

Outdoor Recreation Industry Roundtable

Outdoor Recreation Industry Roundtable is a coalition of America's leading outdoor recreation trade associations working to promote the policy and legislative reforms needed to grow the outdoor recreation economy. Roundtable members represent the thousands of U.S. businesses that produce vehicles, equipment, gear, apparel and services for the millions of Americans who enjoy our nation's parks, waterways, byways, trails and outdoor spaces. Combined, the various business sectors within the outdoor recreation industry generate \$887 billion-per-year in economic activity and provide an estimated 7.6 million direct jobs. Coalition members produce the 8 largest recreation tradeshow in the U.S.



and annually contribute \$40 billion in federal excise tax, sales tax and duties.

The Outdoor Recreation Industry Roundtable strives to achieve the following:

- 1 Ensure** the primary drivers of the outdoor recreation economy across the U.S. are recognized
- 2 Foster** federal collaboration that will enable the outdoor recreation economy to reach its full potential
- 3 Remove** barriers that prevent private investment from being made on public lands and waters
- 4 Change** the mindset of federal agencies so recreational access and high-quality visitor experiences are prioritized

- American Horse Council
- American Recreation Coalition
- Association of Marina Industries (AMI)
- American Sportfishing Association
- Archery Trade Association
- BoatU.S.
- International Snowmobile Manufacturers Association
- Marine Retailers Association of America
- Motorcycle Industry Council
- National Association of RV Parks & Campgrounds (ARVC)
- National Marine Manufacturers Association
- National Shooting Sports Foundation
- Outdoor Industry Association
- PeopleForBikes
- Recreation Vehicle Dealers Association
- Recreation Vehicle Industry Association
- Recreational Off-Highway Vehicle Association
- SnowSports Industries America
- Specialty Equipment Market Association
- Specialty Vehicle Institute of America
- Sports & Fitness Industry Association





American Horse Council - is a nonprofit trade association based in Washington, D.C., that works with Congress and other federal agencies on issues related to the U.S. equine industry. Topics range from trail access on public lands, immigration, taxes, gambling, equine welfare, import/export issues, disease control, and more. The ultimate goal of the AHC is to ensure that the equine industry works together to "Keep Opportunities Open" for the horse industry. For more information: www.horsecouncil.org



American Recreation Coalition - is a nonprofit association providing a unified voice for recreation interests. Since 1979, ARC has forged public-private partnerships to enhance, protect and promote outdoor recreation opportunities and resources. ARC organizes the annual Partners Outdoors conference, plays a primary role in key national coalitions, and leads the national effort to celebrate June as Great Outdoors Month, including activities inviting children to enjoy healthy, active outdoor lives. For more information: www.funoutdoors.com



Association of Marina Industries (AMI) - is nonprofit trade association dedicated exclusively to the marina industry. AMI's membership is made up of over 1200 marinas, boatyards, yacht clubs, and related business. AMI formed in 2005 with the merger of the Marina Operators Association of America (MOAA) and the International Marina Institute (IMI). IMI is dedicated to training and certifying top-tier marina operators. For more information: marinaassociation.org



The American Sportfishing Association - is the sportfishing industry's trade association committed to representing the interests of the sportfishing and boating industries as well as the entire sportfishing community. We give the industry and anglers a unified voice when emerging laws and policies could significantly affect sportfishing business or sportfishing itself. For more information: www.ASAfishing.org



Archery Trade Association - is the organization for manufacturers, retailers, distributors, sales representatives and others working in the archery and bowhunting industry. Founded in 1953, ATA is dedicated to making the industry profitable by decreasing business overhead, reducing taxes and government regulation, and increasing participation in archery and bowhunting. For more information: www.archerytrade.org



BoatU.S. - is the nation's largest organization of recreational boat owners, with over half a million members. Founded in 1966, it provides diverse services, including insuring over eight billion dollars' worth of boats, operating the largest on-the-water towing fleet, representing boaters' interests on Capitol Hill, providing financing for boat buyers, publishing the most widely circulated boating publication, acting as a consumer-protection mediator and more. For more information: www.boatus.com



International Snowmobile Manufacturers Association - is an organization representing the four snowmobile manufacturers. It coordinates industry committees focused on snowmobile safety, the promotion of the lifestyle activity of snowmobiling, keeping accurate statistics, and reporting the growth of the industry and the positive economic impact snowmobiling has throughout the world. For more information: www.snowmobile.org



Marine Retailers Association of America - is comprised of boat dealers, marine parts and accessories vendors, marina operators, boatyards, marine service providers, and all those whose livelihood is affected by the marine industry. Founded in 1972, MRAA serves its members by providing them with tools, resources and educational programs and by representing them with a powerful voice. For more information: www.mraa.com



Motorcycle Industry Council - is a nonprofit trade association supporting motorcyclists in the U.S. by representing manufacturers, distributors, dealers and retailers of motorcycles, scooters, ATVs, ROVs, and related parts, accessories, goods and services as well as members of allied trades such as insurance, finance and others with a commercial interest in the industry. The association, known as MIC since 1970, was founded in 1914. For more information: www.mic.org



National Association of RV Parks and Campgrounds (arvc) - is the only national association exclusively representing the interests of private RV parks and campgrounds in the U.S. Members include RV park and campground owners and operators, industry suppliers and those interested in getting into the industry. For more information: www.arvc.org



National Marine Manufacturers Association - is the nation's leading trade association representing boat, marine engine and accessory manufacturers that produce an estimated 80 percent of marine products used in North America. NMMMA works to strengthen and grow boating and protect the interests of its members. Formed in 1979 by the merger of the Boating Industry Association of Chicago (BIA) and the National Association of Engine & Boat Manufacturers of New York (NAEBM), its roots can be traced to NAEBM's founding in 1904. For more information: www.nmma.org



National Shooting Sports Foundation, Inc. - is the trade association for the firearms industry. Its mission is to promote, protect and preserve hunting and the shooting sports. Formed in 1961, NSSF has a membership of more than 12,000 manufacturers, distributors, firearms retailers, shooting ranges, sportsmen's organizations and publishers. For more information: www.nssf.org



Outdoor Industry Association (OIA) - is the national trade association for thousands of suppliers, manufacturers and retailers across the country in the \$646 billion outdoor recreation industry. The outdoor industry supports more than 6.1 million American jobs and makes other significant contributions toward the goal of healthy communities and healthy economies across the United States. For more information: www.outdoorindustry.org



PeopleForBikes represents the bike industry and bike riders across the nation—including 1.25 million individual members, and 2,000 supplier and retailer members. PeopleForBikes works with this important industry to make bicycling better for everyone. We help create new and better infrastructure, influence political change and strengthen connections between bike businesses and their customers. Because when people ride bikes, great things happen. For more information: www.peopleforbikes.org



Recreation Vehicle Dealers Association (RVDA) - is the only national association dedicated to advancing RV retailers' interests through education, member services, industry leadership, and market expansion programs to promote the increased sale and use of RVs and enhance RV travel. For more information: www.rvda.org



Recreation Vehicle Industry Association - is the national trade association representing RV manufacturers and their component parts suppliers that build more than 98 percent of all RVs produced in the U.S. RVIA is a unifying force for safety and professionalism within the RV industry, works with government agencies to protect and promote member interests, serves as a clearinghouse of industry information, and works with the media to educate the public about the benefits of RVing. For more information: www.rvia.org



Recreational Off-Highway Vehicle Association - is a not-for-profit trade association formed to promote the safe and responsible use of recreational off-highway vehicles (ROVs) [sometimes referred to as side-by-sides or UTVs], manufactured or distributed in North America. For more information: www.rohva.org



SnowSports Industries America - is the nonprofit, North American member-owned trade association representing suppliers of consumer snow sports. Established in 1954, SIA collaborates with all components of the industry to promote the growth of snow sports. Its members include alpine, snowboard, AT, backcountry, cross country, snowshoe, apparel and accessories companies, retailers, reps, resorts, regional and national associations and buying groups. For more information: www.snowsports.org



Specialty Equipment Market Association - is a nonprofit trade association composed of over 6,600 members including manufacturers, distributors, retailers, publishing companies, auto restorers, street-rod builders, restylers, car clubs, race teams and more. The industry employs over one million Americans and offers custom auto accessories to enhance a vehicle's appearance, performance, comfort, convenience and safety. For more information: www.sema.org



Specialty Vehicle Institute of America - is a not-for-profit industry association that promotes the safe and responsible use of all-terrain vehicles through rider training, public awareness campaigns and state legislation. The SVIA is a resource for ATV research, statistics and vehicle standards. For more information: www.svia.org



Sports & Fitness Industry Association - is the trade association of more than 1,000 leading industry sports and fitness brands, suppliers, retailers and partners. Founded in 1906, the association works to enhance industry vitality and foster participation in sports, fitness and active lifestyles. It supports its member companies and promotes a healthy environment for the sporting goods industry by providing access to thought leadership, industry and public affairs, research and member services. For more information: www.sfia.org

Putting “**GREAT**” Back in America’s Great Outdoors

EMBRACING THE OUTDOORS AS A POWERFUL ECONOMIC DRIVER

Outdoor recreation in America generates 6.1 million direct American jobs, contributes \$646 billion per year to the economy and attracts nearly 20 million foreign visitors seeking a world class experience unrivaled anywhere on earth.

Federal lands cover 30% of the nation’s surface. These lands offer opportunities for awe-inspiring experiences, but dated infrastructure and limited access are barriers to realizing this potential.

Theodore Roosevelt championed time outdoors with words and actions. Yet today, we see a declining percentage of Americans embracing outdoor-recreation rich lifestyles on federally-managed lands. The nation needs a strategy to modernize, expand and sustain the infrastructure and access visitors expect.



PARTNERSHIPS ARE THE SOLUTION

Federal land managers’ ability to provide quality experiences is handicapped by the burden of \$20 billion in deferred maintenance. America’s outdoor recreation industry stands ready to help put “Great” Back in America’s Great Outdoors through common sense policy changes modeled after proven public-private partnerships successes such as world-class ski areas on National Forests, iconic lodges in National Parks and marinas that are gateways to U.S. Army Corps of Engineers lakes.

TAKING ACTION

The Outdoor Recreation Industry Roundtable has identified 5 initial steps to create jobs by improving the quality of outdoor experiences on federal lands.



1 Fast track the implementation of the Outdoor Recreation Jobs and Economic Impact Act (P.L. 114-249) by requiring federal agencies to complete implementation by the end of Fiscal Year 2017 and institutionalize the use of this information into federal agency decision making.

2 Prioritize federal agency budgets on recreation-related infrastructure improvement, because outdoor recreation is the largest driver of economic activity on federal lands.

3 Establish public-private partnerships as an entrepreneurial mechanism for addressing deferred maintenance and world class facilities for world class locations. Bring focus to inaccessible and undeveloped areas and areas near population centers.

4 Achieve better balance in decisions involving recreation and conservation. Quality outdoor recreation enjoyment and conservation of America’s natural resources are not mutually exclusive efforts. Congress mandated this in 1916 when it created the National Park Service. The Administration must champion policies that support conservation, recreation and economic development in equal measure.

5 Develop and deploy a digital information strategy for outdoor recreation on federal lands. Americans need current and accurate information about where to go for the experiences they seek, which they are then eager to share digitally in real time. Federal land managers must embrace, not resist, modernization to keep the shared legacy of our Great Outdoors relevant and to capitalize on free, real-time, communications sharing how enjoyable outdoor recreation on federal lands can be.



OUTDOOR RECREATION ECONOMY

- Outdoor recreation contributes \$887 billion in direct spending to the American economy
- Outdoor recreation supports 7.6 million jobs in all 50 states

BOATING

- 95% of all boats sold in the United States are made in America
- Boating manufacturing employs 38,400 jobs in America and supports 472,000 marine jobs
- There are 35,000 recreational boating businesses in the U.S.
- 142 million boaters took to the water in the U.S. in 2014
- Recreational boating has a total economic impact in the United States of \$121.5 billion

RVs

- RV manufacturers and suppliers support 104,131 jobs and \$6.6 billion in wages
- RV manufacturing has a total economic output of \$26.1 billion
- RVs have a total economic output of \$50 billion
- 99% of all RVs sold in the United States are made in America, with 80% made in Indiana alone

POWERSPORTS

- Snowmobile and ATV manufacturing supports 9,785 jobs
- 10,407 U.S. powersports retailers employ 81,500 people with a total payroll of \$3.2 billion
- The economic value of the powersports retail marketplace is \$41.7 billion