



MINNESOTA

OUTDOOR RECREATION
INDUSTRY PARTNERSHIP





OUTDOOR RECREATION INDUSTRY PARTNERSHIP

ORIP

- 4 Agencies (DNR, DEED, EMN, IRRR)
- 1 Mission
 - Support the growth of MN's outdoor rec economy
- 3 Pillars
 - Develop Resources
 - Build Community
 - Promote the value
- 1 FTE, \$150,000 over 2 years
- 2 Years old
 - Started in September 2023 via MOU



Minnesota's “Untamed Dividend”

First Annual Report on the Statewide Impact
of Minnesota's Outdoor Recreation Industry

MINNESOTA'S UNTAMED DIVIDEND
Outdoor Recreation Fueling Our Economy



The Scope of the Report

- First-ever statewide report on outdoor recreation's economic footprint.
- Combines national data (from the Bureau of Economic Analysis) with Minnesota-specific research.
- Provides insights at the state, county, and regional levels.



Why Economic Impact Matters

- Outdoor recreation is more than fun—it fuels our economy. It’s not an “amenity” it’s critical infrastructure.
- Data shows leaders, businesses, and communities how big a role outdoor recreation plays.
- Measuring economic impact helps us make smarter investments in parks, trails, and businesses that support Minnesotans.



Key Statewide Findings

- **\$13.5 billion GDP** → the value created in Minnesota by outdoor recreation (like the wages paid to workers, profits for businesses, and taxes collected).
- **\$23.5 billion total economic output** → the total sales activity, including all the money flowing through businesses that support outdoor recreation.
- **96,000 jobs** → about 3% of all employment in the state.
- Outdoor recreation rivals (and sometimes outperforms) traditional industries.



BEA's Methodology

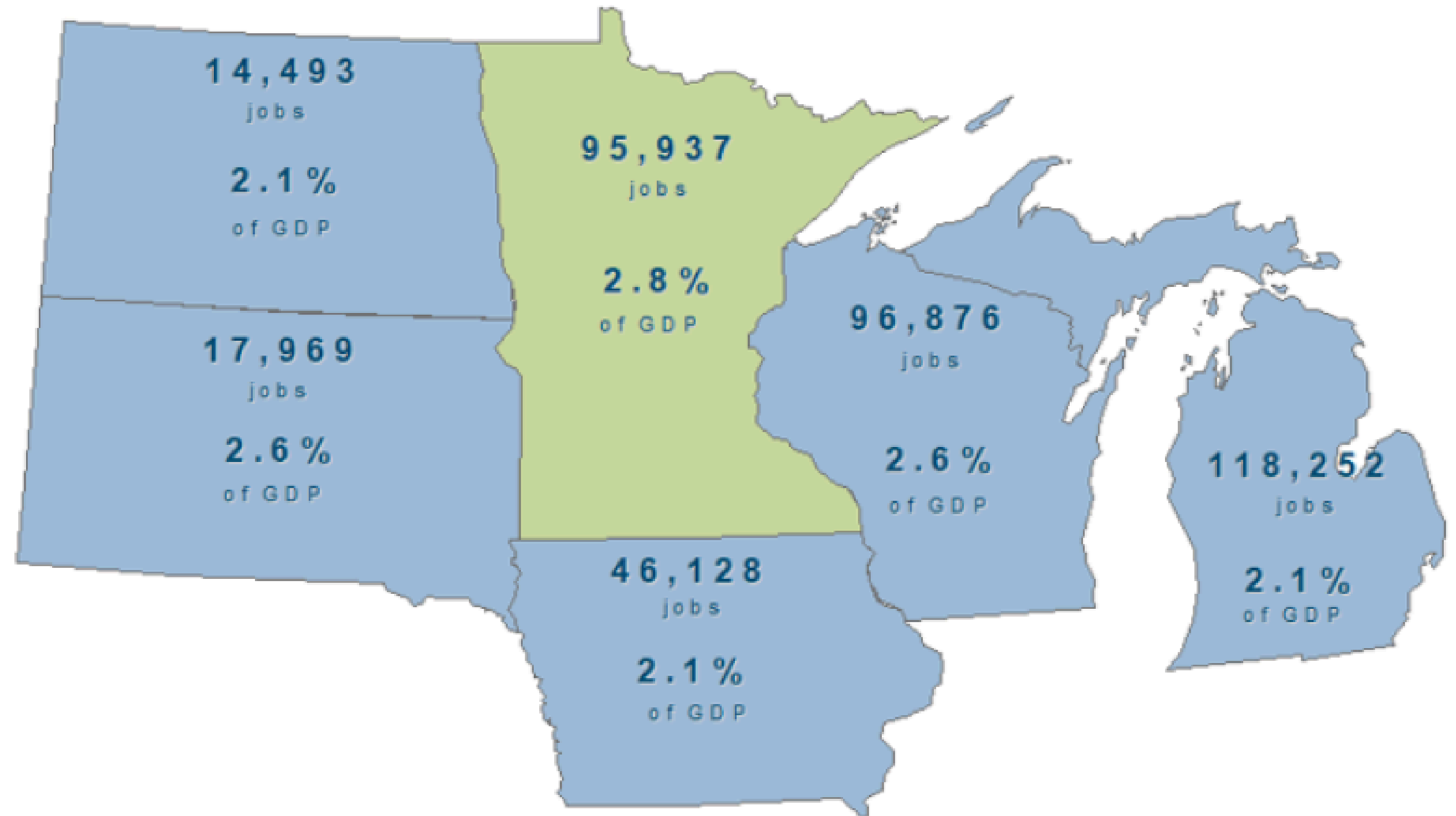
1. Define "Outdoor Recreation."
 - a. Broad. "Anything do for fun outdoors."
2. Identify outdoor-related industries
3. ORSA looks at both:
 - a. Core industries (gear, guides, equipment rentals).
 - b. Supporting industries (travel, hospitality, transportation).
4. Use national surveys to identify what percentage of each industry is outdoor rec.
5. Apply to states using data on jobs and businesses in Minnesota.



Activity Highlights

- Fishing: \$5.9 billion in output; 1.7M anglers in 2022.
- Hunting: \$1.2 billion; 500K hunters.
- Boating & RVing: Billions in manufacturing, travel, and equipment sales.
- Winter sports: Snowmobiling, skiing, and ice fishing keep dollars flowing year-round.

Key Statewide Findings





Turning National Data into Local Insights

- Since BEA doesn't publish county-level data, a custom method was built.
- Steps:
 - Matched outdoor rec industries (e.g., boating, RV parks, gear retail).
 - Used employment and business data from Census and IMPLAN.
 - Allocated state totals (GDP, jobs, output) proportionally to each county.
 - Checked results to match state totals for accuracy.
 - Results shown with maps & tables by region: GDP share, jobs, and location quotients.



County Level Impacts

- Every county benefits from outdoor recreation.
- Some counties (like Cook, Lake of the Woods, Pine) rely on it for more than 7% of their local GDP.
- Metro counties (Hennepin, Ramsey, Dakota) lead in total jobs and spending.

Metro Region

Proportion of GDP

Metro Region

Proportion of GDP from Outdoor Recreation

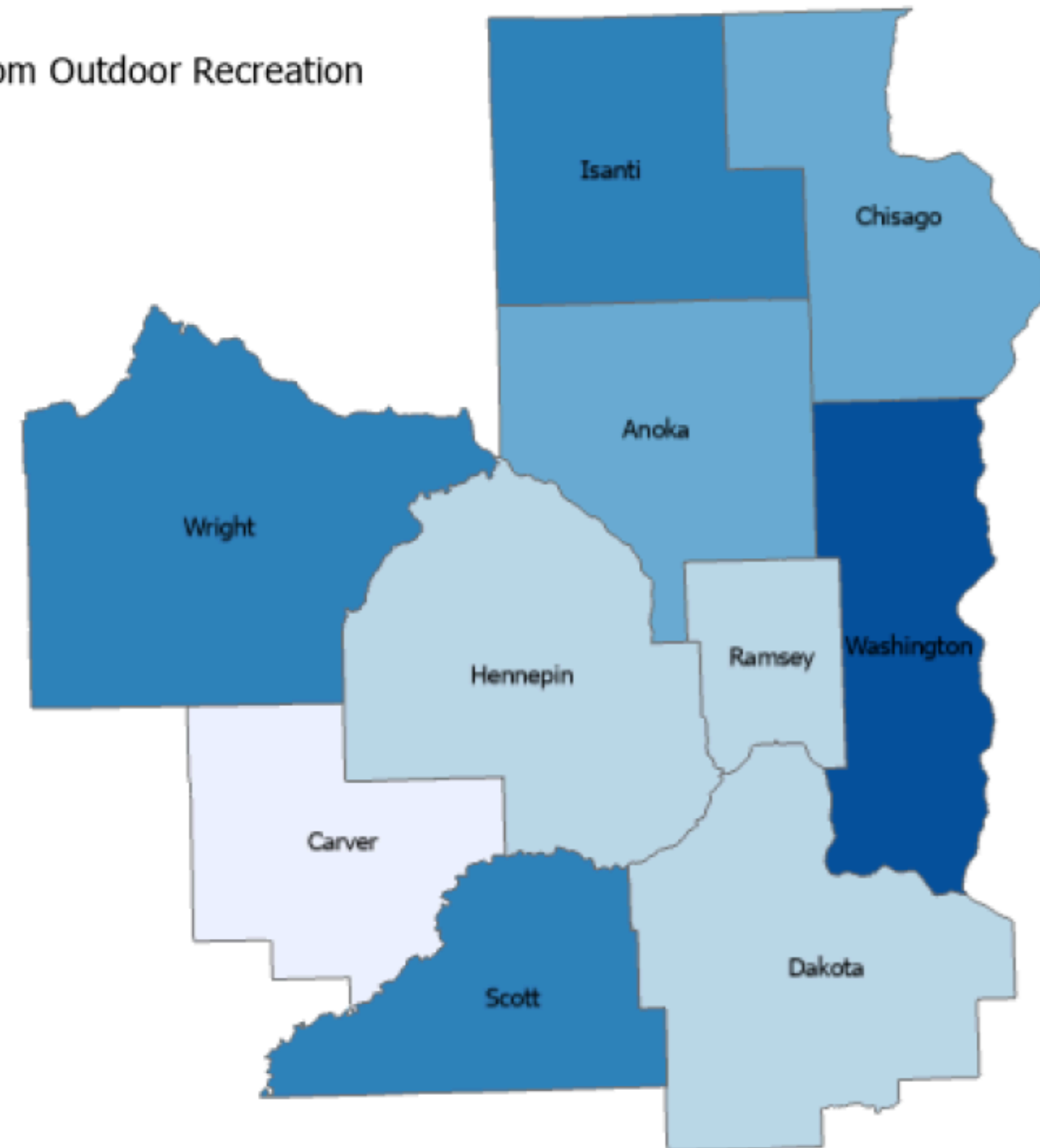
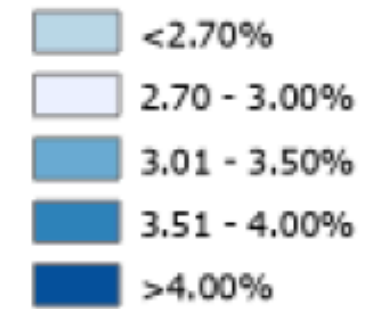


Figure 9. Metro Region Proportion of GDP from Outdoor Recreation.

| County | Jobs Supported by Outdoor Recreation | Outdoor Recreation Value Added | Outdoor Recreation Economic Output | Proportion of All Jobs Supported by Outdoor Recreation | Location Quotient | Proportion of GDP from Outdoor Recreation |
|------------|--------------------------------------|--------------------------------|------------------------------------|--|-------------------|---|
| Anoka | 5,372 | \$691,551,082 | \$1,214,148,226 | 2.93% | 1.24 | 3.42% |
| Carver | 1,484 | \$202,228,128 | \$359,562,994 | 2.35% | 1.03 | 2.84% |
| Chisago | 726 | \$72,767,853 | \$137,721,997 | 3.05% | 1.16 | 3.20% |
| Dakota | 7,248 | \$884,124,095 | \$1,856,724,535 | 2.72% | 0.91 | 2.50% |
| Hennepin | 24,791 | \$4,585,856,439 | \$7,088,900,904 | 2.00% | 0.87 | 2.41% |
| Isanti | 619 | \$59,374,096 | \$111,612,788 | 3.46% | 1.40 | 3.85% |
| Ramsey | 9,272 | \$1,403,179,200 | \$2,296,945,290 | 2.15% | 0.95 | 2.62% |
| Scott | 3,030 | \$369,914,380 | \$655,064,007 | 3.42% | 1.36 | 3.76% |
| Washington | 4,764 | \$640,762,896 | \$1,100,952,523 | 3.45% | 1.51 | 4.16% |
| Wright | 1,981 | \$244,002,808 | \$455,083,781 | 2.84% | 1.28 | 3.54% |



Public Lands Drive the Economy

- 1/5 of all land in Minnesota is public — including state parks, trails, national forests, and wildlife areas.
- These lands provide the settings where billions of dollars in recreation happen each year.
- Types of public lands in Minnesota:
 - State Parks & Trails: 64 parks, 1,500+ miles of trails.
 - National Forests: Superior & Chippewa (3.2 million acres combined).
 - National Parks & Monuments: Voyageurs, Mississippi River, Grand Portage, Pipestone, etc.
 - Local Lands: Parks, trails, and culturally significant sites.



Public Lands Drive the Economy (Cont'd.)

- Visitor Spending:
- State Parks → **\$688 million annually.**
- State Trails → **\$26 per visitor per day.**
- National Forests → **\$57 million GDP & 1,100+ jobs.**
- National Parks → **\$70 million GDP & 900 jobs.**
- Small Business Support: Outfitters, campgrounds, guides, cafes, and lodging thrive near public lands.
- Rural Resilience: Public lands attract visitors year-round, diversifying economies beyond farming/mining.
- Community Benefits: Public lands create affordable recreation, boost quality of life, and attract new residents.
- Long-Term Growth: Investment in trails, campgrounds, and water access generates recurring returns for decades.



Visitor Spending - New Money

- Dollars ripple through local economies:
- Restaurants, hotels, gas stations, retail, and outfitters.
- Tourism is a lifeline for small towns near gateways like Ely, Lanesboro, Grand Marais, and Lake of the Woods.
- Non-resident visitors bring in new dollars that stay in the community.
- Outdoor tourism diversifies rural economies and supports businesses year-round.



Leveraging the Data

- Use data to attract investment in recreation infrastructure.
- Show policymakers outdoor recreation is not just “fun”—it’s essential. It’s not an “amenity” it’s critical infrastructure.
- Support small businesses and entrepreneurs tied to recreation.
- Plan for equitable and inclusive access so benefits reach all communities.