



Nevada's Outdoor Recreation Economy and COVID-19: Economic Impacts and Case Studies

Get Outdoors Nevada

FINAL REPORT

FINAL Report

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Nevada's Outdoor Recreation Economy and COVID-19: Economics Impacts and Case Studies

Prepared for

Get Outdoors Nevada
21 N. Pecos Road
Las Vegas, Nevada 89101

Prepared by

BBC Research & Consulting
1999 Broadway, Suite 2200
Denver, Colorado 80202-9750
303.321.2547 fax 303.399.0448
www.bbcresearch.com
bbc@bbcresearch.com



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SECTION I.

Introduction and Background

Section I.

Introduction and Background

Introduction

The outdoor recreation economy is an important economic driver in the State of Nevada. Nevada's outdoor recreation economy is diverse and offers opportunities for residents and visitors to participate in a wide variety of outdoor activities ranging from hiking and camping to off-highway vehicle driving and attending outdoor cultural events. Outdoor recreation businesses create diverse jobs, income, and opportunity in communities throughout Nevada and represent an important cornerstone of the State's economy. Nevada's extraordinary landscapes, public lands, and outdoor amenities are among the state's most distinguishing characteristics and are key components for the state's quality of life and outdoor recreation economy.

Almost 60 percent of Nevadans participate in outdoor recreation at least once a year, and more than 14 million people visited national parks, national recreation areas, and state parks in Nevada in 2019. Statistics from the Bureau of Economic Analysis (BEA) indicate that outdoor recreation in Nevada directly and indirectly supports about 59,500 jobs in the state (3.1 percent of the entire labor force) and contributes more than \$5.5 billion per year in statewide economic activity (3.1 percent of total).

However, like many other parts of the economy, the COVID-19 pandemic has hurt outdoor recreation businesses as people have responded to the pandemic by increasing social distance and taking other preventative measures to protect their health and the health of those around them. To illustrate the importance of supporting Nevada's outdoor recreation economy, this report discusses the contributions and importance of outdoor recreation and public lands to Nevada and describes the economic impacts the COVID-19 pandemic has had on outdoor recreation, including how individual outdoor recreation businesses have been impacted and responded. The report concludes with recommendations for policy makers and decisions makers on steps they can take to support the outdoor recreation economy.

National Outdoor Recreation Economy

Nationally, the outdoor recreation economy is one of the Country's largest economic sectors, providing employment for more than 5.1 million people, generating \$226 billion of income, and

\$459.8 billion in output – or value added¹ - each year (BEA, 2020). Visitors engaging in outdoor recreation spend approximately \$887 billion in local economies (OIA, 2017). Figure I-1 demonstrates how the flows of money and goods and services within the outdoor recreation economy create jobs, income, output, and tax revenue in local economies. The three-sector model shown below includes: (a) households, (b) outdoor recreation businesses, and (c) local, state, and federal governments. Households have a demand for outdoor recreation goods and services, which they purchase from businesses. Businesses use this money to hire and pay employees and purchase intermediate goods from other businesses. Households and businesses both generate tax revenue for federal, state, and local governments through their spending.

As Figure I-1 shows, changes in household demand for outdoor recreation would reduce household demand for goods and services. This would reduce the household spending received by businesses. Businesses would respond by reducing the number of people they employ, which would reduce the income received by households. The reduction in household spending and employment and lower business revenues would reduce income and sales tax revenue received from the government, which itself would respond by reducing the number of people it employs. This feedback loop would persist until a new balance is reached or an external stimulus changed household demand for outdoor recreation.

Figure I-1.
Circular Flow Model of Economic Activity



¹ Output, also referred to as Gross Domestic Product (GDP) or Value Added, is simply the sum of each industry's gross sales of goods and service minus its costs of goods purchased to produce the final products or service.

Nevada's Outdoor Recreation Economy

The outdoor recreation economy represents a significant piece of Nevada's economy, supporting approximately 59,500 jobs and \$12.6 billion in annual consumer spending (BEA, 2020; OIA, 2017). It is one of the fastest growing sectors of Nevada's economy and it touches every part of the state (BEA, 2020). In addition to creating employment and income for workers, it also generates tax revenues for state and local governments and diversifies the state's tourist base.

Composition and Output. The outdoor recreation economy supports and is supported by a broad number of industries across Nevada. The business case studies presented later in this report reflect this diversity and include businesses in accommodation and food services; arts, entertainment, and recreation; transportation; and retail trade. These industries, together with local government, are the five most productive sectors of the outdoor recreation economy in terms of economic output (Figure I-2). Together, these industries account for approximately 81 percent of the outdoor recreation economy's annual output and 88 percent of its employment. In total, Nevada's outdoor recreation economy produced a total added value of \$5.5 billion dollars, or about \$91,850 per worker in 2019 (Figure I-2).

Figure I-2.
Valued Added by Five Largest Industries in Nevada's Outdoor Recreation Economy (2019)

| Sector | Value Added (\$, Millions) |
|--|-------------------------------|
| Retail trade | \$1,146.6 |
| Transportation and warehousing | \$1,304.5 |
| Accommodation and food services | \$927.8 |
| All other private industry and government | \$1,063.9 |
| Arts, entertainment, and recreation | \$628.5 |
| Local government | \$393.8 |
| Total Outdoor Recreation Industries | \$5,465.2 |
| Total workers | 59,500 |
| Value added per worker | \$91,852 |

Source: BEA, 2020.

Transportation and warehousing is the largest industry in the outdoor recreation economy in terms of value added. The industry, which includes businesses like National Park Express, a tour and shuttle transportation company that provides transportation between Las Vegas and nearby National Parks, generated approximately \$1.3 billion in added economic value in the state of Nevada in 2019. The industry also includes businesses that transport passengers and cargo, provide sightseeing transportation, and supporting activities.

Retail trade was the second largest industry in the outdoor recreation economy as measured by value added. It includes businesses like Patagonia, a large, privately-owned retailer of outdoor equipment and apparel with a storefront in Reno and LV Cyclery, a bicycle retail and repair shop in Las Vegas. In 2019, retail trade businesses in the outdoor recreation economy produced \$1.1 billion in additional value in the state of Nevada in 2019. The industry includes businesses that sell recreation merchandise, apparel, and equipment. The industry also includes clothing stores, boat retailers, off-highway vehicle sales, gas stations and convenience stores.

The accommodation and food services industry, which includes businesses like the Best Western hotel in Boulder City and Eclipse Pizza in Reno, generated about \$928 million of output in the outdoor recreation economy in 2019. The sector includes hotels, motels, and other short-term accommodations, including campgrounds and RV campgrounds; bars and restaurants are also included in the industry's output.

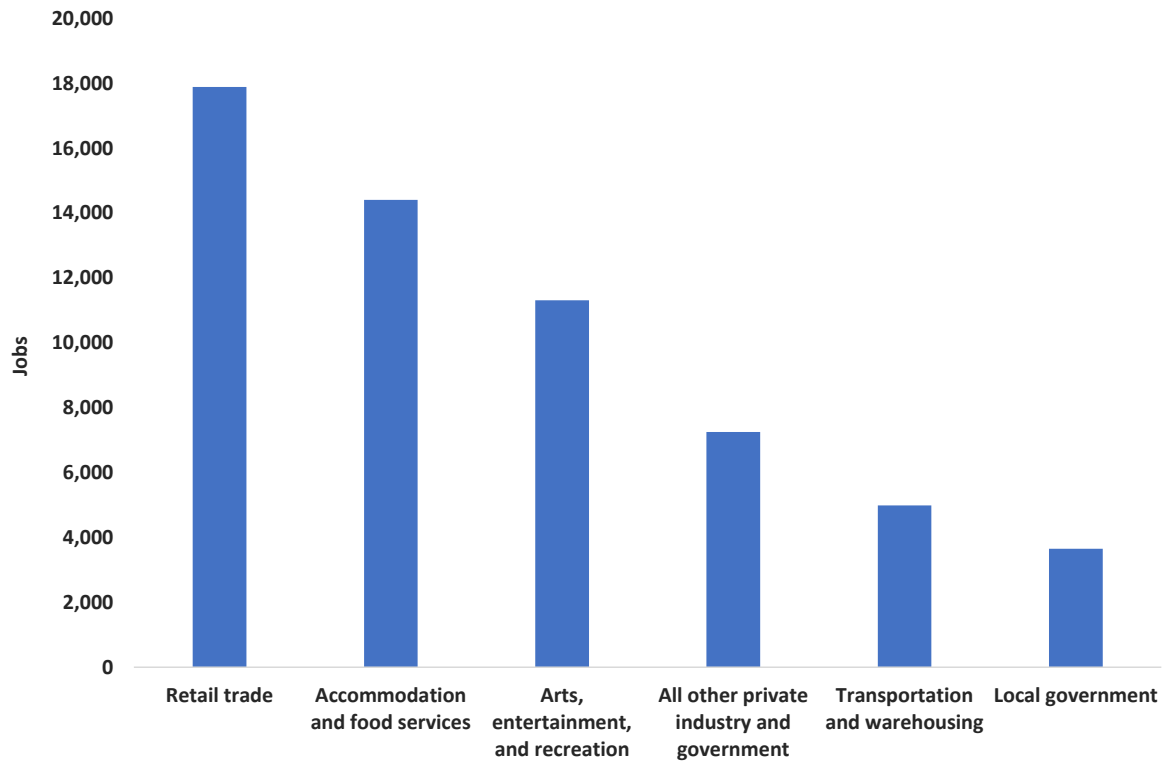
The arts, entertainment, and recreation industry produced \$628 million of additional value in the state of Nevada in 2019 as part of the outdoor recreation economy. This sector contains a broad set of businesses, including Rail Explorers, a business in Boulder City that allows customers to peddle carts on railroad tracks through desert landscapes and Bindlestiff Tours, an outfitter offering tours to nearby National Parks. It also includes professional sports teams, concerts, zoos and botanical gardens, nature parks, amusement parks, golf courses, skiing areas, and marinas.

Local government, which includes legal, police, fire, public health, environmental quality, and administrative services, produced approximately \$394 million of additional value in 2019 as part of the outdoor recreation economy. Local governments, which often co-manage gateway communities near public land, play an important role for outdoor recreation businesses by stewarding public land and ensuring safe access to it.

Employment. Nevada's outdoor recreation economy supports approximately 59,500 jobs across the state according to recent data from the BEA, a U.S. government agency that resides within the U.S. Department of Commerce. According to the BEA data, which reports data by industry, the retail trade industry was the largest creator of jobs in the outdoor recreation economy in 2019 (Figure I-3).

In 2019, outdoor recreation activity helped the retail trade industry employ more than 17,800 people across the state. Accommodation and food services was the second largest industry in terms of employment, creating jobs for more than 14,400 people in 2019, followed by arts, entertainment, and recreation, which employed approximately 11,300 people. Transportation and local governments created approximately 5,000 and 3,700 jobs, respectively. In total, these five industries employed more than 88 percent of the 59,500 people working in Nevada's outdoor recreation economy in 2019 or approximately 3.1 percent of all the jobs in Nevada (BEA, 2020).

Figure I-3.
Employment in Five Largest Outdoor Recreation Industries in Nevada (2019)



Note: Figures in parenthesis above each bar show the share of jobs in each sector created by outdoor recreation. As an example, retail jobs created by outdoor recreation account for 9.9 percent of all of the jobs in the retail trade sector.

Source: BEA, 2020.

In terms of total employment, arts, entertainment, and recreation jobs created by outdoor recreation accounted for 18.4 percent of all the jobs in the state's arts, entertainment, and recreation sector. Retail jobs created by outdoor recreation accounted for 9.9 percent of all the jobs in the retail trade sector, followed by transportation and warehousing (4.9 percent), accommodation and food services (4.3 percent), local government (3.5 percent), and all other sectors (0.4 percent).

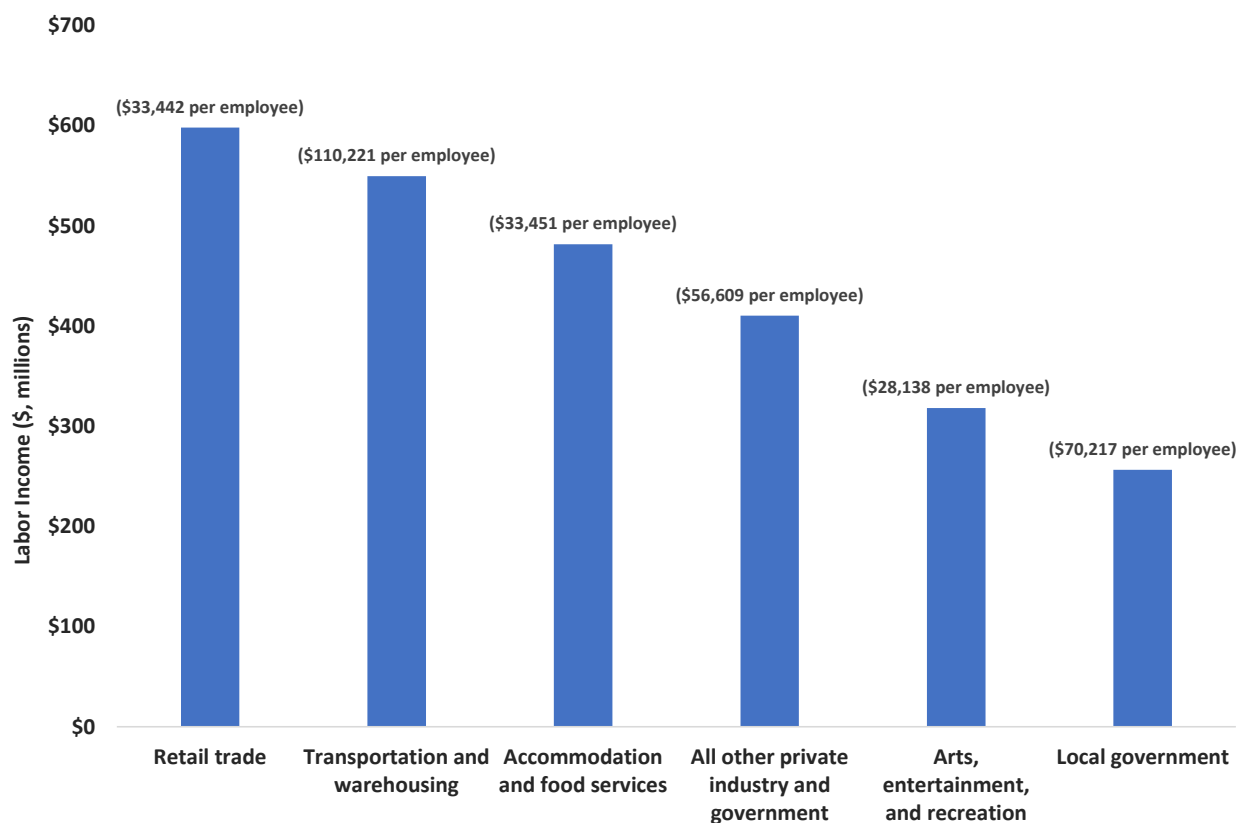
Earnings. People with jobs in Nevada's outdoor recreation economy earned a total of \$2.6 billion in 2019 from wages and salaries, compared to \$226 billion for the state as a whole. Retail trade was the largest source of compensation, paying workers more than \$598 million in 2019 (Figure I-4). Transportation workers earned a total \$550 million in 2019, followed by accommodation and food service workers (\$482 million), arts, entertainment and recreation workers (\$318 million) and local government workers (\$256 million).

It is important to point out that high total wages and salaries do not correspond to high individual wages and salaries. The numbers above each bar in Figure I-4 show the average

compensation per employee for the top five largest industries in the outdoor recreation economy. While the retail trade industry is the largest industry in terms of total income paid to workers, the average worker in the industry earned \$33,442 in 2019. In contrast, the average transportation worker earned an average of \$110,221. In general, positions in the outdoor recreation economy pay modest salaries compared to other economic sectors. The BEA estimates that workers in the outdoor recreation economy earned an average of \$43,955 in 2019 compared to \$64,529 for all salaried jobs in the state (BEA, 2021).

Figure I-4.

Total Labor Income and Average Income per Employee in Five Largest Outdoor Recreation Industries in Nevada (2019)

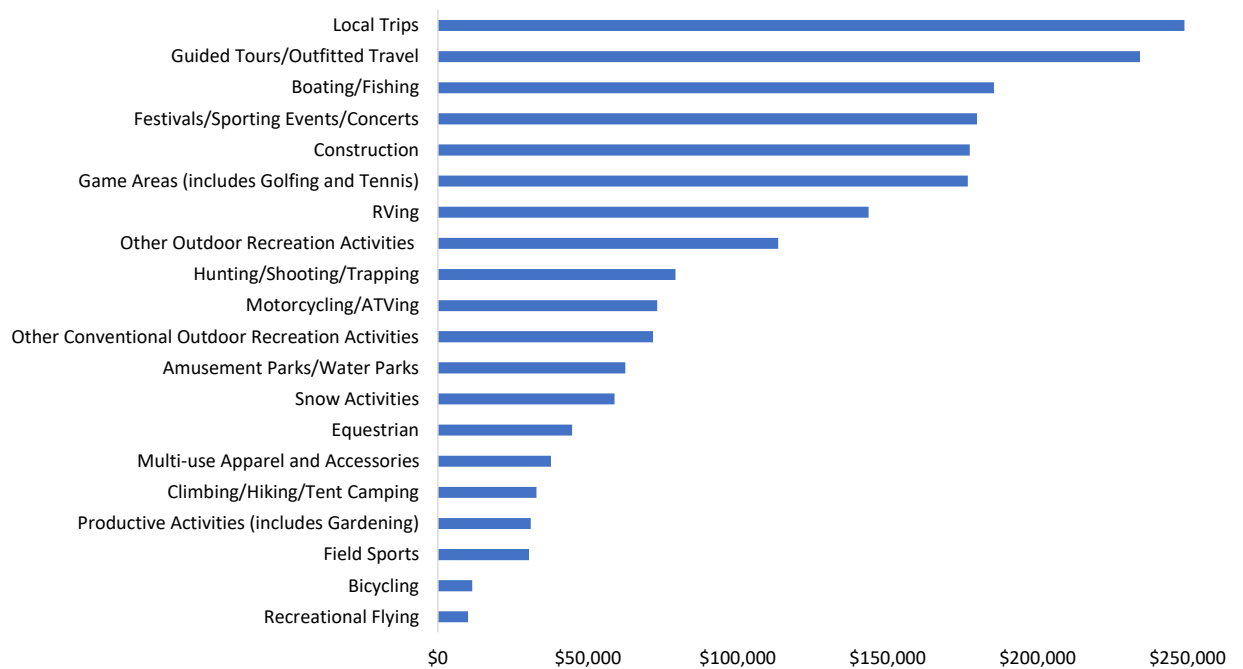


Source: BEA, 2020.

Output by Activity. The BEA Outdoor Recreation Satellite Accounts report value added by recreation activity (Figure I-5). Local trips, defined as travel that occurs less than 50 miles from home, is the largest source of added value, contributing approximately \$249 million per year. Guided tours and outfitted travel is the second largest creator of added value, at \$234 million per year. Boating and fishing, festivals and sporting events, construction, golfing, and RVing are also important sources of added value. Other activities, like bicycling, climbing, hiking, camping, and field sports, while popular activities, generate less economic activity than other forms of outdoor recreation because they do not result in as much spending as a person booking a

helicopter tour of the Grand Canyon or hiring a guide and outfitter for a fishing trip. Still, these daily activities are engaged in more frequently than other types of outdoor recreation, which means their contribution to quality of life is more important than the activities that are engaged in less frequently. This underscores the importance of promoting and ensuring access to the outdoors as a means of protecting and enhancing the value of simple outdoor activities that add value to people's daily lives.

Figure I-5.
Value Added by Outdoor Recreation Activity in Nevada (2019)



Source: BEA, 2020.

SECTION II.

Nevada's Public Recreation Resources and Visitation

Section II.

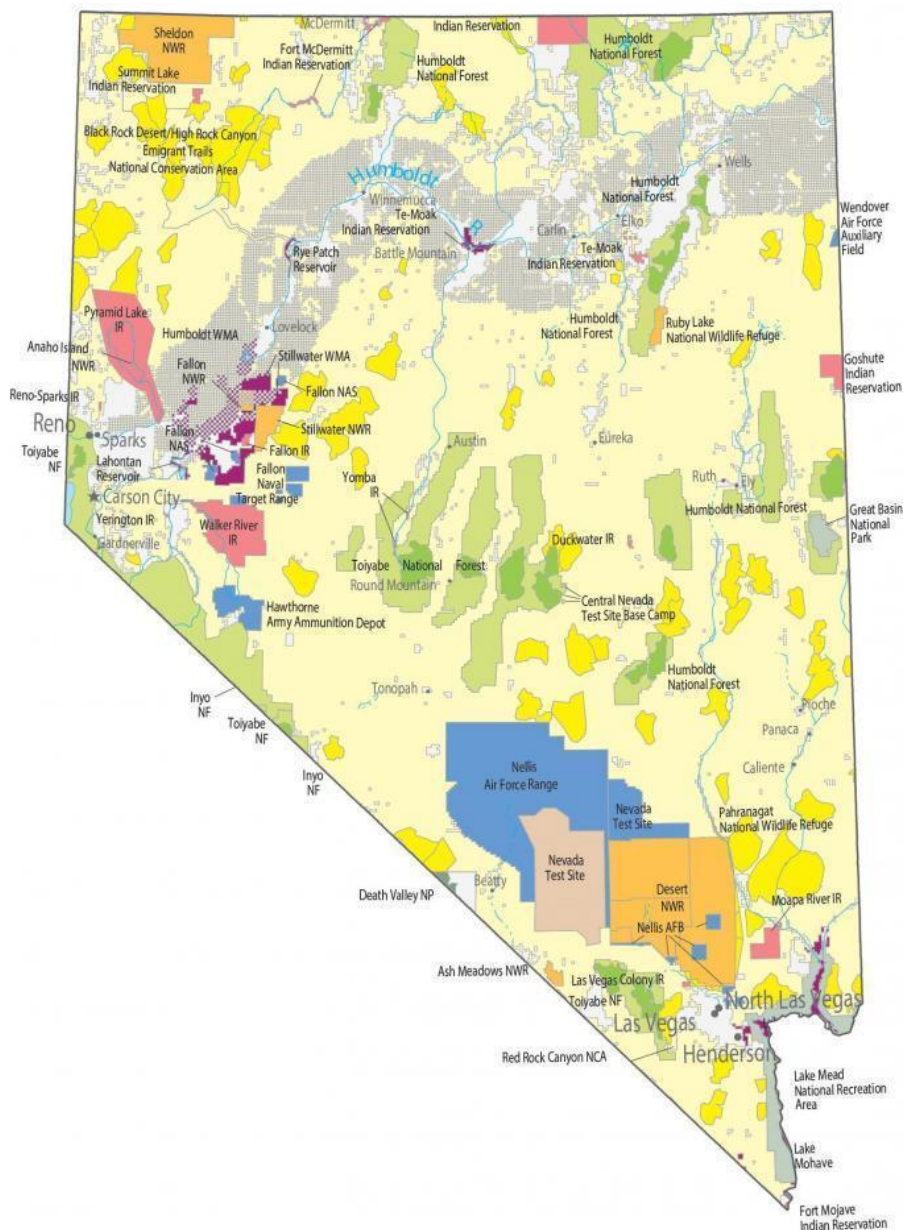
Nevada's Public Recreation Resources and Visitation

The economic contributions of Nevada's outdoor recreation economy are made possible by the abundance of public lands in Nevada, which are endowed with a rich diversity of natural resources and offer a variety of outdoor recreation opportunities. More than 87 percent of land in the state is public land that is open to the public for recreational purposes with limited exceptions (NDSP DCNR, 2016). In fact, Nevada contains more federal land than any other U.S. state (CRS, 2020). It is important to recognize that these lands were stewarded by indigenous nations long before settlers first came to the region and they continue to be important parts of the heritage and culture of the 27 tribal nations represented in Nevada. Today, the state's large areas of public land, low population density, and high levels of public access make the outdoors an important part of resident's lives and visitors' experiences.

National Parks

Nevada's public lands are distributed across the state and encompass unique landscapes and ecosystems that draw residents and tourists alike (Figure II-1). The National Park Service (NPS) manages two parks in the state: Great Basin National Park and Death Valley National Park. In addition, Zion, Bryce Canyon, Grand Canyon, Joshua Tree, Capitol Reef, Yosemite, and Petrified Forest National Parks can all be accessed by car in five hours or less from Las Vegas or Reno. The NPS also manages the Lake Mead National Recreation Area in south-eastern Nevada, which is the first and oldest National Recreation Area in the country. It is also one of the National Park Service's most visited sites, ranking amongst the top ten most visited NPS sites in the country.

Figure II-1.
Public Lands of Nevada



Source: GISgeography.com

National Conservation Areas

The Bureau of Land Management (BLM) also manages several unique areas popular with outdoor recreationists. The Red Rock National Conservation Area, a landscape notable for its scenic motoring loop, red rock formations, and deep canyon wildernesses, is renowned by rock

climbers, hikers, site seers, and other outdoor enthusiasts. The BLM also manages the Black Rock Desert – High Rock Canyon Emigrant Trails National Conservation Area is an area of 0.8 million acres that offers visitors access to hot springs, rugged canyons, and large salt flats or “playas,” as they are also known.

National Forests

There are two national forests in Nevada. The Humboldt-Toiyabe National Forest is a 6.3-million-acre forest that covers areas across the entire state. It is the largest national forest in the lower 48 states. Besides being home to the Heavenly Ski Resort, Lee Canyon ski area, and the Spring Mountains National Recreation Area, which includes Mount Charleston, the Humboldt-Toiyabe is also notable for being a non-contiguous national forest, with areas in western, northern, and eastern Nevada. The Lake Tahoe Basin Management Unit manages the forest lands inside the Tahoe Basin on the Nevada side of the Lake. Part of the Inyo National Forest, which includes the John Muir Wilderness, is in the western part of the state.

National Wildlife Refuges

The U.S. Fish and Wildlife Service (USFWS) manages multiple wildlife refuges throughout the state. The Sheldon National Wildlife Refuge, located in the Great Basin, is the second largest in the state. It was created to protect habitat for pronghorn antelope, but it is also home to mule deer, sage grouse, and a variety of songbirds. Ruby Lake National Wildlife Refuge, also located in the Great Basin, is a large area of spring-fed wetlands that supports an abundance of wildlife habitat for birds and mammals. The Stillwater National Wildlife Refuge, near Reno, is regarded as a premier destination for birders due to its importance for migratory bird species. The largest refuge in the state, the Desert National Wildlife Refuge, is also the largest refuge in the lower 48 states. Covering an area larger than Rhode Island, the 1.6 million-acre refuge was created to conserve habitat for multiple species, some of which are found nowhere else on earth.

National Monuments

There are three national monuments in Nevada. National monuments are protected areas like National Parks, but they can be created from any federal land by Congress and by Presidential proclamation, through the Antiquities Act. All three national monuments are in the south eastern portion of the state. Gold Butte National Monument, located in Clark County, protects nearly 300,000 acres of desert landscape that includes petroglyphs, wildlife habitat, rock pillars, and historic homestead sites. Tule Springs Fossil Beds National Monument, which is located to the west of Gold Butte, is a 22,650-acre monument established in 2014 that contains fossils from animals that lived between 7,000 and 250,000 years ago. The Basin and Range National Monument covers an area of approximately 700,000 acres of mountainous terrain in Lincoln and Nye counties. Created in 2015, the monument contains resources of significant ecological, cultural, and historical importance.

Federally Recognized Tribal Areas

While all land in Nevada is part of the ancestry of the original indigenous nations who occupied the area before settlers arrived, today federally recognized tribal lands are important sites for outdoor recreation in the state. Pyramid Lake, which covers an area of 125,000 acres and is one of Nevada's largest natural lakes, is managed by the Pyramid Lake Paiute tribe and offers visitors a number of recreation opportunities, including world class fishing. The Walker River Paiute tribe offers public access to the Walker River, which hosts numerous fisheries and offers visitors abundant recreation opportunities.

State, County, and Municipal Land

The state of Nevada, along with county and municipal governments, also manage hundreds of sites throughout the state with recreational amenities. The Nevada Division of State Parks manages 24 parks throughout the state, including the Berlin-Ichthyosaur State Park in northern Nevada. The park showcases Nevada's mining heritage by allowing visitors to explore the ghost town of Berlin and nearby fossil beds. Valley of Fire, a unique area of bright red sandstone outcrops, petrified trees, and petroglyphs, offers visitors opportunities to explore its sites through day trips, camping, RV camping, and picnicking. Sand Harbor State Park is located along the coast of Lake Tahoe. The park offers visitors opportunities for swimming, kayaking, fishing, water skiing, and picnicking. County and municipal governments throughout the state also maintain regional and local parks to provide recreational opportunities for their residents.

Outdoor Recreation Activities and Participation

Visitation to the state. The Nevada Commission on Tourism records data on out of state visitor arrivals and national park visitation for the state of Nevada. Visitation is particularly important for the outdoor recreation economy since many jobs and income depend on spending for accommodations and food services and retail trade. Arts, entertainment, and recreation, transportation, and local government are dependent on visitor spending, but these industries also capture local spending, which can help offset reductions in visitor spending.

In 2018, the Nevada Commission on Tourism reported more than 56.5 million visits to the state. The Commission conducted a survey of visitors to better understand their travel habits and primary purposes of travel. According to survey responses from visitors, on average visitors to the state spend about four days on their trip. The survey also asked visitors about the primary attractions and experiences during their trip. While many visitors come to Nevada for gaming, dining, and live performances, the state's public lands and natural amenities are also an important draw for visitors (Figure II-2).

Figure II-2 shows the percent of visitors who said visiting outdoor amenities and public lands was one of their primary experiences during their trip. The results show that outdoor amenities and public lands play an important role in visitors' experiences. Between 10 percent (5.6 million) and 23 percent (12.9 million) of visitors participate in scenic driving, while 13 percent

(7.3 million) to 15 percent (8.5 million) visit a lake or reservoir during their trip. The state's mountains are also an important part of visitor's experiences, with 13 (7.3 million) to 20 percent (11.3 million) of survey respondents stating that mountains were one of the top experiences during their stay. Eight percent (4.5 million) to 13 percent (7.3 million) of visitors to the Reno and Las Vegas areas said that visiting parks and recreation areas was a top experience, while six percent (3.4 million) to nine percent (5.1 million) of respondents said outdoor recreation was their top experience.

Figure II-2.

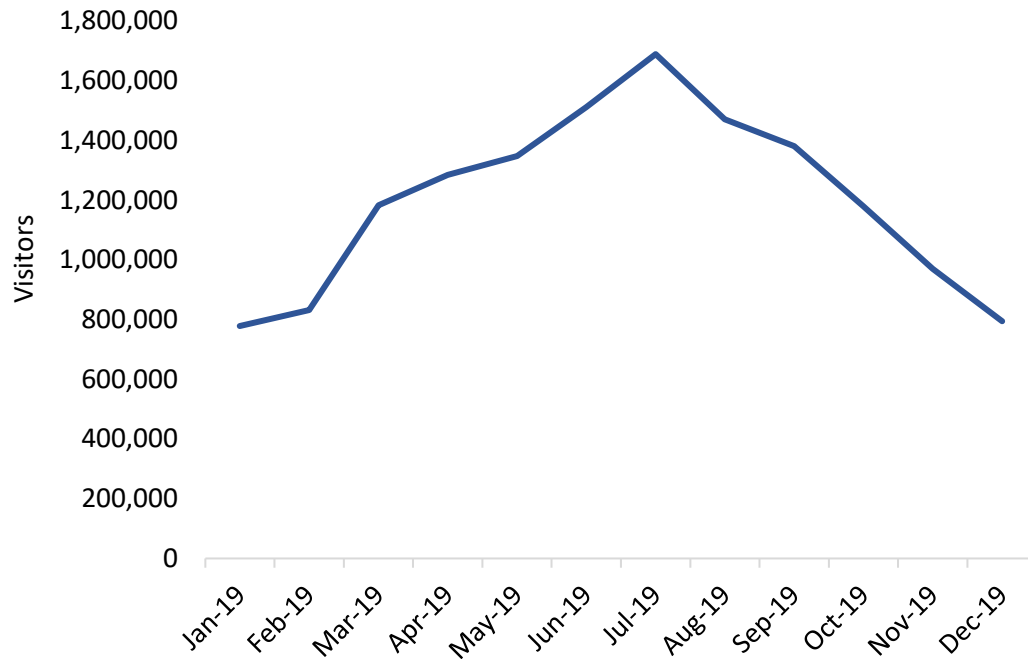
Percent of Visitors Visiting Nevada for Outdoor Amenities (2018)

| Purpose | Reno Area | Central Nevada | South-central Nevada | Las Vegas Area | Northern Nevada |
|-----------------------|-----------|----------------|----------------------|----------------|-----------------|
| Scenic driving | 15% | 23% | 19% | 10% | 19% |
| Lake/reservoir | 13% | | 16% | | 15% |
| Mountains | 13% | 19% | 20% | | 16% |
| Park/recreation areas | 13% | | | 8% | |
| Outdoor recreation | 7% | 9% | 6% | | 6% |

Source: Nevada Commission on Tourism, 2018

Visitation to Parks. Data on park visitation and usage from Nevada Industry Partners shows that approximately 14 million people visited national parks, national recreation areas, and state parks in Nevada in 2019 (Figure II-3). The parks represented in the data include Lake Mead National Recreation Area, Nevada State Parks, Death Valley National Park, Hoover Dam Visitor Center, and Great Basin National Park. As Figure II-3 shows, spring and summer months tend to be the busiest times of year for park visitation, while the fall and winter months see fewer people.

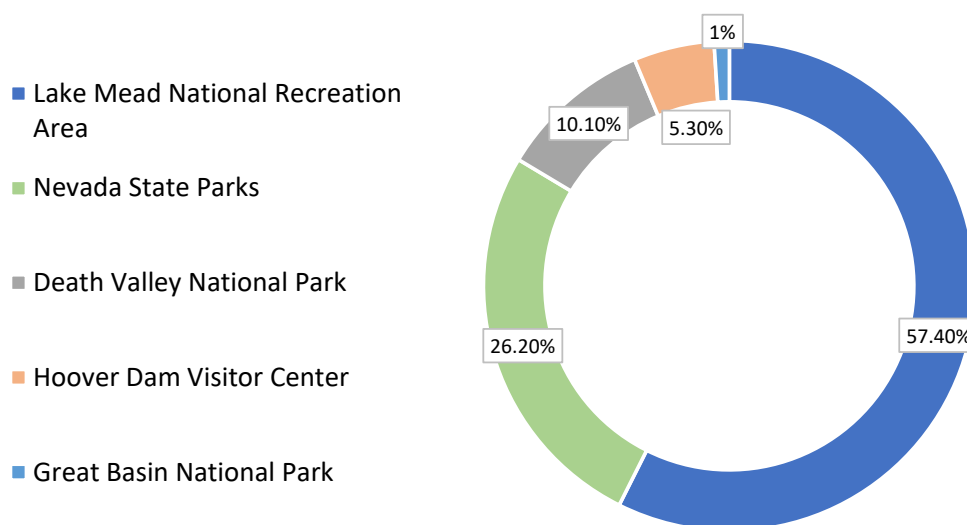
Figure II-3.
Visitors to National Parks, State Parks, and National Conservation Areas (2019)



Source: Nevada Industry Partners, 2020

In terms of visitation, Lake Mead National Recreation Area accounts for the largest share of park visitors (Figure II-4). More than 57 percent of park visits were to Lake Mead between July 2018 and July 2020. Nevada State Parks account for the next largest share of park visitations at approximately 26 percent, followed by Death Valley National Park (10 percent), Hoover Dam Visitor Center (5 percent) and Great Basin National Park (1 percent). While the data is not a comprehensive accounting of park visits in the state, it does show that areas with ease of public access and proximity to major population centers attract more visitors than more remote areas, like Great Basin National Park.

Figure II-4.
Distribution of Visitors to National Parks, State Parks, and National Conservation Areas (2019)



Source: Nevada Industry Partners, 2020

Local Outdoor Recreation Participation. The state of Nevada has a population of about 3.1 million people (U.S. Census ACS 1-year Estimate) and estimates from the Nevada Division of State Parks estimates that about 57 percent of the population engages in some form of outdoor recreation each year (NDSP DCNR, 2016). As Figure I-5 showed, above, local trips taken within 50 miles of a person's home are the most important source of economic activity in Nevada's outdoor recreation economy.

Local participation is an important economic contributor to the outdoor economy because local trips are associated with economic transactions that support local economic activity. For example, a family picnicking at a park may purchase groceries, pay a park entrance fee, and buy recreational-related equipment for their trip. Moreover, the ease of local access means residents may take more trips than visitors. Over time these small but frequent visits can increase the impact of local outdoor recreation participation. Several businesses in Nevada interviewed as part of the case studies presented later in this report noted that local customers have become a much more important source of their business since the pandemic started.

SECTION III.

Impacts of COVID-19 on Outdoor Recreation Economy

Section III.

Impact of COVID-19 on Outdoor Recreation Economy

Impact of COVID-19 on National Outdoor Recreation Economy

The COVID-19 pandemic, which began in the United States in early 2020, has had a profound impact on national, state, and local economies. Consumer behavior has also changed in response to the pandemic. The U.S. economy lost almost 10 million jobs compared to pre-pandemic levels (Ettlinger and Hensley, 2021). In fact, in more than 32 states, job losses since February 2020 were worse than in the Great Recession (Ettlinger and Hensley, 2021). Moreover, the gross output of every U.S. state has declined because of the pandemic (Ettlinger and Hensley, 2021).

The pandemic response of outdoor recreationists, the businesses that serve them, and the cities and towns that host them, have been mixed. The limitations to personal movement and travel during the months of March and April 2020 led to drastic reductions in outdoor recreation across the Country. Since then, many outdoor recreationists have modified their behavior to reduce their risk of contracting and spreading COVID-19 (Rice et al. 2020).

The reduced travel at all scales and reduced access to public lands and other outdoor amenities, particularly at areas where crowding was common, led many outdoor enthusiasts to reduce the frequency of their participation in outdoor recreation, reduce the distance they traveled to participate in the activity, and reduce the average size of the group they participated in the activity with (Rice et al. 2020). For example, in Montana, another state with abundant outdoor recreation opportunities, about 50 percent of visitors thought about or did cancel their trips to the state (MBQ, 2020). Yet, by June 2020, park visitation in the state was 25 percent above its 2019 levels.

In Nevada, the rebound in visitation to some areas was so extreme that access had to be limited to reduce crowding. Red Rock National Conservation Area, outside of Las Vegas, closed several times during 2020 to reduce crowding along its scenic loop drive and hiking trails and now requires reservations to access its scenic loop drive (Red Rock Canyon, 2020). The Lake Mead National Recreation Area also saw unprecedented increases in demand for access once public health and safety restrictions were eased (Boulder City Review, 2020).

Still, in March and April 2020, public health and safety restrictions led to many outdoor recreation businesses having no business at all. This led to many businesses, particularly in the accommodations and food service industry, and the transportation industry, to reduce the size of their staff. A national survey of outdoor recreation businesses conducted by Crame-Krasselt, a

marketing firm, found that 79 percent of businesses reported facing significant impacts from the pandemic. Of these businesses, 88 percent reported laying off staff to reduce the pandemic's financial impact on their business. When asked how the pandemic had impacted their business, 94 percent of businesses said they experienced a decrease in sales. About 25 percent of businesses reported that they had experienced at least a 50 percent reduction in sales.

In Nevada, businesses faced the same impacts others were reporting across the nation. A Best Western hotel in Boulder City, Nevada reported that the initial round of public health and safety restrictions in March led to a large and dramatic drop in their occupancy. National Park Express, a transportation and tourism operator based out of Las Vegas estimated their customer volume dropped by almost 90 percent in the first few months of the pandemic. Bindlestiff Tours, another tourism operator in Nevada, reported seeing a similar drop in customer volume. Outdoor retailers, like Gear Hut in Reno, were also severely impacted when they chose to close in response to public health and safety restrictions in March and April 2020.

As public health and safety restrictions eased, businesses reported that customers were returning and that they were seeing more demand for close-to-home recreation. Some businesses, like outdoor gear retailers, saw large increases in business as outdoor enthusiasts bought equipment like bicycles, tents, hiking boots, and other gear that would let them get outside while remaining socially distanced. In contrast, businesses that relied on groups of people were not doing nearly as well. Businesses like fishing and hunting outfitters, transportation companies, and other hospitality-oriented businesses have continued to see lower customer volumes compared to pre-pandemic levels (Market Place, 2020).

Businesses in Nevada reported similar trends. Desert Adventures, a tourism outfitter operating around Lake Mead, said after reopening the company has seen more local visitors than at any time in the company's existence. Outdoor retailers, like LV Cyclery in Las Vegas, have also seen dramatic increases in retail demand. The company said after public health and safety measures were relaxed, demand for outdoor equipment was so strong the company sold a year's worth of inventory in only three months. Still, businesses that serve groups of people continue to struggle. National Park Express reported that its customer volume remains low and the company continues to operate at a loss each month.

Local communities, including many gateway communities, were also impacted by the pandemic. When public health and safety restrictions were at their most severe in March and April 2020, many gateway communities, such as Moab, Utah, saw an influx of visitors. Many of these towns, fearing that an influx of visitors would lead to a spike in infections that could overwhelm their healthcare systems, made public pleas for visitors to stay away until conditions improved (KUTV, 2020). Lake Tahoe experienced similar issues when residents protested the impacts of increased visitation in August 2020 (Tahoe Daily Tribune, 2020). This put both local businesses and the communities themselves in difficult positions, since visitor spending is an important source of employment, income, and tax revenue for local governments. Some of the impacts could be offset by increased local spending, but local spending alone could not offset all the impacts of reduced visitor spending and the associated reductions in tax revenues.

Impact of COVID-19 on Nevada's Outdoor Recreation Economy

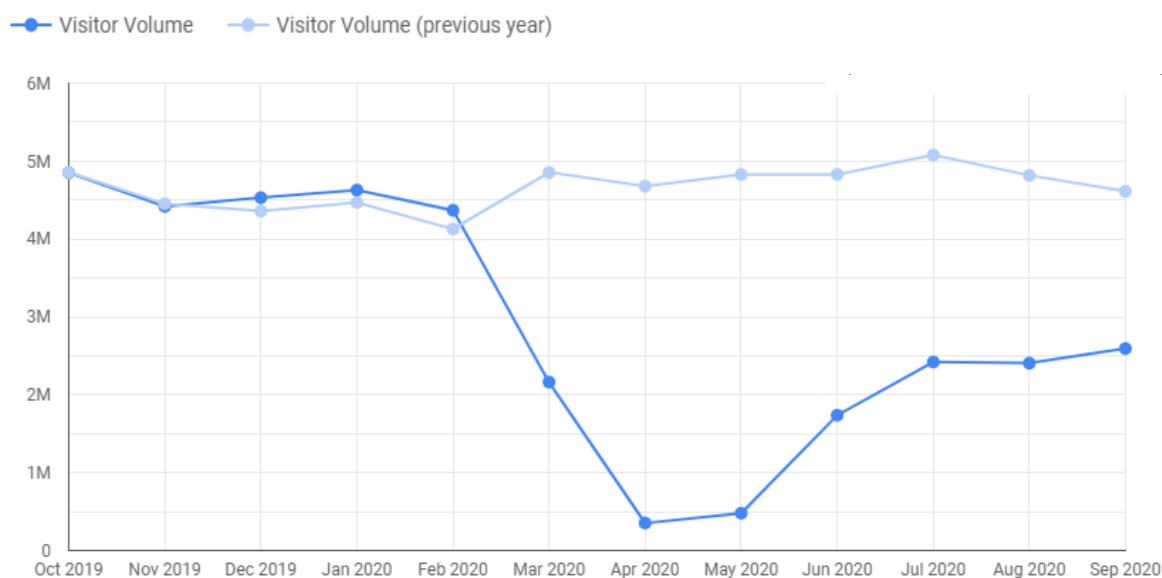
The pandemic has impacted Nevada's outdoor recreation economy by reducing the demand for outdoor recreation in aggregate. Residents and visitors have changed the way they recreate to protect themselves and others and these changes have resulted in fewer visitors to the state and lower total spending in the outdoor recreation economy. While local visits have increased, local spending has not risen enough to offset the reduction in spending by out-of-state visitors. This has caused businesses to reduce their staff sizes or close their business entirely.

The impacts have not been distributed equally across industries, however. Retail and transportation businesses have experienced smaller impacts than restaurants and short-term accommodations like hotels and motels. In fact, some outdoor retailers have increased their sales during the pandemic as the demand for bicycles, paddle boards, tents, and other outdoor equipment has grown. In contrast, the accommodations and food service industry has experienced much larger impacts than most other economic sectors. Local governments have also been heavily impacted by the loss of tax revenue.

The remainder of this section displays data expressing recent trends in visitor arrivals, park visitations, consumer spending, small business revenue, the number of small businesses in operation, and employment across the top five industries in the outdoor recreation economy. These trends are used to estimate the pandemic's impact on the number of jobs, wages and salaries, and value added created by the state's outdoor recreation economy.

Visitor Arrivals. Visitor arrivals to Nevada have fallen because of the pandemic (Figure III-1). Between July 2018 and June 2019, more than 55 million visitors arrived in Nevada. Between the same months in 2019 and 2020, respectively, only 42 million visitors arrived in the state, a difference of -13.7 million visitors. Visitor arrivals in April 2020, at the peak of public health and safety restrictions, were 92 percent lower than visitor arrivals in April 2019, showing how dramatically the pandemic changed visitation to the state. Notably, vehicle traffic counts were largely unchanged throughout 2020 except for April, suggesting that while many visitors did not travel to Nevada by plane, more visitors may have arrived by car. Several businesses interviewed as part of this report noted a dramatic increase in visitors from nearby states, including California and Arizona.

Figure III-1.
Visitor Arrivals to Nevada

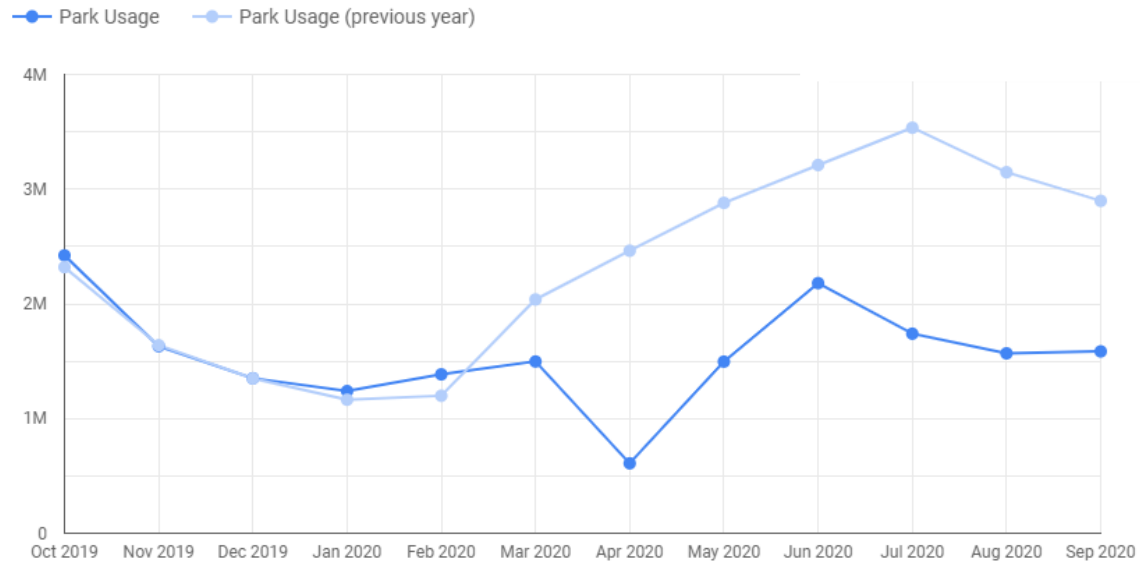


Note: Visitor arrivals data are collected and reported by multiple agencies, including the Las Vegas Convention and Visitor Authority, McCarran International Airport, the Nevada Gaming Control Board, and the Nevada Department of Transportation.

Source: Nevada Industry Partners, 2020

Park Visitation/Time Spent at Parks. The reduction in visitor arrivals reduced the number of visitors to public lands throughout the state in the early months of the pandemic (Figure III-2). The largest decrease in park visitation occurred in April 2020, when public health and safety measures were at their highest levels. Once public health and safety restrictions were relaxed, park visitation throughout the state began to recover, but remained below its trend from 2019. However, recovery trends in park visitation have been uneven and crowding did occur in many popular outdoor recreation areas around the state, including Lake Mead, Red Rock National Conservation Area, and Lake Tahoe (Red Rock Canyon, 2020; Boulder City Review, 2020; KUTV, 2020).

Figure III-2.
Visitation to National Parks, State Parks, and National Conservation Areas in Nevada (2019, 2020)

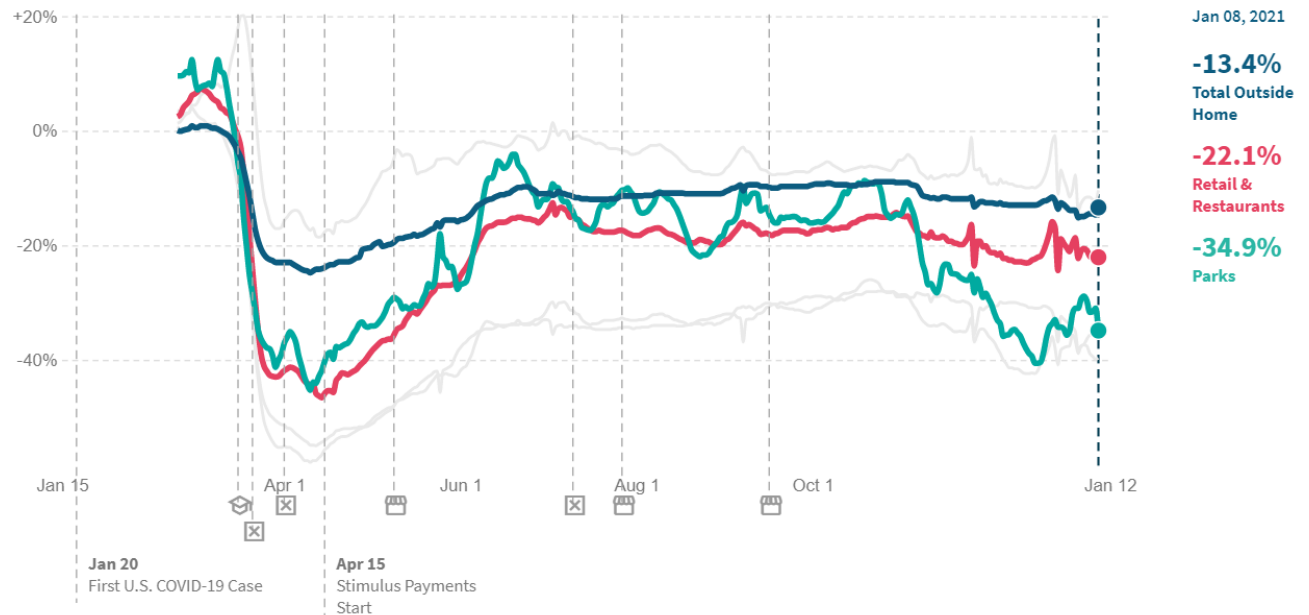


Note: Data on park visitation was only available through September 2020.

Source: Nevada Industry Partners, 2020

The decrease in park visitations that occurred in early 2020 was due to the reduction in visitor arrivals and changes in local outdoor recreation habits. Figure III-3 shows the change in the amount of time that local residents in Nevada spent at various locations on a daily basis throughout 2020. In total, residents spent about 13 percent less time outside of their home compared to pre-pandemic times (blue line). However, the amount of time residents spent at restaurants and retail establishments (pink line), and parks (teal line) decreased by much larger percentages.

Figure III-3.
Percent Change in Time Spent Outside the Home*



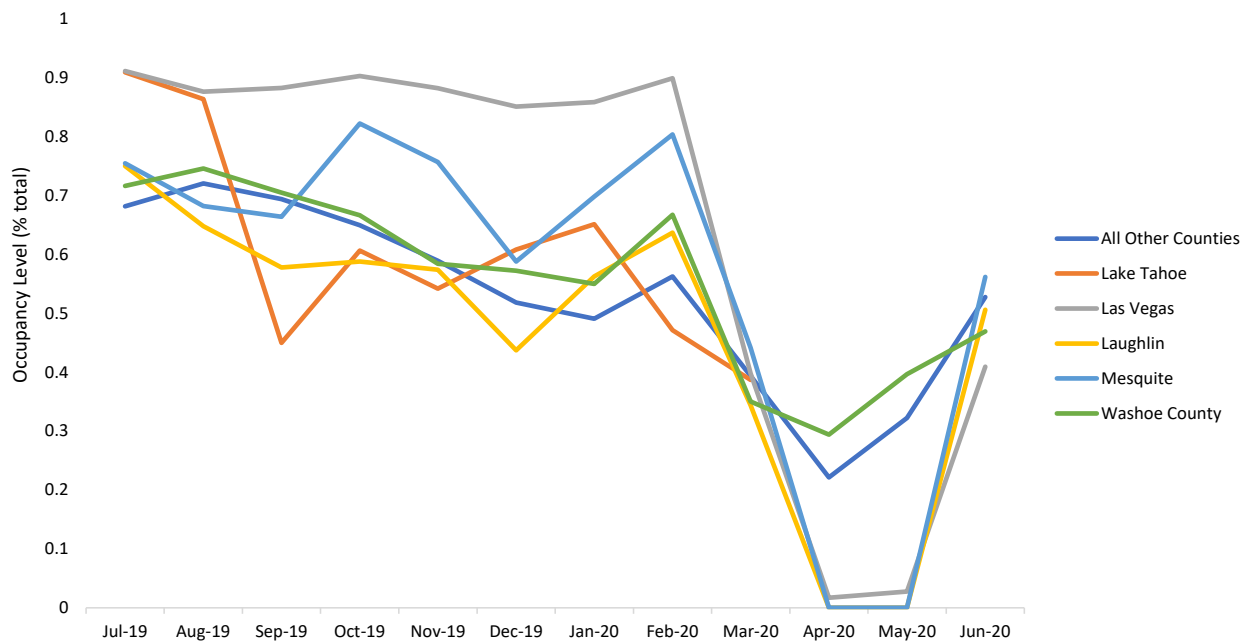
Note: *Change in the average time spent outside of residential locations indexed to the period between Jan 3 – Feb 6 2020. Data are from Google's COVID-19 Community Mobility reports.

Source: Chetty, Freidman, Hendren, Stepner, and the OI Team (2020)

As of January 8th, 2021, residents were spending about 22 percent less time at restaurants and retail establishments compared to January and early February 2020. During the early part of the pandemic, residents were spending as much as 40 percent less time at restaurants and retail establishments. The amount of time households spent at parks also declined significantly during April 2020, when households were spending approximately 40 percent less time at parks. Park visitation improved throughout the summer and fall months, but the return of winter saw park visitation decline again as colder weather and a more intense period of the pandemic began.

Hotel/Motel Occupancy. One of the most direct impacts of decreased visitor arrivals and park visits is the corresponding decline in hotel and motel occupancy. Figure III-4 shows hotel and motel occupancy for different areas in the state of Nevada from July 2019 through July 2020. Between March and May 2020, hotel occupancies nearly reached zero in several parts of the state. Hotels and motels in Washoe County did not fare as badly, but even there, occupancy rates reached a low of about 25 percent. As the economy began re-opening in May, hotel occupancy began to recover, reaching about 50 to 60 percent of its pre-pandemic levels by June. Additional data is not available beyond June, but the rebound effect observed following re-opening is likely to have continued through the summer months before it may have fallen as late fall and winter approached.

Figure III-4.
Hotel and Motel Occupancy as a Percent of Total

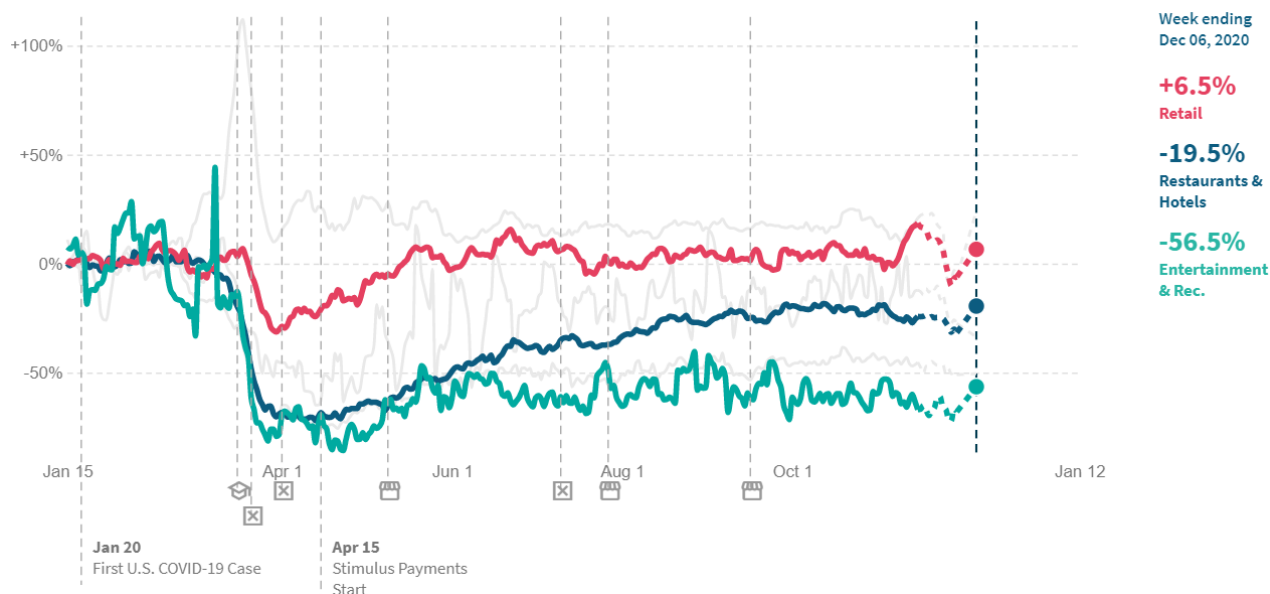


Source: Nevada Industry Partners, 2020

Consumer Spending. Consumer spending supports the outdoor recreation economy by supporting jobs, wages, and businesses in addition to generating tax revenue for state and local governments. As discussed above, when consumers reduce their spending, it has a cascading economic effect. Businesses reduce their staffing levels, which in turn lowers household incomes and government tax revenues, leading to less spending and further job losses.

As Figure III-5 shows, consumer spending in the arts, entertainment and recreation industry, accommodations and food service industry, and transportation industry declined in the months following the start of the pandemic. Consumer spending on arts, entertainment and recreation industry declined by about 60 percent at the start of the pandemic and has remained depressed since. Spending at hotels, motels, and restaurants also declined by about 60 percent in the early months of the pandemic, but federal stimulus money and less restrictive pandemic guidelines have seen consumer spending in the industry recover to about 80 percent of its pre-pandemic level. While not shown above, consumer spending on transportation was down about 40 percent from pre-pandemic levels as of early December 2020. In contrast, retail sales have increased since the start of the pandemic after dropping slightly in the first few months. As of early December 2020, retail consumer spending was about 7 percent higher than its pre-pandemic level.

Figure III-5.
Percent Change in Consumer Spending by Industry

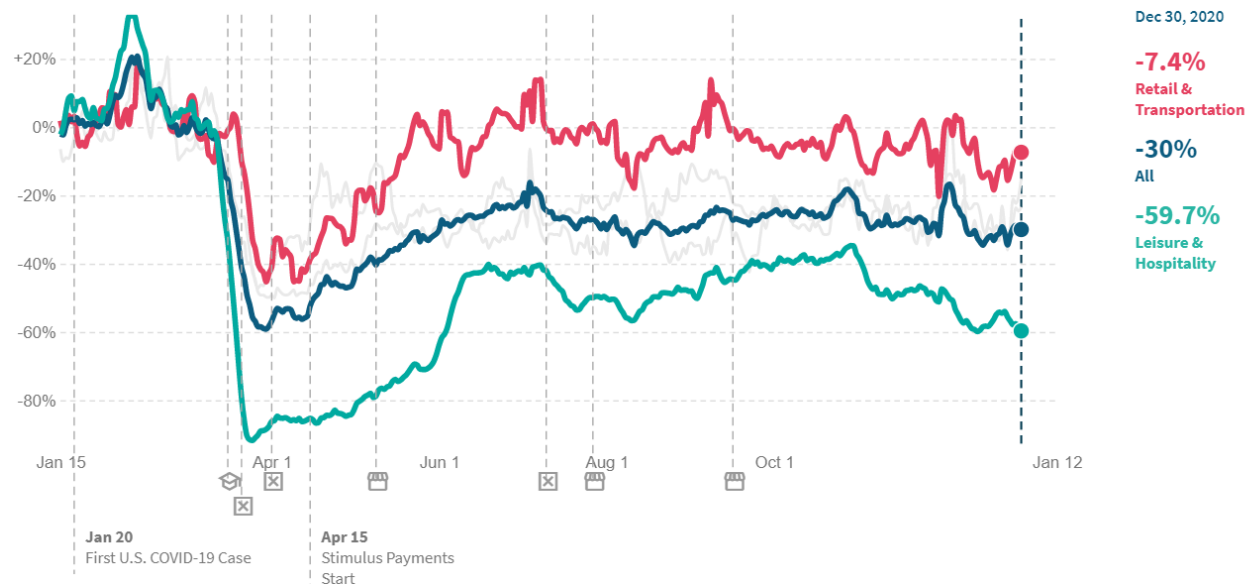


Note: *Change in the average consumer credit and debit card spending, indexed to January 4 – 31, 2020 and seasonally adjusted. The dashed portion of the line is provisional data, which may be subject to revisions as newer data becomes available.

Source: Chetty, Freidman, Hendren, Stepner, and the OI Team (2020)

Small Business Revenue. Reductions in consumer spending lead directly to reductions in business revenue (Figure III-6). While retail consumer spending has remained relatively buoyant throughout the pandemic, transportation spending has not. As a result, the combined small business revenue of the retail and transportation industries is down about 7 percent compared to its pre-pandemic levels (pink line). This is less than the overall reduction in small business revenue, which was still 30 percent below its pre-pandemic level as of late December 2020. The leisure and hospitality sectors, which include the arts, entertainment and recreation industry, and the accommodations and food service industry, saw about a 60 percent reduction in revenues as of late December 2020 (teal line). In the beginning of the pandemic, revenues in these industries were down by more than 80 percent.

Figure III-6.
Percent Change in Small Business Revenue by Industry



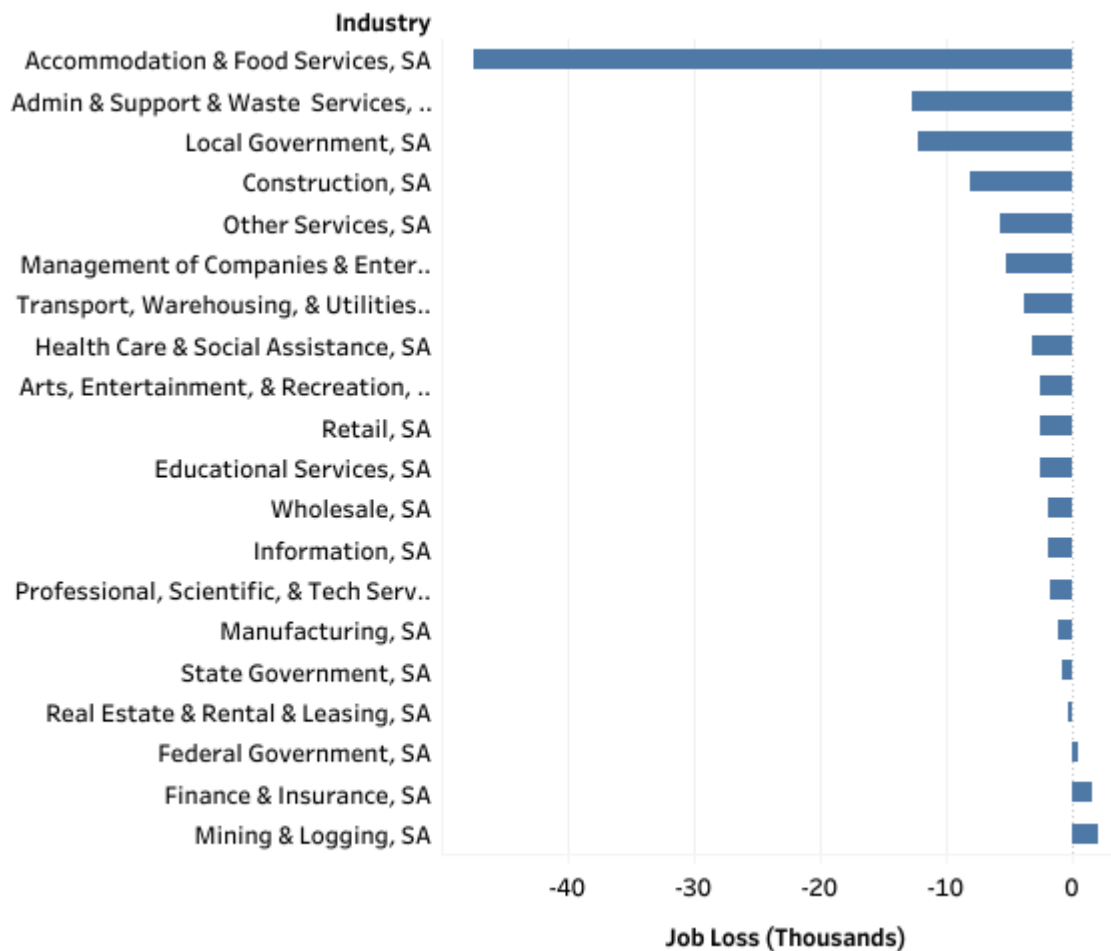
Note: *Change in net business revenue for small businesses, indexed to January 4-31 2020 and seasonally adjusted. This series is based on data from Womply.

Source: Chetty, Freidman, Hendren, Stepner, and the OI Team (2020)

Employment. Many businesses have responded to the decrease in revenue by reducing the size of their staff (Figure III-7). Unsurprisingly, the largest job losses are seen in the accommodation and food services industry, reflecting the sizable loss of revenue from reduced visitor arrivals. The industry has lost a total of almost 48,000 jobs across the state since the start of the pandemic.

Notably, local governments, another important industry in the outdoor recreation economy, have experienced the third largest loss of jobs as a result of declining tax revenues. In total, the industry lost approximately 12,000 jobs since the pandemic began. Transportation, arts, entertainment, and recreation, and the retail industry have also experienced significant jobs losses. The three industries have lost a combined 9,000 jobs since the start of the pandemic, with the transportation industry seeing the largest losses of the three industries.

Figure III-7.
Change in Employment by Industry in Nevada (2020)

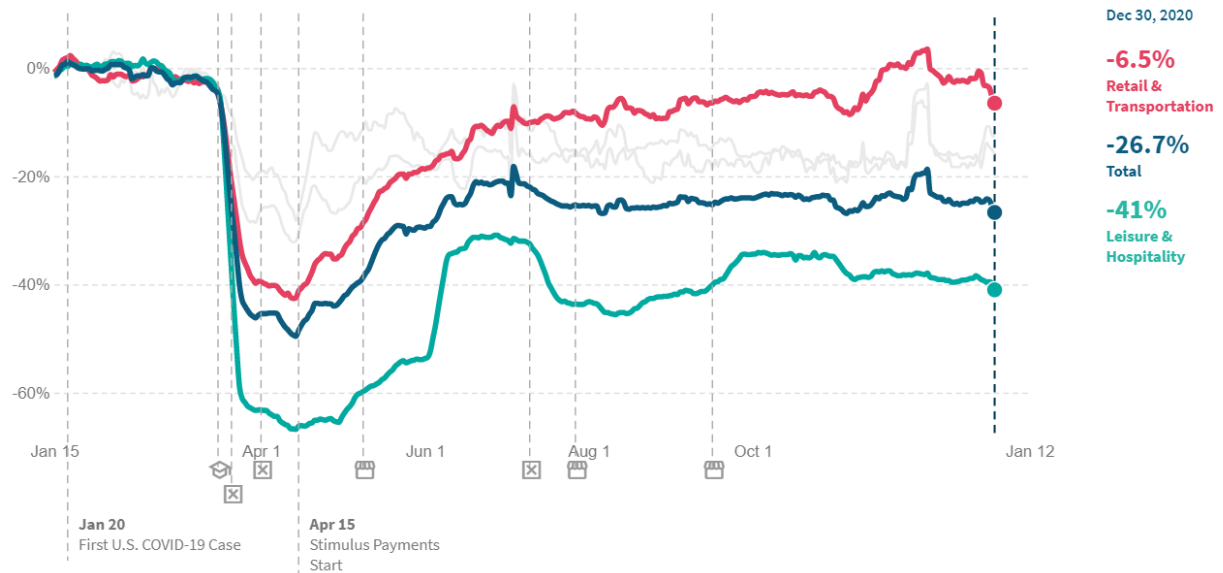


Note: "SA" indicates that data for the sector are seasonally adjusted.

Source: Bureau of Labor Statistics, 2020

Small Businesses Open. While many businesses initially reduce their staff to offset lower revenues, sustained loss of revenue eventually forces businesses to close permanently. Small businesses are particularly vulnerable to prolonged downturns in consumer spending because they often keep smaller reserves of capital on hand and face higher borrowing costs compared to larger businesses. Figure III-8 shows the percent change in the number of small businesses operating in Nevada across the retail, transportation, leisure and hospitality industries. Leisure and hospitality contain the arts, entertainment, and recreation industry as well as the accommodation and food services industry.

Figure III-8.
Percent Change in Small Businesses Open by Industry in Nevada



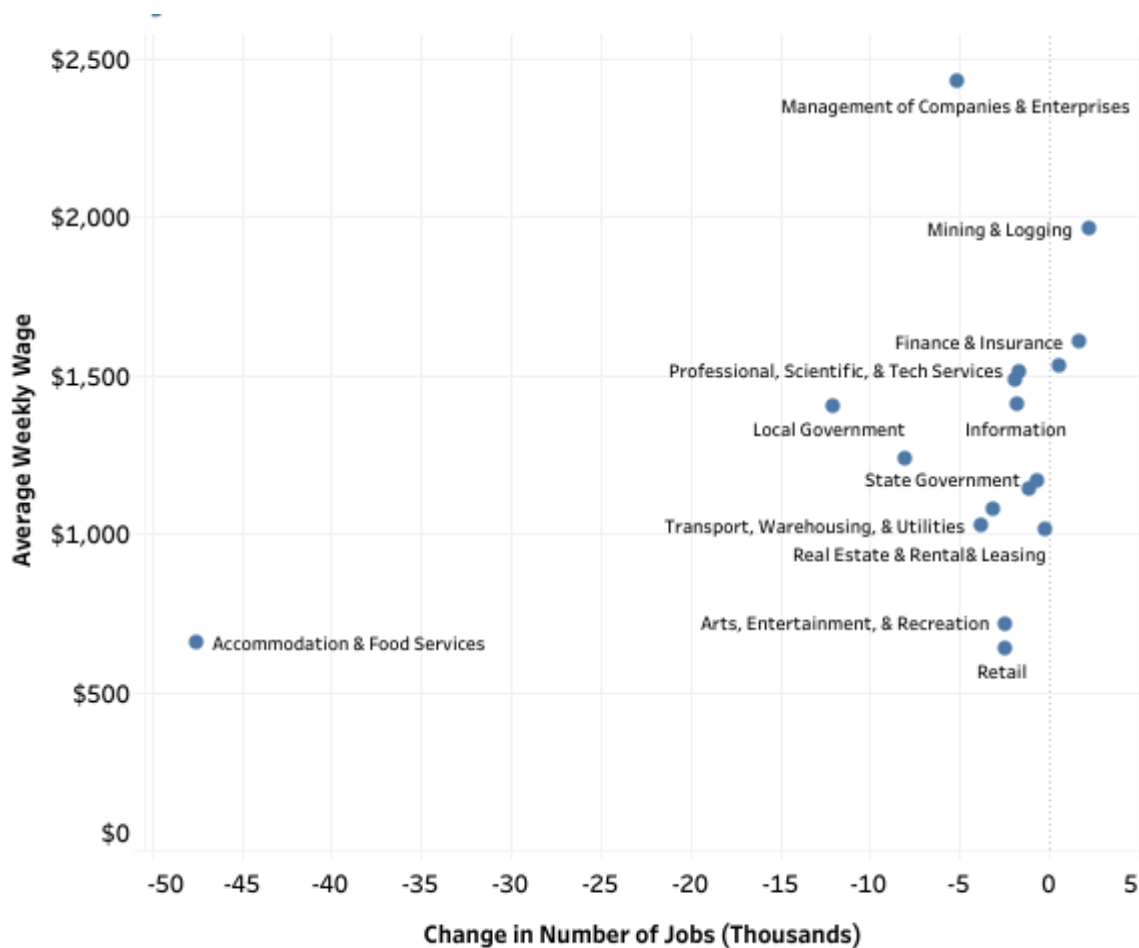
Note: *Change in small business open (defined as having financial transaction activity), indexed to January 4-31 2020 and seasonally adjusted. This series is based on data from Womply.

Source: Chetty, Freidman, Hendren, Stepner, and the OI Team (2020)

In total, there were 27 percent fewer small businesses operating in Nevada on December 30th, 2020 than there were at the start of the year. Small businesses in the retail and transportation sectors fared better than small businesses as a whole, with only about 7 percent fewer small businesses operating. However, the leisure and hospitality sector, which includes the arts, entertainment, and recreation industry as well as the accommodation and food services industry, has 41 percent fewer small businesses operating now than it did at the beginning of 2020.

Labor Income. The loss of a job is a difficult experience for anyone, but it can be particularly challenging for workers in low wage industries. These workers often lack access to financial resources and savings, which means a job loss can quickly put workers in vulnerable conditions. Figure III-9 shows a plot of job losses for the top five largest industries in the outdoor recreation economy and the corresponding weekly wages of the average worker.

Figure III-9.
Average Weekly Wages and Change in Employment by Industry in Nevada (2020)



Note: Hourly pay levels are not available as comprehensively as weekly wages, so weekly wages are used instead.

Source: Bureau of Labor Statistics, 2020

Figure III-9 shows that workers in the accommodation and food services sector have experienced the largest job losses of any industry in Nevada and that they also earn amongst the lowest average weekly wages. The average worker in the accommodation and food services industry earns about \$656 per week or about \$32,800 per year assuming 50 weeks of work per year. While workers in the arts, entertainment, and recreation and retail industries experienced fewer job losses, they also live on modest wages compared to workers in other industries. Local government workers earn the most per week of the top five industries in the outdoor recreation economy, average about \$1,404 or about \$70,200 per year assuming 50 weeks of work per year.

It is important to note these differences because job and income losses are particularly impactful for low-wage workers because they are among the least likely to have financial reserves to weather unexpected hardships. A survey of low wage adults found that only about one in four have any form of financial savings compared to 48 percent of middle-income and 75

percent of high-income adults (Pew, 2020). Job and income losses can make paying for housing, food, and healthcare sources of ongoing stress or put them out of reach entirely. The same survey, conducted in the Spring of 2020, found that about 53 percent of lower-income adults said they would have trouble paying some of their bills in the current month.

Cumulative Impacts on Outdoor Recreation Economy

Figure III-10 shows an estimate of the cumulative economic impacts of the COVID-19 pandemic on the outdoor recreation economy in Nevada in terms of lost jobs, income, and value added. The estimates assume that businesses in the outdoor recreation industry will experience job loss at the same rate as businesses in their broader industries. Employment figures for each industry in the outdoor recreation economy were taken from the Bureau of Economic Analysis' Outdoor Recreation Satellite Account. Job loss data was collected for each industry from the Bureau of Labor Statistics. Estimates of lost income and lost value added were calculated by multiplying income per worker and value added per worker by the number of jobs lost in each industry.

Figure III-10.
Economic Impacts of COVID-19 Pandemic on Outdoor Recreation Economy (ORE) of Nevada

| Industry | ORE Jobs | % Job loss since COVID | COVID Impacts | | |
|---|---------------|------------------------|----------------|---------------------------|--------------------------------|
| | | | ORE Jobs | ORE Income (\$, Millions) | ORE Value added (\$, Millions) |
| Retail trade | 17,888 | 1.4% | (247) | \$ (8.3) | \$ (15.8) |
| Accommodation and food services | 14,406 | 14.0% | (2,017) | \$ (67.5) | \$ (129.9) |
| Arts, entertainment, and recreation | 11,311 | 4.1% | (460) | \$ (25.6) | \$ (25.6) |
| All other private industry and government | 7,250 | 3.6% | (261) | \$ (12.9) | \$ (24.2) |
| Transportation and warehousing | 4,988 | 3.2% | (162) | \$ (17.8) | \$ (42.3) |
| Local government | 3,656 | 11.5% | (419) | \$ (29.4) | \$ (45.2) |
| Total | 59,499 | 6.0% | (3,566) | \$ (161.5) | \$ (282.9) |

Source: BBC Research & Consulting; BEA, 2020; BLS, 2020;

In total, the estimates suggest the outdoor recreation economy lost about 6.0 percent of its total jobs between the start of the pandemic in March and the end of December 2020. This represents about 3,566 lost jobs. Most job losses are concentrated in the accommodation and food service sector, which lost an estimated 2,017 jobs. This is consistent with broader national trends which show job losses have been concentrated in accommodation and food services (BLS, 2021). Arts, entertainment, and recreation and local government both lost more than 400 jobs since the start of the pandemic. As a percentage of total, accommodation and food service and local government saw the largest loss of jobs, at 14.0 percent and 11.5 percent, respectively.

These job losses reduced labor income by approximately \$161.5 million on an annualized basis. The largest income losses are in the accommodation and food services industry, where lost income totaled more than \$67.5 million. Local government lost approximately \$29.4 million of

income, followed by the arts, entertainment, and recreation industry, which lost \$25.6 million of income. Transportation and retail trade saw incomes decline by a total of \$17.8 million and \$8.3 million, respectively.

The outdoor recreation economy's output has also declined as a result of the pandemic. On an annualized basis, the economy's output declined by \$282.9 million since the pandemic began. Most output was lost from the accommodations and food service industry. Local government and the transportation industry both saw declines in output of more than \$40 million.

SECTION IV.

Case Studies

Section IV.

Case Studies

It can be hard to convey the impact of a disruptive event through statistics alone because there is a personal story behind every number, comma, and decimal. Economic statistics are useful because they reduce a complicated business or a person's livelihood into a few rows of numbers that can be quickly understood. And while information can be gleaned from these types of numbers, personal stories can reveal broader trends and dynamics that may not be apparent in tabular form.

As the analysis above showed, businesses in Nevada's outdoor recreation economy are being impacted in numerous ways by the pandemic. In December 2020 and January 2021, BBC Research & Consulting conducted a series of case studies with businesses representing a broad cross section of Nevada's outdoor recreation economy to better understand how they have been impacted by the pandemic, what they are doing in response, and what they are expecting for the future (Figure IV-1).

Figure IV-1.
Businesses Interviewed for Case Studies

| Business Name | Location | Description |
|--|--------------------|---|
| Best Western | Boulder City, NV | Best Western Boulder City is a hotel accommodation provider in Boulder City |
| National Park Express | Las Vegas, NV | National Park Express is based in Las Vegas and is an inbound tour operator |
| Gear Hut | Reno, NV | Gear Hut is a Reno-based used gear store primarily based on consignment |
| Bindlestiff Tours | Las Vegas, NV | Bindlestiff Tours is a small group outdoor tour operator servicing the National Parks |
| Rail Explorers | Boulder City, NV | Rail Explorers is a unique rail cart experience business operating with divisions in Nevada |
| Desert Adventures | Boulder City, NV | Desert Adventures is a small company offering one-, two-, three-, and four-day camping trips, as well as hikes and bike tours in the Lake Mead National Recreation Area |
| Lake Mead Mohave Adventures/Guest Services | Boulder City, NV | Lake Mead Mohave Adventures/Guest Services, manages multiple marinas and RV campgrounds across the Lake Mead Recreation Area in both Nevada and Arizona |
| Patagonia | Reno, NV | Patagonia is a major retailer of outdoor clothing and gear |
| Silver Tree Films | Multiple locations | Silver Tree Films is a one-man film production company operating for the past 4 years |
| LV Cyclery & Escape Adventures | Las Vegas, NV | LV Cyclery/Escape Adventures is a small business with three revenue streams – a bike retail/repair shop, day tours for large groups, and multi-day tours for smaller groups and families. |
| Laughing Planet Café | Reno, NV | Laughing Planet is a 15-store chain of fast casual restaurants, with two locations in Reno |
| Eclipse Pizza | Reno, NV | Eclipse Pizza is a small, independent, gourmet pizza restaurant in Reno |
| Sportsworld | Ely, NV | Sportsworld is an independently-owned sporting goods store in Ely, Nevada |
| Tonopah Main Street | Tonopah, NV | Tonopah Main Street is a 501c3 affiliate of the nationwide Main Street America organization focused on economic revitalization |

Source: BBC Research & Consulting

Each business case study in Figure IV-1 is presented below.

Rob Lored, Best Western, Boulder City, NV

Best Western Boulder City is a hotel accommodation provider in Boulder City, with 21 employees. During a typical year, the summer months are very busy with tourists visiting three public parks. Business usually slows down in the fall as the weather turns, and then the business relies on visitors from Las Vegas that come for events like the rodeo, New Year's Eve, and other events. These events typically bring so many visitors to Las Vegas that hotels like Best Western can absorb the overflow capacity. In total, about 60 percent of their business comes from tourism in the summer months while events in the fall and winter account for the remaining 40 percent. Since it started, the business has been very successful.



The pandemic has brought the Best Western staff closer together and they look out for each other's safety. By focusing on providing top service to guests, Best Western is making sure they will come out on top when things return to normal.

How has COVID affected business. In March 2020, when public health and safety measures were at their highest levels, there was a large drop in occupancy throughout Boulder City. The business accessed funds from the federal government's Payroll Protection Program (PPP), but before those funds were available, they had to lay off about 5 employees. Some of those employees have been brought back, but the business only has enough work for about half its staff at the present time. Revenues for the year will be down about 40 percent compared to 2019, but visitations are up from their lows in March and April.

During the summer the economy opened up and occupancy improved. The volume of visitors surprised the business even with the midst of the pandemic because the summer pickup was bigger than in 2018. Many visitors were from neighboring California. The construction industry also kept the hotel alive in the summer, because construction work in the state did not stop. Business volume remained high until Thanksgiving when another peak in COVID cases caused a wave of event cancellations. Many restaurants in Boulder City also shut down around this time. Notably, the business had no international travelers as they have in previous years. Usually, the hotel receives a lot of international visitors from Europe and elsewhere who come during the summer to visit the Strip, and to see Hoover Dam and the Grand Canyon.

Currently, about half of the hotel's staff are furloughed and waiting to return when business improves.

How did the business adapt? Best Western made a lot of changes to prioritize the safety of their staff and guests. They put staff on different shifts at the front desk to make sure they are not physically interacting with visitors. Once the new protocols were in place, Best Western shared information to reward members about new cleaning, safety, and signage regarding pandemic protocols. At the beginning of the pandemic, they would quarantine a room for 48 to 72 hours before cleaning. Now, they are just cleaning more frequently and using a greater volume of cleaning products. All of these changes have made it harder to manage a hotel than ever before, according to the respondent, but it is important that guests have a lot of visual cues of cleanliness during their stay.

The hotel has also pivoted from attracting guests from Las Vegas to targeting guests from California, Utah, Arizona that can drive to the hotel in under 400 miles. The hotel is also prioritizing streamlining payroll since the first quarter of 2021 could be difficult. In the meantime, it is important to keep morale and positivity high, because it can be hard on staff when you are unable to bring them all back to work. The respondent did note that being a limited-service hotel has been an advantage during the pandemic because no one wants to pay for amenities at a full service resort when many of the amenities are closed.

What are your future expectations? The respondent stated that the most important thing is for the state to open back up. Stay at home orders have hurt their small businesses so badly. For example, when restaurants close, it also hurts hotels. When guests call to make a booking, they want to know what's open and what activities and experiences are available for them to have. When they hear that not many businesses are open, they change their minds about making a reservation. The respondent thinks Lake Mead activity will be up in the summer. He hopes that tournaments and conventions and concerts resume as soon as they can.

One silver lining is that the pandemic has brought the staff team at the Best Western Boulder City closer together and made them look out for each other's safety.

David Lusvardi, National Park Express, Las Vegas, NV

National Park Express is based in Las Vegas and is an inbound tour operator, receiving guests and travelers from all markets, mostly international and some domestic. The company offers day trips to national parks and tribal lands like Grand Canyon, Zion, Bryce, Hoover Dam, Antelope Canyon, and others. They also offer shuttle services, so a visitor could use their shuttle for transportation from Las Vegas to one of the parks, stay at the park for a few days and then return. A large portion of the business is booking hotel rooms and partner attractions, such as hotels and shows in Las Vegas. Day tours are half of the full business, and the other half is shows, helicopter tours, hotel rooms, and other attractions. They additionally have a charter fleet of vehicles, which are used for running their tours as well as renting vehicles to conventions, groups, and so forth.

They have been in business approximately 20 years. Prior to this year, their domestic customers were fly-in customers from the east coast, west coast (not driving distance), Texas, Canada, and so forth. However, domestic tourism was historically not a large part of business when compared with their international customer base. Prior to this year, the company had 35 full-time employees, and now they are down to approximately 10 (this includes some employees who were only recently brought back after being furloughed).

The company's busiest season is June through August. Business volume is also strong in January and February. Spring and fall are less busy, but November and December are generally the slowest months of the year. Domestic visitors and visitors from Europe are common throughout the summer, and the Asian and Australian markets are stronger in January.



The positive for National Park Express is that 2020 provided a year to reevaluate its business, re-strategize, and learn so the management and staff can take the company into the future.

How did COVID affect business? January and February of 2020 were great months for the company, but otherwise 2020 saw a 90 percent reduction in visitor volume and revenue. National Park Express closed in March and reopened in July. The company is currently open and operating, but there are almost no international visitors to Las Vegas now, and the few domestic visitors

have primarily driven in from adjacent cities and states and are not looking to book bus trips or shuttle transportation.

The company is currently losing money every day that they are operating but are hopeful and planning for a big improvement in the next year or two. The company has been running tours with only 10 people, for example, but it generally takes 20-30 people on a bus for a tour to break even.

The company started to see improvement in visitors in September and October, but it went down again in November. The company is heavily dependent on visitors from Southern California right now, so California's increase in public health and safety measures and travel restrictions are a direct impact to its Las Vegas businesses.

Consumers have still expressed some interest in the company's services, but limitations on travel have still created problems. For example, Grand Canyon National Park is only allowing operators to bring 9 people on a tour at a time, so even if the company had more customers interested, it would be unable to fulfill their interest.

National Park Express did access the PPP loans, which helped a bit. The company does not have very many seasonal employees as most staff are permanent full-time and part-time. At the beginning of the pandemic the company furloughed the majority of its employees, but then it had to lay most of them off anyway. Since then, the company has brought back 3 employees in the reservations department to help handle the virtual concierge booking platform partnerships.

Every month that has gone by has become more difficult for the company due to finances, with more and more money being spent and still no customers. However, the forward-looking potential looks better every month, particularly with the digital booking platform.

How did the business adapt? During this year, the company has taken two directions to prepare for the future. Firstly, the company is working with some major hotel partners in Las Vegas to develop a virtual concierge booking platform that hotel guests can use to book all kinds of attractions. They have fast-tracked that development and are launching that platform in a few weeks and already have some contracts signed with hotel partners.

The company Instituted safety protocols and has also spent thousands of dollars to create a video showing the changes they made to hygiene and cleaning protocols as well as the UV equipment being installed in their bus fleet, and they issued a press release to accompany the video and sent that to their partners as well as posting it on social media. The company believes the video has helped them immensely, and not just from the consumer side but in terms of making a positive and lasting impression on their business partners. The company secured some contracts and new business partners simply because they were willing to take those steps in hygiene and safety.

What are your future expectations? Looking forward, the company believes it will take a while to recover to baseline rates of revenue and visitation. Most everyone in the industry would

welcome a return to even 50 or 75 percent of what it used to be. The company is ready to return to good revenue levels given their business diversification that they have worked on over the past several months with the booking platform. The company believes that there is a pent-up demand for travel when it can safely resume.

One silver lining is that National Park Express was able to use 2020 to reevaluate, strategize, and learn about its business. The company has been thinking about how to go in a good direction for the future. The pandemic has been an abrupt shock, but the company has been thinking about how they can be better off in the future with the reengineering of the business and improving their product and efficiency.

Rusty Donlon, Gear Hut, Reno, NV

Gear Hut is a Reno-based used gear store primarily based on consignment. The company sells gear related to camping, hiking, climbing, skiing, paddling, and mountain biking and describes itself as the place where “REI meets Goodwill, but consignment.” The company has been in business for two and a half years, and business has been better than originally thought. The company currently has three employees.

The winter season between November to mid-February is typically very busy for the company. During winter months tourists make up a significant share of business volume due to the popularity of skiing in the Lake Tahoe area. Skiing gear is the company’s largest single source of revenue. The summer season from May through July can also be very busy, but there are certainly seasonal ebbs and flows in their business volume. If an item does not sell, the company has a network of non-profits they can donate items to. The company currently donates to Friends of Nevada Wilderness, Great Basin Outdoor School, First Descent, Snow Lands Network, and many other non-profits locally.



The company’s top priority is using its resources efficiently, maintaining a diversified customer base, and adapting to changing circumstances without missing a beat.

How has COVID affected business? The company shut down in March when public health and safety measures were at their highest levels. The company tried to stay open and do curbside pickup only, but it ended up being too costly because customers want to look at used items in person and try them on before making a purchase. The company tried to use Instagram stories and social media photo albums to showcase gear, but it was a lot of effort and did not lead to an increase in sales. The company reopened in May 2020 by appointment only, with one person in the store at a time and masks required. The company also made sure to sanitize often. Today there are no longer rules limiting customers to one person in the store at a time. Customers have also spread out their visits. In terms of business impacts, for this year and the winter season, the company said they are seeing fewer beginner skiers because fewer people are buying season passes and most of the ski destinations in the area are not selling day passes. Still,

2020 was a better year for the company than 2019, but the company was unsure how much better they could have been doing if the pandemic were not happening.

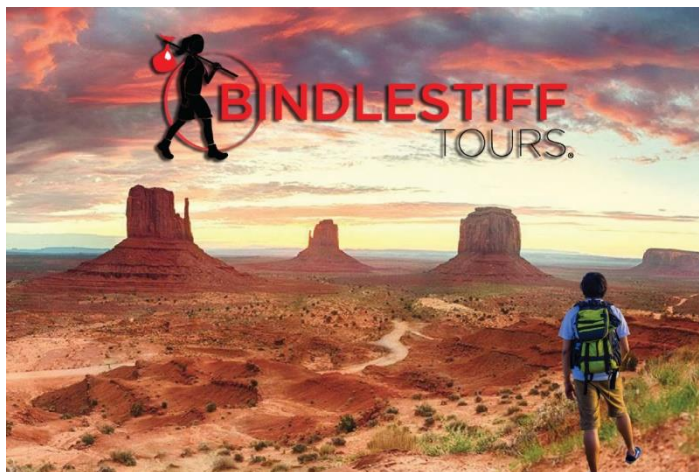
How did the business adapt? The company's owner tried to access Pandemic Unemployment Assistance for the two months of shutdown but was unable to do so. The company did access a PPP loan, which it used to pay its employees. The company's top priority is to use their space efficiently and take in as much consignment as possible. The pandemic is not impeding Gear Hut's business or success. The business has also diversified its customer base. The company has made an effort not to be overly reliant on only one portion of the population and being based in the large urban area of Reno offers exposure to many potential customers.

What are your future expectations? Looking forward, the company is not sure what to expect, but did say that it would like more support or at least an explanation from the state regarding denials or lack of information with the PUA system.

One silver lining is that the company was able to operate through December 2020, which is historically one of its busiest times.

Robert Graff, Bindlestiff Tours, Las Vegas, NV

Bindlestiff Tours is a small group outdoor tour operator (9-14 people max) servicing the National Parks. They specialize in multi-day tours, providing the camping sites, lodging accommodation, or glamping - traveling with experiential guides visiting multiple parks. They also do some day tours from Las Vegas. The guides provide all the tents, equipment, arrange food services, take guests on hiking trips, and are licensed to drive and operate in all the parks. In a normal year, about 70 percent of business volume was from international visitors. Now 90 percent of business is from regional visitors – California, Nevada, Arizona. In a normal year, each day they would normally have 28 vehicles out on the road with a core staff of approximately 45 guides and staff working both on a contract basis and a more permanent basis.



Bindlestiff Tours says the current moment presents an opportunity for outdoor recreation economy and small businesses, including strengthening their existing partnerships and appealing to new customers, especially local customers.

How has COVID affected business? The business is now operating with only five vans and 80 percent fewer staff. On a normal day the company might have 25 vans on the road. In March, they started seeing cancellations almost immediately and then the company partially shut down. Once they reopened it took a month for bookings to come in again. The company's customer base was entirely different after reopening. Unlike international travelers, regional travelers tend to plan last minute. This has created a lot more challenges when operating in national parks that need permits and campsite bookings, and it is also more difficult to predict how many visitors you have to accommodate. Profitability is severely impacted because there were a lot of costs to invest in new hygiene procedures and equipment, while revenue dropped because of the large reduction in visitors.

How did the business adapt? Early on, the company accessed PPP loans which it said helped, but what really helped was rethinking their operations and retooling their business before they reopened. Bindlestiff placed a lot of emphasis on advertising all of the safe options for travel and the ways that trips and tours could be tailored for every guest or guest group so that they could take part and feel safe about the experience. Additionally, the fact that they operate smaller

capacity vehicles helps. Larger bus tourism has been hard-hit, whereas Bindlestiff markets to a more tailored and upscale experience with smaller group sizes.

In response, they launched private vehicle tours, where a guest is following a guide in the park in their own vehicle. This was a tool that was already in development but had been planned for a 2021 release, so they brought the release date forward to try and retool for the pandemic. They also have their own app and when you arrive at a certain spot in the park you can access some of the information that a guide would have given you in person.

The company also dropped its minimum requirements for how many visitors are required for a trip to give confidence to the consumer. They have also been more flexible with cancellation and rebooking policies for the same reason. In addition, the company worked hard to reassure their travel company partners that they were operational and here to stay in the long run. They posted on social media and relied on posts from previous guests to get the word out that they were still around. Timely updates to information on the website were important.

What are your future expectations? The company said they are confident they are retooled to accommodate the last-minute American visitor while anticipating the international visitation will come back once the virus is under control. He also thinks more people will use the outdoors and visit the parks. In terms of revenue, the company said they expect a slow first two quarters of 2021 and this will be especially challenging financially since finances need to last until business picks up in the summer.

One silver lining is that the company has found positives from the experience, including strength in their partnerships with other businesses in the outdoor recreation economy. The company also said the pandemic has leveled the playing field and presented a huge opportunity for the outdoor recreation economy and for small businesses.

Mary Joy, Rail Explorers, Boulder City, NV

Rail Explorers is a unique rail cart experience business operating with divisions in Nevada, New York, and Rhode Island. There are approximately 30 employees working in each division. The company considers itself to be an eco-tourism adventure company providing tours on railroad tracks, using pedal-powered rail bikes. Guests get on at a specific location and pedal the bike down the railroad track for (in the case of the Las Vegas outfit) four miles, all while being distanced by a few to several hundred feet away from other guests who are pedaling the track during the same group time slot. A train follows behind the rail bike guests to take them back up the track at the conclusion of the outing. At the end of the rail bike ride, passengers disembark at a picnic area and then take the train back to the station.

The experience is for people of all ages and abilities. The Nevada division opened 3 years ago and was only seasonal, operating from December through April while the east coast locations were shut down. The company envisioned attracting customers from the Las Vegas Strip but found a niche with local residents. Close to 80 percent of their guests are Nevada residents, and that has been the case since they first opened, prior to the pandemic.



One of the most important lessons is the importance of planning for the unexpected, making changes to make guests and staff feel safe and cared for, and the benefit of community support and partnership with small businesses.

How did COVID affect business? Starting in October 2019, the Nevada location opened year-round and had great expectations for the 2020 season which got off to a good start, but then the company had to close for three months when public health and safety measures were at their highest levels. The company suffered a bit from their non-local guests cancelling trips. In Nevada, they partner with the state, who owns the railroad and the Southern Nevada Railroad Museum where they run their tours. For a long time in Nevada, while businesses were starting to reopen, government offices were not reopening, which trapped their Nevada operation in an additional layer of complexity. The company did not open until mid-August in Nevada. Additionally, while their east coast operations run April-November, the Nevada business operates year-round and relies on a certain amount of winter income, particularly around the holidays. However, rising COVID cases meant business was very slow during the winter, with

few of the expected Christmas bookings. The company is hoping to just break even in Nevada for 2020.

With COVID on the rise, some of the company's staff have symptoms and cannot work. A few staff were not comfortable coming back to work when the Nevada division reopened, and in some cases, staff could not return because they had to protect a vulnerable family member or were experiencing mental health problems heightened by COVID concerns. In some cases, the company helped field staff transition to answering phones remotely.

How did business adapt? The company's Nevada division manager has a background in emergency services and security and used to work for the casino industry. She immediately started preparing a COVID mitigation plan and business recovery plan. The company researched a lot about crew and operational safety. Once the shock of the pandemic subsided, they moved very quickly into a mode of reopening. They got an online platform for hosting and writing their COVID mitigation and reopening plan. That benefited teams across all divisions. For crew preparing to come back to work, the company required an online COVID safety course and test.

The company did not want to lose sight of their customer service priorities, so they did not cut costs because they wanted to deliver the same quality of experience. They doubled up on staff for tours, wiping each of the bikes down between tours. They spent a lot of money to transition to a digital waiver system, which eliminated the guests congregating at the start of the tour. The business looked at their operations to improve and invest in important changes that were not going to be redundant even in a post-COVID environment (e.g., their transition to electronic waivers was a permanent change that has improved their overall operational processes).

Rail Explorers was able to access a PPP loan and kept all their senior staff on throughout those first months of the pandemic. The company applied for the PPP loan within an hour of the application's opening and received it during the first wave. They were able to do this as they had all of the necessary financial information in order. As they continued to monitor the three states in which they operate, they adapted their scenario planning for reopening various locations, planning at what capacity they could reopen and still survive financially. Overall, the company had a huge percentage of refunds this year because of changing state restrictions throughout the spring and summer and fall (e.g., Californians not coming to Nevada).

When the company started to reopen, its popularity was largely due to the natural social distancing in place during tours. Guests are already in their own pods with friends or family while pedaling their rail bikes, and the experience is outdoors and guests could remove their masks for most of the ride, except for when boarding or disembarking, and when riding on the train. Staff marked out every second seat on the train to maintain social distancing and only used the outdoor open-air cars (three of them) and did not use any of the indoor rail cars.

Regarding the guest experience, the company updated their website with complete information on what they were doing in terms of their COVID mitigation operational plan, including changing their cancellation and refund policy to allow customers to cancel at any time. They moved their

waivers to an electronic program, so that people could sign theirs without having to congregate or stand in line. They had to really look at the traffic flow of their guests to increase safety.

When the tour started, it commenced with a safety talk conducted via microphone so that people did not need to congregate to hear. They also ran tours with only 35-40 people instead of the standard 60-person capacity. Instead of allowing guests to get on their rail bikes and then have a guide come check them over before departing, they asked guests to stay in their taped area until the guide could come over and assist them in getting safely onto the bike (while the guide maintained distance from the guest group). Guides wore masks all the time and pointed to things instead of touching anything on the bike. The bikes were all washed down and disinfected between tours. Once the tour started, for 45 minutes guests were able to take off masks and just enjoy the outdoor experience.

What are your future expectations? Looking forward, the company is looking to increase relationships within the Boulder City business community with an experiential passport marketing idea, promoting activities like Rail Explorers as well as local hikes, coffee shops, tours, and other activities. The company believes if one business is attracting guests it makes sense to share those guests with other members of the business community. The company hopes that beginning in March of 2021, they can see pickup in reservations. They continue to prioritize staff wellbeing, both physical and mental.

One of the most important lessons and teaching moments is the importance of emergency planning and making changes that allow staff and guests to feel safe and cared for (while not sacrificing a top-tier customer experience), as well as the benefit of community support and partnership with local businesses and entities, such as the mutually beneficial partnership they have with the railway.

One silver lining is that the communities that have banded together have done well. The company says you have to be responsible and safe but give guests a story and an experience that they want to have.

Joyce Kehoe, Desert Adventures, Boulder City, NV

Desert Adventures is a small company offering one-, two-, three-, and four-day camping trips, as well as hikes and bike tours in the Lake Mead National Recreation Area. The company also offers overnight camping and hiking trips into southern Utah. Tourists are the company's primary customers and most visitors are from out of state, including international visitors.

Busy season for the company usually runs from mid-February through the end of November. They normally have 45 employees during that time. When the weather starts to warm in February, the company starts to get busier, and as they move into spring, they are very busy with spring break visitors in March and April. The company also serves a lot of scouting groups doing kayak rentals and overnight camping trips. Moving into summer, the company remains busy serving families and corporate events. Business can slow down a little in July and August as the temperature climbs. September and October are extremely busy again – the busiest months of the whole year. Then business tapers off in November until it picks up again the following February. Prior to the pandemic the business had grown every year since 2004.



Desert Adventures has many customers sharing posts on social media giving the company positive feedback for how it has handled the situation. This sort of support has given staff optimism and hope for the future.

How has COVID affected business? The company started to be impacted at the beginning of March. People started canceling their planned trips in large numbers. With National Parks and public lands closed, the company could not operate. Once the company got through their complete closure (2.5 months, starting in March), they reopened and made many phone calls to people to let them know they were open and operating. Business did pick up eventually, but the restrictions with distancing meant they were only able to operate at 50 percent capacity, and only on weekends. Recently, business has taken a sharp dive again, even sharper than normal for winter.

The company said there had been a tremendous increase in overhead in response to the pandemic because of the cleaning protocol it instituted for vehicles, kayaks, life vests, paddles and any other equipment. Revenues have all suffered because the company limits the number of

customers in the retail shop to promote social distancing. In order to keep costs down, they have had to ration hours and put off equipment purchases, and they still have overhead costs such as rent. In part, that is because cleaning and safety protocols require a lot of labor. The company was helped by a PPP loan it received at a time everything felt very uncertain. This was the only loan the company secured.

After reopening, the company said it has seen more local visitors than at any time in its existence because the company believes locals are looking for something new, outdoors, and safe for them to do. Still, there are no international guests and very few domestic travelers. The public health and safety measures limiting travel in California have also hurt business. A lot of scouting groups and outdoor schools have also canceled trips.

Customer desires have also changed. The company has seen many more guests that want to drive their own vehicles for the guided tours and meet the tour guide on site. The company has also had numerous people interested only in renting gear, bringing their own vehicles, and taking a kayak or canoe down to Lake Mead or to the Colorado River using a contactless pickup and drop-off experience.

How did the business adapt? In March, when public health and safety measures were at their highest levels, the company examined the efficiency of its operations. They looked at expanding different areas and consolidating other areas going into the future. They explored modifying their trip menu and making changes to use existing resources wisely. The company also built a new website and instituted a digital waiver system.

The company has also been trying to keep their presence up on social media so that people know they are still around and to let customers know they are very strict with safety and hygiene precautions to keep staff and guests safe. The company plans to keep up their social media presence because people are spending so much time online. Another thing that helped was asking customers if they were willing to keep a credit on file instead of asking for a refund.

What are your future expectations? Once the vaccine is available to the general public and the nation starts seeing COVID numbers decrease, the company thinks business will improve and people will get back to traveling. The company said a 'new normal' might look like something like offering more self-guided tours, hosting more local visitors and people who can get to the area by car. While the company does expect business to recover, it thinks it will be a slow gradual climb over a couple of years to get back to where the business was before the pandemic.

One silver lining is that the company has had a lot of people sharing posts on social media giving the company praise and positive feedback. This was received very positively and gave staff hope and optimism because their customers were saying they trusted Desert Adventures to hold on to their money and they want to take that trip with them when they can in the future.

Rod Taylor, Lake Mead Mohave Adventures/Guest Services, Boulder City, NV

Lake Mead Mohave Adventures/Guest Services, manages multiple marinas and RV campgrounds across the Lake Mead Recreation Area in both Nevada and Arizona. A large portion of their business comes from houseboat rentals and small boat day rentals. Historically, the company has had a staff of about 150 people across their Nevada and Arizona locations.



Lake Mead Mohave Adventures is grateful for its talented and committed staff. Their team is resilient and have put their heads down to make sure they continue to deliver an exceptional experience to their customers.

How has COVID affected business? The company said it has experienced ebbs and flows throughout the year, but overall, they are setting sales records as people flock to recreate outdoors in ways where social distance is naturally maintained. In March and April 2020, when public health and safety measures were at their highest levels, the company accessed the PPP loan for payroll, but later in the year the company was struggling to hire people during their summer season when they could have used an additional 50 employees. Revenues are up over 2019 by about 40 percent but could be as high as 50 or 70 percent. The company did experience some supply chain disruptions until Labor Day with everything from food wholesalers to retail goods and gifts and souvenirs.

The challenge for the company was having locations in Nevada and Arizona, when the shutdowns were different in both states. The day the park closed in Nevada created the biggest impact on the company because Arizona sites were then overwhelmed. There was a lot of uncertainty about when sites would be able to reopen because the company could not anticipate what the Governor would do. The company was uncertain about whether to hire or furlough people for the Memorial Day weekend, for example, because they did not know what the rules would be regarding business opening at the time.

Once Nevada reopened, the company had one the best years in their history led by an increase in houseboat and small boat rentals. This year, the company has seen a 50 percent increase in houseboat rentals compared to previous years, and a 25 percent increase in moorage, meaning that people are buying boats and mooring them with the company. Small boat rentals increased by about 40 percent and the company could have done more business if they had more small boats, but they could not find any more boats to buy to add to their fleet.

Normally, the company's business peaks from Memorial to Labor Day, but they described all of 2020 as one big peak that lasted until the end of October. Many of the company's clientele this year were from Southern California, Southern Utah, Las Vegas, and other areas of Nevada and Arizona. The only challenge was the company's raft tours, which suffered substantially because there were far fewer guests coming from Las Vegas.

How did the business adapt? The company adapted by investing in fog sanitizers for its buses and reducing capacity on buses and rafts. The company also enhanced its cleaning protocol for returned houseboats and rooms. The extra cleaning and occupancy monitoring has placed extra demands on the staff. The company has been planning for a crises the past few years due to the plummeting lake levels at Lake Mead. While they did not plan for a pandemic crisis they did have plans in place to deal with a slowdown in business. The company was able to reverse a recent 3% increase that has initiated on mobile home rents, and they forgave late fees for customers. The company also allowed people to shelter in place and did not evict anyone from their properties.

What are your future expectations? The company's top priority is preparing for a large influx of customers coming next year. The company wants to have plenty of product for their guests to use. The company is currently talking to suppliers for small boats trying to get more product.

One silver lining is that the company is grateful for its talented and committed staff. The company's team is resilient, and they have put their heads down to make sure they deliver an exceptional experience to their customers. Staff worked harder and longer than normal but remained dedicated to getting everything done.

Meghan Wolf, Patagonia, Reno, NV

Patagonia is a major retailer of outdoor clothing and gear, and 1% of their sales goes to grassroots and environmental organizations. The company has a staff of 1,000 people in Reno, NV and an additional staff of 1,000 in Ventura, CA. The company has approximately 500 retail staff and 40 stores in North America in addition to employees in Europe, Japan, and South America. Up through 2019, every year for the past 15 years was a record year for the company's sales.



The respondent is the Activism Manager, previously overseeing two grants programs and now working on outward facing campaigns, such as protecting Bears Ears and other examples. These campaigns revolve around protecting public lands as well as protecting the environment and the people and communities that live there. They encourage employees to be involved at the local level.

Patagonia has responded to the moment by changing some of its future priorities, including focusing more on environmental justice and engaging with democracy through local, state, and national government.

How did COVID affect business? All of the company's stores were closed for the first four weeks of the pandemic and there were basically no sales during this time. The company's environmental work was not affected because to a certain extent it is separate from the business side of the company. Even when sales dropped for the business, the company was still able to operate and pay employees' benefits. The company did furlough some staff on the business side for three months, though the business did continue to pay health insurance benefits for employees and employees' dependents.

During the summer, stores were open at 50 percent capacity and they were able to leverage the available hours of store staff to have employees track what was going on in the community. Still, the company said reopening was erratic. Over the course of the pandemic, the company operated on a "red light, yellow light, green light" categorization based on infection rates within that store's county. Currently, all stores are shop by appointment only, although this has

changed throughout the past several months of the pandemic. Overall, a lot of the company's business moved to the digital realm, which has grown by 90 percent, while in-person retail has dried up. While the company suffered financial losses during the initial phase of the pandemic, it has recouped a lot of sales during the summer and fall. While they are behind on revenue for the year, it is not as bad as predicted. They have stabilized, even though it was very concerning for the first two months.

How did the business adapt? Following the start of the pandemic, the company created their own safety and operations protocol tailored to the pandemic, in part because of the lack of leadership and guidelines at the national level. They have employees responsible for tracking the pandemic around the world in the company's various locations and responding to the infection rates appropriately as it concerns store openings and staff safety.

The company shifted most of its sales to the online market, and are operating most of their physical outlets as shop-by-appointment only. They expect to have approximately \$1 billion in sales this year compared to about \$1.5 billion last year. Their focus has been on retaining staff and benefits and maintaining their partnerships.

Patagonia partners with a lot of smaller organizations and local grassroots groups that are traditionally reliant on foundation and grant support as well as membership fees and individual donations for their revenue. The company continued to look after their grant groups to see how they were doing during the pandemic and shifted into donation mode, securing PPE and masks and other supplies to distribute to their partners as well as to other unaffiliated organizations and even some hospitals that reached out. This was a very new experience for them, but they just wanted to do something that could have the most impact and do the least harm. The company also supported more requests related to disaster relief, especially with the wildfire seasons in California, Colorado, and Oregon this year, so they focused more on responding to those needs rather than the dwindling pandemic related requests.

The company made a conscious decision to try and survive on their own terms during the pandemic, using funds and savings that the company already had to not take funds that other companies might need more desperately.

What are your future expectations? The company has had a difficult time planning for 2021. The company tries to plan conservatively, but they are planning for a little bit of growth given the bounce back they experienced after the first couple months of the pandemic, and given the potentially positive news regarding vaccines. The company is hoping that the worst impacts to the business have passed, but it is hard to predict.

One silver lining is that some of the company's priorities for the future changed more rapidly than they would have otherwise. The company has pushed their environmental justice focus forward more quickly, which was difficult, but they knew that is where they needed to go for the future. The company has also shifted more towards democracy work, how to change systems and policy in government.

Ben Robertson, Silver Tree Films, Multiple locations in NV

Silver Tree Films is a one-man film production company operating for the past 4 years. The company films and produces commercials, documentaries, and short films. The company has produced a variety of films for the outdoor recreation industry including environmental groups like Save Red Rock or Escape Adventures Cycling. Generally, business is fairly steady as the company did not see any seasonal variation in projects.



The outdoor recreation economy has been an important part of fostering Silver Tree Films growth and development. Local environmental groups have also been important customers for the company.

How did COVID affect business? The company has been drastically impacted by the pandemic and has gone from year-over-year growth to having almost no customers. The company has no project work in sight for the next six months. The company's business is primarily hurt because filming locations are closed and cannot operate because of government restrictions. The company does not have figures on how revenues have been impacted, but the company has experienced significant losses and has had to sell some equipment and some personal items to stay open.

How did business adapt? The company applied, but was denied, for a small business loan because the company was too small. Being a sole proprietor also meant the company could not take advantage of PPP because there are no employees. The company does not want to borrow money and has instead focused on keeping overhead low.

What are your future expectations? The company believes things will only improve if restrictions on movement and gathering are lifted and people/businesses are allowed to operate as they see fit. The company's priorities are to take time to redirect and focus on larger projects that could be sold to Netflix or other such outlets.

Jared Fisher, LV Cyclery/Escape Adventures, Las Vegas, NV

LV Cyclery/Escape Adventures is a small business with three revenue streams – a bike retail/repair shop, day tours for large groups, and multi-day tours for smaller groups and families. The company is based in Southern Nevada and operates tours year-round through the holiday season. In Nevada, the company primarily accesses BLM lands (e.g., Red Rock Canyon). Outside of Nevada, the company accesses several of the nearby National Parks like Grand Canyon, Zion, Bryce, Yellowstone, and Canyonlands.

The company's busiest times of year are when conventions and businesses come out in March, April, and May. During this time, the company may have 50 to 100 people on cycle tours or hiking tours on a given day. Day tours generally taper off near the end of May and into the summer, but then multi-day tours pick up.

In a normal year, the cycle shop was the least profitable of the company's three divisions, due to the higher overheads. Escape Adventures is the touring portion of the company, and the LV Cyclery serves the community and provides bicycle repairs. Historically, the lion's share of their group tours has been from the convention business from the Las Vegas areas.



The pandemic provided a learning moment for how to emergency plan, diversify business, and prepare on a personal level. Diversifying Nevada's economy by supporting public lands and outdoor recreation is important for becoming more resilient.

How did COVID affect business? The pandemic's effect on business has been mixed. This year the cycle shop is doing three times the amount of business that it previously had. It is also supporting the tour segments of the business until travel can resume safely. The company has focused on flexibility, diversifying, and promoting public health & safety guidelines.

Since bicycle repair shops are considered essential businesses, they were not closed during March and April 2020, when public health and safety measures were at their highest levels. However, the company did have to stop its tours because there were no tourists and no conventions or business meetings or annual retreats, which is where Escape Adventures gets so

many of their bookings. Luckily, the company benefited from revenue diversification, and for the most it has been able to keep on most of its employees. The cycle shop has been saving the company. They had 77 employees in 2019, and this year they have between 50 and 60 on the payroll. The company usually has contract employees come on at the end of March or early April to satisfy high demand in the spring and summer tour season, so the company just was not able to bring on those employees this year. However, the cyclery was looking for mechanics for the bicycle service and repair shop, but there just were not enough qualified candidates to go around because every bike shop in the nation was looking to hire.

As Nevada eased restrictions during the summer months, the company could run some multi-day tours, but uncertainty around park openings has made this difficult. Escape Adventures had already booked charter planes and paid for their tours in full and were then sidelined when National Parks closed and imposed different rules across each park. The company said the uncertainty around park closures and protocols was very difficult to manage.

The company believes they did not see more people traveling this summer because people are hesitant to get on a plane. Customers are comfortable with the company, but they are not comfortable with the travel required to get to southern Nevada unless they can drive. People come from all over the US, and in the case of the big group day tours there are a lot of international groups and companies in Canada and the UK – they see a lot of pharmaceutical companies as well as companies like BP and McDonalds. They really rely on the big group tours as the bread and butter for the Escape Adventures' income.

The recovery and stimulus packages were key in keeping afloat businesses. Escape Adventures did access PPP, but it did not come close to helping their bottom line in the long run. The only reason the company is still operating is because of the bike shop. The business was doing so well during the pandemic that it decided to go to the bike manufacturers and start buying bikes from their main supplier. The company sold a year's worth of inventory in 3 months.

How did the business adapt? Initially, the company survived by having good safety measures in place that made their customers feel safe. The company said adapting for COVID was not very hard because so many of their tour protocols are already appropriate for COVID mitigation with a couple of small changes.

The company also had a disaster plan in place to diversify business. To accomplish this, the company has diversified its tour destinations and branched out to include New Mexico, South Dakota, Wyoming, and other areas. The company also realized it could not focus exclusively on tours, so they branched into the cyclery retail store. The company also decided to work towards owning their own buildings as a form of financial security. The company said, "When you only do one thing, you're only going to survive for so long. Your disaster plan needs to be different revenue streams for your business."

What are your future expectations? One of the company's top priorities for the future is to ask government leaders to provide clear direction for the future so the company can make good

projections as a business. The company hopes that publicizing the vaccine rollout and increasing consumer confidence will help get people back to work and back to traveling. The company also plans on continuing to reduce debt and diversify its revenue streams, possibly by becoming a manufacturer of its own bikes.

One silver lining is that this experience has taught the company the importance of emergency planning, diversifying revenue streams, and preparing on a personal level.

Tim Healion, Laughing Planet Cafe, Reno, NV

Laughing Planet is a 15-store chain of fast casual restaurants, with two locations in Reno, and several locations in Oregon (Portland, Eugene, Corvallis, Bend). Laughing Planet offers healthy food at affordable prices and has been popular with the Reno community: families, young people, the outdoor community, and all kinds of customers. The two Reno locations (opened in 2014 and 2016) were growing prior to the pandemic, and in 2019 they had been considering expansion into other parts of the city.

Regarding seasonality, in general, from end of December through mid-February business is slow. With the location by the university, their peak times align with when school is in session. In a normal week they would see maybe 5 percent of their revenue come from tourism and visitors.



Laughing Planet is excited and hopeful about getting back to work and growing again when normal operations can resume, especially having guests inside the restaurants again.

How did COVID affect business? On March 16, 2020, they closed the university store for what turned out to be 5 months. The other location closed in April for a month, but then reopened again in early May. Due to the pandemic, they are currently not offering any inside dining and are down to about 60 percent of their normal workforce. Right now, they are operating with about 20 employees across the two Reno locations. One of the Portland locations is now permanently closed – a closure accelerated by the pandemic.

The locations in Reno are experiencing 2020 revenue reductions of about 26 percent and 50 percent (at the university store) compared to 2019. The wider network of stores in Oregon means that there is still cashflow to support some of the locations that are struggling more than others. Since reopening the university location in the fall (when the university tried to do hybrid in-person and remote learning, with maybe 30 percent of normal occupancy on campus), they have still been losing a lot of money at that location, but they are losing less money by staying open than by being closed, so they're keeping it open.

Laughing Planet hasn't been overly affected by the plummet in tourism in Nevada, as they are largely a local joint. However, the knock-on impacts of reduced tourism have decreased income for people in the community, decreasing their discretionary funds for things like takeout dining.

There had been a few supply chain issues with food deliveries, although getting food from local growers and suppliers has been steadier than from larger national suppliers. For the industry as a whole, the length of the pandemic has exacerbated the problem because there was no roadmap for how long this would last and a lot of restaurants held on for some time but then just couldn't survive any longer.

Right now, Nevada is operating at a 25 percent rule for indoor occupancy, but also there is no one policing that so many restaurants and bars are operating at full capacity without repercussions, while others are struggling.

How did the business adapt? They actively promoted online and phone sales as well as contactless transactions, and on their outdoor patio they marked out spaces for people to safely wait for their orders. Only employees have been allowed inside the building since the beginning of the pandemic. They also upped their sanitation protocols in almost every way imaginable.

They refined and streamlined their menu and have been helped by the fact that their food is well suited to takeout and often serves as a meal replacement for busy families. The interviewee knows of many restaurants in the Reno area that are now permanently closed – particularly standalone mom-and-pop restaurants with very tight margins, as well as in-person experiential fine dining. Those restaurants that are part of larger groups are better able to draw on stronger cash reserves and centralized management to survive.

Laughing Planet has accessed both rounds of PPP, which has been essential to keep operating. Getting any kind of financial assistance right now is helpful. They've had to reduce their staff and everyone is working less and making less than they were in 2019. They are looking into a support program run by the State of Nevada that they hope to apply for soon –the Governor's Office of Economic Development Small Business and Non-Profit Request for Covid-19 Assistance.

What are your future expectations? Interviewee is hoping, with vaccine rollout, that Laughing Planet can reopen its doors to inside dining customers by end of April 2021.

Laughing Planet is excited and hopeful about getting back to work and growing again when normal operations can resume, especially having guests inside the restaurants again. For example, they used to have a lot of community events at the university location – student groups, university department forums, visiting musicians, and so forth.

Interviewee says that any form of financial assistance or economic relief is helpful, from national or state level. Also, the coordination of the vaccine rollout at the state level is really important to get the Nevada communities back to normal as soon and as safely as possible. The Nevada Health Department has been really supportive to local businesses, taking an educational

approach to helping them operate safely. As much financial support as the state can offer is great, because the restaurant industry just isn't making any money right now. The interviewee is fairly impressed with the response so far from the state and from the governor.

Even before the pandemic, Laughing Planet had taken a proactive approach of continual improvement of its processes and operations. The pandemic really dialed that in, and they had some necessary conversations about how to save on labor and streamline ingredients and menu offerings to survive. The internal conversations they had as a business inspired a lot of creativity on how to do business, and the interviewee thinks that experience and learning will benefit them significantly in the future – especially in the event of another pandemic.

Dave Fish, Eclipse Pizza, Reno, NV

Eclipse Pizza is a small, independent, gourmet pizza restaurant in Reno. It was established 16 years ago and has close ties to the athletic and outdoor community in the area, hiring a lot of young people from that community as well as functioning as the meeting place for various community groups and meetups. The building has indoor seating for about 25 patrons and outdoor seating for approximately 50 people on their back patio., as well as a lot of business in takeout orders. Prior to 2020, the business was growing slightly but steadily, a few percent every year. The business employs 18 to 20 people.

Approximately 25 percent of the customer base is associated in some way with the local athletic and outdoor community, with the remainder of customers being anyone in the local community. Seasonally, in a normal year summer is quite busy, with revenue usually 30 to 40 percent higher than winter. This is in part due to their large outdoor seating area and their summer beer sales. January is always the slowest month. In a normal year, during the winter they do 90 to 95 percent takeout. In the summer, it's closer to 60/40 or 75/25 in favor of dining in.



Looking forward, Eclipse Pizza is hoping to get back to the customer and community engagement that is a core part of their business and is so much more than just handing someone a pizza. In terms of positive changes, Eclipse Pizza has streamlined its processes and menu items, but is looking forward to getting back to the weekly specialty pizza that's part of their brand and vibe.

How did COVID affect business? January and February of 2020 were normal, and even in mid-March things were fine. They were closed from April 1 to 15, but since reopening, they have been very busy, especially through the summer. In total, 2020 revenues are down by 5 to 6 percent compared to 2019. However, beer and wine sales are down 90 to 95 percent.

They do have staff working on slightly reduced hours, but only as a function of the business having a narrower window of opening hours now. For example, they may still have 10 employees working on a Friday night as usual, but those employees will go home at 8pm instead of 10pm. They are also still operating with the same number of employees as in a normal year –

approximately 18 to 20 employees depending on how many want part-time versus full-time work.

How did the business adapt? The restaurant has made a few operational changes in response to the pandemic. They have reduced their opening hours each day to narrow in on their peak times and make labor more efficient. Since the pandemic, they are using Uber Eats, Grub Hub, and Postmates (which they never used before), and that is now approximately 10 percent of their business.

Patrons are not allowed inside the restaurant. Customers can place and pay for their order at a door/service counter and pay with card via iPad and chip reader. Patrons are encouraged to order and pay online or over the phone, and since the pandemic they have started their own online ordering platform.

When they closed for two weeks in April, they supported employees with how to apply for unemployment. They also were able to get the first wave of PPP shortly after that. Some of their employees chose not to return to work because of pandemic concerns or because unemployment payments were higher than wages, so they onboarded new staff as necessary.

The restaurant has streamlined some of its processes and menu items in order to operate more efficiently. The business experienced intermittent supply chain issues, but mostly with PPE like gloves and so forth. Some specialty food items haven't been in stock, or the price was prohibitive. The price of cheese has been fluctuating, but that has always been their most volatile product in terms of price even in a normal year.

Compared to impacts from the Great Recession, the owner sees an increased focus on the 'support local business' movement, rather than the global financial crisis where it was about finding the best value for money. Now, people are voting with their dollar to try and keep their local businesses open.

What are your future expectations? The owner notes that the pizza business is made for takeout and they already have the systems in place to accommodate a lot of takeout transactions. Since people are accustomed to pizza as a takeout food, their business has not suffered the way other restaurants have.

The interviewee believes there is a lot of pent-up demand for a variety of experiences – travel, dining, and so forth. But that is more for businesses that have been really suffering and seeing dramatic declines in revenue over the past year, so he does not think that the pizza shop is going to see any kind of huge surge when things return to normal. He believes that by the summer of 2021, things will be pretty much back to normal and that the summer will be busy as it would have been in a previous normal year like 2019.

Looking forward, the owner is hoping to get back to the customer and community engagement that is a core part of their enterprise and is so much more than just handing someone a pizza. In terms of positive changes, they have streamlined their processes and menu items, but he's

looking forward, for example, to getting back to the weekly specialty pizza that's part of their brand and vibe – they tabled this during the pandemic because it's more suited for an in-person dining experience. He does think that they will keep some of the changes related to reducing their hours during weekdays, although with a return to extended hours on weekends. The business has not changed drastically since the pandemic started, but the owner looks forward to getting back some of the positive aspects that they have paused on (e.g., their community engagement and in-person experience), while keeping some of the smarter changes like the efficient opening hours.

Jim Bath, Sportsworld, Ely, NV

Sportsworld is an independently-owned sporting goods store in Ely, Nevada. It was first established in a different Nevada town in the 1980s but has since moved to Ely and the business has grown since the relocation. In the past, gun and ammunition sales were a major component of the business, and while that is still an important component of the overall business, they have expanded their bicycle, clothing, and archery sales.

The business has customers in all seasons since they cater to winter and summer outdoor recreationists. August, September, and October are their best sales months because it is hunting season. However, now backcountry biking is an increasingly popular sport and goes quite a bit longer than the hunting season.

With recent droughts in the state, their ski sales and rentals have been down, and the recent draining of a local aquifer for dam repairs has negatively impacted the business in terms of fishing, kayaking, and other water sports. Nearly 100 percent of the recreation activities that they cater to rely on public lands in the area.



Sportsworld provides goods and services for entertainment and happiness, so the most important goal moving forward is to stock a wide variety of products that make customers genuinely happy.

How did COVID affect business? 2020 was a banner year for the business. They now employ more people than ever– 12 people, compared to 10 staff in 2019.

The owner indicates that the business has done well and has not suffered, and that the core challenges have been supply chain delays, getting stock and materials (ammunition in particular), as well as making the extra investment (time and money) in having a safe work environment for employees.

Through 2018 and 2019, the business was stable but not growing, but with a new manager at Sportsworld starting in 2020, and with the pandemic, they saw approximately 20 percent revenue growth in 2020 compared to 2019.

How did the business adapt? When the pandemic first started, several employees were afraid to even be physically present in the business. The interviewee (business owner) offered year-end

bonuses to all employees across both his businesses (primary business is a lumber and hardware store) if they stayed on.

They changed a lot of cleaning and hygiene protocols: staff and customers are required to wear masks; they use a fog disinfectant inside the business twice a week; they hired an extra full-time cleaning staff person to sanitize all day long. Additionally, they installed plexiglass screens very early on in the pandemic (April) to protect cashiers, which made the staff more comfortable. Several customers have pushed back on the store's enforcement of mask requirement, but those customers have mostly complied with the protocol when offered a free mask by staff.

The owner decided to pursue fog disinfecting after observing that the local school system had hired a company to fog their classrooms twice a day, and the school system had not experienced a covid outbreak. Sportsworld now has its own fogging machine (after some supply chain delays) and uses it twice weekly.

The business has had a couple of staff out with Covid, but the owner has set up a special rate with the local hospital for testing, so that employees don't have to worry about the cost of a test. Additionally, by this point (early February 2021), each staff person willing to be vaccinated has already received their first shot.

The owner does not see similarities between the Great Recession and the pandemic in terms of business impacts, in large part because the community is so rural and remote that they do not experience the same economic trends that impact the country as a whole. Because they are heavily reliant on the mining industry, they would be negatively impacted by a drop in mineral prices but not necessarily by a global recession.

Sportsworld accessed the PPP loan and found it helpful.

What are your future expectations? The owner believes the sales and revenue outlook for 2021 is good, although he is much more concerned about the performance of his primary business (lumber) because of the ongoing problems with supply chains and volatile prices (lumber and steel product prices in some cases are 3 to 4 times what the product would have cost in 2019).

Regarding lessons learned from the pandemic, the owner states that a sporting goods store is for discretionary spending and that Sportsworld is selling entertainment and happiness, so the most important goal is to stock that wide variety of products that make customers genuinely happy.

Tracy McCormick, Tonopah Main Street, Tonopah, NV

Tonopah Main Street is 501c3 affiliate of the nationwide Main Street America organization. Tonopah Main Street is focused on economic revitalization for the town, while promoting historic preservation. The town, located on Hwy 95 halfway between Las Vegas and Reno, has one chain grocery store, pharmacy, and a Family Dollar, which get a lot of pass-through traffic. The town also has 10 gas stations. Historic hotel culture is strong in Tonopah, with a few hotels that have long histories (established early 1900s) and a lot of cultural significance.

In a pre-pandemic year, Tonopah would get quite a few international tourists from locations including Germany, England, and Brazil in addition to visitors interested in the history of the American West, particularly the town's historic mining economy. Due to its central location, Tonopah also hosts conventions and business events for people and companies in Reno and Las Vegas.

In a pre-pandemic year, March through November is the busy period of the year, especially for conventions. Tonopah can occasionally be booked out during this time (the town has a few hotels with a total capacity of approximately 1,500). The town gets some limited visitation from hikers. The primary tourism opportunities are related to the town's mining history.



Business owners are optimistic that a full economic recovery will be underway by June 2021. The town's central location and successful marketing are central to its success.

How did COVID affect the town? In 2020, virtually all international tourism vanished, although Tonopah has seen some local and regional tourism from Nevada residents and from California (particularly considering California's stricter public health and safety measures). However, impacts from the pandemic did not hit Tonopah until the summer. Initially, the town's small size and remote location buffered it from the full impacts that denser, urban areas were experiencing, but by the beginning of summer incoming traffic was substantially diminished – international visitation had vanished and there was less tourism from other parts of Nevada and the West, although some people were still driving in from other cities or states to visit. Some residents of Las Vegas and Reno began to drive to Tonopah to buy up toilet paper at the town's one grocery store.

Restaurants, hotels, and casinos have all been impacted by social distancing and capacity requirements. However, the small size of the town and its businesses meant that adapting operations to comply with capacity and distancing protocols was not exceptionally difficult. There were a few minor supply chain issues with personal protective equipment (PPE) and sanitizing products in the early summer, but since then items have been in stock.

The whole town experienced a dip in revenues because of diminished visitation from tourism and conventions/meeting, however, mining is still a large part of the Tonopah economy so several of the chain hotels were still making revenue by catering to mine workers. The holiday season was busier than expected, with some of the hotels experiencing near-full capacity at the end of the year.

How did the town adapt? Tonopah Main Street heavily promoted a “shop small, shop local” mission, particularly during the 2020 holiday season. By instating incentives such as a business bingo, they kept a lot of shopping dollars in the local community rather than dispersing to Reno or Vegas for holiday purchases.

Additionally, the organization has assisted local businesses in identifying and applying for any relevant grants or loans that can help them financially. Examples include PPP, which was invaluable for Tonopah’s local businesses. The Rural Development Nevada Corporation has also provided helpful financing assistance to local businesses.

What are your future expectations? Business owners in the town are very optimistic and the pervasive feeling is that full economic recovery will be underway by the end of May 2021. The interviewee stated that the town’s central location (between Reno and Vegas) and the town’s successful marketing throughout the state (as a small, unique, historic place), are central to its success as a destination.

In terms of lessons learned and ideas about assistance (state/regional) going forward, the interviewee notes that while Tonopah businesses have done well to survive, all of them have taken a hit in revenues and have therefore had to de-prioritizing long-term investments in their business, such as building maintenance or upkeep. Tonopah has a lot of old buildings that are costly to maintain, and by having gone into survival mode for the past year, many businesses are lacking funds for repairs or maintenance. The most helpful form of financial assistance would be targeted grant assistance for small, rural community businesses that recognizes the unique challenges they have faced in the pandemic – challenges that are different to those encountered by urban small businesses.

SECTION V.

Summary and Recommendations

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Summary and Recommendations

Nevada's outdoor recreation economy is diverse and depends on the State's many opportunities for residents and visitors to participate in a variety of outdoor activities ranging from hiking and camping to off-highway vehicle driving and attending outdoor cultural events. Together, these opportunities support an outdoor recreation economy that employs slightly more than 59,000 people statewide across a variety of different businesses, including motels and hotels, tour operators and outfitters, gear retailers, transporters, and food services, to name only a few. Employees and operators in the outdoor recreation economy earn more than \$2.6 billion in wages and salaries, annually, which is about 1.5 percent Nevada's total annual labor income.

Retail trade; accommodation and food services; and arts, entertainment, and recreation are the largest sub-sectors of the ORI in terms of employment and income. They are also some of the industries most heavily impacted by the COVID-19 pandemic. Businesses in the outdoor recreation economy have experienced mixed economic impacts due to COVID-19.

Many outdoor recreation businesses had no business during March and April 2020, when strict public health and safety measures were put in place. Since then, retail businesses and businesses that naturally lend themselves to social distancing have seen their business recover and, in some cases, business has actually increased during the pandemic, but businesses that rely on out-of-state visitors and/or provide services to groups have continued to experience a sustained loss of business, resulting in reductions in income and staff. These losses have been particularly concentrated in the accommodations and food services sector.

It is important in a time like this to recognize the large and diverse contributions the outdoor recreation economy makes on the economy of Nevada and to take measures to support and grow the industry and protect the public lands on which it relies. Policy makers at local, state, and national levels can take action to support the industry by:

- **Protect and Fund Public Land.** Protecting and funding public lands to keep them open and accessible for all Americans. Increased enthusiasm for outdoor recreation means there is a need to protect existing public lands and adequately fund their upkeep and maintenance in addition to expanding and improving public land offerings, which require additional funding and federal action.
- **Support Outdoor Recreation Businesses.** The recreation economy is greater than the sum of its parts. This means that ecosystem of outdoor recreation businesses can only flourish in the long run when all businesses are thriving. While some outdoor recreation businesses have seen their customers return, many others have not. Many accommodation and food service and transportation businesses continue to be

impacted by the pandemic and are operating at a loss. Policy makers should reach out to these industries and provide aid in the form of financial assistance, subsidized capital finance, emergency grants, and other types of short-term financial aid to help businesses sustain themselves until customers return.

- **Support Outdoor Recreation Workers.** Policy makers should also provide targeted financial assistance to outdoor recreation employees. Many employees work in the outdoor recreation economy because they are passionate about their work and want to share that passion with others. Moreover, these workers often make less than the median household salary, meaning they are less likely to have financial safety nets to help them through difficult times. Policy makers can avoid permanent damage to the recreation economy by making sure these workers have the resources they need to sustain themselves and their families until they can return to their jobs.

Call to Action. The impacts of the pandemic are being felt by outdoor recreation businesses and employees right now. Many of these businesses and employees have been enduring the impacts for nearly a year and need ongoing assistance beginning today. The new Congress and upcoming state legislative sessions offer opportunities to meet this challenge head on by providing important resources that will ensure the outdoor recreation economy not only survives but thrives in the future.

SECTION VI.

References

Section VI

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