

AMERICA'S OUTDOOR RECREATION SECTOR

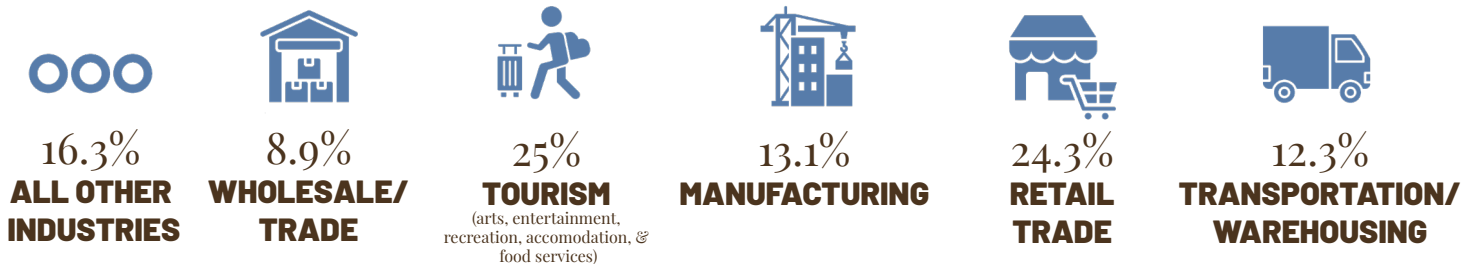
Rooted in vast public lands and protected natural spaces, America's outdoor recreation sector connects iconic parks, forests, and natural wonders with rural communities across the country, and it's growing faster than the national economy.

OUTDOOR RECREATION SPANS INDUSTRIES

Outdoor recreation has grown 37% since 2012, driving job growth across skilled trades and professional sectors, from construction to technology. In the same time, the overall economy grew by 29%*

INDUSTRY SHARE OF OUTDOOR RECREATION, CURRENT VALUE ADDED**

In 2024, outdoor recreation contributed nearly \$697 billion to the U.S. economy. About half of that impact came from tourism, entertainment, lodging, food services, and retail sales, while the rest supported manufacturing, transportation, wholesale trade, and other industries.



IN 2023, NATIONALLY, OUTDOOR RECREATION CONTRIBUTED***:



\$1.3T
Economic Output

5.2M
Jobs

2.4%
of National GDP

IN 2023, OHIO OUTDOOR RECREATION CONTRIBUTED***:



\$20.1B
Economic Output

153,614
Jobs

2.6%
of State GDP

NATIONALLY: Outdoor recreation is nearly 4x larger than air transportation and bigger than the auto, agriculture, energy, and manufacturing sectors,* leading 24 states to create outdoor recreation economy offices that align traditionally siloed agencies, industries, tourism, natural resources, and local communities to turn visitor activity into long-term economic growth, workforce attraction, and private investment.****

OHIO: Ohio's outdoor recreation sector is already one of the nation's Top 10 by size, yet ranks just 37th in growth,** suggesting significant room for expansion through coordinated investment and regional strategy. At 2.6% of Ohio GDP, outdoor recreation already exceeds mining (0.5%), farming (0.6%), utilities (1.7%), and several manufacturing sectors,*** positioning this economic sector as a major opportunity for economic and community growth.

SCALING OHIO'S OUTDOOR RECREATION ECONOMY

Ohio's outdoor recreation economy is a high-potential, cross-sector driver advancing workforce, health, community, environmental, and education outcomes. With strong natural assets and proven regional models already in place, Ohio is positioned to strengthen communities, grow its economy, and enhance statewide competitiveness through coordinated investment and statewide strategy.

OHIO'S COMPETITIVE ADVANTAGE

From forests to parks to public investment, Ohio has the assets to compete, but is currently underleveraged. **IN APPALACHIAN OHIO ALONE:**

40%
Forested

140+
State Nature
Preserves

20+
State
Parks

\$500M+
Investment
through GOA

1
Ohio's only National
Forest (Wayne)

CAPITALIZING ON OHIO'S OUTDOOR RECREATION ECONOMY: THE OUTDOOR RECREATION COUNCIL OF APPALACHIA (ORCA)

ORCA is leading a coordinated, multi-county model aligning outdoor recreation with economic development, workforce, and community development. The coalition is advancing a shared regional brand, Ohio's Rolling Hills, aligning partners and investment to build a regional destination, and transitioning Ohio's poorest region to a thriving economy.



ORCA/OHIO'S ROLLING HILLS PARTNER COUNTIES (ON MAP IN GREEN)

- Adams
- Athens
- Brown
- Clermont
- Gallia
- Highland
- Jackson
- Lawrence
- Meigs
- Monroe
- Morgan
- Noble
- Perry
- Pike
- Ross
- Scioto
- Vinton
- Washington



18 COUNTIES: One region. Shared vision. Stronger together.

APPALACHIAN OHIO IN ACTION: THE BAILEYS TRAIL SYSTEM

The Baileys Trail System, developed by ORCA in partnership with the Wayne National Forest, is a nationally recognized model for regional growth. It is the longest continuous mountain bike trail system, open to all human-powered use, east of the Mississippi. Featured in federal and global case studies, it is driving visitation, small business growth, and a strong regional identity.



88
Miles
of Trail

\$5.3M
Economic
Impact/Year 1

3
Trailhead
Communities

\$30M
Community
Infrastructure
Leveraged

\$13M
Federal & State
Infrastructure

A PROVEN STRATEGY TO GROW OHIO'S OUTDOOR RECREATION ECONOMY

Regional collaboration is already proving effective in Appalachian Ohio, demonstrating how coordinated investment and strategy can strengthen communities and grow the outdoor recreation economy. With 24 states now operating dedicated outdoor recreation offices, Ohio has a clear opportunity to scale this success through stronger statewide coordination, investment, and regional alignment.