Outdoor recreation runs deep in the Wisconsin story—from the early development of the Northwoods as an outdoor vacation destination to the hatching of one of the world’s leading bicycle manufacturers. Wisconsinites have long known the state has something special outside that adds to our quality of life. But it is much more.

It is with anticipation we present this report analyzing the critical contributions of outdoor recreation to Wisconsin’s economy. Prepared by Headwaters Economics, a leading independent, nonpartisan, nonprofit research group, this report illustrates how outdoor recreation is more than just a fun thing to do. In the following pages, you will learn how outdoor recreation is a major economic driver—from tourism to manufacturing to retailers and outfitters—and supports tens of thousands of jobs. Outdoor recreation, built from the foundation of our beautiful natural assets and their responsible management, truly means business in Wisconsin.

The Wisconsin Office of Outdoor Recreation was founded with bipartisan support in recognition of this economic significance. It is the vision of the Office to see Wisconsin claim its identity as a top outdoor recreation state for residents, visitors, and businesses. To accomplish this, we will uplift the industry and align partners around four key tenets, as defined below, to realize the full potential of the outdoor recreation economy.

Now, presented with the challenges and uncertainties resulting from the COVID-19 pandemic, this work has never been more important. The outdoor industry has a critical role to play in our economic recovery. As you read the report, you may be surprised by the strength of the outdoor recreation economy, and I hope the opportunities for the future leave you eager to join us in our work to support and grow the outdoor recreation sector for a thriving Wisconsin.

Mary Monroe Brown, Director
Office of Outdoor Recreation
Wisconsin Department of Tourism

A note from the Director

More than just a bike ride:
Outdoor adventure drives significant economic activity across diverse economic sectors.

Gear manufacturer designed and built the equipment.
Graphic artists created tourism ad that inspired the family outing.
Local restaurant provided sustenance and an ice cream cone on the way home.
Main street retailer fitted and sold the equipment.

Software engineers developed a mapping app to guide the family’s adventure.
Trail organization designed, built, and maintains the recreation area.
Local farmer and grocery store supplied snacks to fuel the outing.

PUBLIC HEALTH

Ecosystem services. Areas open for public recreation are often ecologically important. In addition to supporting diverse plants and animals, these places provide flood control, water and air filtration, and carbon sequestration, providing millions of dollars in value to Wisconsin.

COMMUNITY COHESION

Participation in nature-based activities is often social, bringing together diverse members of the community and enhancing a sense of place. Research shows a connection between time spent in nature and reduction in crime, saving public safety costs.

PUBLIC HEALTH

Research shows that when people live close to trails and greenspace, they tend to be more physically active. This can reduce incidence of cardiovascular disease, cancer, mortality, and childhood obesity—saving lives as well as public health costs.

BROADER ECONOMIC BENEFITS

Public health. Research shows that when people live close to trails and greenspace, they tend to be more physically active. This can reduce incidence of cardiovascular disease, cancer, mortality, and childhood obesity—saving lives as well as public health costs.

Community cohesion. Participation in nature-based activities is often social, bringing together diverse members of the community and enhancing a sense of place. Research shows a connection between time spent in nature and reduction in crime, saving public safety costs.

Ecosystem services. Areas open for public recreation are often ecologically important. In addition to supporting diverse plants and animals, these places provide flood control, water and air filtration, and carbon sequestration, providing millions of dollars in value to Wisconsin.

Sustain Wisconsin's invaluable natural assets by encouraging outdoor recreation, the connection to place and the preservation of healthy lands and waters.

Thrive when active lifestyles and outdoor recreation are promoted to create healthy individuals and communities.

Connect people to the state’s natural places and outdoor recreation opportunities through access and education with a focus on inclusion.

Invite residents, visitors, businesses and workforce talent to live, work and play in Wisconsin.

Outdoor Recreation: A Top Driver of Wisconsin's Economy

3
Outdoor recreation helps attract and retain professionals, directly supporting jobs across diverse economic sectors.

The outdoor recreation economy in Wisconsin is diverse, employing people in a variety of sectors in both rural and urban areas. These jobs would not exist were it not for the outdoor recreation industry.

**OF THE 93,000 PEOPLE EMPLOYED IN OUTDOOR RECREATION IN THE STATE:**

- 38% - Arts, recreation, accommodation and food services
- 32% - Retail trade
- 2% - Construction
- 2% - Health, education, and social assistance
- 4% - Government
- 9% - Manufacturing
- 1% - Business and professional services
- 3% - Transportation and warehousing
- 5% - Wholesale
- 3% - Other
- 7%
- 12%
- 3%
- 12%

“As we continue to grow our healthcare community in northern Wisconsin, attracting excellent clinicians has been critical to our success. The access to trails right on the property is something that very few organizations can offer their employees. It is difficult to imagine a better scenario for those who love outdoor recreation.”

Luke Beirl, CEO Hayward Area Memorial Hospital, Hayward, WI

“...from all over the world and often the ones who choose to relocate and work for Organic Valley care about people, animals, and the environment. Our rural setting exemplifies this and enables our employees to pursue their personal and professional passions of a more sustainable world.”

Eric Hartwig, Director of Workplace Services, Organic Valley, La Farge, WI

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Outdoor Recreation: A Top Driver of Wisconsin’s Economy

Wisconsin is a national powerhouse in outdoor recreation manufacturing.

Manufacturing is an essential part of the outdoor recreation economy in Wisconsin, providing 9 out of every 100 jobs related to outdoor recreation in the state. Many prominent outdoor companies are based in Wisconsin, including Johnson Outdoors, Trek Bicycles, Harley-Davidson Motorcycles, and numerous others.

Manufacturing jobs are particularly valuable because, on average, they pay 19% higher wages than the rest of the economy. In 2017 the Bureau of Economic Analysis of the U.S. Department of Commerce estimated that 8,378 people working in manufacturing in Wisconsin were part of the outdoor economy. Collectively the compensation (salaries plus benefits) for these workers totaled just under $887 million dollars, which translates to $105,853 per employee.

OUTDOOR RECREATION PROMOTES RURAL ECONOMIC DEVELOPMENTS.

Wisconsin’s outdoor recreation opportunities are a competitive economic advantage for the state. Studies have shown that access to outdoor recreation and an outdoor lifestyle attract and retain local citizens; draw entrepreneurs who locate their business for quality-of-life considerations; and serve as an advantage for business owners to attract talented employees. In Wisconsin many outdoor recreation manufacturing businesses are located in rural communities.

17% of Wisconsin’s outdoor recreation-related GDP comes from bicycling, motorcycling, and ATV-ing, more than twice the share in any other state. This is due in large part to manufacturers like Harley-Davidson and Trek.

Wisconsin ranks 5th among U.S. states for the share of all jobs that are in outdoor recreation-related manufacturing.

“Basing our global headquarters in Wisconsin provides Trek the opportunity to recruit world-class talent and employees with a strong work ethic, as well as access to excellent road and mountain biking right out the back door.”

Bob Burns, Vice President, Trek Bicycles, Waterloo, WI
Outdoor Recreation: A Top Driver of Wisconsin’s Economy

Diverse outdoor recreation activities bring in billions of dollars year-round.

Outdoor Recreation is a top reason people visit Wisconsin.9

Summer
Anglers spend $1.5 billion fishing in Wisconsin annually.10

Winter
Snowmobilers spend $250 million on trips annually.13

Spring
Bicyclists in Wisconsin spend an estimated $534 million annually on trips in the state.15

Fall
Waterfowl hunters spend $19 million on trips and equipment annually.11

Wisconsin’s outdoor offerings make it a world-class recreation destination.

Wisconsin has endless water recreation opportunities:
over 15,000 inland lakes,
43,000 miles of river shoreline, and
650 miles of Great Lakes shoreline.23

Wisconsin is home to 2 of the 11 National Scenic Trails in the U.S.: the 1,200-mile Ice Age Trail and the 4,600-mile North Country Trail, 200 miles of which cross northern Wisconsin.24

County forests comprise 2.4 million acres, making them the largest public land holding in the state.4

Now more than ever, the outdoors is essential for Wisconsin.

While the COVID-19 pandemic’s long-term impacts to Wisconsin are unknown, two things are clear: the outdoors is critical to health and well-being, and the recreation industry is poised to help lead economic recovery.

Getting outside has never been more important. Wisconsin’s outdoors provide wide-open spaces where people can responsibly distance while enhancing physical, mental, and social well-being. Since the onset of the COVID-19 pandemic, people are seeking outdoor experiences in unprecedented numbers.

Even though Wisconsin’s economy was hit hard by the COVID-19 pandemic, the state’s outdoor recreation industry is seeing the economic impact of this amplified interest. Many businesses were greatly limited by changing recommendations, but those able to respond report increased demand for products, gear, and services.

BY SPRING 2020:
371% increase in searches for hikes and trails on TravelWisconsin.com25
24% increase in sales of Wisconsin ATV trail passes26
100% increase in first-time buyers of Wisconsin fishing licenses26
18% more weekend visitations to Wisconsin state parks26
70% increase in national boat sales27
121% increase in national sales of leisure bikes28
10.8% increase in national RV sales29

Over 40,000 people from around the world travel to Hayward to participate in or watch North America’s largest Nordic ski race, the American Birkebeiner.14

Participants in non-motorized events like cross-country skiing, mountain biking, and running races in Ashland, Bayfield, and Sawyer counties spend about $14.7 million per year. Many participants in events return to the area later in the year.17

The Kickapoo Water Trail attracts 10,000 paddler visits a year that generate $1.2 million.19

Outdoor Recreation: A Top Driver of Wisconsin’s Economy
In recognition of the strength and significance of the outdoor recreation economy to Wisconsin, the Office of Outdoor Recreation was created within the Department of Tourism to uplift the sector and its partners for continued growth. As we publish this report, the COVID-19 pandemic is ongoing and the full impacts will not be known for some time. But even as we wait for that picture to crystalize, this report solidifies the strong economic foundation and the growing interest in outdoor recreation that have positioned the industry to be a leader in driving Wisconsin’s economic recovery. For more information, contact:

**Wisconsin Office of Outdoor Recreation**  
**Department of Tourism**  
http://industry.travelwisconsin.com/outdoorrecreation  
Mary Monroe Brown | 608-261-0341 | mmonroebrown@travelwisconsin.com

This report was supported in part by Recreational Equipment, Inc. (REI). Additional support provided by Trek Bicycles. Discussion of brands in this report is not an endorsement.

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Wisconsin was the 14th state—and one of the first in the Midwest—to create an Office of Outdoor Recreation. As more states add offices, competition to capture the economic potential of outdoor recreation is growing. The office is connecting industry, government, and community partners to collaborate, share resources, and identify funding sources. We are raising Wisconsin’s profile as an outdoor recreation destination to help the state reach its economic potential.

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$7.8 billion is contributed to Wisconsin’s GDP by the outdoor recreation industry, and it is growing faster than the overall economy. Wisconsin ranks 5th in the U.S. for the share of all jobs in outdoor recreation-related manufacturing. 93,000 jobs are supported by outdoor recreation in Wisconsin, contributing $3.9 billion in worker compensation. 95% of Wisconsin residents participate in outdoor recreation, and it is a primary driver behind visitation to the state.

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