



minnesota outdoor recreation economic impact report

2026



2024 Data Release

A collaboration of: DNR • DEED • Explore Minnesota • Iron Range Resources and Rehabilitation

Data Sources: U.S. Bureau of Economic Analysis (BEA) | Headwaters Economics | RRC Associates



executive summary

Minnesota’s outdoor recreation economy is a significant and growing driver of jobs, wages, and economic output across all regions of the state. Based on 2024 data from the U.S. Bureau of Economic Analysis (BEA) and supporting analyses from Headwaters Economics and RRC Associates, this report documents the scale and scope of outdoor recreation’s contribution to Minnesota’s economy which increased 5% over the previous year.



key highlights from the 2024 data release

- Outdoor recreation supported **99,145 direct jobs** statewide — **3.2%** of all wage and salary employment.
- Outdoor industry direct employment **grew 3.3%** from 2023 to 2024, outpacing broader economic growth.
- Total outdoor recreation value added rose from \$13.5 billion (2023) to **\$13.9 billion (2024)**, a **3.0% increase**.
- When indirect and induced effects are included, outdoor recreation generates **\$23.4 billion in gross economic activity**.
- Outdoor recreation-associated travel (trips greater than 50 miles) is the single largest contributor to economic output at **\$6.7 billion**.
- Retail trade and manufacturing are the dominant private industries, together employing more than **41,500 outdoor recreation workers**.



statewide economic overview

bureau of economic analysis: key metrics

The BEA’s Outdoor Recreation Satellite Account (ORSA) provides the most comprehensive and nationally comparable measure of outdoor recreation’s economic contribution. The following table presents Minnesota’s 2024 performance on the three primary BEA metrics.

bea metric	2024 value	share of state total
Total outdoor recreation value added	\$13,940,241,000	2.7%
Total outdoor recreation employment	99,145 jobs	3.2% of wage & salary employment
Total outdoor recreation compensation	\$6,380,418,000	2.3% of total compensation

Note: Based on state-level data from gross domestic product, compensation, and employment estimates published March 5, 2026, on BEA’s website, www.bea.gov.

full economic impact: direct, indirect, and induced

The complete economic footprint of Minnesota’s outdoor recreation sector extends well beyond direct activity. Input-output modeling captures ripple effects throughout the economy — from suppliers of goods and services to businesses and workers who spend outdoor recreation wages locally.

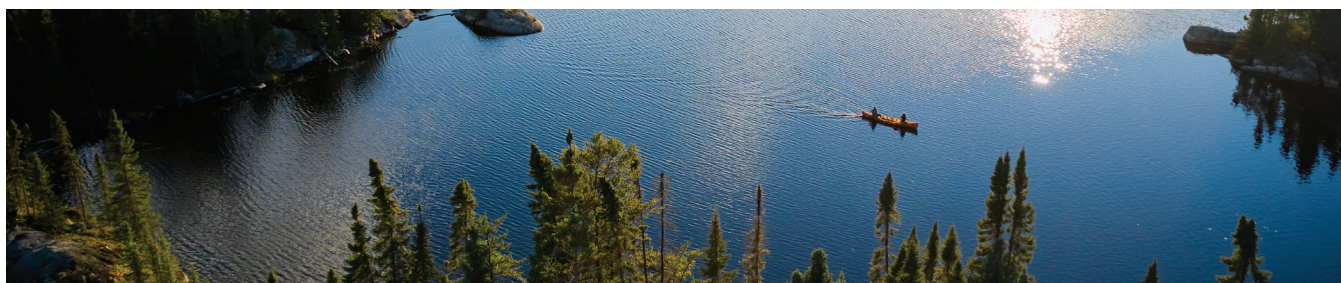
impact type	employment	labor income	value added	output
Direct (1)	99,011	\$4.48B	\$7.46B	\$12.64B
Indirect (2)	24,978	\$1.86B	\$2.97B	\$5.42B
Induced (3)	28,345	\$1.85B	\$3.32B	\$5.36B
TOTAL	152,334	\$8.20B	\$13.76B	\$23.41B

value added by activity

The table below presents value-added contributions from selected outdoor recreation activities as measured by the BEA. These figures reflect the direct contribution of each activity category to Minnesota's gross domestic product.

activity	value added (in thousands)	share of total or value added
Boating / fishing	\$1,119,600	8.0%
RV-ing	\$527,247	3.8%
Snow activities	\$213,764	1.5%
Game areas (incl. Golf, tennis)	\$643,145	4.6%
Amusement/water parks	\$217,496	1.6%
Festivals/events/concerts	\$358,239	2.6%
Other outdoor recreation	\$2,680,590	19.2%
Conventional outdoor recreation	\$5,050,375	36.2%
Government expenditures	\$524,932	3.8%
TOTAL	\$13,940,241	100%

Note: 'All other supporting outdoor recreation' (\$5,684,344 thousand) is included in the total but encompasses a broad range of supporting activities not individually listed.



economic activity by industry

Outdoor recreation employment and economic value is distributed across multiple industries. Retail trade and manufacturing lead in employment, while ‘all other private industries’ — which includes a diverse range of supporting businesses — leads in value added.

industry	value added (\$000s)	employment	compensation (\$000s)
All other private industries	\$4,516,666	18,144	\$2,008,466
Retail trade	\$3,165,033	33,881	\$1,350,492
Manufacturing	\$2,540,953	7,629	\$885,727
Arts, entertainment & recreation	\$1,319,404	20,532	\$872,168
Accommodation & food services	\$1,071,725	15,018	\$562,704
Finance, insurance, RE & leasing	\$536,211	784	\$82,421
Government	\$790,250	3,157	\$618,440
TOTAL	\$13,940,241	99,145	\$6,380,418

Note on Industry Data: Private industries account for **\$13.1 billion** of total outdoor recreation value added (94.3%), with government contributing **\$790 million** (5.7%). Within private industries, the ‘all other private industries’ category at **\$4.5 billion** includes a wide range of businesses that supply goods and services to outdoor recreationists, reflecting the broad economic reach of the sector.

full economic impact by activity

The following table presents the complete economic impact (direct + indirect + induced) for each major outdoor recreation activity category in Minnesota, ranked by total economic output.

activity	total jobs	labor income	value added	total output
Outdoor recreation-oriented travel (>50 miles)	40,233	\$2.34B	\$3.99B	\$6.73B
Apparel & accessories	17,956	\$783M	\$1.50B	\$2.63B
Boating & fishing	9,925	\$700M	\$1.14B	\$1.96B
Game areas	18,608	\$595M	\$952M	\$1.69B
Travel (<50 miles)	9,485	\$552M	\$941M	\$1.59B
Government	4,208	\$331M	\$488M	\$1.13B
Sporting events	10,107	\$351M	\$665M	\$1.08B
Hunting/shooting/trapping	5,403	\$333M	\$553M	\$920M
Productive activities	4,157	\$300M	\$532M	\$854M
RV-ing	4,137	\$317M	\$527M	\$838M
Motorcycling/ATV-ing	3,614	\$287M	\$489M	\$814M
Construction	3,331	\$261M	\$418M	\$693M
Other	6,231	\$304M	\$419M	\$649M
Guides/outfitted travel	4,922	\$234M	\$343M	\$550M
Snow activities	2,159	\$137M	\$238M	\$383M
Climbing/hiking/camping	3,017	\$130M	\$209M	\$342M
Field sports	1,976	\$97M	\$136M	\$217M
Equestrian	1,727	\$87M	\$137M	\$212M
Bicycling	1,140	\$58M	\$83M	\$134M
TOTAL (ALL ACTIVITIES)	152,334	\$8.20B	\$13.76B	\$23.41B

Note: Totals reflect the complete economic impact model including direct, indirect, and induced effects. Individual activity rows may not sum exactly to totals due to model methodology.



regional economic impact by county

The following tables present the economic contribution of outdoor recreation across Minnesota’s five regions. Data are organized by county and include jobs supported, value added, total economic output, the share of all local jobs tied to outdoor recreation, the location quotient (LQ), and the share of local GDP attributable to outdoor recreation.

A location quotient (LQ) greater than 1.0 indicates that outdoor recreation is more economically concentrated in that county than the state average, reflecting areas where the industry plays an outsized role in the local economy.

metro region

county	jobs	value added	economic output	jobs %	LQ	GDP %
Anoka	5,550	\$713,830,960	\$1,211,615,706	3.02%	1.24	3.53%
Carver	1,532	\$208,856,400	\$358,891,349	2.43%	1.03	2.93%
Chisago	752	\$75,156,515	\$137,611,324	3.16%	1.16	3.30%
Dakota	7,495	\$913,049,452	\$1,854,498,396	2.82%	0.91	2.59%
Hennepin	25,644	\$4,738,305,370	\$7,081,157,352	2.07%	0.87	2.49%
Isanti	637	\$61,229,279	\$111,275,022	3.56%	1.40	3.97%
Ramsey	9,601	\$1,450,184,950	\$2,295,626,477	2.23%	0.95	2.70%
Scott	3,140	\$382,554,207	\$655,163,723	3.54%	1.36	3.89%
Washington	4,927	\$661,928,978	\$1,099,663,198	3.57%	1.51	4.29%
Wright	2,046	\$251,781,165	\$453,987,524	2.94%	1.28	3.65%
REGION TOTAL	61,324	\$9,456,877,276	\$15,259,490,071	—	—	—

northeast region

county	jobs	value added	economic output	jobs %	LQ	GDP %
Carlton	319	\$30,958,989	\$59,094,725	1.82%	0.60	1.70%
Cook	188	\$25,646,956	\$42,889,493	4.61%	2.83	8.05%
Itasca	792	\$78,224,020	\$145,598,322	3.58%	1.21	3.45%
Kanabec	157	\$14,920,989	\$28,062,758	2.36%	0.89	2.55%
Koochiching	193	\$22,071,930	\$38,134,393	3.26%	1.06	3.03%
Lake	235	\$24,488,366	\$44,735,496	4.09%	1.40	3.99%
Pine	527	\$50,591,709	\$101,550,465	4.31%	1.77	5.03%
St. Louis	3,852	\$539,665,136	\$885,544,111	3.08%	1.35	3.85%
REGION TOTAL	6,263	\$786,568,095	\$1,345,609,763	—	—	—

northwest region

county	jobs	value added	economic output	jobs %	LQ	GDP %
Becker	551	\$60,749,488	\$112,908,500	2.55%	1.11	3.17%
Beltrami	917	\$110,402,544	\$193,312,575	3.33%	1.48	4.21%
Cass	468	\$54,199,621	\$98,168,938	2.75%	1.42	4.05%
Clay	711	\$77,742,034	\$0	2.29%	0.90	2.55%
Clearwater	103	\$9,784,226	\$18,708,210	2.52%	0.86	2.45%
Hubbard	308	\$31,120,863	\$58,101,788	3.17%	1.11	3.15%
Kittson	45	\$3,478,268	\$7,127,600	1.78%	0.36	1.04%
Lake of the Woods	116	\$13,049,442	\$23,620,051	4.92%	2.13	6.07%
Mahnomen	105	\$13,807,229	\$24,166,722	3.56%	1.63	4.64%
Marshall	51	\$6,208,781	\$10,835,402	1.15%	0.39	1.12%
Norman	48	\$4,113,203	\$8,985,865	1.47%	0.45	1.30%
Pennington	260	\$28,497,350	\$55,310,409	2.05%	0.62	1.77%
Polk	389	\$41,500,903	\$76,693,060	2.13%	0.80	2.28%
Red Lake	22	\$2,534,704	\$4,357,265	1.23%	0.42	1.20%
Roseau	260	\$27,236,135	\$54,259,364	2.36%	0.62	1.77%
Wilkin	29	\$3,496,206	\$5,833,945	0.97%	0.30	0.85%
REGION TOTAL	4,383	\$487,920,997	\$752,389,694	—	—	—

central region

county	jobs	value added	economic output	jobs %	LQ	GDP %
Aitkin	216	\$23,067,277	\$42,903,715	3.32%	1.43	4.07%
Benton	567	\$66,875,631	\$117,945,163	2.38%	0.96	2.74%
Crow Wing	1,451	\$196,437,159	\$337,489,493	3.40%	1.73	4.94%
Douglas	868	\$111,440,057	\$195,119,881	3.03%	1.40	4.00%
Grant	47	\$4,365,599	\$8,319,935	1.44%	0.48	1.36%
Kandiyohi	729	\$99,204,428	\$167,614,438	2.40%	1.15	3.27%
McLeod	637	\$76,891,872	\$139,648,336	2.86%	1.14	3.24%
Meeker	254	\$25,982,777	\$51,832,428	2.10%	0.76	2.17%
Mille Lacs	473	\$53,043,473	\$98,261,057	3.59%	1.69	4.80%
Morrison	475	\$46,644,006	\$90,179,851	2.68%	1.08	3.07%
Otter Tail	885	\$94,171,987	\$177,890,178	2.54%	0.99	2.83%
Pope	119	\$13,230,390	\$26,563,312	1.62%	0.62	1.76%
Sherburne	1,112	\$126,802,037	\$228,161,049	2.64%	1.02	2.91%
Stearns	3,206	\$449,003,321	\$786,862,889	2.69%	1.26	3.58%
Stevens	168	\$18,972,868	\$33,992,596	2.34%	0.81	2.32%
Todd	270	\$21,234,618	\$44,668,439	2.39%	0.68	1.94%
Wadena	166	\$18,695,543	\$33,377,379	2.02%	0.93	2.65%
REGION TOTAL	11,643	\$1,446,063,043	\$2,580,830,139	—	—	—

southern region

county	jobs	value added	economic output	jobs %	LQ	GDP %
Big Stone	58	\$4,882,696	\$9,605,556	2.06%	0.63	1.81%
Blue Earth	2,016	\$148,116,067	\$487,709,951	3.82%	0.91	2.59%
Brown	569	\$62,702,030	\$116,519,715	3.13%	1.10	3.13%
Chippewa	152	\$19,139,251	\$34,743,660	1.95%	0.85	2.42%
Cottonwood	146	\$16,906,639	\$31,348,092	1.85%	0.63	1.78%
Dodge	142	\$16,885,051	\$30,494,430	1.62%	0.56	1.60%
Faribault	160	\$14,998,753	\$29,929,636	2.17%	0.62	1.77%
Fillmore	241	\$22,145,734	\$44,729,960	2.24%	0.82	2.33%
Freeborn	469	\$62,016,491	\$109,619,000	2.77%	1.21	3.45%
Goodhue	1,004	\$118,708,517	\$217,750,045	3.36%	1.16	3.30%
Houston	147	\$13,344,156	\$26,701,684	1.67%	0.64	1.82%
Jackson	100	\$10,675,940	\$21,097,043	1.34%	0.44	1.26%
Lac qui Parle	55	\$5,639,947	\$11,375,655	1.32%	0.49	1.40%
Le Sueur	265	\$26,419,676	\$52,992,128	1.99%	0.71	2.03%
Lincoln	40	\$3,824,434	\$7,383,469	1.24%	0.42	1.18%
Lyon	577	\$67,100,195	\$119,694,797	3.04%	1.16	3.29%
Martin	355	\$39,544,381	\$72,439,011	2.81%	0.94	2.67%
Mower	600	\$68,551,134	\$120,527,328	2.73%	0.99	2.81%
Murray	81	\$8,226,354	\$16,146,640	1.59%	0.57	1.63%
Nicollet	433	\$56,253,187	\$97,459,027	2.06%	0.89	2.54%
Nobles	343	\$42,361,689	\$73,914,333	2.51%	0.96	2.72%
Olmsted	3,329	\$460,943,301	\$730,749,683	2.59%	1.10	3.12%
Pipestone	131	\$13,957,816	\$25,886,182	2.09%	0.67	1.90%
Redwood	308	\$35,563,098	\$63,723,234	3.27%	1.00	2.85%

southern region (continued)

county	jobs	value added	economic output	jobs %	LQ	GDP %
Renville	126	\$12,387,862	\$24,749,307	1.44%	0.41	1.17%
Rice	941	\$105,829,336	\$187,229,187	2.55%	0.96	2.75%
Rock	107	\$11,816,220	\$21,872,166	1.80%	0.58	1.64%
Sibley	136	\$12,592,921	\$23,937,360	2.13%	0.70	2.00%
Steele	638	\$90,535,626	\$156,165,803	2.54%	1.17	3.34%
Swift	90	\$13,152,171	\$22,072,469	1.53%	0.61	1.73%
Traverse	25	\$2,774,825	\$5,156,732	1.17%	0.49	1.40%
Wabasha	276	\$25,241,658	\$48,647,527	2.76%	0.91	2.60%
Waseca	210	\$6,798,753	\$42,938,045	2.46%	0.26	0.75%
Watsonwan	116	\$14,667,388	\$26,367,743	1.82%	0.76	2.15%
Winona	965	\$112,206,845	\$205,435,430	2.93%	1.26	3.58%
Yellow Medicine	175	\$15,901,443	\$32,439,183	2.78%	0.82	2.34%
REGION TOTAL	15,526	\$1,762,811,585	\$3,349,551,211	—	—	—



year-over-year trends (2023–2024)

The 2024 BEA data release shows continued growth in Minnesota’s outdoor recreation sector, building on a strong 2023 performance.

metric	2023	2024	% change
Total Value Added (BEA)	\$13,540,058,000	\$13,940,241,000	+3.0%
Direct Employment (BEA)	95,937	99,145	+3.3%
Snow Activities Value Added*	\$238,378,000	\$213,764,000	-10.3%
RV-ing Value Added	\$528,523,000	\$527,247,000	-0.2%
Boating & Fishing Value Added	\$1,142,249,000	\$1,119,600,000	-2.0%
Game Areas Value Added	\$627,404,000	\$643,145,000	+2.5%
Total GDP from Outdoor Rec**	\$13,463,454,000	\$13,430,656,000	-0.2%

*2024 in Minnesota was characterized by a “lost winter” with historically low snowfall, as most areas received less than 50% of their normal accumulation through February.

**Includes data from Headwaters Economics, which has yet to be updated from the previous year.

activity-level observations

Overall growth in value added (+3.0%) and employment (+3.3%) reflects the resilience of Minnesota’s outdoor recreation sector. Notable within-sector shifts include:

- Snow activities declined 10.3% in value added, likely reflecting unfavorable winter conditions in parts of the state.
- Boating and fishing saw a modest 2.0% decrease, consistent with broader national trends in fishing participation.
- Game areas (including golf and tennis/pickleball) grew 2.5%, indicating continued demand for structured outdoor recreation venues.
- RV-ing remained essentially flat (-0.2%), suggesting a stable but mature market segment.



data notes and methodology

data sources

- Bureau of Economic Analysis (BEA): Outdoor Recreation Satellite Account (ORSA), 2024 data released March 5, 2026. Available at bea.gov/data/special-topics/outdoor-recreation.
- Headwaters Economics: State-level outdoor recreation economic analysis and activity-level GDP estimates. Available at headwaterseconomics.org.
- RRC Associates: Regional and county-level impact modeling using IMPLAN input-output analysis, based on 2023 ORSA reporting data.

methodology notes

- BEA value-added figures represent the direct contribution of outdoor recreation activities to gross domestic product and are not directly comparable to total economic output figures, which include multiplier effects.
- County-level estimates are based on 2023 RRC Associates modeling with 2024 BEA inputs applied to update state-level benchmarks. Regional and county totals reflect proportional adjustments.
- Location quotients (LQ) measure the concentration of outdoor recreation employment relative to the state average. An LQ above 1.0 indicates above-average concentration.
- Figures in thousands of dollars are drawn directly from BEA source tables. All other dollar figures have been converted to full values for readability.
- Direct employment totals from BEA (99,145) and RRC Associates models (99,011) vary slightly due to rounding and model methodology; both are presented in appropriate contexts throughout this report.

about ORIP

The Minnesota Outdoor Recreation Industry Partnership (ORIP) is a four-agency collaboration between the Minnesota Department of Natural Resources (DNR), the Department of Employment and Economic Development (DEED), Explore Minnesota Tourism, and Iron Range Resources and Rehabilitation (IRRR). ORIP's mission is to grow Minnesota's outdoor recreation economy and expand access for all Minnesotans.

For more information, contact the Minnesota Outdoor Recreation Industry Partnership.

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