

ANNUAL REPORT

2023

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.



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WHAT WE DO:

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

.....

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, and filling the research gaps.

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

.....

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



LETTER FROM BOARD CHAIR AND PRESIDENT

Outdoor recreation has never played a more important role in supporting America’s societal health or local economies. The release of new U.S. Department of Commerce data proves that the outdoor sector is a highly diverse, and powerful \$1.1 trillion industry, comprising 2.2% of the GDP, 5 million jobs and 3.3% of all U.S. employees. It also means that our collaboration is essential to our nation’s future, and federal and state policymakers are taking note. Here are some highlights:

- The recreation package we have promoted for years progressed in the House and Senate and our Rural Economic Development and Together Outdoors Inclusive Grants made a tangible difference in communities across the country.
- Our new Workforce Hub created a one-stop-shop for information about careers in the outdoors and a first-ever map of the education institutions focused on certificates, degrees, and trainings within the outdoor recreation economy.
- Together Outdoors brought more resources and focus to welcoming everyone outside and ensuring businesses have the tools they need to create inclusive experiences.
- We added members, staff, partners, State Offices of Outdoor Recreation, and champions to our growing ecosystem and expanded our reach beyond public lands and waters into commerce, labor, and other areas vital to our growth and success.

As we celebrate our 5th year of national impact together, we’d like to extend a heartfelt thank you to all our members and partners. The progress we’ve made in such a short window of time shows that we are so much stronger together. We look forward to another year of convening the entire industry to move the recreation economy forward and ensure more people can benefit from time outside!

Sincerely,



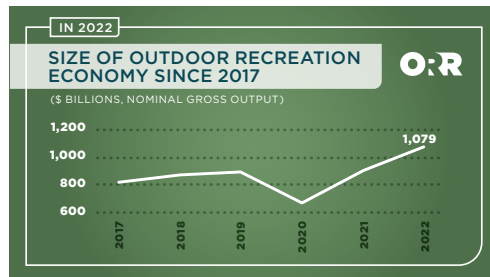
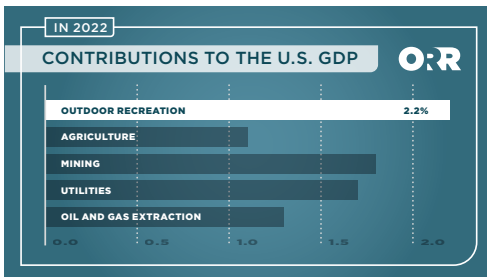
JESSICA TURNER,
PRESIDENT OF ORR



FRANK HUGELMEYER,
PRESIDENT OF NMMA,
BOARD CHAIR OF ORR

OUTDOOR RECREATION POSTS BIGGEST YEAR EVER IN 2022

ORR worked closely with the Bureau of Economic Analysis (BEA) of the U.S. Department of Commerce to release the sixth 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 2022, the outdoor recreation economy grew 2.5 times the rate of the national economy. ORR's webinar releasing the data featured state Directors of Outdoor Recreation, industry leaders, officials from the Bureau of Economic Analysis, and more.

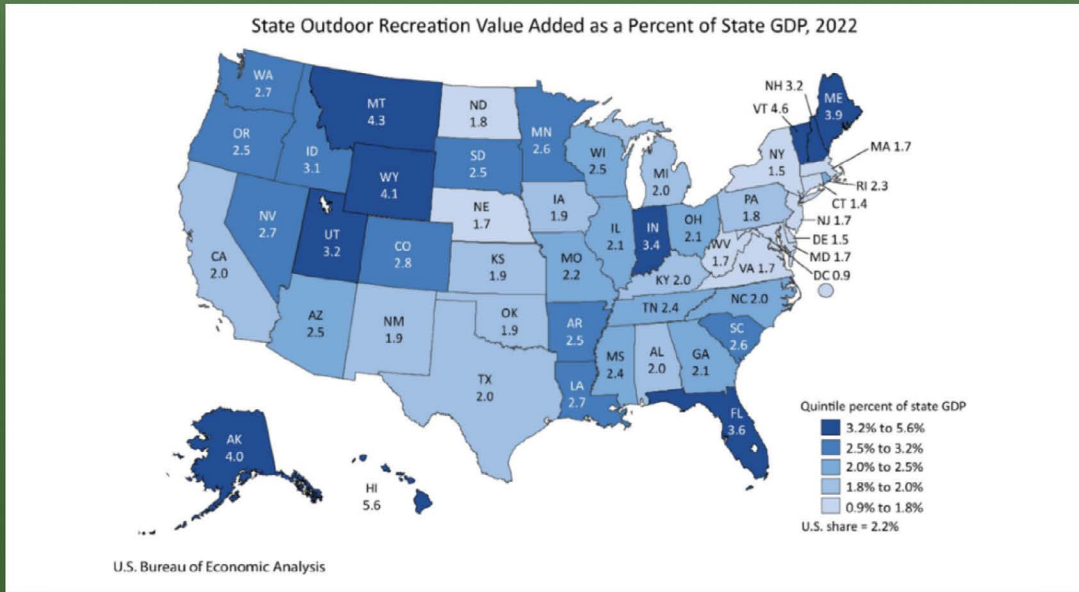


“We have long appreciated the physical, social, and emotional benefits of spending time outdoors. This latest BEA data confirms the compelling case for the outdoor recreation economy as a powerful driver of both GDP and jobs. The data also shows that a deep love for the outdoors is shared across the country. As this industry builds connections to people across the US, VF and its brands are committed to supporting a thriving recreation economy for everyone.”

- **Julie Sutton**, Senior Director, Government Affairs and Global Impact, VF Corporation

STATE OUTDOOR RECREATION ECONOMIES SHOW IMPRESSIVE GROWTH

ORR also published its [annual ranking](#) of state outdoor recreation economies, including top states by overall size, top year-over-year growth, top growth since before the COVID-19 pandemic, and percent contribution to state GDP.



Rank	Overall Size	GDP (\$B)	Growth 2021-2022	%	Growth 2019-2022	%	% State GDP	%
1	California	\$73.8	Hawaii	44.4	Indiana	12.5	Hawaii	5.6
2	Florida	\$52.4	Alaska	29.5	South Dakota	10.2	Vermont	4.6
3	Texas	\$47.6	District of Columbia	28.6	Iowa	9.5	Montana	4.3
4	New York	\$31.2	Wyoming	26.1	Idaho	9.4	Wyoming	4.1
5	Illinois	\$21.9	Florida	20.8	Arkansas	9.3	Alaska	4.0

ADVANCING OUTDOOR RECREATION ON CAPITOL HILL

Outdoor Recreation Roundtable Association was at the forefront of advancing outdoor recreation on Capitol Hill in 2023. The organization led the way on the introduction and unanimous passage through House and Senate committees of the first-ever comprehensive recreation legislative package, called “America’s Outdoor Recreation Act” (AORA) in the Senate, and “Expanding Public Lands Outdoor Recreation Experiences Act” (EXPLORE) in the House of Representatives. ORR President Jessica Wahl Turner, Senior Program Director Ambreen Tariq, and ORR members provided expert testimony and perspective on this groundbreaking legislation.

ORR President Jessica Turner at the House Committee on Natural Resources EXPLORE hearing.



“We are thrilled to see Congress taking action to ensure each American has the opportunity to enjoy outdoor spaces in their own community, bolster economic growth, and advance mental and physical health benefits for all. Outdoor recreation continues to soar, supporting over five million outdoor industry employees and growing to 168.1 million outdoor participants in the U.S., marking the eighth consecutive year of growth. This is an important inflection point. We must modernize, preserve, and increase access to the public lands and waterways – regardless of where someone lives or works – to secure a healthy and sustainable future for all.”

- **Kent Ebersole**, *President, Outdoor Industry Association*

ORR President Jessica Wahl Turner also testified at the first-ever Senate Small Business and Entrepreneurship Committee hearing focused solely on outdoor recreation businesses, where she discussed how Congress and federal agencies can support the thousands of small businesses that make up the outdoor recreation economy and the 5 million jobs it supports.

ORR President Jessica Turner at the Senate Small Business and Entrepreneurship Committee hearing on outdoor recreation businesses.



RECREATION AS A PRIORITY FOR THE WHITE HOUSE AND AGENCIES

ORR is leading the way on tracking recreation infrastructure spending from major pots of federal funding including the Great American Outdoors Act Legacy Restoration Fund, Bipartisan Infrastructure Law, Inflation Reduction Act, and Economic Development Administration Travel, Tourism, and Outdoor Recreation (TTOR) competitive and state block grants. This tracking ensures that federal dollars are going toward high-value recreation projects on public lands and waters around the United States. ORR organized and participated in the White House Conservation in Action Summit in March, highlighting the importance of conservation to recreation, and shined a light on the Biden Administration’s significant conservation-related accomplishments like the Inflation Reduction Act’s investment in forest health, outdoor infrastructure, and ecosystem and habitat restoration.

ORR Members Taldi Harrison (REI co-op), Frank Hugelmeyer (National Marine Manufacturers Association), and Mary Ellen Sprenkel (The Corps Network) alongside Tracy Stone-Manning, Director of the Bureau of Land Management.



ORR HOSTS EDA LEADERSHIP AND CONFLUENCE OF STATES AT ORR HQ

Along with Directors from the Confluence of States, ORR hosted leadership from the U.S. Economic Development Administration (EDA) to illustrate the impact of state-level recreation infrastructure investments in their Travel, Tourism, and Outdoor Recreation funding opportunity, as well as highlight increased potential for EDA to support economic development through outdoor recreation into the future.

Vice President of Programs Chris Perkins alongside Confluence of States directors with Dennis Alvord, Deputy Assistant Secretary of the U.S. Economic Development Administration.



TOGETHER OUTDOORS

In its third year, Together Outdoors underwent many developments including welcoming Senior Program Director Ambreen Tariq as the new program lead who successfully convened a new Divisional Board for the coalition and created a governance structure through which they will usher in a sophisticated new strategic plan and programming with oversight.

The new Divisional Board is composed of diverse leaders from various sectors across the outdoor recreation industry who share expertise and passion for promoting greater diversity, equity, inclusion, and accessibility (DEIA) in the outdoors. With support from the Divisional Board, the TO Strategic Plan supports the outdoor recreation industry’s efforts to expand outdoor equity and inclusion from the showroom to the campsite to the marina. The coalition will plan and implement future programming focused on education, engagement, and advocacy to pursue that mission.

TO also augmented its Resource Hub by transitioning it into a shared partnership with Recreate Responsibly (RR). This dynamic partnership aims to convene resources that help businesses and community organizations engage in learning and promoting DEIA principles and practices in order to help educate the industry on how to build an outdoor community where everyone belongs. RR is hosting a working group led by community leaders and DEIA advocates who will curate the materials for the Resource Hub including, books, articles, research reports, data, videos, podcasts, and toolkits, and present academic, industry, and grassroots perspectives. TO is working with Joy Trip Project to be a main content contributor to the Resource Hub and has partnered with Slim Pickins Outfitters, a Black-owned outdoor recreation retail shop, to create merchandise products for us to amplify our brand and grow community around the Together Outdoors ethos.



The Together Outdoors grant program received the 2023 “Inclusion Award” by The Bessie Awards, which honor women and gender-diverse people of impact in travel, particularly influencers, creative entrepreneurs, marketers, and other representatives who have contributed unique voices and work to the travel industry. The Inclusion Award is annually granted to an organization that has shown outstanding commitment to diversity and inclusion in the last year, whether in the form of a campaign, piece of content, partnership, or other initiative.

Senior Program Director Ambreen Tariq presented at several important conferences to share TO's message including the Winnebago Industries Leadership Summit, the North Carolina Outdoor Economy Conference, Montana Outdoor Recreation Summit, and the Association of Outdoor Recreation and Education Outdoor Professional Conference.



Senior Program Director Ambreen Tariq testifies on behalf of EXPLORE.

Tariq also testified before the U.S. House Committee on Natural Resources on the EXPLORE Act, which would boost outdoor recreation inclusion and equity, and led a news conference on Capitol Hill educating Members of Congress on the how the passage of this bill would help welcome more people outdoors who have historically been marginalized. None of this deep and important work around creating a more welcoming and inviting outdoors would be possible without our generous funder and thought partner, THOR Industries.



Left: Jessica Turner, Secretary Haaland and Ambreen Tariq at DOI Headquarters.

Right: Members of the Together Outdoors Divisional Board join Secretary of the Interior Deb Haaland, and Assistant Secretary for Fish and Wildlife and Parks Shannon Estenoz.

SHAPING THE NEXT GENERATION OF OUTDOOR RECREATION WORKFORCE DEVELOPMENT

In 2023, ORR charted a shared course on workforce development for the outdoor recreation economy as a whole, in recognition of the need to have prospective talent, academic and trade partners, and hiring organizations in lockstep to meet future demands.

With the support of The VF Foundation, ORR collected input from industry and academic partners along with prospective talent throughout the year, culminating in an in-person convening of nearly 50 industry leaders in Bend, OR supported by the Oregon State University Center for the Outdoor Recreation Economy.

This research culminated in the publication of the [ORR Workforce Hub](#), a new resource that includes:

- [A new PSA](#) on careers in the outdoor workforce;
- A primer to outline the full breadth and depth of outdoor careers;
- A four-part Outdoor Workforce Expert series;
- A first-of-its-kind map of nearly 250 higher education, trade, and training programs for outdoor careers;
- An ORR Career Path Module featuring real professionals across the industry;
- A new [Roadmap for a 21st Century Outdoor Workforce](#);
- Materials for career development offices and youth-serving organizations; and
- Links to other impactful resources to help outdoor professionals thrive.

“This is an amazing resource for the outdoor recreation industry and does a great job capturing the breadth and depth of careers across the industry including the professionals that SORP supports. Thanks to Chris Perkins and others at the Outdoor Recreation Roundtable for putting this together!”

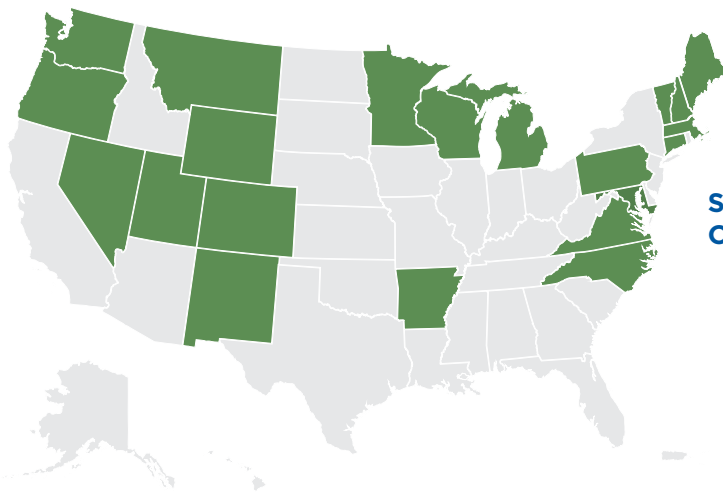
– **Rachel Franchina**, Executive Director, Society of Outdoor Recreation Professionals

Vice President of Programs Chris Perkins with leaders from Camp Yoshi and attendees at ORR’s Workforce Convening in Bend, OR.



GROWING OUTDOOR RECREATION AT THE STATE LEVEL

With the creation of offices in [Pennsylvania](#) and [Minnesota](#) in 2023, 21 states now have Offices of Outdoor Recreation (OREC). These offices serve as driving forces for their state's outdoor recreation economies. They are also central to economic development initiatives, stakeholder outreach, conservation and stewardship of public lands and waters, youth engagement, and unifying businesses around diverse public and private partnerships.



STATES WITH OFFICES OF OUTDOOR RECREATION

ORR President Jessica Turner alongside Governor Josh Shapiro and Nathan Reigner, Pennsylvania Director of Outdoor Recreation, at an event creating their new Office.



In addition to creating new ORECs, ORR continued its work supporting existing offices through our partnership with the [Confluence of States](#) - a coalition of 17 existing ORECs committed to growing outdoor recreation across the country. ORR deepened its already strong ties with the Confluence by cohosting the organization's spring meeting held in Annapolis, Maryland and Washington, D.C., and participating in the fall meeting at the [Outdoor Economy Conference](#) in Cherokee, North Carolina.

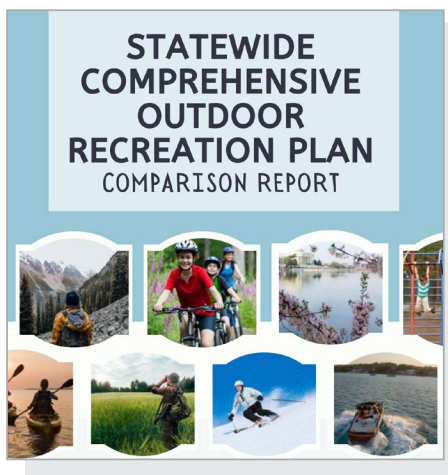
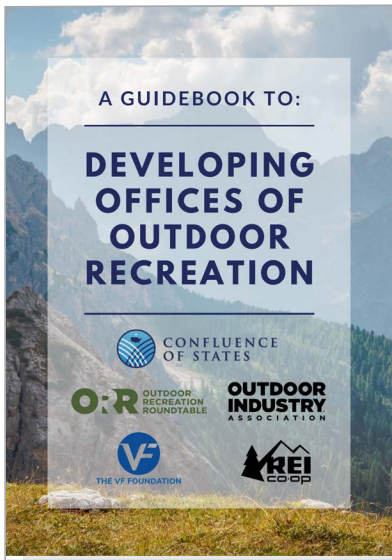
ORR joins Directors from the Confluence of States at the Outdoor Economy Conference in Cherokee, North Carolina.



PRODUCING NEW STATE RESOURCES

Over the course of 2023, ORR collaborated with the Confluence of States, Outdoor Industry Association, REI Co-op, and VF Corporation to produce new educational resources about the benefits of state offices of outdoor recreation, how to operate them effectively, and contemporary topics at the state level.

(CLICK BELOW TO VISIT RESOURCE)



CONFLUENCE OF STATES EDUCATION SERIES SUMMARY

STRATEGIES TO PROMOTE OUTDOOR ACCESS FOR ALL

DECEMBER 21, 2023 Hosted by:

Overview
Denise Beronio and Kendal Scott from the Nevada Division of Outdoor Recreation joined Karina Armijo of the New Mexico Outdoor Recreation Division and Ángel Peña of Nuestra Tierra Conservation Project to discuss strategies to promote outdoor access for all. This session comes on the heels of a new report funded by REI at the National Caucus of Environmental Legislators called the "Outdoor Opportunity Legislative Toolkit". This report, authored by Francesca Governali, MS/MBA candidate at the University of Michigan Ross School of Business, outlines different strategies employed by states across the country to increase outdoor access for all their constituents.

Take-Home Advice

"Many of those interviewed talked about the importance of having upfront funds, rather than reimbursement, as well as having the advisory board be able to determine how much match or any match at all is required of grantees. The grantee grant amounts leave room for some flexibility in the implementation process." - Francesca Governali

Panel Speakers

- Karina Armijo**
Executive Director for the New Mexico Outdoor Recreation Division
- Denise Beronio**
Administrator for the Nevada Division of Outdoor Recreation
- Kendal Scott**
Outdoor Education Lead for the Nevada Division of Outdoor Recreation

BOOSTING RURAL ECONOMIES THROUGH OUTDOOR RECREATION

ORR announced the recipients of implementation grant funding to help rural communities grow their local economies and make them more resilient through outdoor recreation. These grants, made possible through funding from the Richard King Mellon Foundation, help ensure that ORR can continue its charge to provide support, information, and resources to rural communities seeking to create economic opportunities through outdoor recreation. Late in the year, The VF Foundation generously provided additional funding for a fifth community.

This is the second cohort of recipients since the grant’s launch in 2021. In 2023, grant sizes increased to \$10,000 and will provide in-kind technical assistance from ORR members to awardees. For communities with big plans and limited bandwidth, this funding will help to unlock federal, state, and local match dollars from programs like USDA Rural Development, state infrastructure funds, and interest from private foundations.



“This grant comes at a serendipitous time and gives us the ability and opportunity to hear from the community about what they would like to see for their community. We can talk about tourism, we can talk about outdoor recreation, but in the end, it’s going to be the community that is going to be using this resource. What do they want? What are they going to do? How are they going to treat it? Now we’ve got a story, we have momentum, the passion behind this project is astounding, and we are ready.”

- **Mick Daniel**, *Executive Director, San Luis Valley Great Outdoors*

MOVING ORR FORWARD

ORR continued to grow and change as an organization in 2023. [Chris Perkins](#) was promoted to Vice President of Programs and [Ambreen Tariq](#) joined the team as Senior Program Director. New members—Trust for Public Land, Rails to Trails Conservancy, Booz Allen Hamilton, American Prairie, Wyoming Office of Outdoor Recreation, Rivian, and Eddyline Kayaks—were added from across the outdoor recreation economy, including the [University of Denver](#) as a new “Preferred Academic Partner.” Team members presented at events, gatherings, and educational opportunities across the country. We also launched our [new and improved website!](#) We’re continuing to drive recognition of the outdoor recreation economy, and we look forward to an even better 2024.

BOARD MEMBERS

- **Chair:** Frank Hugelmeyer, *President, National Marine Manufacturers Association*
- **Vice Chair:** Glenn Hughes, *President, American Sportfishing Association*
- **Secretary:** Mary Ellen Sprenkel, *President & CEO, The Corps Network*
- **Treasurer:** Erik Pritchard, *President, Motorcycle Industry Council*
- **Past Chair:** Phil Ingrassia, *President, RV Dealers Association*
- **At-large Members:**
 - Mark Amaral, *Executive Director, Association of Marina Industries*
 - Kent Ebersole, *President, Outdoor Industry Association*
 - Paul Bambei, *President & CEO, Outdoor Hospitality Industry*
 - Mindy Meade-Meyers, *Executive Director, National Park Hospitality Association*
 - Jenn Dice, *President & CEO, PeopleForBikes*
 - Heather Lougheed, *President, BoatU.S. Foundation*
 - Dan Forster, *Vice President and Chief Conservation Officer, Archery Trade Association*
 - Matt Gruhn, *President, Marine Retailers Association of the Americas*
 - Eric Snyder, *Senior Director of Federal Government Affairs, Specialty Equipment Market Association*
 - Tom Ingram, *President & CEO, Diving Equipment & Marketing Association*
 - Ed Klim, *President, International Snowmobile Manufacturers Association*
 - Craig Kirby, *President & CEO, RV Industry Association*
 - Kelly Pawlak, *President, National Ski Areas Association*
 - Nick Sargent, *President, SnowSports Industries America*

