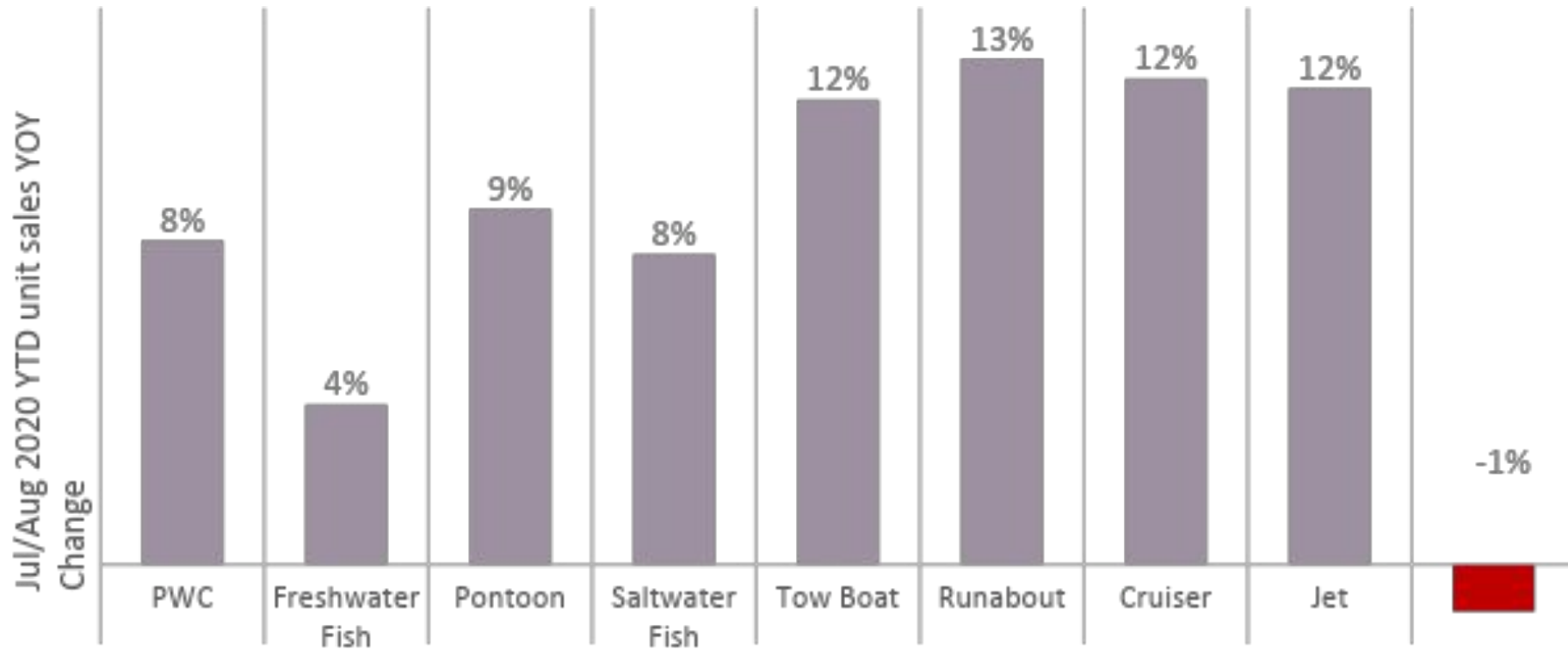
source:
NMMA
Quarterly
Marine
CEO
Sentiment
Report

New Boat Sales up 10% YTD



By NMMA using NMMA and Info-Link data

4%—13% Growth Across all Segments

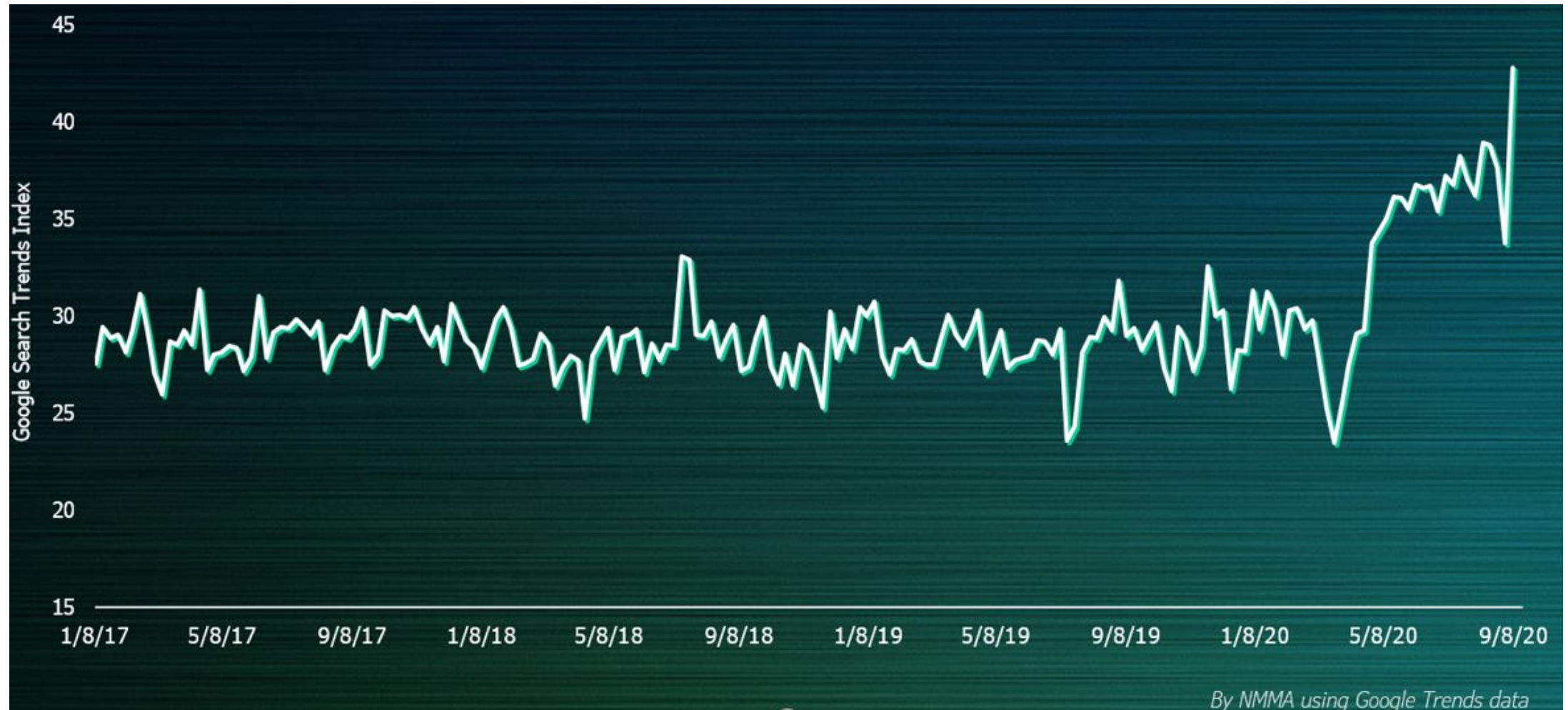


High volume

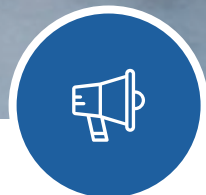
Low volume

By NMMA using NMMA and Info-Link data

Interest in Boating Climbs to All Time High



GET ON BOARD



13,458

Placements via PR
and social media
outreach



1.8 Billion

Overall campaign
impressions

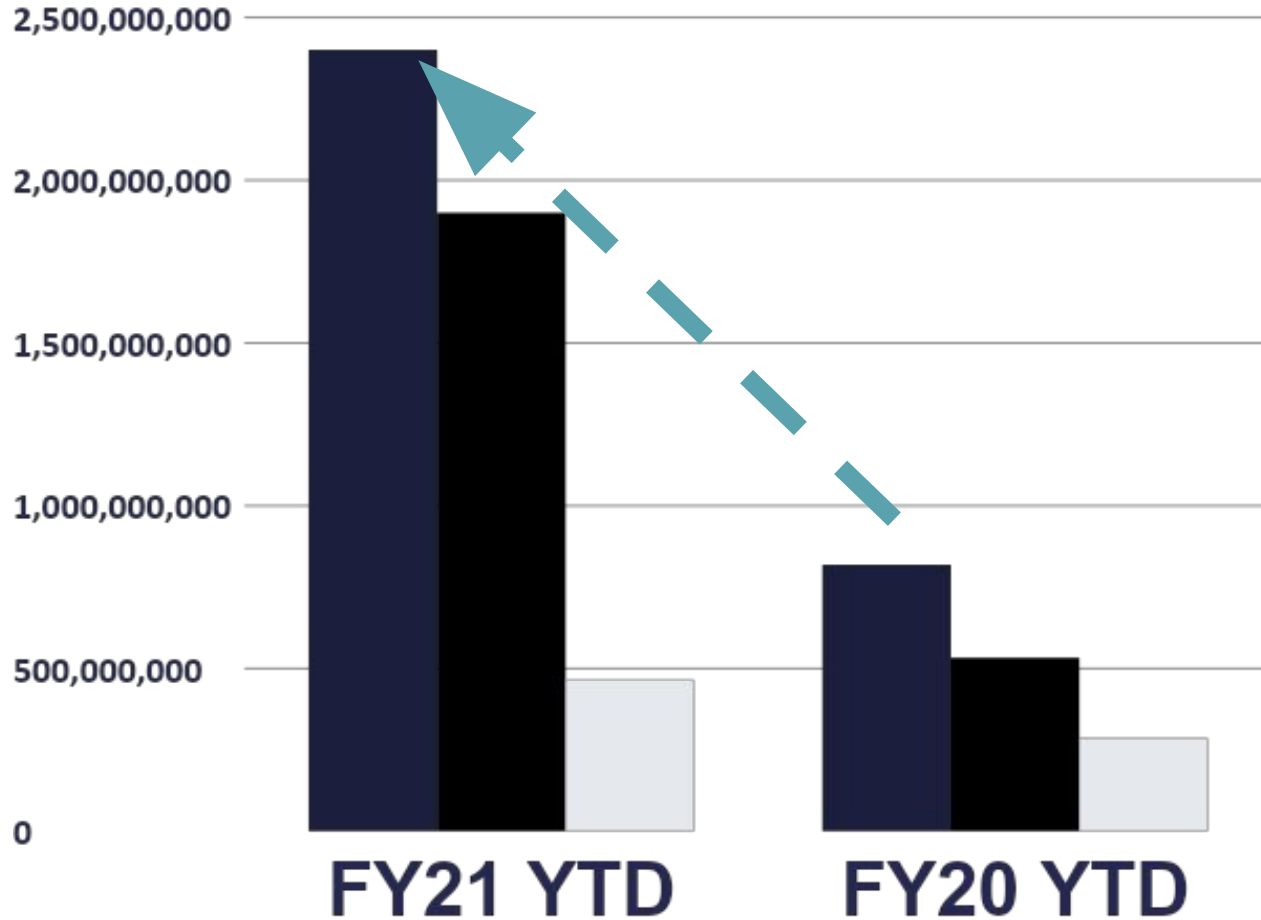


20 Million

Campaign video
views



Campaign Results



Overall Impressions

FY21 = **2.4 Billion**



Earned Media Impressions

FY21 = **1.9 Billion**

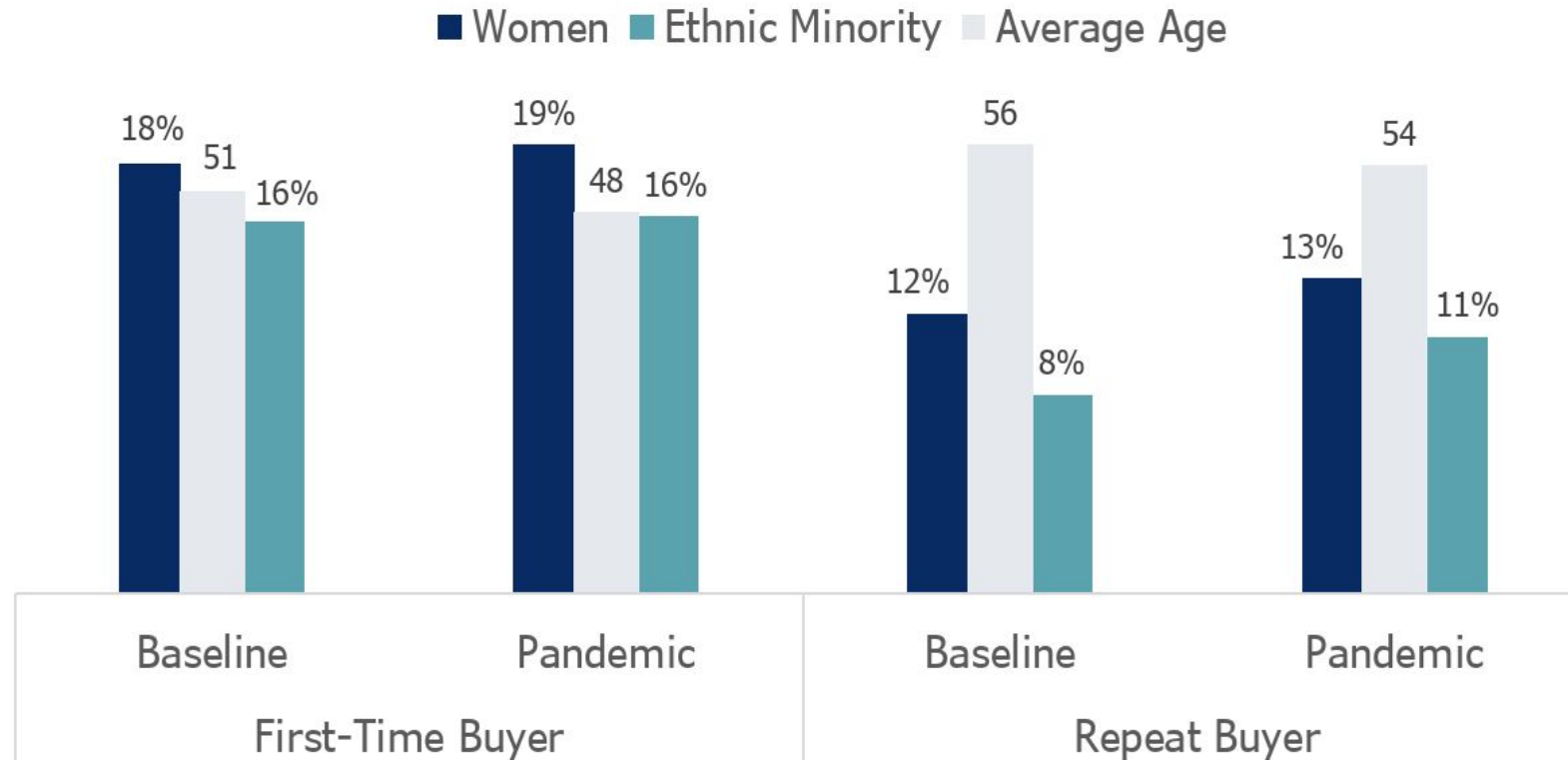


Paid Media Impressions

FY21 = **467 Million**



Diversity Uptick in Buyer Mix



State Fishing License Trends



14%

Total fishing license sales up
Jan. through August 2019 vs 2020

18%

Resident licenses up
2,774,354 licenses

0.6%

Non-resident licenses up
25,131 licenses



Remaining 2020 Priorities

1. Infrastructure needs to meet demand, pass WRDA
2. Ensure safety with uptick in new boaters, pass Coast Guard Authorization
3. Implement Great American Outdoors Act
4. Outdoor Recreation is key to COVID economic recovery, additional stimulus needed



**Recreation
During a
Pandemic**

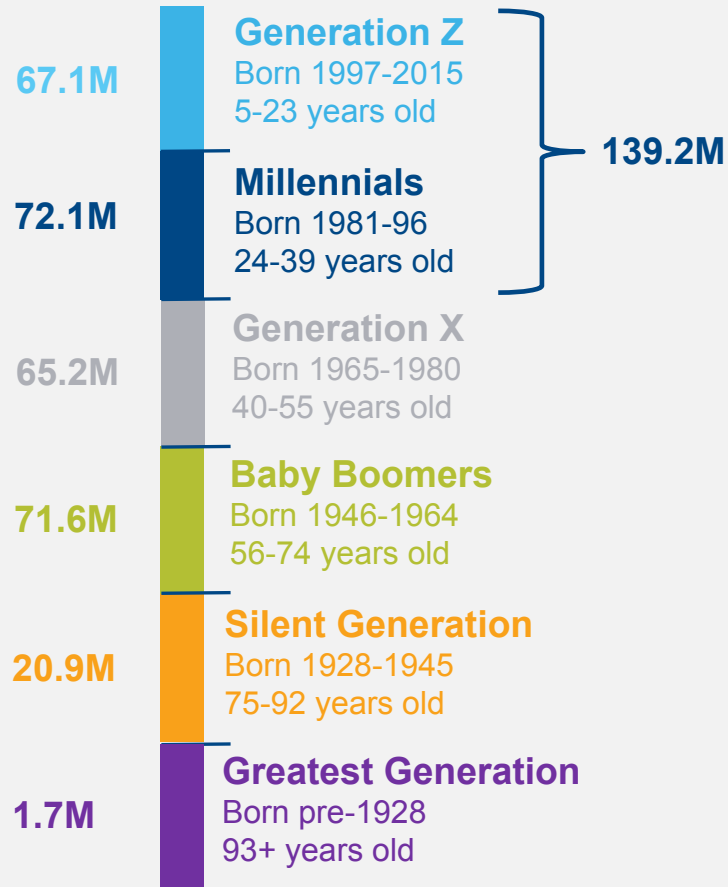
*Capitol Hill
Briefing*

OUTDOOR RECREATION EXPERIENCES FOR FUTURE GENERATIONS

**Sandi Miller, VP of NIC Outdoors & Chris Neff, VP of Research and Marketing
October 21, 2020**



Millennials & Generation Z Represent 42% of the US Population



INSIGHT #1: Navigating Government is a Challenge

- 61% don't know which government agency or level provides a service
- 22% rarely or never choose online for transactions or customer service
 - 23% will call for help
 - 22% will visit a government office (pre-COVID)



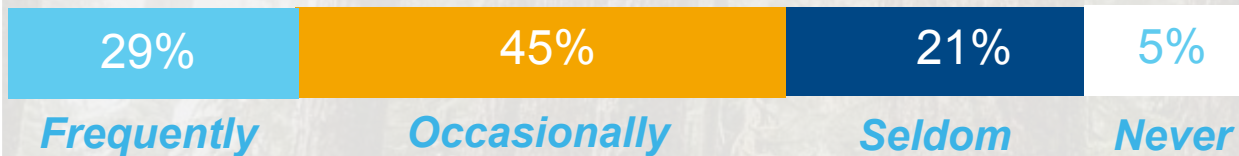
INSIGHT #2: A Growing Opportunity for Equity & Inclusion

- 22% of Generation Z has at least 1 immigrant parent

YOUNG ADULT OUTDOOR RECREATION PREFERENCES

FREQUENCY OF ACTIVITY

How often do you participate in outdoor recreational activities?



Participated in the following activities over the past 12 months:

- Hiking: 53%
- Camping: 39%
- Fishing: 35%
- Hunting: 10%

↓
Cost
Time
Expertise

TOUCHLESS SERVICES = ARRIVE READY

My approach to planning an outing is...

- Plan & prepare in advance: 53%
- Make spur-of-the-moment decisions: 40%



- 211,000 digital passes sold YTD across 70+ state and federal properties

- Digital entrance passes or permits
- Timed entry permits
- Digital payments

HOW TO RECRUIT YOUNG ADULTS



New customers are driving diversity in the outdoors

Engage to Build Confidence

- Squeeze risk out of access
- Enable activity and outing pre-planning
- Provide enhanced content to help prepare, collaborate, and gear up
- Engage new customers with lower outdoor recreation familiarity

What Government Can Do

- Provide useful content and resources
- Revisit policies that may unintentionally exclude some customers
- Embrace “arrive ready” solutions

How Industry Can Help

- Build tools, channels, and social networks
- Provide marketing to drive higher awareness

BUILDING STRONGER PATHWAYS



- **Harness the role of influencers in outdoor recreation**
 - Social groups to share knowledge & build confidence
 - Mentors, trusted elder, extended family
- **Can influencing relationships help transfer knowledge?**
 - Gateway activities – can hiking open doors to camping?
- **Adding purpose-driven products**
 - 42% would pay \$5-10 for a conservation license
- **Focus on the experience**
 - Technology, policy, and know-how are enablers
 - A great experience is what your customers want

What's Driving the RV Industry Boom

Karen Redfern

Vice President, Brand Marketing & Communications



The RV Industry at a Glance:

- **\$114 Billion Industry**
- **Employs over 600,000 American workers**
- **400,000+ new units will be shipped in 2020**
- **500,000+ units projected to be shipped in 2021**

America Embraces Camping in 2020

- **26% of campers were new**
- **20% were inspired to re-start camping**
- **Interest is highest among Gen X (41%) and Millennials (33%)**
- **African Americans are highly interested in camping but feel a need for mentors and role models and secondarily, access to resources, including being invited to public lands once barred from**

Need for RV Industry Skilled Labor

- **RV Manufacturers need more skilled labor to keep pace with consumer demands**
- **RV dealers need certified RV Service Technicians to service and maintain the vehicles they sell**
- **The RV Technical Institute (RVTI) in Elkhart, IN trains RV technicians on-site and virtually across the country with accredited partners and administers the certification exams**
- **RVTI is launching a new program to train female prison inmates as service techs providing vital career training for employment opportunities upon completion of their incarceration**



Thank you from the 600,000 American workers employed by the RV industry

- Investment in our public lands through the passage of the **Great American Outdoors Act** is vital to all segments of the outdoor recreation industry
- We are hopeful **Congress** will pass a comprehensive outdoor recreation package so all Americans can access our public lands

The Great Outdoors is a Great Unifier





Scott Schloegel
SVP Government
Relations
Motorcycle
Industry Council
(MIC)

Representing
Motorcycles,
All-Terrain
Vehicles (ATVs)
and Off-Highway
Recreational
Vehicles (OHVs or
side-by-sides)

COVID-19 & The Powersports Industry

Essential Service Designation

Worked with CISA to be added

COVID Relief

Industry provided PPE

Some received PPP

Still need to include 501(c)(6)

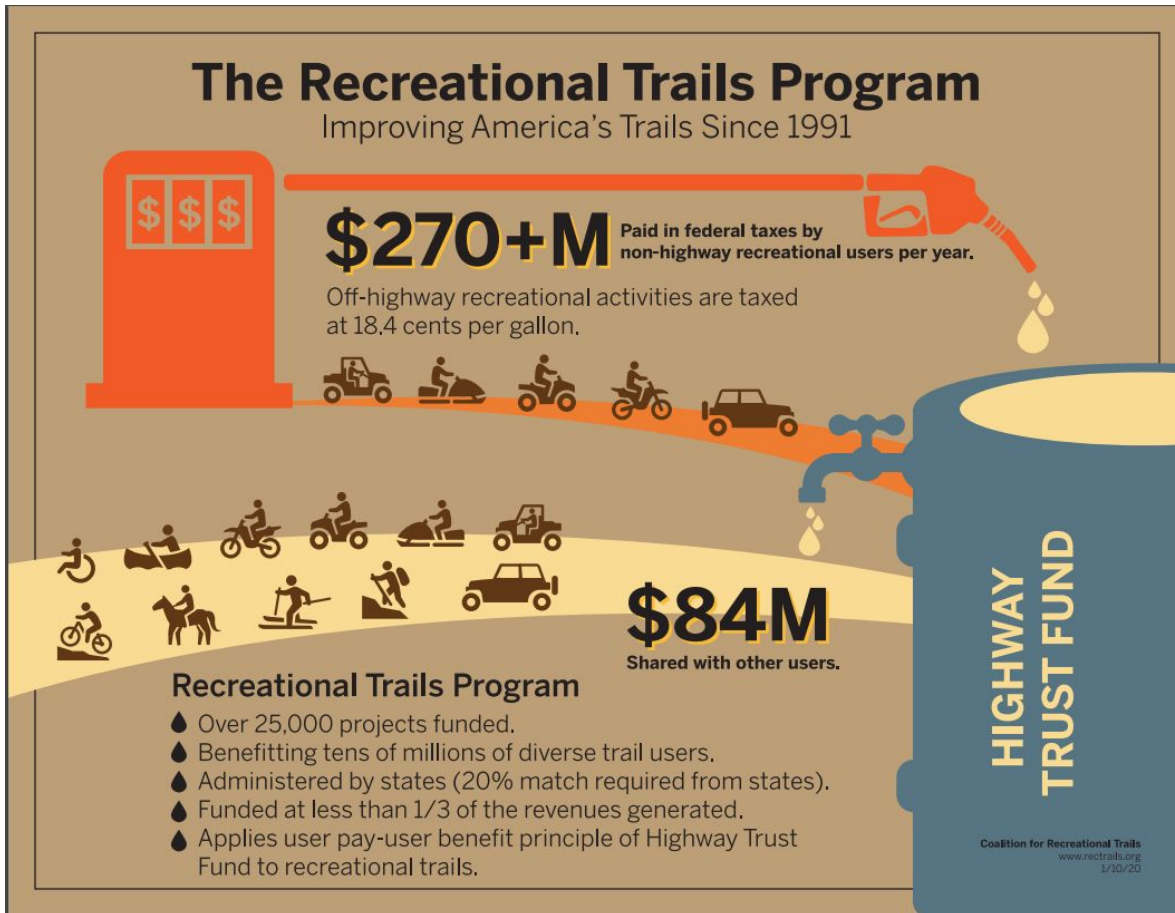
Great Way To Social Distance

Spikes in sales

More taking part in powersports



Recreational Trails Program (RTP) - Needs reauthorization and plus-up in funding



RTP Resources

Coalition for Recreational Trails (CRT)

<https://www.americantrails.org/crt>

Federal Highway Administration (FHWA)

https://www.fhwa.dot.gov/environment/recreational_trails/

Americans for Responsible Recreational Access (ARRA)

<https://arra-access.com/>





ARCHERY

TRADE ASSOCIATION

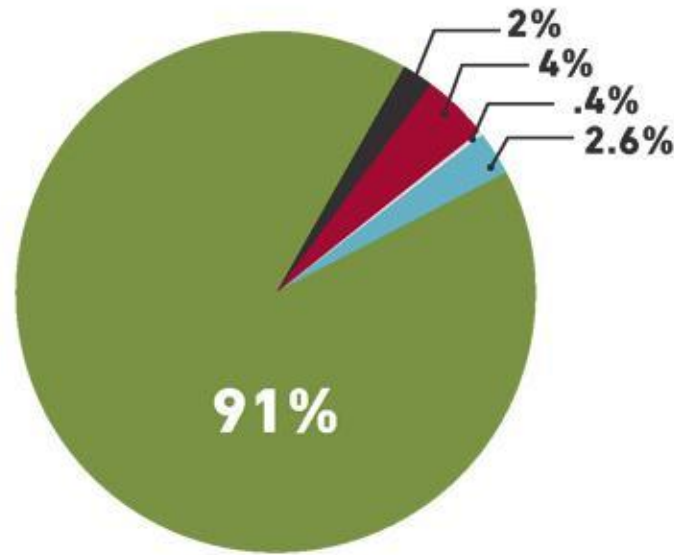
**WE EXIST TO INSPIRE
GROWTH, INCREASE
PARTICIPATION AND
PRESERVE THE SPORTS
OF ARCHERY AND
BOWHUNTING.**

OUR VISION

The Archery Trade Association works to increase the recruitment and retention of new, current and once-active archers and bowhunters. We are the driving force in defending, educating, and lobbying for the greater good of the industry and sport. We preserve and promote archery and bowhunting's rich heritage to ensure active consumer participation, and successful manufacturing and retailing for generations to come.



PERCENT OF U.S. POPULATION (AGES 13+) WHO PARTICIPATED IN SINGLE-SPORT ARCHERY DISCIPLINES IN 2019



- No response
- Participated in Bowhunting but not Archery
- Participated in Recreational Archery but not Bowhunting or Competitive Archery
- Participated in Competitive Archery but not Recreational or Bowhunting
- Did not participate in any activity over the past year

ESTIMATED NUMBER OF TOTAL U.S. PARTICIPANTS

5,243,460

BOWHUNTING BUT NOT ARCHERY

10,486,920

RECREATIONAL ARCHERY BUT NOT BOWHUNTING OR COMPETITIVE ARCHERY

1,048,692

COMPETITIVE ARCHERY BUT NOT RECREATIONAL ARCHERY OR BOWHUNTING

MEDIAN NUMBER OF TIMES PARTICIPATED IN THE PAST YEAR

6

BOWHUNTING

5

RECREATIONAL ARCHERY

4

COMPETITIVE ARCHERY

*Survey conducted in 2020 by McKinley Advisors. Percentages based off U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplement, 2018.

RACE/ETHNICITY



	OF THE ENTIRE U.S. ASIAN POPULATION	OF THE ENTIRE U.S. BLACK POPULATION	OF THE ENTIRE U.S. HISPANIC POPULATION	OF THE ENTIRE U.S. WHITE POPULATION
ARE BOWHUNTERS	6%	3%	7%	7%
ARE RECREATIONAL ARCHERS	13%	4%	11%	11%
ARE COMPETITIVE ARCHERS	1%	3%	5%	2%

*Survey conducted in 2020 by McKinley Advisors, with data collection by Braun Research, Inc. The data presented is based on cumulative participation recorded from 2016, 2017 and 2018 among participants ages 13+.

Leveraging Influencers and Content Marketing to Recruit Bowhunters

Our main goal: Increasing bowhunting license sales and generating revenue for your state!

AllisonJasper@archerytrade.org

This pilot project allows for state agencies to grow their digital and content marketing with influencers. Through new strategic content covering areas of bowhunter participation and conservation, we will target a new audience of hunters in recruiting them to purchase a license through their local agency. The “call to action” for all ads will direct participants to their local state agencies with an emphasis on realness and obtainability, breaking down barriers of intimidation for a new hunter.



PITTMAN ROBERTSON MODERNIZATION FUNDING

- USA Archery- Target Archery participants and R3 \$78,295.00
- Development of a Real-Time Data Dashboard \$239,450.00
- Development of a Hunter Avidity Model to Assess and Improve R3 Participation \$207,000.00
- Helping State Agencies effectively Recruit and Retain the new Locavore Audience \$154,000.00
- Leveraging Influencers to Recruit Bowhunters \$210,000.00

TOTAL \$888,745.00





ARCHERY
TRADE ASSOCIATION



**RECREATE
RESPONSIBLY**



Overview

Insight: Public lands have reopened nationwide, and user guidance is likely to be inconsistent across boundaries and geographies.

Opportunity: Working collaboratively, we can help enable our community to recreate responsibly to keep each other safe and our public lands and green spaces open.

Everyone deserves the benefits of spending time outdoors, especially during COVID-19.



National Coalition

Over **750** businesses, government agencies, nonprofits, outdoor media and influencers sharing best practices to get outside responsibly.

- Amplify the Recreate Responsibly guidance to the largest audience possible
- Collective problem solving and information sharing across geographies, user groups, agencies, influencers, business and nonprofits
- Provide meaningful resources in the time of COVID to help all people get outside safely and keep our public lands open
- Increase the number of organizations sharing the guidance and diversity of audience reached

State Coalitions

Washington 100 + Organizations
California 100 + Organizations
Colorado 100 + Organizations
Michigan 50 + Organizations
North Carolina 20 + Organizations
New York 30 + Organizations
Oregon 20 + Organizations

- Trusted working relationships
- Information sharing across agencies- county, state, federal
- Shared high-level messaging/marketing campaign
- Best practices for:
 - Trail crews, volunteers, experiential learning, guides and outfitters, trip leaders

#RecreateResponsibly

KNOW BEFORE YOU GO

Check the status of the place you want to visit. If it is closed, don't go. If it's crowded, have a back up plan.

PRACTICE PHYSICAL DISTANCING

Keep your group size small. Be prepared to cover your nose and mouth and give others space. If you are sick, stay home.

PLAN AHEAD

Prepare for facilities to be closed, pack lunch, and bring essentials like hand sanitizer and a face covering.

PLAY IT SAFE

Slow down and choose lower-risk activities to reduce your risk of injury. Search and rescue operations and health care resources are both strained.

EXPLORE LOCALLY

Limit long-distance travel and make use of local parks, trails, and public spaces. Be mindful of your impact on the communities you visit.

LEAVE NO TRACE

Respect public lands and waters, as well as Native and local communities. Take all your garbage with you.

BUILD AN INCLUSIVE OUTDOORS

Be an active part of making the outdoors safe and welcoming for all identities and abilities.

7/1/2020

#RecrearResponsablemente

INFÓRMATE ANTES DE IR



MANTÉN TU DISTANCIA



PLANEA CON ANTICIPACIÓN



EVITA LOS RIESGOS



QUÉDATE CERCA DE CASA



DEJA SÓLO HUELLAS



APOYA LA INCLUSIVIDAD AL AIRE LIBRE



7/1/2020

Additional Toolkit Languages:

ASL
Arabic
Somali
French
Spanish
Vietnamese
Simple Chinese
Traditional Chinese

Metrics (5/21-9/1)

Social

- 432M impressions
- 8.6M engagements
- 52,000 posts
- 20,000 users

of Toolkit Downloads

- 8,139 English
- 1,299 Spanish
- 224 Chinese
- 13 Arabic

Website Impressions

- 87,800 page views
- 58,500 visitors



Learn More at
RecreateResponsibly.org

Winter 2020/21

COVID's Impact On The Upcoming Winter Season



Snowsports
Industries
America

March 2020

- Closed ski resorts led to an industry-wide shutdown ending a great winter season early & inventories left unsold
- US ski resorts lost \$2 billion in unrealized income
- Retail sales were down 40% in March -> layoffs and closures
 - Stimulus helped many retailers and manufacturers, but it has since run out
 - Quick shift to online/re-education of industry
- Winter recreation shifted to the backcountry, which saw increased sales of gear in March and April
- Retailers cancelled Fall orders
- National trade show cancelled/January 2021, being replaced with a digital show

Impact/Response

- It's been really tough on the winter outdoor community. The sudden shut down in mid-March came at a time that is traditionally the highest sales of the season for resorts, retailers and the travel industry – spring break, rentals, food & beverage, hotels, etc., plus end-of-season sales – these were all cancelled due to COVID.
- However, there have also been a number of bright spots. Businesses that have faced the challenges head-on, have found new ways to adapt and innovate in ways that will ultimately make their businesses stronger in the long run
- The winter outdoor industry has spent the entire summer preparing for this “new normal” this winter. Many retailers and resorts were open this summer and were able to try new things and prepare for the busy winter season.
- Most have already moved to things: buy online/pick up in store, touchless pay, limited capacity, in-store flow, implementing new technologies, etc., as well as, implementing technologies to take the place of B2B meetings and showings.



Consumer Research

- Consumer demand is high/people want to get outside
- Even so, many expect reductions in income, spending, and savings
- Travel, in particular, will likely be dramatically reduced this season compared to the past
- In-person spending will likely continue to lag compared to the past
- Overall, core participants remain excited about the upcoming season, continuing strong desire to enjoy the outdoors

Outlook: Winter 2020/21

- Resorts will open
 - Seasons pass sales are strong (Epic, IKON and IndyPass, as well as resort passes)
 - Reservations, priorities for passholders
 - Limited amenities
 - Travel will decline/drive market resorts will succeed
- Backcountry and Nordic gear sales are strongest
 - Stores are already sold through on much of the years backcountry and nordic inventory
 - Concern for increase in backcountry is the possible strain local first responders



Outlook: Winter 2020/21

- Consumers are increasing their involvement in all activities in the next year, but the most anticipated increases were seen for off-resort activities such as:
 - Cross-country skiing
 - Backcountry skiing (AT)
 - Snowshoeing
 - Fat tire bicycling
 - Uphill skiing
 - Sledding
 - Winter running
- Climate change is still a consideration and a driver of our industry's success each year
- Tariffs will continue to place burdens on retailers in the form of an added tax – limiting their ability to stay afloat during the short selling season







QUESTIONS?

