



COLORADO

**Outdoor Recreation
Industry Office**

Outdoor Industry COVID-19 Impact Survey

Summary Report

Colorado outdoor recreation industry businesses provided confidential survey responses to help the State understand the financial and social impacts of the COVID-19 pandemic to this business sector.



Methodology

The *OREC COVID-19 Impact Survey* was conducted online with 317 responses collected between April 1st and 11th, 2020. Respondents were sought from email subscribers to the Colorado Office of Outdoor Recreation Industry's *All Forward!* Newsletter. The call to respond was further circulated via social media and by other organizations and leaders in the outdoor industry.

The results of this survey are only representative of the Outdoor Recreation Industry (OREC) organizations which chose to respond – and only for the time period surveyed – but provide a valuable snapshot of pandemic impacts faced by OREC businesses across Colorado.

The Office of Outdoor Recreation Industry partnered with Keating Research, OnSight Public Affairs, and berbur llc to design and execute the survey.



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3 of **4** Colorado businesses surveyed have suspended some or all operations.

Have you partially or fully shut down your business operation?

Yes, we have suspended some business operations	137	43 %
Yes, we have suspended all business operations	100	32 %
No, we are continuing to operate	80	25 %



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On average, **27%** of employees at the businesses surveyed have been laid-off, furloughed or let go.

One-Fourth of businesses have reduced their number of employees **by half**.

15% have decreased their workforce by **over 90%**.

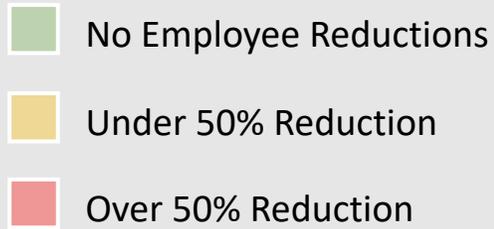


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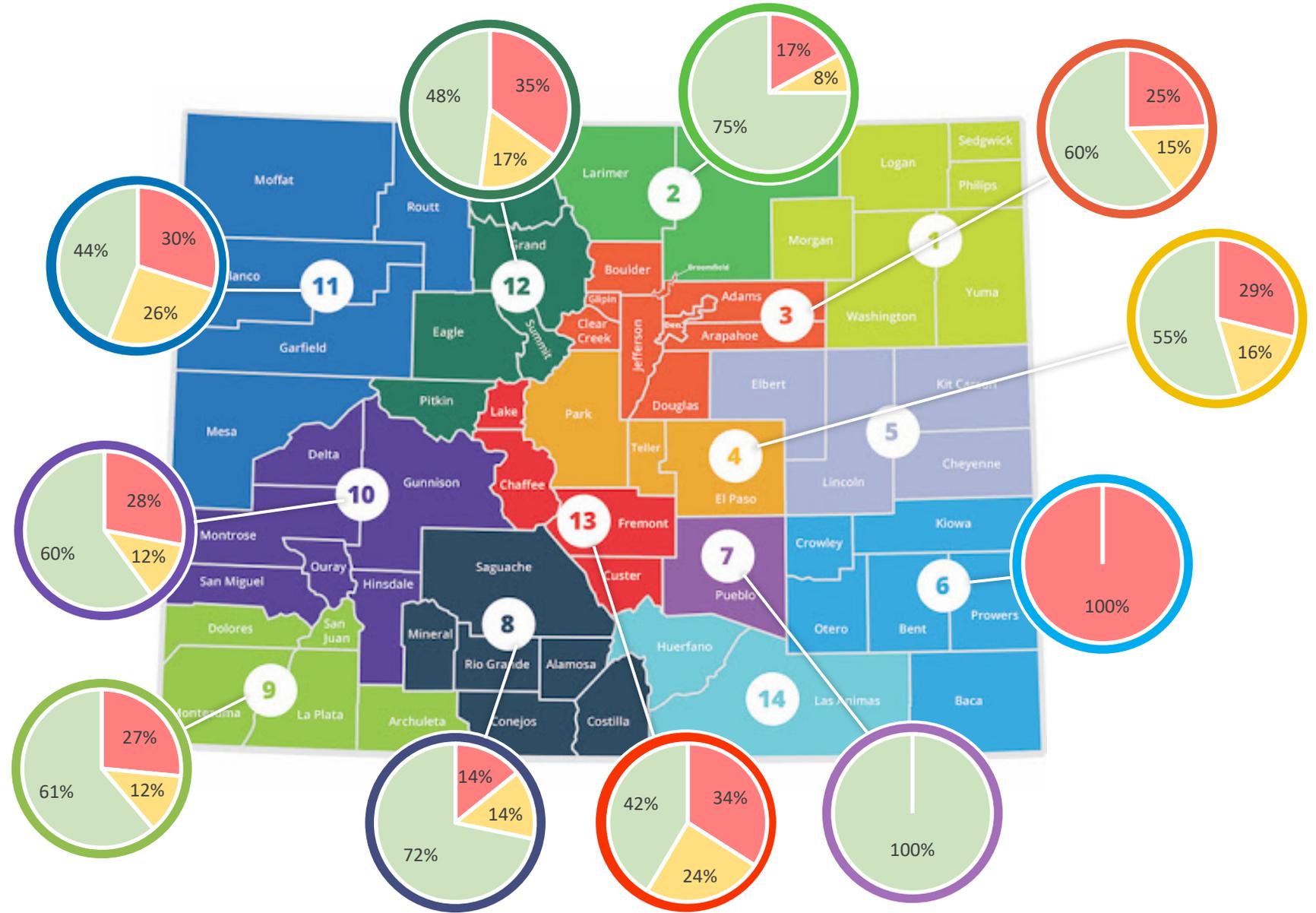
Please indicate the percentage of employees that your business has laid-off, furloughed or let go due to the Coronavirus/COVID-19 pandemic?

0%, none	174	55%
1% up to 10%	17	5%
11% up to 20%	13	4%
21% up to 30%	9	3%
31% up to 40%	5	2%
41% up to 50%	7	2%
51% up to 60%	6	2%
61% up to 70%	6	2%
71% up to 80%	10	3%
81% up to 90%	17	5%
91% up to 100%	48	15%
Unsure / do not know	5	2%

Percentage of Businesses Reporting Employee Reductions by Region



Region	Respondents
Region 1	0
Region 2	12
Region 3	91
Region 4	32
Region 5	0
Region 6	1
Region 7	2
Region 8	7
Region 9	43
Region 10	25
Region 11	43
Region 12	23
Region 13	31
Region 14	0



Half (51%) of surveyed businesses have reduced some employees' hours.

29% have reduced hours for **over 90%** of their employees.



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Excluding employees who have been laid-off, furloughed or let go, please indicate the percentage of employees at your organization whose hours or pay have been reduced due to the Coronavirus/COVID-19 pandemic?

0%, none	145	46%
1% up to 10%	27	9%
11% up to 20%	8	3%
21% up to 30%	11	3%
31% up to 40%	1	0%
41% up to 50%	7	2%
51% up to 60%	3	1%
61% up to 70%	4	1%
71% up to 80%	2	1%
81% up to 90%	9	3%
91% up to 100%	91	29%
Unsure / do not know	9	3%

Without assistance **4** of **10** (41%) businesses will not survive longer than 3 months. **12%** will survive one month or less.

If the Coronavirus/COVID-19 pandemic continues for an extended period of time and you do not receive assistance, how long can your business survive?

1 month or less	37	12%
3 months	91	29%
6 months	59	19%
12 months or more	54	17%
Unsure / Do not know	76	24%



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On average, OREC businesses' revenues are down **50%** due to the COVID-19 pandemic.

One-fourth of businesses have lost **over 80%** of their revenues.



How much do you estimate your business's revenues are down due to the Coronavirus/COVID-19 pandemic? 8

0%, none	16	5%
1% up to 10%	13	4%
11% up to 20%	27	9%
21% up to 30%	37	12%
31% up to 40%	40	13%
41% up to 50%	23	7%
51% up to 60%	24	8%
61% up to 70%	25	8%
71% up to 80%	18	6%
81% up to 90%	25	8%
91% up to 100%	49	15%
Unsure / do not know	20	6%

For businesses surveyed with 2019 annual revenues...

Under \$500,000

Revenues for **43%** of businesses are down **over 50%**

Revenues for **19%** of businesses are down **over 90%**

Over \$500,000

Revenues for **46%** of businesses are down **over 50%**

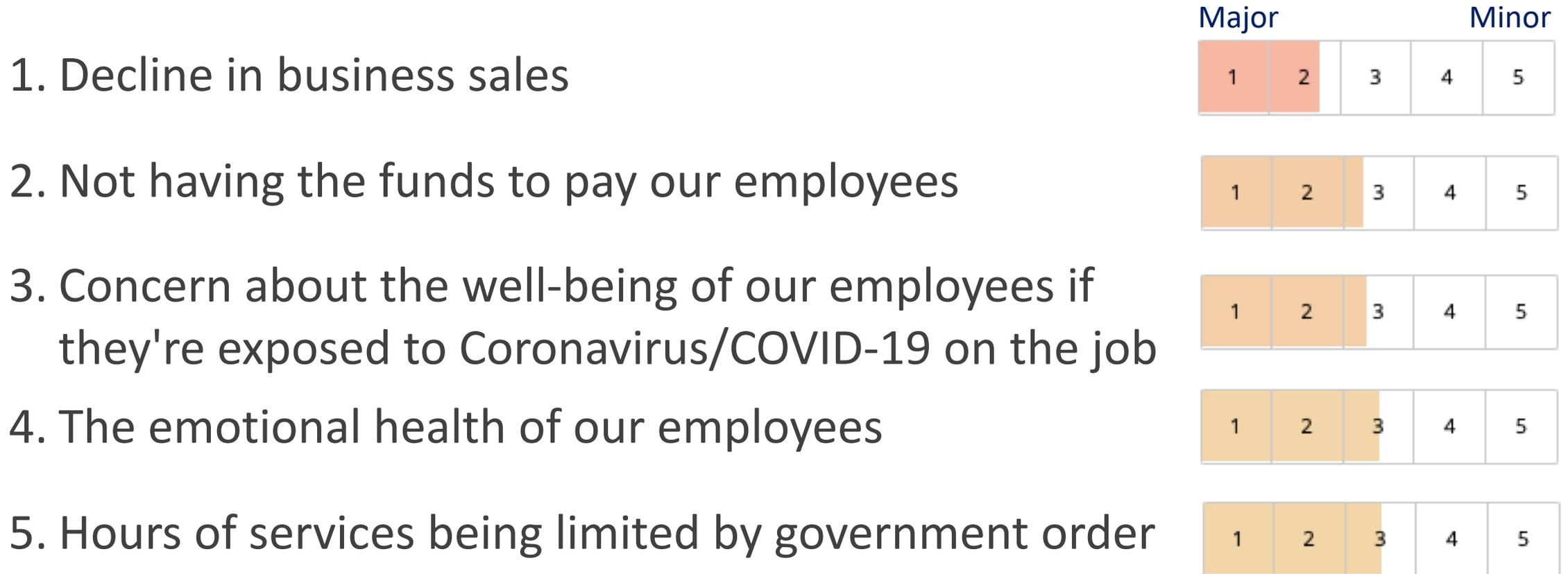
Revenues for **13%** of businesses are down **over 90%**



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Top 5 Problems for Businesses



Demographics of **317** OREC Business Respondents

Which of the following describes your outdoor recreation business?

Guide or Instruction Service	88	28%
Non-profit / Advocacy Organization	77	24%
Other	70	22%
Retailer	57	18%
Product Manufacturer	54	17%
Event Service / Event Planning / Event Management	33	10%
Independent Sales / Contractor	24	8%
Climbing Gym / Indoor Recreation	6	2%
Ski Resort	5	2%

Please indicate the total number of employees your business had in January of this year.

5 or less	157	50%
6 to 10	64	20%
11 to 20	32	10%
21 to 30	28	9%
31 to 50	13	4%
51 to 100	11	3%
101 to 250	1	0%
251 to 500	9	3%
501 or greater – please specify number of employees here	2	1%

What was the total revenue for your business last year - in 2019?

\$0, none	13	4%
\$1 up to \$50,000	42	13%
\$50,001 up to \$100,000	31	10%
\$100,001 up to \$250,000	35	11%
\$250,001 up to \$500,000	60	19%
\$500,000 up to \$1 million	37	12%
\$1 million up to \$2 million	36	11%
\$2 million up to \$5 million	32	10%
\$5 million up to \$10 million	15	5%
\$10 million or more – please specify dollar amount here	16	5%



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