



Vermont Outdoor Recreation Economic Collaborative

VOREC Report and Recommendations

October 15, 2020

Introduction and Executive Summary:

COVID-19 has highlighted the importance of outdoor recreation, as experienced, new, and returning users alike have turned to outdoor recreation for mental and physical health during the pandemic. The higher numbers of people seeking to swim, hike, bike, camp, and experience their local parks, forests, waters, and trails is both an opportunity and challenge. On one hand, the VOREC pillar of increasing outdoor recreation participation is happening almost organically as people seek outdoor recreation as a respite or alternative for regular life activities (schooling, work, or events and gatherings). On the other, the VOREC pillar recognizing that stewardship of the land, waters, and recreational infrastructure and assets is key to sustaining the quality and availability/access to these opportunities is in dire need of attention and resources. Underlying these issues is a recognition that land and trail managers and outdoor recreation businesses need to do more to welcome Black, Brown and all People of Color by dismantling systemic racism, taking decisive and well thought out action, and working with key collaborators in communities and other sectors.

This report presents the VOREC steering committee's annual report of recommendations to Governor Scott – as called for in the enabling Executive Order – as well as those of our sister organization, VOBA (Vermont Outdoor Business Alliance).

The critical areas of focus include:

- Provide increased support for stewardship and ongoing funding for the maintenance of outdoor recreation assets that are being used by more people who are not always demonstrating an understanding of outdoor ethics
- Continue government and philanthropic financial assistance (grants, low-interest loans, etc.) and technical assistance to outdoor businesses and non-profits that:
 - Continue to sustain impacts (losses, limitations, mitigation, COVID precautions, etc.) from the pandemic; and,
 - Have incurred increased costs due to pivots and necessary innovations to new operations, markets, products and programs, staffing, and manufacturing systems.

- Embrace the health and wellness opportunity of outdoor recreation, especially to new and returning outdoor enthusiasts during COVID-19
- Create and implement strong policy and action on racial justice, equity, and inclusion
- Target outdoor entrepreneurs that are considering relocating their businesses to Vermont or starting a business here for financial and other incentives and workforce development/retraining programs. Additionally, focus on the growth of outdoor companies that currently operate within the state and have workforce and business expansion goals.

Accomplishments

Since our last annual report in September 2019, the VOREC steering committee has:

- Held 7 public steering committee meetings (online since April)
- Participated in two community visits (Brattleboro and Randolph)
- Participated in recommending funding for VOREC Community Grants to 7 communities around the state (total of \$200,000)
- Submitted two Special Reports on COVID-19 Response and Recovery to the Governor
- Hosted conversations on planning for outdoor recreation in the winter of 2020/2021

2020-21 Recommendations

Support Outdoor Recreation Businesses

Challenge/Opportunity: Most outdoor recreation businesses have experienced financial loss this year due to COVID-19.

Recommended Actions:

- Continue to provide access to relief grants and other funding sources.
- Within health and safety guidelines, allow businesses to operate at as near to full capacity as possible.
- Encourage business support of local trail groups and recreation lands to foster customer loyalty and business promotion through a socially responsible business model.

Challenge/Opportunity: Vermont's reputation as a place to live, work and recreate is at an all-time high: taking this opportunity now to invite outdoor businesses is a smart, strategic investment of time and energy.

Recommended Actions:

- Target outdoor entrepreneurs that are considering relocating their business to Vermont or starting a business here for financial and other incentives and workforce development/retraining programs. Additionally, focus on the growth of outdoor companies that currently operate within the state and have workforce and business expansion goals.
- Work with ACCD and VDOL to package a comprehensive set of economic development programs and workforce development resources based on the emerging needs of the outdoor recreation sector, such as talent pipeline and higher education.

Increase Stewardship and Quality of Recreation Assets

Challenge/Opportunity: This year has seen a sharp increase in new and returning users to outdoor recreation: many locations were above capacity for much of the spring and summer, with some visitors showing their lack of knowledge about best practices and ethics. Trails, parks, parking and access areas, and other infrastructure have been damaged and degraded in many locations.

Recommended Actions:

- Provide increased education/information to help inform new users of ethics and best practices for safety and etiquette: work with stakeholders and the CMO's office to create pdfs which can be widely distributed physically, online, and through social media.
- Consider fully funding the Vermont Housing and Conservation Fund to enable maximum investments in recreation infrastructure, especially as a state match to federal LWCF and other federal funding sources that are available but risk being left on the table for want of match.
- Work with VOBA and other stakeholders on networking and other resources to provide information and knowledge for new users of outdoor recreation assets.
- Provide incentives for creating more access and assets to disperse use: examine the UVA program, the Vermont Trail System and others for potential expansion of benefits and incentives.
- Prioritize funding for maintenance and stewardship of existing assets.
- Involve high school and college students in courses and/or volunteer opportunities that relate to outdoor recreation and provide opportunities for future involvement and possibly employment
- Explore a "Pay to Play" model for outdoor recreation access: look to other states for examples (ex. New Mexico, Alaska, Wisconsin and Minnesota)

Increase Participation in Outdoor Recreation

Challenge/Opportunity: 2020 has provided stark examples of Black people being killed at the hands of the police and being policed for being Black in the outdoors. Welcoming Black, Indigenous and People of Color (BIPOC) to the outdoors in Vermont is both a challenge and an opportunity. Addressing it will take systemic change.

Recommended Actions:

- Address diversity, equity, inclusion and belonging in the outdoors by working with affinity groups to understand and overcome barriers to participation.
- There is an opportunity to have shared messaging, training, and resources across the outdoor recreation sector. Right now, individual organizations are working to address DEI at different scales: the OR sector should combine resources and coordinate actions.
- Examine and modify VOREC's charter to reflect a commitment to addressing systemic racism and barriers to participation, inclusion, and belonging
- Provide funding through a portion of the VOREC Community Grant program to in- and out-of-state affinity groups to increase access to the outdoors in Vermont for BIPOC

Challenge/Opportunity: Increasing use of outdoor recreation assets is both excellent news and a challenge for land, park, and trail managers. A 200% increase in visitation in some areas, especially during the height of the Stay Home Stay Safe order, has been observed, and overall increases in use have been sustained in many locations. This use has provided a preview of what is likely to be a continuing trend.

Recommended Actions:

- See above: user ethics and stewardship campaign
- Make a long-term plan that anticipates mitigation for this increased level of use, because it will become the norm.
- Ensure sufficient funding is available to the varied access managers
- Ongoing public service message campaign and signage regarding our collective responsibility to respect landowners, pick up our trash and after dogs, be kind to people on the trail and the waterside and stay off sensitive vegetation and sites.
- Promote understanding of the important role private landowners play in providing public recreation: acknowledging that you are on private land and to behave accordingly and with respect.
- Provide more recreation land, facilities and amenities (trails, boat ramps, picnic areas and swimming areas especially)
- The VOREC Community Grant program model should focus on several outdoor "regions" in the state, and each of those regions should be developed toward an outdoor recreation goal, on their own respective timelines.

Promote the Health and Wellness Benefits of Outdoor Recreation

Challenge/Opportunity: Increased interest in the outdoors and outdoor recreation presents an opportunity to encourage lifestyle changes that include more outdoor activity and resulting health and wellness outcomes.

Recommended Actions:

- Increased education, outreach, and information about health and wellness benefits of outdoor recreation.
- Messages could be delivered through the Governor's press conferences as well as through the two major health insurance providers in VT.
- Develop more partnerships between health and wellness providers and VOREC ... find what they need and are working on (since they have funding) and support that.
- Promote trails alongside farms located in VT. The two sectors would work together to promote health and wellness.
- The Winter Wellness program at middle schools should be made available to all students.
- Encourage outdoor recreation programs as part of physical education in public schools
- Incentivize this behavior by providing discounts on insurance premiums for employees that recreate outside, paid "recreation time" from employers, employee match, tax breaks for memberships in outdoor recreation organizations, etc.



VOBA Addendum to the 2020 VOREC Report and Recommendations

October 15, 2020

The Vermont Outdoor Business Alliance (VOBA) was established in the fall of 2018 as a non-profit organization with a mission to educate Vermonters about outdoor recreation and to engage outdoor recreation businesses in economic development, collaboration, and policy advocacy. VOBA represents 70 outdoor recreation businesses and non-profit organizations that produce, provide, or sell outdoor recreation products or services, as well as other entities that have an interest in growing Vermont's outdoor recreation economy.

Key recommendations to support Vermont's outdoor recreation economy

Recommendation #1: Continue government and philanthropic financial assistance (grants, low interest loans, etc.) and technical assistance to outdoor businesses and non-profits that:

- Continue to sustain impacts (losses, limitations, mitigation, etc.) from the pandemic; and,
- Have incurred increased costs due to pivots and necessary innovations to new operations, markets, products and programs, staffing, and manufacturing systems.

Recommendation #2: Continue to widely promote safe recreation options, including information to residents and marketing campaigns to out-of-state visitors for the fall, holiday, and winter that:

- Clearly convey the latest health and safety guidance targeting outdoor enthusiasts; and,
- Supports businesses in their management of customer screening and taking precautionary measures to ensure the safety of customers, employees and the community.

Recommendation #3: Target outdoor entrepreneurs that are considering relocating their business to Vermont or starting a business here for financial and other incentives and workforce development/retraining programs. Additionally, focus on outdoor growth companies that currently operate within the state and have workforce and business expansion goals.

- Work with ACCD and VDOL to package a comprehensive set of economic development programs and workforce development resources based on the emerging needs of the outdoor recreation sector, such as talent pipeline and higher education.

Recommendation #4: The number of outdoor participants has grown steadily over the years, with the pandemic intensifying the trends, increasing the frequency and engaging new and underrepresented populations in physical activities.

- Work with recreation/trail organizations and state agencies that manage recreation assets to identify the stewardship and mitigation needs and establish revenue mechanisms for the ongoing and future maintenance needs of existing and new infrastructure.

Current state of Vermont's outdoor recreation economy

In May, VOBA's pandemic impact report stated that most of Vermont's outdoor businesses had experienced full or partial closure, significant losses in revenue, increased costs due to precautionary measures, and shifts in workforce, supply chain and operations. Despite these challenges over many months, Vermont's outdoor recreation economy enters fall in a much stronger financial position. Factors behind this economic rebound are multi-fold:

- Increase in business financial support: Investments of state government and private sector/philanthropic economic relief and the availability of technical assistance have been crucial to businesses and nonprofits most impacted by COVID-19 as well as providing a bridge to restoring channels for buying and selling, facilitating innovations to new products, services, markets, and manufacturing, and encouraging customers to safely return to stores or to expand options to buy online.
 - Approx. \$4 million in economic recovery grants, including \$1.5 million dedicated to outdoor recreation, were awarded to outdoor recreation businesses and non-profit organizations by the Agency of Commerce and Community Development (ACCD) and the Vermont Department of Taxes.
- Increase in consumer purchasing of recreation products and services: The access to recreation infrastructure, interest in physical health and well-being, consistent safety guidance, gradual re-opening of the economy, consumer stimulus campaigns, business pivots, and expansions of e-commerce have boosted retail and brand sales, especially for hiking, biking, paddling, fishing, hunting, and cross country/backcountry skiing equipment, showing promise for the outdoors as a sustainable lever in the state's recovery.

Most important outdoor recreation issue or opportunity experienced in 2020?

- Increase in outdoor participation: State and industry data has shown that the numbers of those participating in outdoor recreation was already steadily growing over the years. The pandemic intensified those trends, increasing the frequency and engaging new and underrepresented populations in physical activities close to home or within a drive. Record numbers of Vermonters and allowed visitors have been recreating in Vermont's public and private recreation areas. Not only has this physical activity been recognized as a benefit to overall community health, but the opportunity has led to greater economic opportunity for outdoor businesses providing gear and equipment, information, skill-building education and an outdoor community. It has also driven patronage to businesses in the more rural communities and outdoor regions of the state.

VOBA activities & accomplishments in 2020

Networking and Education: VOBA launched BASECAMP VT, a resource and technical assistance initiative, and provided networking, education, and support services:

- Surveyed the industry and communicated needs to policymakers and service providers;
- Maintained resource webpages on COVID-19, business development, and JEDI;
- Hosted 6/scheduled 2 virtual events to foster dialogue, build relationships, and exchange information, with hundreds attending;
- Published communications such as bi-monthly e-newsletters to 700 subscribers and posted regularly on social media to share information and highlight resources;
- Supported a membership of 70 businesses and nonprofits representing many different aspects within the sector; and,
- Coordinated bi-monthly meetings with 20+ state outdoor business alliances from around the country to exchange information and collaborate on initiatives.

Sector Development and Policy Engagement: VOBA provided development to businesses and nonprofits and enriched policy processes on outdoor recreation economy issues:

- Facilitated market access opportunities such as participation in winter and summer industry trade shows and company/product features in industry media;
- Provided technical assistance to start ups and entrepreneurs relocating business to VT;
- Established priorities and a process for policy engagement, monitored legislative bills and budgets, supported members being informed, and weighing in with policymakers;
- Engaged with state agencies on the development and promotion of outdoor recreation/marketing initiatives and economic stimulus packages, including advising the Administration of outdoor recreation economic recovery grants; and,
- Provided business input to VOREC's discussions, participated in COVID/stewardship messaging and collaborated with VOREC grant communities on marketing.

VOBA detailed recommendations for the fall and 2021

Despite progress, the stability of Vermont's outdoor sector remains tenuous, due to the uncertainties of the foliage, holiday, and winter seasons. Health data, travel (visitor and business/international) and business restrictions, holiday shopping, consumer purchasing power, snow conditions, winter resort and facility operations, state and private land recreation access, child care availability, and manufacturing supply chains/product inventory will be determining factors. Importantly, subgroups of businesses such as resorts and facilities, lodging, and events continue to sustain negative impacts from restrictions.

Prior recommendation #1: VOBA continues to recommend government and philanthropic financial and technical assistance targeting outdoor recreation businesses and non-profit organizations that continue to be negatively impacted by the pandemic.

VOBA recommends:

- ACCD to develop flexible eligibility guidelines for the next round of economic recovery grants, specifically around demonstrating ongoing unmet needs and accommodating nonprofits, new businesses, and sole proprietors:
 - Those that continue to sustain impacts (losses, limitations, mitigation, etc.); and,
 - Have incurred increased costs due to pivots and necessary innovations to new operations, markets, products and programs, staffing, and manufacturing systems.
- The Restart Technical Assistance program and other service providers to emphasize advising e-commerce expansion, best practices and accommodations for in person customers (indoors and outdoors), and spurring innovations to new operations, markets, outdoor programs, and manufacturing.
 - Continue to secure public and private sources of capital to invest in emerging plans, systems, and employment.
- Putting in place workplace supports for bringing employees back safely, retraining to new positions/skills, and implementing health precautions for storefronts, programs & facilities.
- The Administration to work with the outdoor industry on planning and preparations for the possibility of another shutdown, curtailing of recreation options, or significant disruptions.
 - Work with the industry on the implementation of mitigation strategies and communication tools for safety guidance, could include centralized testing and reporting methodology, technology such as voluntary smartphone app for visitors.
- The state to continue to integrate justice, equity, diversity and inclusion approaches to outdoor recreation leadership, training, policies, and programs to advance equity for VT's BIPOC and LGBTQ communities, youth and adults with disabilities, and other underrepresented communities:
 - Appoint a VOREC Steering Committee member representing these perspectives.

Prior recommendation #2: Continue to widely promote safe recreation options, including information to residents and marketing campaigns to out-of-state visitors for the fall, holiday, and winter seasons.

VOBA recommends:

- Clear conveyance of the latest health and safety guidance targeting outdoor enthusiasts;
- Support for businesses in their management of customer screening and taking precautionary measures to ensure the safety of customers, employees and the community;
- Marketing and messaging funding and capacity be directed to outdoor recreation activities and businesses as well as stewardship education;
- Consider Vermont outdoor recreation businesses for content creation and communications contracts (i.e. photographers, writers, filmmakers, public relations).
- ACCD and Vermont Department of Tourism and Marketing direct additional consumer stimulus programs and marketing initiatives to VOREC's designated outdoor recreation friendly communities of Newport, Randolph, St Albans, Brighton, Craftsbury, Montpelier, Poultney, Rockingham, and Springfield (as well as others VOREC deems as promising.)
- Work with businesses and affinity groups to increase participation by those populations that are new to the outdoors (providing access to education and gear), as well as supporting BIPOC and

LGBTQ communities, those with disabilities and other underrepresented communities in having positive experiences outdoors.

New funding and policy recommendations for 2021 & beyond

New recommendation #1: Continue to prioritize government and philanthropic financial support and marketing, workforce, and business development programs for outdoor recreation businesses and non-profits that continue to sustain negative impacts from the pandemic into 2021, as well as those who have made necessary innovations.

New recommendation #2: Collaborate with VOREC and ACCD on a process with public and private stakeholders to develop a multi-year framework and action plan for Vermont's outdoor recreation economy.

- Revisit existing documents by VOREC, VOBA and other outdoor partners as a starting point for setting a collective future vision for the state, establishing benchmarks, identifying strategies, and clarify roles and capacities for VOBA and VOREC.

New recommendation #3: Target outdoor entrepreneurs that are considering relocating their business to Vermont or starting a business here for financial and other incentives and workforce development/retraining programs. Additionally, focus on outdoor growth companies that currently operate within the state and have workforce and business expansion goals.

- Work with ACCD and VDOL to package a comprehensive set of economic development programs and workforce development resources based on the emerging needs of the outdoor recreation sector, such as talent pipeline and higher education.

New recommendation #4: Work with recreation/trail organizations and state agencies that manage recreation assets to identify the stewardship and mitigation needs and establish revenue mechanisms for the ongoing and future maintenance needs of existing and new infrastructure, especially with additions from federal funds [CARES Act and Land and Water Conservation Fund (LWCF)]. Related recommendations:

- Fully fund the Vermont Housing and Conservation Fund to enable maximum investments in recreation infrastructure, especially as a state match to federal LWCF dollars.
- Involve outdoor businesses in the Agency of Natural Resources' best management practices stakeholder process on Act 250 changes related to recreation trails.