

AMERICAN HORSE COUNCIL



OUTDOOR

RECREATION

INDUSTRY

ROUNDTABLE



# Who is the Outdoor Recreation Industry Roundtable?

America's leading outdoor recreation trade associations working to promote the policy and legislative reforms needed to grow the outdoor recreation economy.

# Outdoor Recreation Is Vital To America's Economy

- Outdoor recreation annually contributes \$887B in direct consumer spending to the U.S. economy
- Outdoor recreation supports 7.6 million jobs
- \$125B in federal, state, local, excise taxes and import duties

# Outdoor Recreation Is Growing

## RV Industry Example:

- Shipments are shattering last year's all-time record by 13%.
- Three out of the last four months represent the largest single monthly RV shipment totals on record.
- 20 OEMs and suppliers are expanding facilities in rural Elkhart, IN.
- 2% unemployment and an est. 2500 new jobs coming.

# Outdoor Recreation is Overlooked As An Economic Engine

- Collectively, the sector isn't accurately measured by the Department of Commerce.
- Yet, Roundtable members produce the 10 largest and most vibrant outdoor recreation tradeshow in the U.S. (8 of which are in the top 50 of all tradeshow in America).

# Outdoor Recreation: An American Way of Life. We Are The Global Leaders.

- The best recreation, brands, IP and jobs are based in the U.S. However, we source and export all over the world.
- International markets study the U.S outdoor recreation economy to understand how to manage resources, compete and drive future growth.
- Outdoor recreation is a major driver of domestic and international tourism.

# Very Big And Very Connected To The Federal Government

- \$887B and 7.6M direct jobs
- Very reliant on access to and enjoyability of federally-managed public lands and public waters

# THE CHALLENGES:

- Outdoor recreation economy is hidden -- buried in many sectors of the US economy.  
Manufacturing ... retail ... service ... transportation ... and more.
- Industry data is useful, but trusted independent data is needed.



## THE SOLUTION:

### Outdoor Recreation Jobs and Economic Impact Act (PL 114-249) - REC Act

- Bipartisan, and supported by agencies managing nearly 1/3 of USA
- Requires key Federal agencies and BEA to complete an assessment and analysis of the outdoor recreation economy
- Calls for report within two years

## REQUESTS

- Beat the 2 year time frame.
- Follow with annual outdoor recreation economic reporting.
- Accept our recommendation to NOT just focus on recreation tied to Federally-managed lands and waters.
- Help Congress, OMB and all Federal agencies understand how Federal decisions impact the health of the outdoor recreation economy.

## WE OFFER:

- Technical support to BEA.
- Supplemental databases to assist in development of state and regional reports.
- Industry forums to discuss data and key issues to make this a useful, on-going resource.

# SALTWATER RECREATIONAL FISHING = BIG ECONOMIC IMPACT

	Recreational Fishing	Commercial Fishing (without imports)
Pounds Harvested (in million pounds)	188	9,718
Jobs	439,242	695,794
Jobs per million lbs harvested	2,335	71
Sales	\$63.4 billion	\$51.9 billion

Source: Fisheries Economics of the U.S. 2015, NOAA Fisheries

# Thank You!

- ▶ Regional Fishery Management Council appointments, particularly in the southeast, that more equitable recreational fishing industry representation
- ▶ 39 day Gulf of Mexico red snapper season

## More Help Needed

- ▶ Regional Fishery Management Councils still lean heavily in favor of commercial fishing industry over the recreational fishing industry
- ▶ 39 day Gulf of Mexico red snapper season being challenged in court by environmental organizations
- ▶ Changes to the Magnuson-Stevens Act (MSA) are needed

# The Modernizing Recreational Fisheries Management Act

- ▶ Bipartisan, bicameral legislation (H.R. 2023, S. 1520) that amends MSA to improve recreational fisheries management and data collection
- ▶ Would allow us to work with the Administration to implement alternative management and data collection approaches better adapted to recreational fishing
- ▶ We would appreciate the Administration's support

# Economic Importance of NAFTA for Outdoor Industry

## ▶ Boating

- ▶ Canada is the #1 trading partner and Mexico is the #3 for overall recreational craft exports.
- ▶ In 2016, \$517 million in marine boat and engine exports were shipped to Canada (32%)
- ▶ In 2016, \$121.6 million in marine and boat exports were destined for the Mexican market (7.6%)
- ▶ In 2016, Mexico was the number one trading partner for outboard boats in terms of overall value (55.9%)

## ▶ RVs

- ▶ 16% of all US RV shipments are destined for the Canadian market.
- ▶ 95% of RVs sold in Canada are US made.



# NAFTA Priorities for ORIR Manufacturers

1. Keep overall framework of NAFTA, maintain trilateral agreement.
2. Free trade supports US manufacturers with customers and supply chains throughout North America
3. Include chapters on **Technical Barriers to Trade** and good **Regulatory Practices** to reduce overall burdens for small and medium size companies.
4. Enforce strong IP provisions to protect against counterfeit products and streamline customs procedures and enforcement.
5. Move Environment and Labor letters to main NAFTA text.

## HELPING AMERICA'S GREAT OUTDOORS COMPETE IN DOMESTIC AND INTERNATIONAL TRAVEL

- \$887B annually -- \$525B of that is part of the \$2+ trillion US travel and tourism industry.
- \$40B in spending linked to just our national parks.
- Aids the USA's balance of trade: 35.4% of all overseas visitors (43% of Europeans and 59.5% of all Aussie visitors visit at least one USA park.

## HELPING AMERICA'S GREAT OUTDOORS COMPETE IN DOMESTIC AND INTERNATIONAL TRAVEL

- Parks and our Great Outdoors are key to benefit from international visitors to states other than those with our principal gateways.
- International visitation to America's Great Outdoors is growing fast - from an estimated 10 million visitors in 2012 to 13.6 million visitors in 2015.

## HELPING AMERICA'S GREAT OUTDOORS COMPETE IN DOMESTIC AND INTERNATIONAL TRAVEL

- Thank you for appearing at IPW 2017 in June, where US companies including our members did nearly \$5B in sales!
- The recreation industry is a key partner in the popular, growing IPW Great Outdoors USA zone which helps the international market find “best in the world” fishing, hiking, camping and much, much more.
- Commerce should actively boost visitation to marine sanctuaries - *Get Into Your Sanctuary Day* is a good start.

## HELPING AMERICA'S GREAT OUTDOORS COMPETE IN DOMESTIC AND INTERNATIONAL TRAVEL

- Growth in domestic and international visitation to America's Great Outdoors requires modernizing and expanding visitor facilities -- campgrounds and marinas and lodges -- and better infrastructure to get people there and then avoid bottlenecks like Yosemite Valley.
- Secretary Zinke is taking action with a new advisory committee which could certainly use the support of Commerce, your own Travel and Tourism Advisory Board's expertise and the Tourism Policy Council you chair.

## WE WANT TO HELP ...

We have communications channels.

We have meetings and shows.

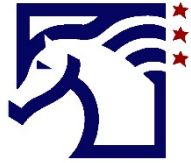
We have manufacturing facilities.

We have thousands of retail venues.

We have ideas.

We have expertise.

And we have passion.



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National Marine Manufacturers Association

