

MAY 2025

UP FOR ADVENTURE

AN OUTDOOR RECREATION INDUSTRY GROWTH STRATEGY FOR THE CENTRAL UP



ORIAN

OUTDOOR RECREATION INNOVATION
ACTION NETWORK

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TIP Strategies, Inc., is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm has spent 30 years partnering with communities, turning insights into strategies that shape tomorrow. Its core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

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OVERVIEW



Introduction

Michigan's Central Upper Peninsula (Central UP) has long been defined by its natural resources, pristine landscapes, and deep-rooted outdoor heritage. As outdoor recreation grows as a driver of economic development, the region is well-positioned to expand its outdoor economy beyond tourism. Fostering businesses that design, manufacture, and engineer outdoor equipment and technology is a means to this end. This strategy presents a unified approach to growing outdoor recreation businesses, enhancing outdoor recreation assets, and supporting tourism and community development to strengthen the Central UP's position in the outdoor recreation industry.

With a strong tradition of artisanship and innovation, the Central UP (defined as Alger, Delta, Dickinson, Marquette, Menominee, and Schoolcraft Counties) has the potential to attract companies specializing in advanced materials, sustainable product development, and outdoor technology. Leveraging existing assets is key. Building on a skilled workforce, respected educational institutions, and a culture of outdoor activity can bring this strategy to fruition.

Unlike the well-known mountain communities of the West, the Central UP remains affordable and offers notable opportunities for growth. While the region has experienced population decline since the mid twentieth century, the rise of remote work and Industry 4.0 is creating new opportunities for revitalization. *UP for Adventure: An Outdoor Recreation Industry Growth Strategy for the Central UP (UP for Adventure)* provides a framework to support business retention and expansion, attract new enterprises, and position the region as a leader in the outdoor economy—developing long-term economic resilience while preserving its outdoor heritage.

Investments in business growth and entrepreneurship, outdoor recreation infrastructure, and community development are primary goals. Aligning economic development initiatives with the needs of the outdoor recreation industry can create jobs, attract investment, and diversify the economy while preserving the region's natural assets. Collaboration between public and private stakeholders will ensure that industry growth remains both economically and environmentally sustainable.



Project Origin and Approach

UP for Adventure is a direct response to economic shifts following the closure of the Presque Isle Power Plant in Marquette, which resulted in job losses and highlighted the need for industry diversification. The Central Upper Peninsula Planning and Development (CUPPAD) Regional Commission and Innovate Marquette secured funding from the US Economic Development Administration (EDA) to develop a comprehensive strategy focused on outdoor recreation technology, electrified mobility, and business development. The Outdoor Recreation Innovation Action Network (ORIAN), a public-private collaborative, is guiding this initiative and ensuring alignment with regional economic priorities.

The planning process was led by TIP Strategies (TIP) over a 10-month period, using the firm's three-phase planning model: discovery, opportunity, and implementation. The plan was co-developed with ORIAN's 22 members who represent diverse public and private sector interests related to the outdoor recreation industry. Together, this group comprised the project steering committee (ORIAN Committee), which met regularly throughout the project. Industry engagement and a commitment to relevant data were hallmarks of the process.

DISCOVERY. The first phase began with a comprehensive asset inventory and regional analysis that assessed competitive advantages, gaps, and opportunities. Stakeholder engagement was a vital component of this phase, incorporating surveys, roundtables, and interviews to gather insights from businesses, public agencies, and workforce representatives. The ORIAN Committee ensured alignment with regional priorities and assisted with identifying and facilitating stakeholder input. Next, a benchmark analysis compared the region's outdoor recreation industry to peer and aspirational regions, identifying best practices and lessons that could inform local strategies, which can be found in the Benchmarks section (beginning on page 20).

Findings from the discovery phase were synthesized into a strengths, weaknesses, opportunities, and threats (SWOT) analysis, which directly informed the strategies and actions outlined in the Growth Strategy section, beginning on page 6. A summary of the SWOT analysis can be found in Figure 9 on page 40. TIP's quantitative analysis was delivered as an interactive data visualization allowing for future exploration by ORIAN. Additional information on the data analysis is provided as part of Appendix A. Planning Context (beginning on page 32).

OPPORTUNITY. During the opportunity phase, the consulting team refined its initial findings, built on emerging themes, and conducted additional stakeholder outreach. This phase culminated with an interactive workshop where the ORIAN Committee shaped industry growth priorities, emphasizing environmental stewardship, cultural sustainability, and multimodal connectivity.

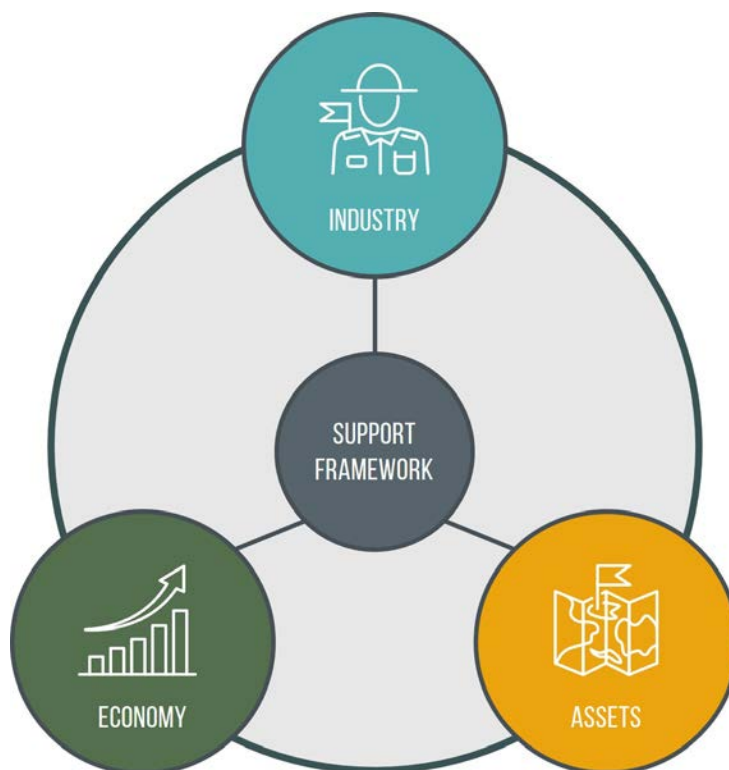
IMPLEMENTATION. The final phase of the planning process centered on cocreating strategies and building consensus among partners on plan priorities. As part of this phase, the consulting team also provided an implementation matrix, which defined responsibilities, resources, and performance metrics to track progress. To ensure sustained impact, a metrics tracking dashboard was developed to monitor industry growth and inform future decision-making. The strategy was presented at the U.P. Outdoor Summit on May 16, 2025, where ORIAN was instrumental in convening stakeholders and setting the stage for long-term implementation.

Defining the Outdoor Recreation Sector

The outdoor recreation sector is multifaceted, complicating the task of arriving at a definition. Stated simply, it is about deriving economic benefit from enjoying the outdoors. Whether that enjoyment comes from hiking, mountain biking, climbing, paddleboarding, kayaking, fishing, snowmobiling, or one of numerous other activities, building a successful outdoor recreation sector requires an intentional investment of time and resources. For this work, it is useful to think about those investments across three segments: (1) the industries that supply the equipment needed by outdoor enthusiasts; (2) the ancillary goods and services that support the outdoor economy, including tourism; and (3) the natural features, physical infrastructure, and assets that underpin the sector.

This definition, while simple, presents challenges. Federal industrial classification systems do not recognize outdoor recreation as a separate industry. As a result, designers and manufacturers of outdoor goods are classified across multiple industries within the broad manufacturing sector. In addition, many of the businesses associated with outdoor recreation, like restaurants and hotels, serve other parts of the economy, complicating attempts to isolate their contribution to the sector. Even the outdoor assets themselves defy simple categorization. They may be privately owned ventures (e.g., ski hills and golf courses) or public resources managed by various public or nonprofit entities (e.g., trails and waterways). The US Bureau of Economic Analysis (BEA) offers some insights through its outdoor recreation satellite account, which tracks employment, compensation, and contribution to gross domestic product for relevant industries. While the BEA definition is useful for comparing the Central UP to other regions (see Strategic Analysis in Appendix A. Planning Context), it is subject to many of these same limitations.

FIGURE 1. OUTDOOR RECREATION INDUSTRY FRAMEWORK



Source(s): TIP Strategies, Inc.

Outdoor Recreation Industry

The outdoor recreation industry includes companies that design, engineer, and manufacture hard goods—such as outdoor equipment, gear, and vehicles—and soft goods like apparel, footwear, and textiles. This segment, often referred to as makers, encompasses product innovation, material development, and advanced manufacturing to support activities like hiking, camping, cycling, climbing, paddling, snow sports, and hunting. In addition to their importance to enthusiasts in the Central UP, the market served by makers typically extends beyond the region, making these traded sectors particularly important from an economic standpoint.

Unlike tourism-driven outdoor recreation, these businesses operate within national and global supply chains, exporting goods and driving regional economic growth through job creation, investment, and technological

advancements. They intersect with industries (e.g., advanced manufacturing and textiles), and sustainability-focused product development. Innovation plays a key role in this sector, particularly in emerging areas like rec tech, where advancements in electrification are shaping the industry. This includes developments in charging infrastructure for all-terrain vehicles (ATVs), electric vehicles (EVs), and electric bikes (e-bikes), as well as solar canopies for powering outdoor equipment.

Outdoor Recreation Economy

The outdoor recreation economy includes the tourism, hospitality, and retail sectors that support outdoor activities. This segment encompasses businesses, like guides and outfitters, outdoor gear and apparel retailers, lodging and hospitality services, recreational vehicle rentals, and adventure tourism operators. These businesses generate revenue by providing experiences, services, and consumer goods that facilitate outdoor activities, including hiking, fishing, boating, skiing, and wildlife viewing.

Unlike traded-sector businesses that design and manufacture outdoor products, the outdoor recreation economy is location dependent, relying on natural assets, public lands, and infrastructure to attract visitors. It drives economic activity through visitor spending, job creation, and local business growth, benefiting sectors, such as lodging, food services, transportation, and entertainment. Aligning recreation development with these essential services is important to ensure the region can support growth in the outdoor recreation economy.

Outdoor Recreation Assets and Infrastructure

Outdoor recreation assets include the physical infrastructure and natural features that enable outdoor activities, often referred to as the facilitators of outdoor recreation. These assets encompass built environments, including ski jumps and hills, golf courses, and skate parks, as well as natural resources like waterways, forests, mountains, and open spaces that support activities, like hiking, climbing, biking, paddling, skiing, and fishing.

The work of developing, maintaining, and advocating for these assets is accomplished by a network of organizations and stakeholders including trail clubs, conservancies, land trusts, and public agencies. Their efforts help expand access, ensure sustainability, and strengthen the outdoor recreation economy.

In addition to driving economic growth, outdoor recreation assets and related infrastructure are also critical for talent attraction and retention. A strong outdoor recreation ecosystem enhances quality of life, making regions more appealing to skilled workers and entrepreneurs who prioritize access to outdoor activities. Businesses increasingly recognize that proximity to amenities, including high-quality recreation opportunities, helps attract and retain employees, particularly in industries that rely on innovation and a highly skilled workforce.

Summary

UP for Adventure provides a road map for leveraging the region's outdoor recreation assets to drive economic development and innovation, leading to a more diversified economy. By aligning business growth, talent and tourism attraction, and asset and infrastructure investments, this strategy supports a sustainable outdoor recreation sector. Through collaboration between public and private stakeholders, the region can strengthen its position as a hub for outdoor product design, manufacturing, and technology while preserving its natural resources and enhancing quality of life. The Growth Strategy section outlines the strategies and actions necessary to achieve this vision.



GROWTH STRATEGY



Goal 1. Outdoor Recreation Industry

Foster a dynamic ecosystem that supports innovation, attracts and grows businesses, enhances workforce capabilities, and drives commercialization of new technologies to strengthen the industry's long-term economic impact.

The outdoor recreation industry goal is designed to encourage innovation, support scalable enterprises, and strengthen the industry's economic foundation. It aims to position the region as a competitive hub by advancing technology commercialization, leveraging the Central UP's workforce capabilities, and cultivating entrepreneurship. The strategy also builds a robust ecosystem that accelerates innovation, connects entrepreneurs with critical resources, and supports the growth of high-potential ventures through commercialization pathways, research collaborations, and niche industry clusters.

- 1.1. BUSINESS RETENTION AND EXPANSION (BRE).** Strengthen the outdoor recreation industry by ensuring existing businesses have the resources, connections, and policy support needed for long-term stability and growth.
 - 1.1.1.** Support the growth of existing outdoor recreation businesses by facilitating access to capital, workforce development and training programs, and industry-specific technical assistance.
 - 1.1.2.** Maintain a database of companies in the outdoor recreation industry. Organize the database to ensure that traded sector companies are easily identifiable to ensure they are prioritized for assistance and support.
 - 1.1.3.** Create a BRE survey specifically tailored to the outdoor recreation industry to ensure consistency in business development initiatives. Identify and track the specific needs of outdoor recreation companies.
 - 1.1.4.** Establish a network for outdoor recreation companies to connect, share resources, and collaborate on market expansion opportunities.

Kootenay Outdoor Recreation Enterprise

The [Kootenay Outdoor Recreation Enterprise](#) (KORE) is a nonprofit organization based in British Columbia's Kootenay region, dedicated to fostering the outdoor manufacturing sector. Founded to attract investment and support local gear makers, KORE has implemented several initiatives to bolster the industry. The KORE Cluster aims to attract and nurture outdoor industry startups or relocations to the Kootenays, cultivating a vibrant community of gear makers and product designers. KORE Discovery introduces potential brands, designers, and media to the region, showcasing its lifestyle amenities and industry support to entice businesses. KORE Connection facilitates quarterly meet-ups for networking, idea sharing, and collaboration among outdoor industry professionals. To address workforce development, KORE WorkForce collaborates with educational institutions to identify labor market needs and develop training programs, ensuring a skilled workforce for the outdoor industry. Additionally, KORE Fab Labs provides access to fabrication technology for product design and rapid prototyping in partnership with local colleges. KORE also expands industry knowledge and engagement through an outdoor speaker series featuring experts from the field and a podcast that offers insights from industry leaders to support entrepreneurs. Through these initiatives, KORE has significantly contributed to the growth of the outdoor manufacturing sector in the Kootenays, supporting local businesses and enhancing the region's economic and cultural landscape.

1.2. ENTREPRENEURIAL ASSETS AND RESOURCE MAP. Strengthen the entrepreneurial ecosystem by maintaining an entrepreneurial ecosystem map of assets and resources that helps startups identify available funding, mentorship, and technical support.

1.2.1. Maintain a comprehensive inventory of entrepreneurial resources, including incubators, accelerators, funding sources, and technical assistance programs. Identify gaps or limitations in resources and work to improve weak areas.

1.2.2. Leverage Innovate Marquette to connect outdoor recreation startups with industry experts, research institutions, and investors.

1.2.3. Facilitate networking and mentorship opportunities to help entrepreneurs navigate the challenges of launching and scaling their businesses.

1.3. TECH TRANSFER AND COMMERCIALIZATION.

Accelerate innovation in outdoor recreation and rec tech by fostering collaboration among research institutions, entrepreneurs, and industry partners to commercialize cutting-edge technologies.

1.3.1. Strengthen partnerships with Midwestern universities and national labs (including Argonne National Laboratory, Ames National Laboratory, and Fermi National Accelerator Laboratory) that have expertise in electrification advancements and other outdoor recreation related technology (e.g., fabric and materials technology at the University of Wisconsin—Madison) to increase the transfer of outdoor recreation related technologies to the marketplace.

1.3.2. Support pilot programs and prototype development of outdoor recreation equipment that bridge the gap between research and commercialization. Utilize events like the Michigan Ice Fest as a platform for testing prototypes and gathering real-time feedback for product developers. Consider developing new events that would be conducive to product testing (see strategies 2.2 and 3.3).

1.3.3. Expand access to funding and incentives for businesses engaged in research and development, ensuring new technologies can be rapidly developed and scaled. Promote the Michigan Outdoor Innovation Fund as a mechanism to fund advancements in outdoor recreation technology.

1.4. BUSINESS RECRUITMENT. Attract businesses in the outdoor recreation industry that align with regional strengths, supply chain opportunities, and workforce capabilities of the Central UP.

1.4.1. Target emerging and/or high-growth companies in outdoor gear design, advanced materials, and recreation technology to expand the industry’s presence in the Central UP (see action 1.6.1). Focus on companies that support the niche outdoor recreation activities (see Appendix B. Niche Outdoor Recreation, page 40), as well as divisions of companies (i.e., the research and development department or marketing department).

Rec Tech

Recreation technology, or rec tech, encompasses the use of advanced tools to enhance outdoor and recreational experiences through innovation. This includes wearable devices that monitor health and performance, mobile apps that provide real-time navigation and trail conditions, and virtual or augmented reality systems that create immersive training and adventure experiences. Data analytics and smart equipment have also led to dramatic advances in optimizing performance and safety. By integrating these technologies, rec tech is making outdoor recreation more accessible, engaging, and tailored to individual needs.

- 1.4.2. Create custom marketing materials tailored to businesses in the outdoor recreation industry that can also be used for talent recruitment and tourism promotion (see action 1.7.6). Materials should promote the Central UP's extensive outdoor recreation assets.
- 1.4.3. Identify lead sources specifically for companies in the outdoor recreation industry. This could include accessing member databases, like the Outdoor Industry Association (OIA); attending industry events, such as Outdoor Retailer or The Materials Show; and monitoring industry publications, including the *Outside Business Journal*.
- 1.4.4. Develop and promote creative incentives tailored to the needs of outdoor recreation manufacturers, suppliers, and service providers. For example, renaming a trail after a company or offering a complimentary or discounted corporate membership to local trails or a recreation club.
- 1.4.5. Leverage partnerships with industry associations and trade organizations to understand critical needs of the outdoor recreation industry, as well as attract new businesses and investment.
- 1.5. **SITE AND INFRASTRUCTURE DEVELOPMENT.** Create a business-ready environment by investing in infrastructure, optimizing land use, and enhancing site development to support outdoor recreation industry growth.
 - 1.5.1. Identify and prepare key sites for outdoor recreation businesses by ensuring access to necessary utilities, transportation networks, and sustainable infrastructure. Consider additional needs, like proximity to recreation amenities, based on industry niche. For example, identify suitable commercial sites near a ski jump and target companies within that industry (e.g., such as binding designers or apparel manufacturers).
 - 1.5.2. Partner with public and private stakeholders to develop flexible industrial and commercial spaces that accommodate the sector's evolving needs. Consider developing shared spaces where equipment could be used by multiple businesses to reduce startup and operating costs, as well as encourage collaborative innovation.
 - 1.5.3. Advocate for outdoor recreation friendly zoning policies and land use strategies that support industry growth while maintaining environmental sustainability.
 - 1.5.4. Continue to support the development and expansion of routes from Marquette Sawyer Regional Airport and Ford Airport Iron Mountain airports to support business development and tourism growth.
- 1.6. **NICHE CLUSTER DEVELOPMENT.** Position the Central UP as a hub for specialized outdoor recreation sectors by supporting the growth of emerging markets, like electrification and advanced materials. (This strategy should be informed by the guidance on fostering startup ecosystems provided separately as part of the planning engagement.)
 - 1.6.1. Identify and recruit businesses, including start-ups, specializing in high-growth niches, such as sustainable gear manufacturing, rec tech, and digital outdoor experience technologies (see action 1.4.1). Utilize industry reports, including those from McKinsey & Company (McKinsey Insights) or the OIA, to understand trends and market dynamics.
 - 1.6.2. Support the development of an electrification ecosystem for outdoor recreation products, including batteries, lightweight materials, energy-efficient designs, and equipment (e.g., EV snowmobiles, EV ATVs, and e-bikes). Concentrate efforts on electrification of industries outlined in the Central UP's niche outdoor recreation activities (see Appendix B. Niche Outdoor Recreation, page 41).

1.6.3. Facilitate industry collaboration to establish best practices, regulatory support, and investment attraction for next-generation outdoor recreation innovations.

1.7. COLLABORATION AND COORDINATION. Develop strategic partnerships, align resources, and facilitate coordinated efforts among businesses, research institutions, economic development organizations (EDOs), and policymakers to drive innovation, expand market opportunities, and advocate for shared priorities to develop the outdoor recreation industry.

1.7.1. Formalize the Outdoor Recreation Innovation Action Network (ORIAN). ORIAN can begin by facilitating communication among private companies and anchor institutions (public entities, universities, medical and health providers). Aligning these stakeholders around the strategic goals can serve as a work plan operation. Ensuring diverse representation, including members from all Central UP counties and from the state of Michigan will be highly beneficial. The implementation plan gives further guidance to ORIAN as the lead organization for implementation (see page 18).

1.7.2. Develop cross-sector partnerships that connect outdoor recreation businesses with complementary industries (e.g., advanced manufacturing, clean energy, and digital technology).

1.7.3. Organize regular industry roundtables, workshops, and networking events to encourage knowledge sharing and collective problem-solving.

1.7.4. Collaborate with workforce development and training partners to understand the needs of the outdoor recreation workforce and explore programs to retrain and upskill workers to position them for emerging opportunities.

1.7.5. Strengthen collaboration between public agencies and private businesses to streamline regulatory processes, unlock funding opportunities, and advance industry-supportive policies.

1.7.6. Support joint marketing and branding initiatives that position the Central UP as a leader in outdoor recreation innovation and business development (see action 1.4.2).



Goal 2. Outdoor Recreation Economy

Cultivate a resilient and diversified outdoor recreation economy that enhances regional competitiveness, attracts visitors, supports infrastructure development, and maximizes the industry's economic and community benefits.

A strong outdoor recreation economy, including tourism and hospitality, creates market conditions that drive demand for new products, services, and experiences. This demand fuels innovation and growth for designers, engineers, and manufacturers. Investments in destination development, local business support, and workforce training strengthen the ecosystem, allowing consumer-facing and industry-focused businesses to thrive and reinforcing the Central UP's leadership in outdoor recreation.

- 2.1. TOURISM.** Strengthen the outdoor recreation tourism sector by enhancing visitor experiences, leveraging digital tools, and aligning offerings with user preferences.
 - 2.1.1.** Improve wayfinding through consistent signage, interactive kiosks, and multilingual information to enhance accessibility for visitors, as well as encourage or direct visitors to lesser-known areas in the Central UP.
 - 2.1.2.** Develop and maintain digital mapping tools that provide real-time information on trails, recreation sites, and nearby businesses and amenities. This should include maps for experiences, like gravel riding and paddleboarding, that may not use traditional trail infrastructure.
 - 2.1.3.** Conduct user profile research to better understand visitor demographics, interests, and spending patterns, ensuring targeted marketing and service improvements (see Appendix C. User Profiles, page 44).
 - 2.1.4.** Continue to develop and expand coordinated marketing efforts that highlight the Central UP's assets and boost talent attraction. Examples include leveraging the state's highly regarded Pure Michigan (tourism) and Pure Opportunity (business development) campaigns.
 - 2.1.5.** Utilize earned media or film and television partnerships to build awareness of outdoor recreation in the Central UP through authentic storytelling. Leverage niche publications, such as *Midwest Vertical Journal* (regional) or *Mountain Gazette* (national) to reach targeted audiences, as well as local writers and content creators.
- 2.2. EVENTS.** Expand the role of outdoor recreation events in driving economic activity, attracting visitors, and strengthening industry connections. Prioritize niche outdoor recreation activities where the Central UP has a competitive advantage (see Appendix B. Niche Outdoor Recreation, page 41).
 - 2.2.1.** Develop and promote signature outdoor recreation events that showcase the region's assets and attract participants from local, national, and international markets.

User Profiles

The Central UP attracts a diverse range of outdoor recreation participants, each with unique interests, needs, and spending patterns. Understanding characteristics and demographics of these user groups can help inform marketing strategies, infrastructure investments, and business development efforts to better serve visitors and residents while maximizing the economic impact of the outdoor recreation industry. Appendix C outlines 10 profiles that represent key segments engaging in outdoor activities across the region (see page 44). By tailoring services, amenities, and promotional efforts to these groups, the Central UP can enhance visitor experiences, support local businesses, and strengthen its reputation as an outdoor recreation destination.

- 2.2.2.** Support event organizers by streamlining permitting processes, coordinating logistics, and providing marketing assistance.
- 2.2.3.** Leverage events to create business opportunities for local retailers, hospitality providers, and outdoor recreation companies. This should include product testing opportunities, using the Michigan Ice Fest model as a guide (see action 1.3.2 and strategy 3.3).
- 2.2.4.** Ensure regional coordination when launching or setting dates for significant events across the broader Upper Peninsula region. Identify opportunities to coordinate complementary events to draw larger audiences, while also ensuring that events are distributed throughout the year. For example, the UP200 and the Michigan Ice Fest both took place over the third weekend in February 2025. However, this also overlapped with major events in Hancock (Snow Sculpture Invitational), Houghton (Jibba Jabba rail jam), and Sault Ste. Marie, Ontario (BON SOO Winter Carnival). In past years, many of these events have also overlapped with the Fédération Internationale de Ski (FIS) Continental Cup at Pine Mountain.

Michigan Ice Fest

The Michigan Ice Fest, held annually in Munising, Michigan, is the oldest ice climbing festival in the US and represents a significant contribution to the state's outdoor recreation economy. Hosted by Down Wind Sports and Pictured Rocks National Lakeshore, the event attracts climbers and outdoor enthusiasts from across the country, supporting local businesses and reinforcing the Central UP's reputation as a top-tier winter sports destination. The festival offers multiple participant tracks, including photography, women's climbing, and innovation, each providing a tailored experience. The innovator track stands out as a platform for designers and entrepreneurs to test and refine outdoor gear with direct feedback from climbers. In 2025, for example, a Michigan Technological University student showcased a prototype ice climbing axe, highlighting the festival's role as a proving ground for new equipment. The Ice Fest also prioritizes inclusivity through initiatives like the diversity program, supported by the Michigan Office of Outdoor Recreation Industry, which partners with organizations, including Detroit Outdoors and Memphis Rox, to expand access to outdoor recreation for underrepresented communities. Strategic partnerships with leading outdoor brands, including Black Diamond, Patagonia, The North Face, and YETI, further enhance the festival's industry presence and position the Central UP as a hub for outdoor recreation innovation. Through these efforts, the Michigan Ice Fest exemplifies how natural assets can drive economic growth, industry collaboration, and community engagement.

- 2.3. HOSPITALITY AND RETAIL.** Strengthen the hospitality and retail sectors by expanding services, enhancing visitor amenities, and supporting guides and outfitters as economic drivers.
 - 2.3.1.** Foster the development of lodging, dining, and retail options that align with outdoor recreation tourism and enhance the visitor experience.
 - 2.3.2.** Support guides and outfitters by improving business resources, training programs, and permitting processes.
 - 2.3.3.** Encourage partnerships between local businesses and outdoor recreation organizations to create custom experience packages (e.g., lodging with guided tours and outfitters), loyalty programs, and cross-promotional opportunities that appeal to distinct users (see Appendix C. User Profiles, page 44).

- 2.4. COORDINATION AND COLLABORATION.** Align outdoor recreation industry growth with broader community development efforts by ensuring adequate housing, infrastructure, arts and cultural amenities, and local engagement.
- 2.4.1.** Integrate outdoor recreation planning with housing strategies to ensure a stable workforce and vibrant communities.
 - 2.4.2.** Invest in infrastructure improvements, such as transportation and broadband access that enhance both local quality of life and visitor experiences.
 - 2.4.3.** Coordinate and collaborate with arts and cultural organizations in the Central UP, especially where there are opportunities to coordinate events around outdoor recreation and the arts, like the Fresh Coast Film Festival.
 - 2.4.4.** Continue to grow and promote the annual U.P. Outdoor Summit by engaging local governments, businesses, and the outdoor recreation community.



Goal 3. Outdoor Recreation Infrastructure and Assets

Enhance, maintain, and expand the region's recreation infrastructure to support economic growth, attract visitors, and improve community access to outdoor experiences.

Developing and enhancing outdoor recreation assets and infrastructure is critical to the growth of the outdoor recreation industry. High-quality trails, parks, and facilities attract talent, businesses, and visitors while creating a strong foundation for innovation and contributing to a high quality of place. Investing in these assets supports designers, engineers, and manufacturers, driving industry advancements and positioning the region as a hub for new investment and talent. Strengthening outdoor recreation infrastructure not only benefits existing businesses but also reinforces a long-term strategy for a resilient and innovation-driven outdoor recreation sector.

- 3.1. ASSETS.** Maximize the economic and community benefits of the region's outdoor recreation assets by enhancing their quality, accessibility, and integration with business and tourism development.
 - 3.1.1.** Invest in the maintenance and enhancement of outdoor recreation assets to ensure long-term sustainability and appeal, incorporating technological advancements to improve accessibility, efficiency, and environmental impact.
 - 3.1.2.** Strengthen partnerships among stakeholders, operators, and facilitators to enhance programming, events, and marketing efforts that drive visitation and business growth around these assets.
 - 3.1.3.** Expand and improve access to outdoor recreation by developing well-connected, user-friendly entry points that enhance visitor experience and community engagement.

Downtown Bentonville

Over the past decade, Bentonville, Arkansas, has made strategic investments in its mountain biking infrastructure to attract talent and businesses, transforming the city into a [vibrant economic hub](#). These investments, which include approximately 130 miles of single-track trails that connect directly to downtown and another 250 miles of regional trails, have earned the city the title Mountain Biking Capital of the World™ and positioned it as a [premier destination](#) for outdoor enthusiasts. The emphasis on mountain biking has also fueled significant economic growth. In 2023, Arkansas's outdoor recreation industry, with Bentonville as a focal point, generated a \$7.3 billion [economic impact](#), supporting over 68,000 jobs and contributing nearly \$2 billion in state and local taxes. This economic momentum has attracted businesses, including bike manufacturers and service providers, fostering a thriving ecosystem around the sport.

Beyond its economic benefits, Bentonville's mountain biking culture has contributed to talent attraction efforts by appealing to professionals seeking an active lifestyle. The city has integrated bike-friendly amenities, including hotels with bike storage and wash stations, commercial developments with bike ramps and other cycling amenities, and protected bike lanes, creating a community that appeals to residents and visitors. This focus on outdoor recreation has drawn top talent and contributed to the city's continued growth. In recognition of Bentonville's prominence in the cycling world, USA Cycling designated it as the official home of the US National Mountain Bike Team in December 2022. Through strategic investments in mountain biking infrastructure and community engagement, Bentonville has successfully positioned itself as a national leader in outdoor recreation driven economic development.

- 3.2. INFRASTRUCTURE.** Enhance and modernize outdoor recreation infrastructure to support the growth of outdoor assets, improve user experience, and ensure long-term sustainability.
- 3.2.1.** Expand and upgrade supporting infrastructure, such as lodging, campgrounds, and visitor facilities, to meet the needs of residents and visitors. Incorporate solar electrification infrastructure when possible, including, but not limited to, solar canopies and charging stations.
 - 3.2.2.** Invest in sustainable infrastructure solutions, including energy-efficient lighting, durable materials, and eco-friendly trail maintenance practices.
 - 3.2.3.** Support the implementation of recommendations from the electrified trails feasibility study (to be published in conjunction with this work).
 - 3.2.4.** Coordinate with transportation and urban planning agencies to integrate outdoor recreation infrastructure into broader regional development plans.
- 3.3. PRODUCT TESTING.** Position the region as an ideal destination for outdoor gear innovation by expanding product testing opportunities and strengthening collaboration among businesses, researchers, and land managers (see action 1.3.2 and strategy 2.2).
- 3.3.1.** Develop designated product testing sites that offer real-world conditions for outdoor gear and recreation technology evaluation, leveraging the Central UP's extreme winter weather and rugged landscapes.
 - 3.3.2.** Partner with research institutions, especially Northern Michigan University (NMU) and Michigan Technological University (MTU), and industry leaders to support field testing, data collection, and product refinement.
 - 3.3.3.** Promote the Central UP's diverse landscapes and climate conditions as a competitive advantage for outdoor product testing and development. Concentrate these promotional efforts on companies, including start-ups and entrepreneurs, in the niche outdoor recreation segments identified in Appendix B. Niche Outdoor Recreation (page 41).
- 3.4. ADVOCACY.** Advance policies and initiatives that promote the sustainability and preservation of the Central UP's outdoor recreation assets.
- 3.4.1.** Engage industry leaders, policymakers, and EDOs to align on legislative priorities and funding opportunities to support outdoor recreation assets.
 - 3.4.2.** Leverage programs, like the Marquette County Ambassadors, to ensure consistent messaging on the outdoor recreation ecosystem in the Central UP for talent, visitor, and business attraction.
 - 3.4.3.** Promote the economic and community benefits of outdoor recreation through data-driven storytelling and public awareness campaigns.
 - 3.4.4.** Support efforts by Central UP counties to establish a county millage to enhance, maintain, and expand outdoor recreation opportunities, including trail development and water access.
 - 3.4.5.** Ensure each county in the Central UP has a designated member on the ORIAN Committee who can lead local outdoor recreation efforts.
- 3.5. FUNDING.** Expand financial resources for outdoor recreation infrastructure and assets through public and private investment.
- 3.5.1.** Identify, coordinate, and secure federal, state, and/or local funding streams to support outdoor recreation infrastructure and industry development.

- 3.5.2.** Coordinate letters of support and serve as the principal convener for outdoor recreation related grants and funding opportunities.

National Recreation and Park Association

The [National Recreation and Park Association](#) (NRPA) is a leading organization dedicated to advancing public parks, recreation, and conservation efforts across the US. Through advocacy, research, and grant programs, NRPA strengthens local communities by promoting equitable access to green spaces, health and wellness initiatives, and sustainable infrastructure development. One of its flagship programs, Parks for Inclusion, focuses on increasing accessibility and engagement for underserved communities. Additionally, NRPA provides professional development and certification programs, equipping park professionals with the tools needed to enhance community services. NRPA also funds community-driven initiatives through its grant programs. In [March 2025](#), the organization announced over \$1 million in grants for 68 organizations to support the transformation of youth sports programs. Awards included funding for adaptive infrastructure and programming at [skate parks](#) and [climbing walls](#), as well as planning resources to better engage youth in recreational investments. By investing in local programs, fostering collaboration between government agencies and private sector partners, and shaping policies that prioritize recreation, NRPA ensures long-term investment in public parks and outdoor spaces.





ORGANIZATIONAL CONSIDERATIONS



Implementation

To effectively implement *UP for Adventure*, a structured approach to strategy execution will be required. While ORIAN is envisioned as the ideal body to oversee implementation, its current lack of staffing and resources presents a challenge. As a result, the initial implementation phase should be guided by the ORIAN Committee, with its initial task being to identify and engage stakeholders and partners who can take the lead on specific strategies.

Preliminary work on strategy prioritization, partner identification, and the transitional framework was completed during the implementation workshop conducted with the ORIAN Committee as part of the *UP for Adventure* planning process. Continuing with this approach ensures that priority initiatives progress even in the absence of a formalized ORIAN structure.

1. **IDENTIFY AND PRIORITIZE STRATEGIES.** Given the broad scope of the outdoor recreation industry growth strategy, prioritization is essential to efficiently advance the initiatives with the most impact. The ORIAN Committee should categorize strategies based on urgency, resource requirements, and feasibility for near-term implementation.
 - a. **Alignment.** Priority should be given to initiatives that align with existing efforts by EDOs, workforce development agencies, and outdoor industry groups, ensuring immediate momentum.
 - b. **Foundational Tasks.** At the same time, strategies requiring foundational work—e.g., data collection, pilot programs, or partnership development—should be identified early to allow preliminary efforts to begin alongside ORIAN's establishment.
 - c. **Partners and Resources.** To support this process, the ORIAN Committee participated in an implementation workshop at the end of the project planning process focused on prioritizing strategies, identifying additional resources, and engaging partners to facilitate execution.
2. **ENGAGE IMPLEMENTATION PARTNERS.** Because ORIAN is currently unstaffed, its immediate role should be coordination of implementation activities rather than direct execution. To advance the growth strategy, the committee should identify implementers with the expertise and capacity to integrate strategy components into their existing work plans. For example:
 - a. **Goal 1: Outdoor Recreation Industry** centers on business development and traditional economic development initiatives. Therefore, local and regional economic development organizations are best positioned to implement these strategies, leveraging their existing networks and tools.
 - b. **Goal 2: Outdoor Recreation Economy** encompasses tourism, retail, and community development. Destination marketing organizations, chambers of commerce, and small business development centers can drive these initiatives by supporting businesses that serve outdoor recreation users.
 - c. **Goal 3: Outdoor Recreation Assets** involve infrastructure development and land use planning. Municipal planning departments, parks and recreation agencies, and conservation organizations should be engaged to lead efforts in this area.
3. **ENGAGE PRIVATE SECTOR PARTNERS.** Private sector participation in advancing the outdoor recreation industry growth strategy will be paramount. ORIAN should engage businesses across the sector, including manufacturers, retailers, service providers, and investors, to ensure their needs and perspectives are integrated into implementation efforts. Including public and private sector leadership in the implementation of *UP for Adventure* will enable ORIAN to create a more responsive and sustainable process. Primary strategies for private sector engagement include:

- a. **Industry Advisory Group.** Establishing a formal or informal group of business leaders to provide insights on market trends, workforce needs, and innovation opportunities.
 - b. **Public-Private Partnerships.** Facilitating collaboration between businesses and public agencies to support infrastructure investments, workforce development programs, and product testing initiatives.
 - c. **Investment Attraction.** Working with economic development organizations to attract new businesses and venture capital into the outdoor recreation industry by highlighting regional strengths and competitive advantages.
 - d. **Business Support Programs.** Partnering with accelerators, incubators, and business development organizations to provide resources, funding opportunities, and networking connections for emerging outdoor recreation companies.
4. **ESTABLISH A TRANSITIONAL FRAMEWORK.** While ORIAN moves toward establishing a formal structure, an interim implementation framework should be put in place to ensure continuity. This framework could include:
- a. **A coordinating committee** composed of representatives from partner organizations to guide initial efforts.
 - b. **Working groups** charged with advancing priority strategies, ensuring that actions are led by relevant subject matter experts.
 - c. **A tracking and accountability mechanism** to monitor progress and ensure that strategies are being executed effectively.
 - d. **Evaluate the feasibility** of establishing ORIAN as either an independent entity or as a division within an existing organization.

By identifying principal implementers and leveraging the existing capacity of these organizations, ORIAN can drive the outdoor recreation industry growth strategy forward more effectively. This decentralized approach allows for flexibility in execution while maximizing the strengths of various partners, including public agencies, industry leaders, and community organizations. As roles and responsibilities are further defined, this foundation will support a more structured and coordinated implementation process. Aligning efforts across stakeholders will not only accelerate progress but also ensure long-term sustainability and encourage collaboration, investment, and innovation in the outdoor recreation sector.





BENCHMARKS



Peer and Aspirational Community Profiles

Understanding how other regions have successfully developed outdoor recreation economies helped inform the Central UP's strategic growth plan. The following profiles of eight peer and aspirational communities identify best practices, innovative policies, and economic development strategies that diversified the local economy to include outdoor recreation. These benchmarks provided real-world examples of leveraging natural assets, supporting entrepreneurship, and addressing challenges to drive economic growth.

By examining peer communities with similar geographic and economic characteristics alongside aspirational communities with notable outdoor recreation success, the analysis pinpointed relevant opportunities and challenges for the Central UP. Comparisons highlighted effective funding mechanisms, workforce development strategies, and public-private partnerships that facilitated industry expansion, while also offering insights on balancing conservation with business growth for long-term sustainability.

Applying lessons from these case studies can inform Central UP leaders on how to develop approaches suited to its local needs, accelerating outdoor recreation industry growth while addressing potential challenges. While not intended for direct replication, these examples illustrate how other communities have navigated obstacles and leveraged opportunities to strengthen their economies. This benchmarking process provides a foundation for shaping policy decisions, guiding investment priorities, and fostering collaboration to position the Central UP as a leader in outdoor industry development.

Bend, Oregon

Bend serves as an aspirational benchmark due to its success in leveraging outdoor recreation to drive economic diversification, despite its remote location. Once heavily reliant on the timber industry, the city faced significant economic shifts in the late twentieth century. Over the past two decades, it has strategically positioned itself as a growing destination for outdoor enthusiasts while simultaneously developing new industries to support long-term economic resilience. However, challenges, including rising housing costs, aging infrastructure, and the ongoing need for economic diversification, remain central to the community's future planning.

A thriving craft beverage and culinary scene has been instrumental in attracting visitors as well as new residents. With one of the highest concentrations of breweries per capita in the US, Bend has become a leader in the craft beer industry, reinforcing its appeal as a tourism hub and a desirable place to live. This cultural vibrancy, combined with relatively affordable commercial space compared to larger West Coast cities, has also positioned Bend as an emerging destination for tech startups and remote workers. Reliable internet infrastructure and a high quality of life have further facilitated this transition, broadening the city's economic base beyond tourism.

Outdoor recreation remains at the heart of Bend's identity, drawing visitors year-round for activities, such as skiing, snowboarding, kayaking, and fishing. Beyond its natural assets, the city has cultivated a dynamic event landscape, hosting festivals and competitions that activate downtown and strengthen its reputation as an outdoor recreation hub. This ecosystem has supported the growth of industry leaders, including Hydro Flask, Metolius Climbing, Ruffwear, Argonaut Cycles, EarthCruiser, BlackStrap, and Puffin Drinkwear, all of which contribute to Bend's reputation as a center for outdoor industry innovation. The Oregon Outdoor Alliance, headquartered in Bend, further advances industry collaboration and growth.

Transportation connectivity has also been fundamental to Bend's expansion, with the nearby Redmond Municipal Airport (RDM) experiencing significant growth. Now offering nonstop flights to 13 destinations across five

carriers, the airport has improved accessibility for both business and tourism, further integrating Bend into national markets.

Bend's ability to balance outdoor recreation, economic diversification, and infrastructure investment provides valuable insights for regions pursuing similar growth strategies. By leveraging its natural assets while fostering business innovation and expanding its economic base, Bend offers a model for the development of the outdoor recreation sector.



Center for the Outdoor Recreation Economy

Oregon State University's (OSU) Center for the Outdoor Recreation Economy (CORE) is a nationally recognized leader in workforce development, research, and industry collaboration for the outdoor sector. CORE provides specialized training, certification programs, and continuing education tailored to the needs of outdoor recreation businesses, including manufacturing, retail, guiding, and land management. By developing partnerships with industry leaders, policymakers, and educators, the center strengthens the talent pipeline, ensuring businesses have access to a skilled workforce. Its research initiatives generate valuable insights that inform policy and economic development strategies, positioning CORE as an indispensable resource for communities leveraging outdoor recreation as an economic driver. CORE's degree and industry programs are offered at multiple OSU campuses, including OSU-Cascades in Bend, where students benefit from direct access to the region's outdoor assets, such as Mt. Bachelor, Smith Rock State Park, and the Deschutes River.

Duluth, Minnesota

Duluth was selected as a peer benchmark due to its rural location, economic diversification efforts, talent attraction initiatives, and extensive outdoor recreational amenities. As a port city, Duluth's economy was historically built around shipping, mining, and manufacturing. However, the decline of these industries throughout the twentieth century led to significant population loss and economic challenges. In recent decades, strategic investments in downtown revitalization, economic diversification, and talent attraction—particularly focused on outdoor recreation—have helped reshape Duluth into a vibrant and growing community. Despite these successes, ongoing challenges include rising housing costs, aging infrastructure, and the need to deepen traded sector clusters to reduce reliance on tourism.

A core component of Duluth's talent attraction efforts has been its positioning as a destination for climate refugees. The city has actively promoted its access to fresh water, clean air, and cooler temperatures as competitive advantages for individuals and businesses seeking a high quality of life. Public-private partnerships have also featured prominently in the city's economic development, leading to various projects, including the Spirit Mountain recreation expansion, the adaptive reuse of Central High School for affordable housing, and the redevelopment of Canal Park into a mixed-use district with strong quality-of-place assets. These initiatives have supported economic diversification while enhancing community livability.

The University of Minnesota Duluth serves as an important driver of workforce development, attracting high-quality talent and supporting innovation in emerging industries. The Duluth Area Outdoor Alliance has been a

driving force in advancing outdoor recreation industry growth, providing coordination and advocacy while hosting the Great Lakes Outdoor Summit. Several outdoor brands have established a presence in the city, including ROMP Bags, Frost River, Duluth Pack, Spring Creek Manufacturing, and Epicurean Inc., creating a portfolio of businesses similar to those in the Central UP.

Duluth's connectivity has also supported its economic and tourism growth, with Duluth International Airport (DLH) offering direct service to Minneapolis-Saint Paul, Chicago O'Hare, and Fort Myers through Delta, United, and Sun Country Airlines. The city's ability to leverage its natural assets, strategic partnerships, and economic development tools offers a strong model for balancing outdoor recreation driven growth with long-term economic resilience.



Duluth Area Outdoor Alliance

The Duluth Area Outdoor Alliance (DAOA) is a coalition of organizations, businesses, and advocates committed to strengthening Duluth's outdoor recreation economy. Since its launch in 2010, DAOA has worked to ensure the Duluth region's abundant outdoor assets—e.g., trails, waterways, parks, and adventure sports—continue to drive economic growth and enhance community well-being. One of DAOA's primary initiatives is the annual Great Lakes Outdoor Summit, which brings together industry leaders, policymakers, and outdoor enthusiasts to explore emerging trends, challenges, and opportunities within the outdoor recreation sector. Through this event and ongoing partnerships, DAOA is helping to position Duluth as a national leader in outdoor recreation, while promoting responsible use and long-term sustainability of its natural resources. DAOA meets monthly, with subcommittees working independently on specific action items. Additionally, the organization hosts monthly socials to engage new volunteers and foster connections among local organizations. After pausing during the COVID-19 pandemic, DAOA was relaunched in 2022 with support from a city of Duluth tourism grant.

Wausau, Wisconsin

Wausau was selected as a peer benchmark for the Central UP due to its balance of outdoor recreation, manufacturing, and economic diversification efforts in a rural setting. With a history rooted in the paper and lumber industries, Wausau has successfully transitioned to a regional hub for outdoor recreation, advanced manufacturing, and entrepreneurship while maintaining its authenticity. Its ability to leverage natural assets, attract businesses, and invest in infrastructure makes it a relevant model for communities in the Central UP looking to strengthen their outdoor economy.

Outdoor recreation is an important component of Wausau's economic development strategy. Rib Mountain State Park and Granite Peak Ski Area provide year-round attractions, drawing visitors for skiing, mountain biking, and hiking. The Wisconsin River and its surrounding trails further enhance access to paddling, fishing, and running events. The region has also developed a strong network of parks and green spaces that contribute to quality of place and talent retention efforts.

Economic diversification has been a major cornerstone, with Wausau focusing on a mix of legacy industries and emerging sectors. Manufacturing remains a significant employer, with companies in precision metalworking, food

production, and paper processing anchoring the economy. At the same time, downtown redevelopment efforts and entrepreneurship initiatives have supported small business growth, with a rising number of coworking spaces, craft breweries, and tech startups adding vibrancy to the community.

Public-private partnerships have driven notable revitalization efforts, including infrastructure improvements, housing developments, and recreation-based investments. The city has prioritized quality-of-place enhancements, recognizing the role of outdoor amenities in attracting talent and visitors. Additionally, Wausau is home to major outdoor industry companies, like Granite Gear, and has positioned itself as a gateway for outdoor adventure in northern Wisconsin.

Wausau's transportation connectivity through Central Wisconsin Airport (CWA) offers direct flights to major hubs, supporting business and tourism access. Its approach to leveraging outdoor recreation, supporting business retention and expansion, and strengthening its workforce through strategic investments makes it a strong comparison for the Central UP as it seeks to build a resilient and dynamic outdoor recreation economy.



IRONBULL

IRONBULL is a nonprofit organization in Wausau, Wisconsin, dedicated to promoting outdoor adventure sports and fostering healthy, active lifestyles. Through events like the Rib Mountain Adventure Challenge, Red Granite Grinder, and Underdown Trail Races, IRONBULL showcases Central Wisconsin's natural assets while driving economic development and community engagement. The organization collaborates with local partners, including the Wausau and Marathon County Parks Department, the Central Wisconsin Offroad Cycling Coalition, and Wausau Whitewater, to enhance outdoor recreational opportunities and improve trail systems. By attracting participants from across the region, IRONBULL stimulates local tourism and supports businesses in hospitality, retail, and outdoor recreation. Its commitment to environmental stewardship and investment in recreation infrastructure further strengthens Wausau's appeal as an outdoor destination. Recognized with grants, such as a Wisconsin Department of Tourism [Joint Effort Marketing](#) grant, IRONBULL continues to expand its impact, positioning Central Wisconsin as a hub for adventure sports, innovation, and community-driven outdoor experiences.

Traverse City, Michigan

Traverse City serves as a strong benchmark for the Central UP due to its success in leveraging outdoor recreation, tourism, and entrepreneurship to drive economic growth. With a scenic location along Grand Traverse Bay, the city has built a strong reputation as a four-season destination while also developing a diversified economy that includes agriculture, manufacturing, and a growing technology sector. Its ability to balance natural assets with business development provides valuable insights for communities aiming to strengthen their outdoor recreation economy.

Outdoor recreation is central to Traverse City's identity and economic strategy. The region offers abundant access to Lake Michigan, inland lakes, and the Boardman River for kayaking, fishing, and sailing, as well as extensive trail networks for hiking, biking, and cross-country skiing. The Sleeping Bear Dunes National Lakeshore,

about 20 miles east of the city, attracts visitors year-round, reinforcing the area's strong tourism base. Additionally, events like Bell's Iceman Cometh Challenge mountain bike race and the Bayshore Marathon highlight Traverse City's role as an outdoor recreation hub.

Beyond tourism, Traverse City has cultivated a thriving food and beverage industry, with a renowned winery scene and a high concentration of craft breweries. The region's agricultural heritage has supported the growth of farm-to-table restaurants, agritourism, and artisanal food production. Meanwhile, the city's business ecosystem has expanded to include startups, creative industries, and remote workers, drawn by the region's desirable quality of life and outdoor amenities. Notable companies in the outdoor recreation industry around the Traverse City region include Shaggy's Copper Country Skis (design, engineering, and precision manufacturing), Little Bay Boards (design, engineering, and manufacturing), and Quantum Sails (corporate headquarters, including design and engineering).

However, Traverse City faces significant challenges with affordable housing, which has impacted workforce retention and business recruitment. The high demand for vacation homes and short-term rentals has driven up housing costs, making it increasingly difficult for service workers, young professionals, and middle-income families to live within the city. In response, local leaders have explored zoning reforms, mixed-income developments, and public-private partnerships to increase housing availability and affordability.

Traverse City's economic growth has been supported by strategic investments in infrastructure, placemaking, and business development initiatives. Cherry Capital Airport (TVC) provides direct flights to major metropolitan areas, enhancing connectivity for businesses and visitors. The city's model of integrating outdoor recreation with entrepreneurship, tourism, and regional collaboration makes it a relevant benchmark for the Central UP as it seeks to grow its outdoor economy while addressing workforce and housing challenges.



TART Project

The Traverse Area Recreation Trail (TART) [Bayfront Improvement and Extension Project](#) is a transformative initiative designed to enhance the connectivity and safety of Traverse City's regional trail network. This project, a collaboration among TART Trails, Michigan Department of Transportation, and Traverse City, aims to expand the existing trail along the West Bay shoreline to better serve the area's over one million annual users. Leading objectives include widening the trail for bidirectional bicycle and pedestrian use, improving road crossings, and integrating cultural and artistic elements to reflect the region's heritage. The first phase, completed in 2024, connects vital community areas like Sunset Park and the Senior Center to the regional trail, with future phases planned to further extend and enhance nonmotorized infrastructure along key corridors. This project aims to create a safer, more accessible environment for residents and visitors that integrates the city's outdoor recreation assets with its vibrant downtown.

Eau Claire, Wisconsin

Eau Claire presents a noteworthy model for balancing economic diversification, outdoor recreation, and creative placemaking. Once reliant on the timber and manufacturing industries, the city has transformed into a regional hub for arts, culture, and entrepreneurship while still maintaining strong ties to its outdoor amenities. Eau Claire's success in leveraging public-private partnerships, revitalizing its downtown, and encouraging a strong quality of

place makes it a potential reference point for communities in the Central UP exploring strategies for economic resilience and workforce attraction.

While not traditionally known as an outdoor recreation destination on the scale of Wausau or Duluth, Eau Claire has successfully integrated recreation into its broader economic development efforts. The Chippewa River State Trail and Half Moon Lake provide opportunities for paddling, running, and cycling, while numerous parks and greenways enhance access to outdoor spaces. The city has also embraced outdoor-focused events, including music festivals and riverfront programming, to increase engagement with its natural assets.

Economic diversification has been a priority, with growth in healthcare, education, and tech startups helping to stabilize Eau Claire's economy. The presence of the University of Wisconsin–Eau Claire has been a driver of workforce development, research partnerships, and talent retention efforts. A thriving downtown, anchored by revitalized historic buildings, a strong independent business scene, and a growing arts community, has positioned Eau Claire as a regional leader in quality-of-place investments.

Public and private investment in mixed-use developments, commercial corridors, and infrastructure projects has helped fuel growth. The city has also seen an influx of remote workers and entrepreneurs, drawn by its affordability, creative culture, and access to a combination of urban amenities and outdoor spaces. Although outdoor recreation is not as deeply embedded in its economic identity as in Wausau, Eau Claire provides a valuable example of how cultural assets, talent attraction strategies, and placemaking efforts can complement outdoor industry growth.

Transportation access through the Chippewa Valley Regional Airport (EAU) connects the city to major hubs, enhancing its accessibility for visitors and businesses. Eau Claire's approach to integrating outdoor recreation with arts, entrepreneurship, and quality-of-life investments offers insights for communities in the Central UP looking to diversify their economies while leveraging natural and cultural assets.



Paved Trails and Public Art Initiative

Eau Claire, Wisconsin, has strategically leveraged its outdoor recreational assets to stimulate economic development, particularly through investments in its extensive trail system and public art initiatives. The city's network of paved trails not only offers residents and visitors recreational opportunities but also significantly bolsters the local economy. A [2024 report](#) highlighted that users of these trails contribute approximately \$4.1 million annually to local businesses, including restaurants and shops. Moreover, the trails' appeal extends beyond tourism. They help attract new residents, with 29 percent of recent movers citing outdoor recreation as an important factor in their decision to relocate to Eau Claire. This integration of outdoor amenities into urban planning exemplifies how recreational infrastructure can drive economic growth, enhance quality of life, and position a community as a desirable place for residents and visitors.

Kalispell, Montana

Kalispell serves as a model for leveraging outdoor recreation assets to drive economic growth, attract talent, and support business development. Situated in the Flathead Valley near Glacier National Park, Kalispell has built a thriving economy by balancing tourism with investments in entrepreneurship, manufacturing, and infrastructure

improvements. Its ability to capitalize on natural assets while diversifying beyond a tourism-dependent economy makes it a compelling aspirational benchmark for the Central UP.

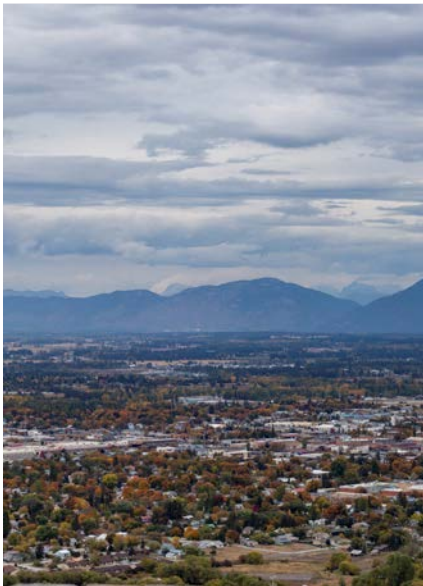
Outdoor recreation is a primary economic driver in Kalispell, with access to world-class hiking, skiing, mountain biking, and water-based activities. Flathead Lake, Whitefish Mountain Resort, and Glacier National Park create year-round recreation opportunities, drawing visitors and new residents alike. The city has invested in trail systems, open space preservation, and recreation-based business development to strengthen this sector. Additionally, regional leaders have positioned the area as an outdoor industry hub, attracting companies specializing in recreation technology, gear manufacturing, and adventure tourism services.

Economic diversification has been a priority for Kalispell. While tourism remains a significant contributor, the city has supported a growing advanced manufacturing sector, a strong healthcare industry, and a rising number of remote workers. Investments in broadband expansion and commercial space redevelopment have supported entrepreneurship and business attraction efforts. Additionally, Kalispell has worked to create a business-friendly environment, leading to the growth of outdoor gear companies, craft beverage producers, and tech startups.

The city has also undertaken strategic downtown revitalization initiatives, including the Kalispell Core and Rail Redevelopment project, which removed an underutilized rail corridor to create walkable mixed-use developments and public spaces. These efforts have enhanced the city's quality of place, making it more attractive for talent retention and business investment.

Like many outdoor-oriented communities, Kalispell faces challenges with housing affordability and infrastructure capacity. The influx of new residents and remote workers has increased housing demand, raising costs and creating housing shortages. The city has responded by promoting workforce housing developments, expanding infrastructure, and implementing zoning changes to support sustainable growth.

Kalispell's ability to leverage outdoor recreation, attract businesses, and invest in long-term economic resilience offers insights for the Central UP. Its approach to balancing tourism, business development, and quality-of-life enhancements makes it a strong aspirational benchmark for communities seeking to grow their outdoor recreation economies while ensuring sustainable and diversified economic development.



Core and Rail Redevelopment Project

The [Kalispell Core and Rail Redevelopment Project](#) is a transformative initiative aimed at revitalizing Kalispell's downtown by repurposing its historic rail corridor. The project included the creation of the Glacier Rail Park, a modern industrial park that relocated rail-dependent businesses, and the development of the Kalispell Parkline Trail, a 1.7-mile multiuse trail connecting to regional trails and featuring spaces for recreation and public events. A complete street was also constructed to improve connectivity. The project, which began in 2010, involved extensive community engagement to address concerns and build support, and it has significantly boosted the local economy by attracting new businesses, housing, and amenities. It also included environmental remediation of brownfield sites, improving public health and safety. The redevelopment has been widely praised for its innovative approach to urban planning and received national recognition for its success.

Stowe, Vermont

Stowe offers a prime example of how a community can leverage outdoor recreation to drive economic growth, attract high-quality businesses, and enhance its year-round visitor economy. Known for its world-class skiing, scenic hiking trails, and strong outdoor industry presence, Stowe has successfully positioned itself as a high-end recreation destination and a hub for outdoor gear and apparel companies. The city's inclusion in *Outside* magazine's recent list of the [Top 9 Small Adventure Towns](#) is evidence of its appeal. Its ability to integrate tourism, business development, and sustainability makes it an aspirational benchmark for the Central UP.

Outdoor recreation has long been the foundation of Stowe's economy. The region is home to Stowe Mountain Resort, one of the top ski destinations in the northeast, offering downhill skiing, snowboarding, and a range of winter sports. Beyond winter recreation, Stowe boasts extensive mountain biking trails, road cycling routes, and hiking opportunities in the Green Mountains. The town has actively invested in trail systems, outdoor infrastructure, and environmental conservation to maintain its reputation as a leading four-season destination.

In addition to its robust tourism economy, Stowe has attracted a variety of outdoor recreation businesses, including some of the most well-known brands in the industry. Notable companies in the region include:

- **Darn Tough Vermont (Northfield, Vermont).** A leading manufacturer of high-performance wool socks, designed for outdoor activities like hiking and skiing.
- **Ibex Outdoor Clothing (White River Junction, Vermont).** A sustainable performance apparel brand specializing in merino wool products.
- **Turtle Fur (Morrisville, Vermont).** Founded in Stowe in 1982, Turtle Fur has been the leading headwear and accessories brand in the outdoor, snow sports, hunting/fishing, and lifestyle markets for more than 40 years.
- **Concept2 (Morrisville, Vermont).** A world-renowned manufacturer of rowing machines and fitness equipment, supporting elite athletes and outdoor enthusiasts.
- **Burton Snowboards (Burlington, Vermont).** One of the most influential snowboarding brands globally, pioneering advancements in snowboard technology and outdoor apparel.
- **Skida (Burlington, Vermont).** A boutique designer and manufacturer of colorful headwear and accessories for winter sports.
- **Rossignol North America (Williston, Vermont).** Although the main US headquarters for French-based Rossignol Group is in Ogden, Utah, Rossignol North America has a smaller East Coast distribution and office center in Vermont.

Stowe's economic strategy includes a strong emphasis on sustainability, infrastructure development, and business-friendly policies that encourage entrepreneurship. The town has successfully cultivated a vibrant downtown with a mix of retail, dining, and boutique outdoor outfitters, enhancing its appeal for residents and visitors. High-end accommodations and a strong culinary scene further position Stowe as a luxury outdoor destination. However, these developments didn't come by chance—downtown revitalization efforts were conscientiously driven by thoughtful strategic planning and implementation.

The community is in the process of developing a new town plan, expected to be completed in 2026. A 2025 [community survey](#) revealed some of the issues and concerns facing residents. Like many resort towns, Stowe faces challenges related to housing affordability and workforce retention. The demand for short-term rentals and vacation homes has significantly increased housing costs, creating barriers for local workers in the tourism and

outdoor industries. The region has responded by exploring affordable housing initiatives, zoning reforms, and employer-supported housing solutions to maintain a sustainable workforce.

Stowe's ability to blend high-quality outdoor recreation, a strong outdoor industry presence, and an upscale tourism economy makes it a valuable benchmark for the Central UP. Its focus on business development, infrastructure investment, and sustainability provides insights for communities looking to strengthen their outdoor recreation economies while ensuring long-term economic resilience.



Vermont Stay to Stay Campaign

Although not unique to Stowe, the Vermont [Stay to Stay](#) program, developed through collaboration between the Vermont Department of Economic Development and the Vermont Department of Tourism and Marketing, is a multifaceted initiative aimed at both tourism and talent attraction. Launched in 2018, it continues to evolve, with core components, including a marketing campaign, job board, and peer-to-peer connections. The program encourages individuals considering a move to Vermont to visit for a weekend, where they can connect with employers, real estate professionals, community leaders, and entrepreneurs while exploring the state's amenities. Vermont's innovative approach to funding tourism efforts through its general fund offers greater programmatic flexibility compared to states that rely on a lodging tax or other dedicated revenue streams.

Fayette County, West Virginia

Fayette County, historically reliant on coal mining, has embraced outdoor recreation as a chief strategy for economic diversification. With the New River Gorge National Park and Preserve at its heart, Fayette County offers a wealth of natural assets for outdoor activities, including rock climbing, whitewater rafting, hiking, and mountain biking. The county's efforts to capitalize on these resources aim to shift its economy from extractive industries to one focused on sustainable tourism and outdoor recreation. This transition has been supported by educational and research initiatives, notably through the West Virginia University (WVU) Brad and Alys Smith Outdoor Economic Development Collaborative (OEDC). The OEDC has been an integral part of fostering the sector's growth by offering research, technical assistance, and workforce development to local businesses and communities looking to leverage outdoor recreation for economic gain.

Specifically, WVU's OEDC has been instrumental in helping develop Fayette County's outdoor recreation sector by conducting research on the economic impact of tourism and advising on strategies to attract and support outdoor businesses. In partnership with local businesses and community leaders, the OEDC has also created training programs and certifications for outdoor tourism professionals, like guides and instructors, to ensure that the local workforce is prepared for the growing demand. Finally, the OEDC's guidance on infrastructure planning and sustainable development helps the county attract visitors and businesses while maintaining environmental stewardship.

The economic impact of these efforts is already evident. Job creation in certain sectors, such as hospitality, retail, and adventure tourism, has spiked, alongside an increase in tourism revenue as visitors flock to the New River Gorge area. This surge in activity has also led to a rise in entrepreneurial ventures, with local startups offering outdoor-related services and experiences. The success of these initiatives aligns with statewide efforts to

promote outdoor recreation as a significant driver of West Virginia's economy, positioning Fayette County as a leader in this movement. Furthermore, Fayetteville was named one of the nation's [Top 9 Small Adventure Towns](#) by *Outside* magazine in April 2025.

Despite these positive trends, Fayette County must continue investing in infrastructure, workforce development, and sustainable practices to ensure the long-term viability of its outdoor recreation industry. Overcoming challenges like overcrowding and balancing growth with environmental conservation will be key as the county moves forward. Through its collaboration with WVU and a commitment to sustainable economic practices, Fayette County is setting a model for other communities transitioning from traditional industries to vibrant, recreation-driven economies.



Waynestock Outdoor Adventure and Music Festival

[Waynestock](#) is an annual outdoor adventure and music festival held in the New River Gorge of West Virginia, with strong ties to downtown Fayetteville. Since its inception in 1999, it has grown into a dynamic event that blends live music with outdoor recreation. During the day, attendees can experience activities like whitewater rafting, paddleboarding, cliff jumping, mountain biking, and climbing. Beyond the festival grounds, visitors are encouraged to explore downtown Fayetteville, visit the Farmer's Market, and support local restaurants and shops. In the evenings, Waynestock features live music performances, creating a lively and engaged community atmosphere. Although reservations include a primitive camping site, festival organizers have partnered with local outfitters to provide VIP and glamping options where participants can opt to have their campsites and gear arranged for them. The festival has earned national recognition, including being named in 2023 as one of the best outdoor festivals in the US by [Outside magazine](#).



APPENDICES



Appendix A. Planning Context

To provide a foundation for the recommendations, TIP conducted a strategic analysis of the Central UP's competitive position with regard to the outdoor recreation sector. Two surveys gathered insights from ORIAN constituents and outdoor recreation industry leaders nationwide, while stakeholder engagement—including roundtables and interviews—provided further perspectives on opportunities and challenges. Together, these quantitative and qualitative approaches informed TIP's strengths, weaknesses, opportunities, and threats (SWOT) analysis.

Strategic Analysis

The strategic analysis assessed employment and economic output trends in the outdoor recreation industry across the Central UP and selected benchmark communities, following the Bureau of Economic Analysis's Outdoor Recreation Satellite Account (ORSA). It also included an economic impact assessment of jobs and earnings in the Central UP based on potential changes in industry sales and revenue. The analysis and the economic impact were delivered as an interactive data visualization to enable additional exploration of the data by ORIAN and its partners.

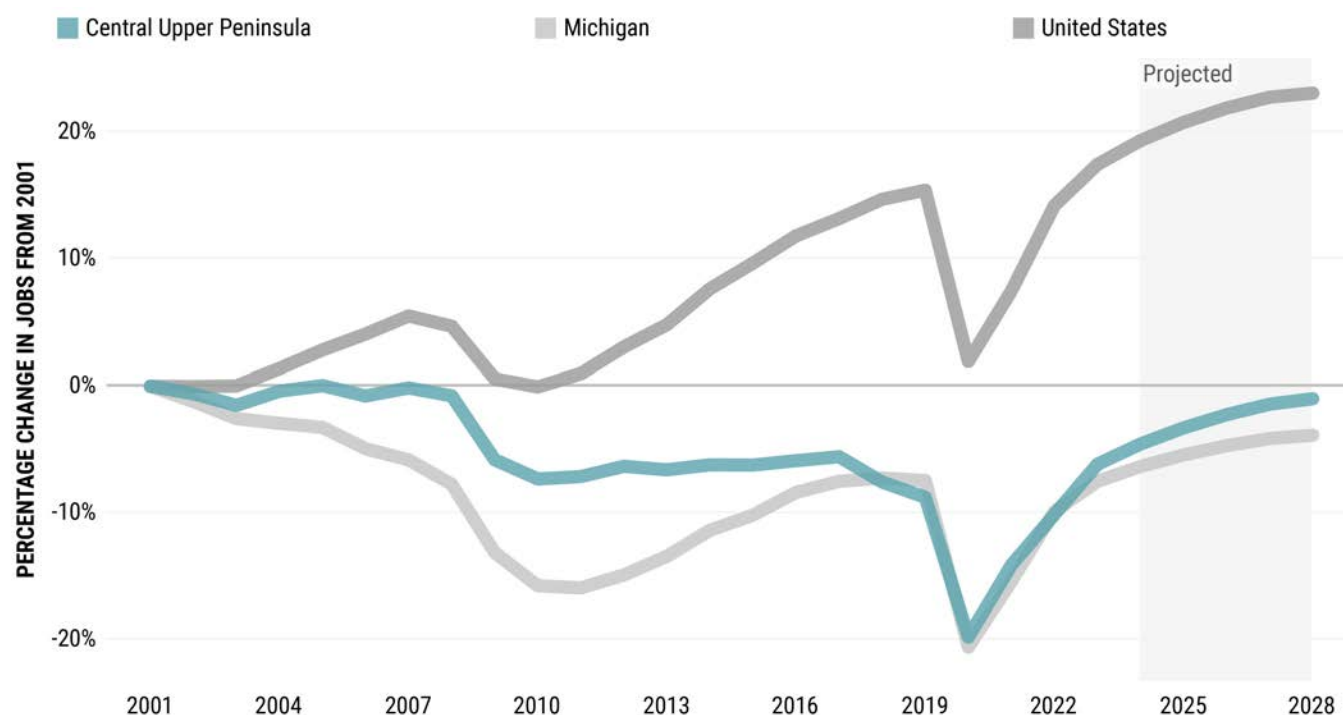
Outdoor Recreation Employment Comparisons

Regional perceptions of the Central UP are closely tied to the outdoor recreation industry, but despite a strong rebound following the COVID-19 pandemic, outdoor recreation employment in the region has declined since 2001 (Figure 2, page 33). A net decrease can also be observed for Michigan and for two communities in one of the state's Great Lakes peers, Duluth and Northfield in Minnesota. Conversely, the US has seen a nearly 20 percent increase in outdoor recreation jobs over the same period, while growth in the Central UP's other peer communities has eclipsed this national figure.

By employment count, the retail trade sector represents the Central UP's largest source of outdoor recreation jobs, with an estimated 952 outdoor recreation positions making up more than 10 percent of the region's total retail trade employment. This also represents more than 43 percent of the Central UP's total outdoor recreation jobs, the largest share for any single sector among the Central UP and its peers. Outdoor recreation employment in this industry has seen a net increase over the past five years regionally, bolstered by a wealth of retailers that support popular and niche activities, while it has declined both statewide and nationally.

While the percentages of Michigan's retail trade and arts, entertainment, and recreation jobs classified as outdoor recreation are comparable to national levels, Michigan has lower concentrations of outdoor recreation employment in several other sectors compared to its peers (Figure 3, page 34). This difference is likely partially a reflection of Michigan's relatively large and diversified economy, where outdoor recreation accounts for less than 3 percent of statewide employment—a smaller share than the nation and the selected peer states. Despite this context, the Central UP has one of the highest estimated shares of manufacturing jobs within outdoor recreation (5.6 percent in 2023), though this represents only about 120 jobs in the region.

FIGURE 2. CUMULATIVE OUTDOOR RECREATION EMPLOYMENT CHANGE
PERCENT CHANGE IN OUTDOOR RECREATION EMPLOYMENT FROM 2001



Source(s): US Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages (QCEW); Lightcast 2024.4—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Department of Commerce, Bureau of Economic Analysis (BEA), Outdoor Recreation Satellite Account (ORSA), 2022; TIP Strategies, Inc.

Note(s): The Central UP includes Alger, Delta, Dickinson, Marquette, Menominee, and Schoolcraft Counties.

Nearly one-half of all jobs in Michigan's Arts, Entertainment, & Recreation industry are classified as outdoor recreation. Among peer states, only Maine and Oregon have a higher concentration of outdoor recreation jobs in this industry, a reflection of their smaller, more tourism-centered economies compared to Michigan. However, for the Central UP, outdoor recreation jobs in this industry represent only 19 percent of all outdoor recreation jobs for the region. This number ranks below both the state and national rates, and below all peer communities except for Duluth, Minnesota. While a near-majority of Arts, Entertainment, & Recreation jobs in Michigan are classified as outdoor recreation, this industry represents a relatively small share of the Central UP's total outdoor recreation employment.

Economic Impact Analysis

TIP performed an economic impact analysis on the Central UP that was provided as part of the interactive data visualization. Using a scenario modeling approach, the analysis illustrates the direct and indirect impacts of a percentage change in sales and revenue in the region's outdoor recreation industries on jobs and earnings within each sector. The impacts are based on the gross economic output of outdoor recreation activities published by the Bureau of Economic Analysis's Outdoor Recreation Satellite Account (ORSA), which includes "all recreational activities undertaken for pleasure that occur outdoors."¹ Additionally, outdoor recreation impact multipliers are provided to indicate the projected indirect impacts of a change in sales and revenue for the region's outdoor recreation industries, illustrating downstream regional impacts on jobs and earnings.

¹ ["How Will Outdoor Recreation Be Defined?"](#) BEA. November 2, 2017.

FIGURE 3. OUTDOOR RECREATION EMPLOYMENT, SHARE OF TOTAL SECTOR EMPLOYMENT COMPARISON
OUTDOOR RECREATION AS A PERCENTAGE OF SECTOR EMPLOYMENT IN PEER STATES, 2022

	SHARE OF ALL JOBS	SHARE OF JOBS IN SELECTED SECTORS			
		Accommodation & Food Services	Arts, Entertainment, & Recreation	Manufacturing	Retail Trade
Montana	5.9%	16.3%	45.9%	4.5%	13.1%
Maine	5.2%	20.1%	60.0%	4.7%	11.3%
Oregon	3.7%	9.3%	50.3%	2.5%	11.8%
Washington	3.5%	6.6%	41.5%	2.4%	13.1%
Minnesota	3.3%	6.1%	44.9%	2.4%	11.2%
US	3.3%	7.0%	41.6%	2.1%	10.9%
North Carolina	3.1%	6.4%	41.0%	1.6%	10.0%
Michigan	2.8%	5.0%	47.7%	1.3%	10.2%

Source(s): BLS, QCEW; US Department of Commerce, BEA, ORSA, 2022; TIP Strategies, Inc.

Note(s): Outdoor recreation job share is based on state and national BEA, ORSA data in 2022 and is applied to all years and geographies within the state.

Constituent Survey

As part of the strategic planning process, TIP conducted an online survey of outdoor recreation industry establishments in the Central UP. The survey was open for a seven-week period between November 4, 2024, and December 20, 2024, and drew 68 respondents. The survey instrument opened with basic questions about business location and characteristics. The remainder of the survey included 14 questions directed at respondent perceptions of and business outlook for the Central UP. All responses were confidential. Question-by-question survey results were delivered to ORIAN in an interactive data visualization using Tableau Public. Findings from this survey, summarized below, were used to guide the direction of the strategic plan.

Nearly all respondents (86.8 percent) were located in a Central UP ZIP Code. Generation X (27 of 68 respondents) were the dominant age group in the survey, followed by Millennials and Baby Boomers (18 each), Gen Z (3), and pre-Boomers (2). The survey was not designed to be a scientific sample, though the pool of respondents was large enough and stratified enough to provide convincing strategic feedback. As a result, the survey yielded valuable and relevant input from outdoor recreation industry businesses in the Central Upper Peninsula.

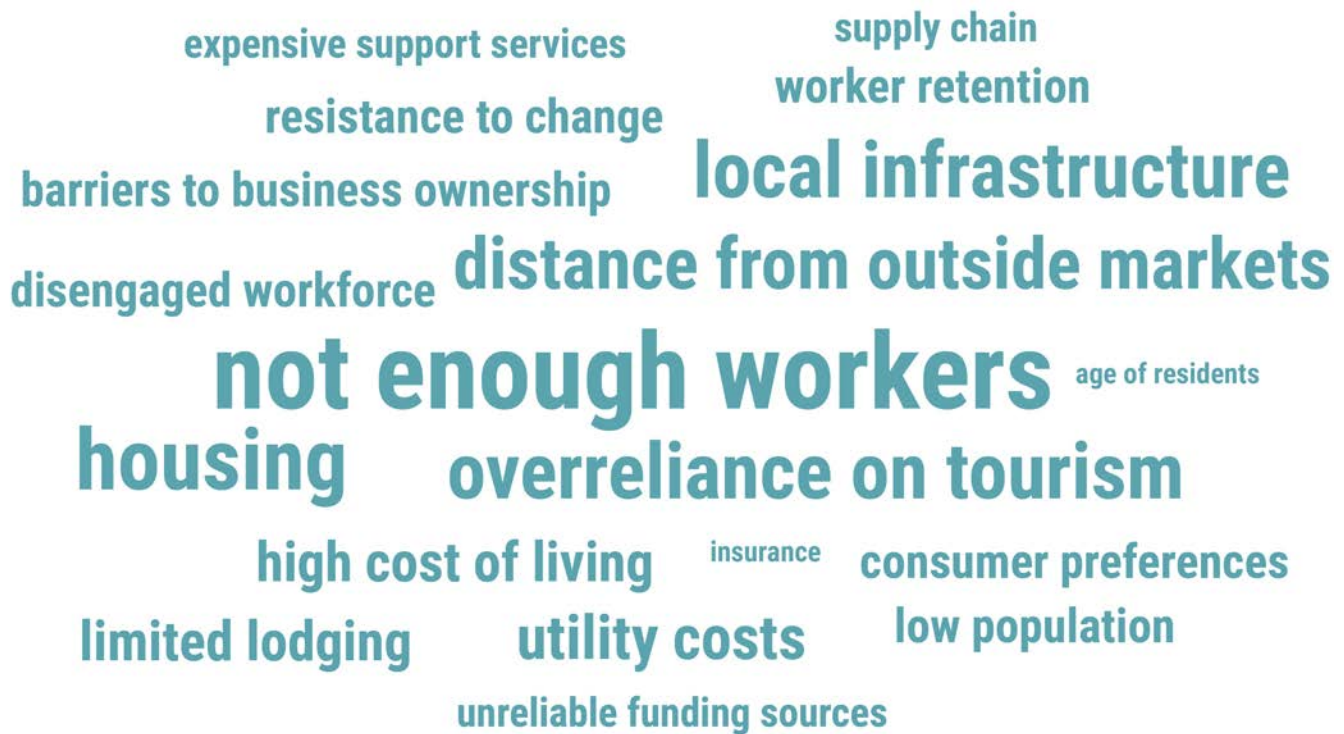
Addressing Workforce Attraction and Development Challenges

Throughout the survey, respondents made the challenge posed by the Central UP's small workforce clear. When asked about the region's progress in several talent attraction and retention areas, respondents scored the balance of supply and demand of workers (2.4 out of 5.0) and workforce size (2.4) as two of the region's greatest weaknesses. Labor/workforce also scored below average as a retaining factor for local businesses (2.5). A lack of workers was the most commonly identified challenge for business success in the region (17.2 percent of responses), with more specific challenges like "disengaged workforce" (3.4 percent) and "worker retention" (3.4

percent) also receiving nods (Figure 4). Respondents also noted a need to equip the region's existing workforce with soft skills (communication, reliability) and specialized skills (technical certifications, business development, commercial driving), while wishing to see better retention of graduates from local education institutions, so that Central UP businesses may better compete with other Midwest, Mountain, and Pacific markets.

FIGURE 4. CHALLENGES

WHAT ARE THE MOST DAUNTING CHALLENGES FOR BUSINESS SUCCESS IN THE CENTRAL UPPER PENINSULA?



Source(s): Survey results compiled by TIP Strategies, Inc.

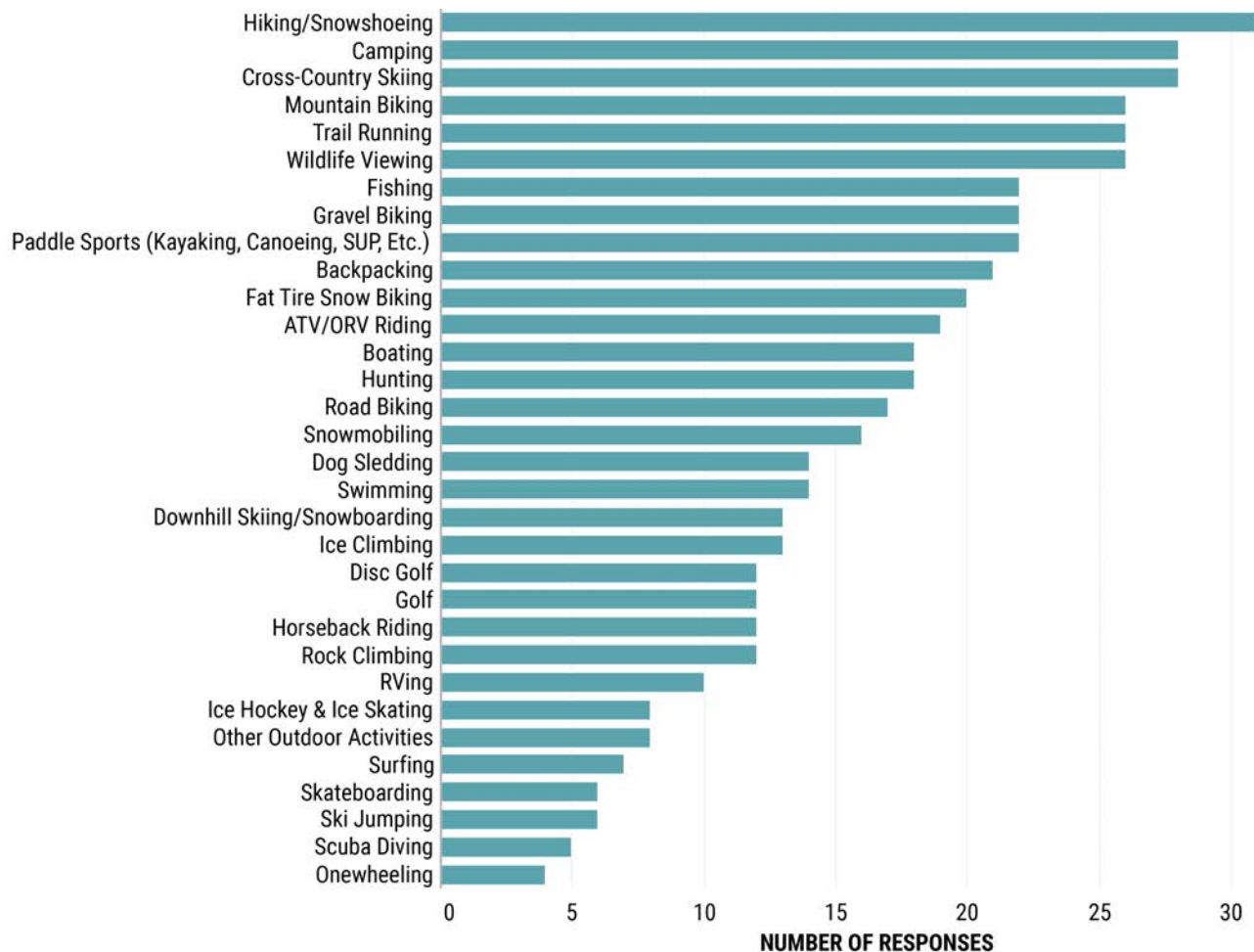
Note(s): Of the 68 respondents, 35 answered this question. Larger fonts indicate higher frequency of responses. Respondents were allowed to select more than one option.

Avoiding Overreliance on Tourism

Outdoor recreation represents a significant industry strength for the Central UP. Hiking/snowshoeing, camping, cross-country skiing, and mountain biking are the most popular among a range of activities supported by respondent businesses (Figure 5, page 36), while individual respondents are also personally involved in many of the region's offerings. Despite a strong outdoor recreation-based tourism industry, respondents cautioned against dependence on this sector. "Overreliance on tourism" was the third most cited challenge for local business success (9.2 percent of responses), with respondents noting the difficulties of seasonality in sales and visitors. Respondents identified opportunities in other industry sectors (tech and innovation, healthcare, mining, etc.) indicating a region looking to broaden its traded sector strengths. Still, the importance of protecting the region's outdoor assets was clear, with proximity to natural amenities (3.6 out of 5.0) and the quality of life afforded by them (3.6) standing apart as the Central UP's most significant business retention factors. Prescribed actions like preservation of natural spaces and committing to sustainable development demonstrate respondents' aspirations to protect the local ecosystem, while electrification efforts (with scores ranging from 2.7 to 3.3) represent innovation in the local outdoor recreation industry.

FIGURE 5. SUPPORTED ACTIVITIES

WHICH OUTDOOR ACTIVITIES DOES YOUR BUSINESS SUPPORT?



Source(s): Survey results compiled by TIP Strategies, Inc.

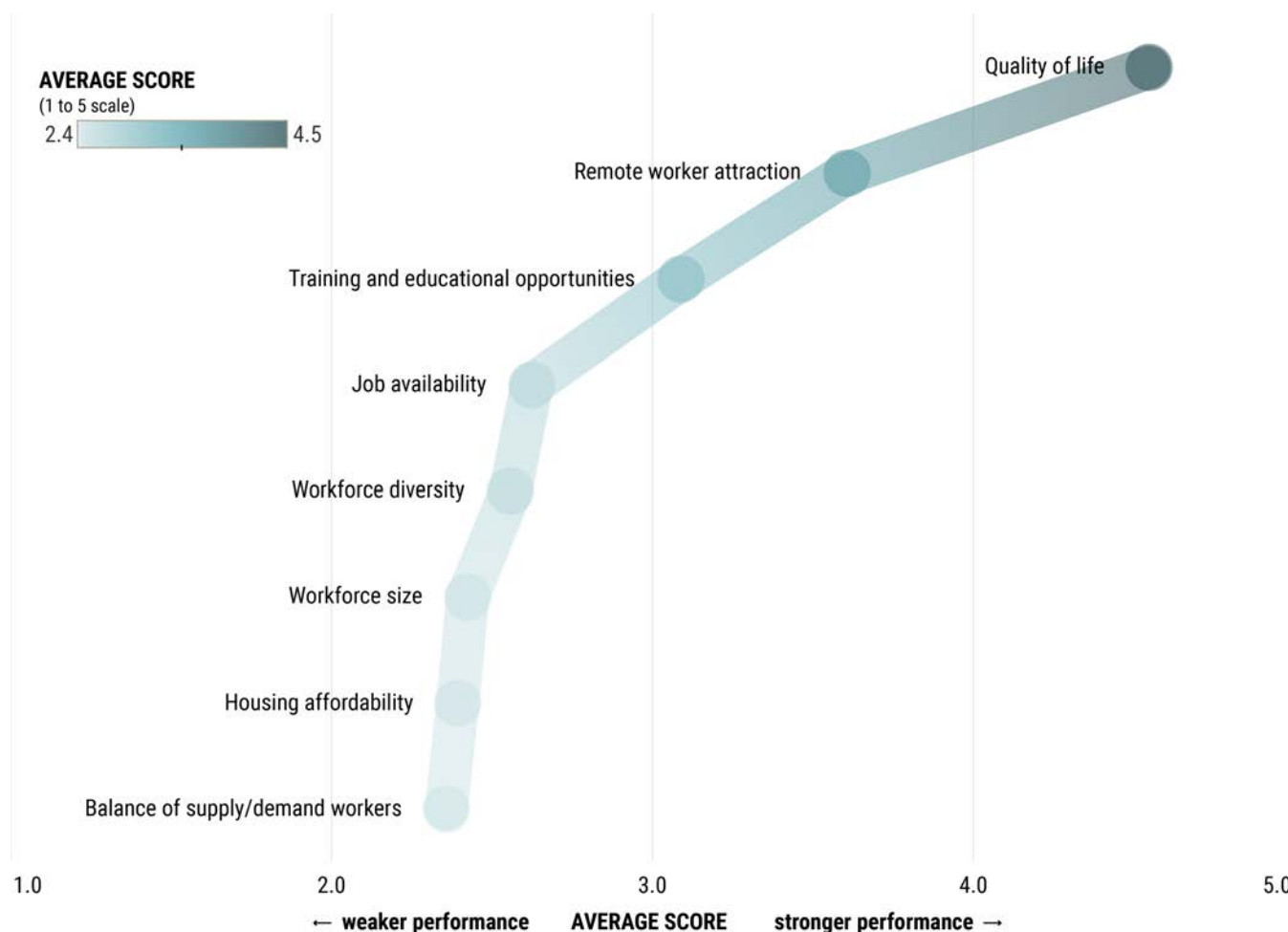
Note(s): Of the 68 respondents, 48 answered this question. Respondents were allowed to select more than one option. SUP is stand up paddleboarding. ATV is all-terrain vehicle. ORV is off-road vehicle. RVing is recreational vehicle travel.

Expanding the Region's Full-Time Population

Appropriately for a region whose biggest challenge is not having enough workers, respondents also called out opportunities to increase the number of full-time residents in the area, with respondents noting the disadvantages of a highly seasonal population. "Attracting new residents," "remote work," and "climate change migration" each received multiple mentions as opportunities for local economic growth. The region's quality of life, bolstered by its natural amenities, was identified as its greatest talent attraction and retention strength with a score of 4.5, contributing to its attractiveness as a destination for remote workers (identified as its second greatest such strength with a score of 3.6 (Figure 6, page 37). Housing affordability was identified as one of the region's weaknesses as far as talent attraction and retention (2.4), with 11.5 percent of responses selecting housing as one of the most daunting challenges for business success in the region. As such, increasing housing stock and affordability was selected by multiple respondents as an action to positively impact business success (8.3 percent).

FIGURE 6. TALENT ATTRACTION AND RETENTION

ON A SCALE OF 1 TO 5, ASSESS THE CENTRAL UPPER PENINSULA REGION'S PROGRESS IN EACH OF THESE AREAS.



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 68 respondents, 46 answered this question. The scale indicated the average score, with 5 being the highest possible and 1 being the lowest possible.

Improving Networks and Supply Chains

The most commonly identified action that ORIAN should pursue to positively impact respondent business success was to increase networking and collaboration opportunities (15 percent of responses), to connect local businesses with groups like ORIAN, and with one another in support of innovation and job placement efforts (Figure 7, page 38). Increased funding and grant opportunities for local businesses and nonprofits was also a popular response (10 percent), better allowing these organizations to support local events. Respondents also noted a need to improve supply chain infrastructure. On average, the majority of respondent business' customer base and supplier base was located within the Central UP, however respondents selected local infrastructure (9.2 percent) and distance from outside markets (8 percent) as major challenges for local business success, ranking supplier and raw materials as the weakest retaining factor for keeping business in the Central UP (scoring 2.0 out of 5.0).

FIGURE 7. ACTIONS

WHAT ACTIONS SHOULD ORIAN PURSUE THAT WOULD POSITIVELY IMPACT YOUR BUSINESS'S SUCCESS?



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 68 respondents, 26 answered this question. Larger fonts indicate higher frequency of responses. Respondents were allowed to select more than one option.

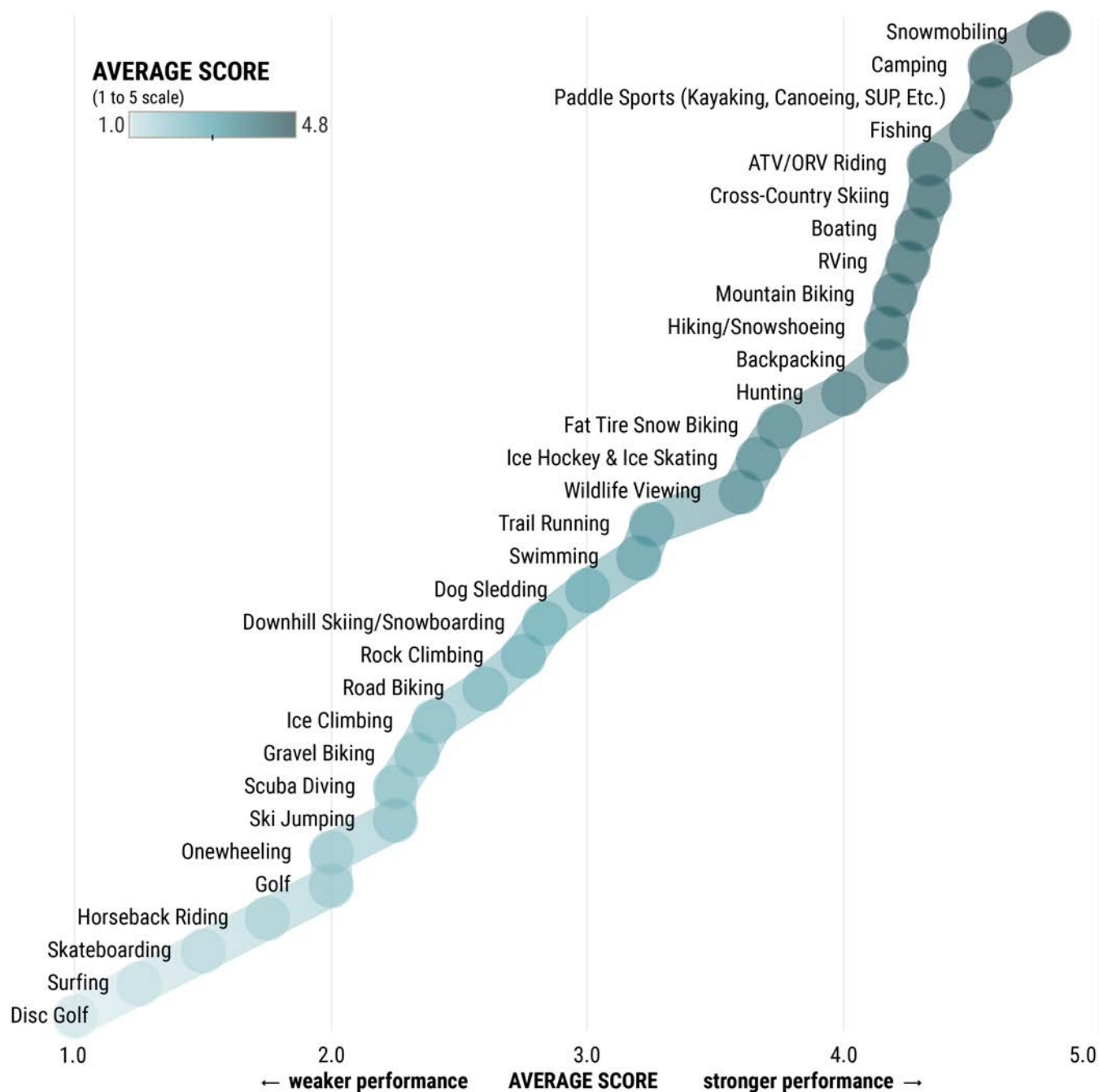
Perception Survey

TIP conducted an additional survey of the nation's outdoor recreation industry leaders. This survey was open for a three-week period between January 14, 2025, and February 4, 2025, and drew 19 respondents. The survey instrument opened with basic questions about business location and characteristics. The remainder of the survey included 13 questions directed at respondent perceptions of and business outlook for the Central UP. All responses were confidential. Question-by-question survey results were delivered to ORIAN in an interactive data visualization using Tableau Public. Findings from this survey, summarized below, were used to guide the direction of the strategic plan.

Though responses were few in number, they were geographically diverse. The majority of respondents indicated at least some familiarity with the Upper Peninsula, though most have never visited. Still, the region is strongly associated with outdoor recreation, with respondents indicating high positive perceptions of the region's power sports, camping, paddle sports, and other popular activities (Figure 8, page 39). Camping, hiking, paddle sports, and backpacking were the most popular outdoor activities among respondents. These were also rated as the activities that respondents were most likely to travel to the Upper Peninsula to pursue. The Great Lakes, New England, and Rocky Mountain regions were each identified as having several markets that compete with, or are comparable to, the Upper Peninsula.

FIGURE 8. QUALITY OF OFFERINGS

ON A SCALE OF 1 TO 5, HOW DO YOU PERCEIVE THE UPPER PENINSULA REGION'S QUALITY OF OFFERINGS IN EACH OF THESE AREAS?



Source(s): Survey results compiled by TIP Strategies, Inc.





Note(s): Of the 19 respondents, 9 answered this question. The scale indicates the average score, with 5 being the highest possible and 1 being the lowest possible.

SWOT Analysis

During the discovery phase of the project, the consulting team gathered qualitative input from local stakeholders across the Central UP to better understand the outdoor recreation industry, economy, and assets. In addition, TIP conducted quantitative data analyses to understand the Central UP's competitive position compared to peer and aspirational markets. The results of these efforts informed the following strengths, weaknesses, opportunities, and threats (SWOT) analysis. The four components of a SWOT analysis can be defined as follows.

- **Strengths.** Assets and resources that can be built on to grow, strengthen, and diversify the local/regional economy.
- **Weaknesses.** Liabilities and barriers to economic development that could limit economic growth potential.
- **Opportunities.** Competitive advantages and positive trends that hold significant potential for the attraction of new businesses, investments, and skilled workers.
- **Threats.** Unfavorable factors and trends (often external) that could negatively affect the local/regional economy.

FIGURE 9. CENTRAL UP OUTDOOR RECREATION INDUSTRY SWOT

 <h3>STRENGTHS</h3> <ul style="list-style-type: none"> • Strong sense of community and regional collaboration • Natural resources, access to outdoor recreation • Commercial airports (Delta County, Marquette Sawyer, Ford Airport Iron Mountain) • NMU and Bay College • Lower cost of living versus other outdoor rec hubs • Proximity to Lake Superior State University and MTU, and Gogebic Community College network • Success in attracting state and federal funding • Product testing • Variety of outdoor recreation-oriented events 	 <h3>WEAKNESSES</h3> <ul style="list-style-type: none"> • Geographic isolation: logistic challenges, higher costs • Limited amenities for visitors (hotels, restaurants) • Housing shortages • Workforce shortages, including aging workers • Low wage jobs • Aging infrastructure
 <h3>OPPORTUNITIES</h3> <ul style="list-style-type: none"> • Economic diversification, including expanding outdoor recreation industry • Develop the high tech/rec tech industry (engineering and design) • Elevating NMU • Growth of the outdoor recreation economy and tourism • Develop and expand outdoor recreational assets • Leverage regional outdoor recreational assets outside the Central UP (e.g., Copper Peak, Copper Harbor) • Commercial and industrial land development • Talent attraction and retention (remote worker attraction, graduate retention) 	 <h3>THREATS</h3> <ul style="list-style-type: none"> • Decreased housing availability and affordability, as well as aging assets (e.g., infrastructure) • Population decline • Declining tax revenues • Infrastructure limitations • Climate change • Economic volatility (resource-based industries) • Lack of major private investment opportunities

Appendix B. Niche Outdoor Recreation

Hiking and snowshoeing may be the first activities that come to mind when thinking about outdoor recreation in the Central UP, but the region offers far more than just these well-known pursuits. With its rugged terrain, vast forests, and access to both inland and Great Lakes waters, the Central UP provides an exceptional setting for a wide range of niche outdoor sports. While traditional activities like fishing, hiking, and snowmobiling remain popular, emerging and specialized adrenaline sports, such as mountain biking and ice climbing, are gaining traction and creating new economic opportunities.

Supporting the expansion of these niche opportunities is a core component of the region's outdoor recreation industry growth strategy. By focusing on activities with strong participant engagement but limited market saturation, the Central UP can differentiate itself as a destination for specialized recreation. This approach not only attracts dedicated user groups but also creates opportunities for business development in equipment manufacturing, guiding services, and event hosting, strengthening the region's economy beyond tourism. The following experiences were identified as having competitive advantages for the Central UP due to climate and/or topography, existing awards and events, national trends in participation,² and insights garnered from the local constituent and national perception surveys conducted as a part of this planning process. (See Appendix A. Planning Context on page 32 for an overview of the surveys.)

FIGURE 10. OVERVIEW OF NICHE OUTDOOR RECREATION OPPORTUNITIES FOR THE CENTRAL UP

NICHE	RATIONALE
Mountain Biking	The Central UP's rugged terrain and extensive trail systems offer some of the most challenging and scenic mountain biking in the Midwest. The varied topography, from rocky descents to smooth flow trails, attracts riders of all skill levels. The region's commitment to trail development has earned it national recognition as a top-tier mountain biking destination. Marquette's trail network has earned the prestigious designation from the International Mountain Bicycling Association (IMBA) as a Bronze Level ride center.
Dogsledding	The Central UP's long, snowy winters and expansive wilderness make it an ideal location for dogsledding. Trails through the Hiawatha National Forest and along the shores of Lake Superior provide scenic and challenging routes for mushers. Annual events like the UP200, one of the most recognized mid-distance sled dog races in the country, highlight the region's strong mushing tradition and draw competitors from across North America.
Cross-Country (XC) Skiing	With heavy snowfall and meticulously groomed trails, the Central UP is a popular destination for Nordic skiing. Areas like the Noquemanon Trail Network and Valley Spur provide a mix of classic and skate skiing through pristine wilderness. The region's long winter season ensures consistent conditions for training and competition. Significant XC events in the Central UP include the Noquemanon Ski Marathon and the Eskymos XC Invitational.
Fat Biking	The Central UP's extensive snow-covered trails and dedicated grooming make it one of the best places in the country for fat tire biking. Trails in Marquette and Munising are specifically maintained for winter riding, allowing cyclists to explore the backcountry even in deep snow. Events like the Polar Roll attract riders looking to test their endurance in extreme conditions. Outside Magazine profiled Marquette County's outstanding winter trail network in 2018.

² Outdoor Industry Association. Outdoor Foundation. [2024 Outdoor Participation Trends Report](#).

NICHE	RATIONALE
Ski Jumping	The UP has a rich history in ski jumping, with two major facilities in the Central UP, including Suicide Hill Ski Jump in Negaunee and the Pine Mountain Ski Jump in Iron Mountain hosting competitions for more than a century. The region continues to support the sport with training programs and events that draw athletes from across the country. Its strong winter sports culture has helped preserve this tradition.
Surfing	Lake Superior's powerful winds and long fetch create surfable waves, particularly in areas like Marquette and Grand Marais. Unlike ocean surfing, the freshwater experience presents distinct challenges, including frigid temperatures and rapidly changing conditions. Dedicated cold-water surfers take advantage of fall and winter storms for optimal conditions. Furthermore, according to OIA's 2024 Outdoor Participation Trends Report, surfing saw the highest average annual growth rate in core participation from 2019 to 2023 of any outdoor recreation activity.
Ice Climbing	The Central UP is home to some of the Midwest's most challenging ice climbing, with towering frozen waterfalls in Pictured Rocks National Lakeshore and Munising. Reliable cold temperatures and a variety of routes, from beginner-friendly climbs to expert-level ice walls, make it a sought-after destination. Every February, the Michigan Ice Fest draws climbers from across the country to test their skills on world-class formations.
Scuba Diving	Lake Superior's cold, clear waters preserve historic shipwrecks, making the Central UP a superb location for wreck diving. Sites like the Alger Underwater Preserve near Munising feature well-preserved vessels from the 1800s, offering a unique underwater experience. The lake's excellent visibility and lack of marine growth allow divers to explore history beneath the surface. Like surfing, OIA data found that scuba diving has seen significant growth in participation rates from 2022 to 2023.
Snowmobiling	With one of the most extensive and well-maintained trail networks in the country, the UP is a prime destination for snowmobiling. The Central UP boasts hundreds of miles of interconnected snowmobile trails, linking towns like Marquette, Munising, and Escanaba. Heavy snowfall and well-maintained routes make the area a prime destination for snowmobile tourism and industry growth. The Haywire Grade Trail hosts multiple events every year, including an antique snowmobile ride.
Hiking and Camping	The Central UP offers diverse hiking and camping opportunities, from backcountry adventures in the Hiawatha National Forest to scenic trails along Pictured Rocks National Lakeshore. Its mix of rugged wilderness and accessible campgrounds attracts outdoor enthusiasts year-round. While many of the Central UP's winter outdoor recreation experiences are snow dependent, outdoor explorers can enjoy winter hiking and camping, regardless of the snowpack. Nationally, hiking remains the most popular outdoor recreational activity for both men and women, and camping has the highest overall user crossover rating, meaning that 91.9 percent of people who camp participate in at least one other outdoor activity (OIA, 2024).
ATV and Off-Road	The Central UP is a top destination for ATV and off-roading enthusiasts. Hundreds of miles of interconnected trails traverse forests, rocky landscapes, and scenic routes, and run throughout all six Central UP counties. Well-maintained paths, seasonal access, and a strong off-road culture make the region ideal for recreational riders and industry growth.

NICHE	RATIONALE
Kayaking	The Central UP's diverse waterways, from Lake Superior's dramatic coastline to inland rivers and lakes, provide exceptional paddling opportunities for kayakers of all skill levels. The region's mix of calm waters and challenging conditions, including sea caves at Pictured Rocks National Lakeshore and whitewater sections on rivers like the Menominee, attracts adventure seekers throughout the warmer months. The area's natural beauty, combined with growing infrastructure like water trails and launch sites, has established the Central UP as an emerging destination for kayaking enthusiasts.
Rock Climbing	The Central UP's ancient rock formations, particularly the quartzite cliffs around Marquette and the sandstone bluffs of Pictured Rocks National Lakeshore, provide climbers with diverse and challenging routes. The region offers remarkable variety with numerous sport climbing locations (AAA Wall, Slug's Bluff, Top of the World, and Suicide), lakeside granite bouldering opportunities (Wetmore and Little Presque Isle), and trad climbing crags (Palmer and Cliff's Ridge), delivering some of the most breathtaking climbing experiences in the Midwest. The combination of stunning Lake Superior vistas, quality rock, and continued route development has established the Central UP as an under-the-radar climbing destination with growing appeal.
Disc Golf	The Central UP's varied terrain and forested landscapes have become home to challenging disc golf courses that attract players seeking superior playing experiences. Courses like Powder Mill in Marquette and Pioneer Trail Park in Escanaba offer technical layouts that utilize natural features, elevation changes, and woodland corridors to create distinctive holes that test players' skills. This sport has expanded rapidly, with course installations increasing by over 15 percent annually nationwide in recent years. The rising popularity in the region is evidenced by new course development and increasing participation in local tournaments and leagues, reflecting the broader national trend.

Source(s): TIP Strategies, Inc., research.



Appendix C. User Profiles

Understanding the diverse profiles of outdoor recreation participants is important for both outdoor companies and organizations working to promote outdoor participation. The Central UP attracts a wide range of outdoor enthusiasts, each with distinct interests, needs, and spending patterns. According to the OIA's annual *Outdoor Participation Trends Report*, national interest and participation in outdoor activities has been steadily increasing since 2016 with few signs of slowing down.

By analyzing participant demographics and preferences, local organizations can identify opportunities to target specific users and develop products, services, and programs that cater to both frequent (core) and infrequent (casual) visitors, broadening access to outdoor recreation across the Central UP. Comprehensive user profiles provide invaluable insights that inform targeted marketing strategies, guide strategic infrastructure investments, and help businesses tailor their offerings to the specific needs of different outdoor recreation segments. The following 10 profiles represent key segments engaging in outdoor activities across the region. By leveraging insights about these users, the Central UP can enhance visitor experiences, support local businesses, and strengthen its position as a leading outdoor recreation destination, while maximizing the economic impact of the industry.



1. The Outdoor Enthusiast Couple

Demographics	Ages 30–45, mid-to-upper income, often from nearby urban areas (e.g., Milwaukee, Chicago, Minneapolis, Detroit).
Interests	Hiking, kayaking, biking, camping, and exploring scenic trails.
Needs and Preferences	<ul style="list-style-type: none"> Well-marked trails and detailed digital maps. Lodging options, ranging from rustic cabins to eco-friendly boutique hotels. Access to high-quality outdoor gear rental shops and guided excursions.
Opportunities	<ul style="list-style-type: none"> Promote multi-day adventure packages with lodging, dining, and recreation experiences that highlight sites that may not be as well-known. Because this segment typically has a personal vehicle, promote assets across the Central UP, especially in rural communities. Enhance digital wayfinding tools and itineraries that highlight scenic routes.

2. The Weekend Warrior

Demographics	Ages 25–40, professionals looking for short getaways, often traveling solo or with a small group.
Interests	Mountain biking, trail running, hiking, rock climbing, noctourism (stargazing, northern lights, night hiking or biking), and skiing/snowboarding.
Needs and Preferences	<ul style="list-style-type: none"> Generally experienced adventurer, but enthusiastic to try new things. Quick access to recreation areas with minimal planning. Affordable lodging or camping options near trailheads. Access to locally grown food and farm-to-table fast casual restaurants. Connectivity for work/leisure balance (Wi-Fi access, coworking spaces).
Opportunities	<ul style="list-style-type: none"> Create 48-hour adventure itineraries showcasing top activities and dining options. Offer easy online booking for equipment rentals and guided experiences. Promote awareness of alternative recreation sites and trails to alleviate congestion at popular destinations and distribute visitors more evenly across the Central UP. Technologically savvy, weekend warriors are likely to use social media tools to identify locations or document adventures. Leverage a wide array of tools to engage and find new users, including recreation-focused apps like Strava, along with social networking and lifestyle platforms like Instagram or Pinterest.

3. The Family Explorer

Demographics	Parents in their 30s–50s with children ages 5–15, often visiting from within the Midwest.
Interests	Family-friendly hiking, bicycling, wildlife viewing, beach outings, and winter recreation.
Needs and Preferences	<ul style="list-style-type: none"> Accessible trails, picnic areas, and beginner-friendly outdoor activities. Visitor centers with educational programming and interactive exhibits. Lodging with family-friendly amenities (e.g., campgrounds, cabins, RV sites, child-friendly dining).
Opportunities	<ul style="list-style-type: none"> Expand family-oriented programming, like nature walks, geocaching, and introductory outdoor skills courses. Promote seasonal vacation packages for summer and winter family trips. Design itineraries that appeal to multiple generations and include alternative recreation sites and trails to alleviate congestion at popular destinations.

4. The Silent Sports Enthusiast

Demographics	Ages 50+, retirees or empty nesters, higher disposable income. Participation rates for older Americans have steadily increased over the past five years.
Interests	Cross-country skiing, birdwatching, wildlife viewing, kayaking, fishing, and nature photography.
Needs and Preferences	<ul style="list-style-type: none"> • Quiet, scenic recreation areas with minimal crowds. • Well-maintained, easy-to-moderate trails with interpretive signage. • High-quality lodging and dining experiences that emphasize local culture.
Opportunities	<ul style="list-style-type: none"> • Develop and promote silent sports experiences, such as guided nature tours and photography workshops. • Improve accessibility features at parks and trailheads to accommodate aging adventurers. • Curate weekday and off-season/shoulder-season itineraries and packages to appeal to this segment.

5. The Motorsports Adventurer

Demographics	Ages 20–70, primarily male, however the majority of motorsports users feel this is a family sport, strong interest in ATVs, snowmobiling, and off-road experiences.
Interests	Long-distance trail riding, backcountry exploration, and off-road camping.
Needs and Preferences	<ul style="list-style-type: none"> • Clearly marked multiuse trails and wayfinding for off-road vehicles. • Adequate parking for trailers and large trucks. • Lodging and dining options that cater to motorsports travelers, for example, dedicated parking for snowmobiles and ATVs. • Repair shops, gas stations, and gear retailers near trail systems.
Opportunities	<ul style="list-style-type: none"> • Expand partnerships with motorsports manufacturers and outfitters for promotional events. • Invest in trailhead infrastructure, including staging areas and signage, to enhance user experience. • Target regional snowmobiling and ATV clubs in large Midwestern markets to promote the Central UP's trails and infrastructure for riding.

6. The Adaptive Outdoor Enthusiast

Demographics	All ages, individuals with physical or cognitive disabilities seeking accessible outdoor experiences, often traveling with family members or groups.
Interests	Any outdoor activity that can be adaptable. Some activities, like ATVing or fishing, may not require any modifications. Other activities, including biking or skiing, may require specialized equipment. And others may require adaptive infrastructure, for example, paved areas or handrails.
Needs and Preferences	<ul style="list-style-type: none"> • Fully accessible trails, campsites, and recreation areas with adaptive equipment rentals. • Clear information on accessibility options through digital and printed resources. • Inclusive programming and events designed for people with special needs.
Opportunities	<ul style="list-style-type: none"> • Invest in adaptive infrastructure, like all-terrain wheelchairs, accessible kayak launches, and wider trails. • Partner with disability advocacy groups to improve outdoor accessibility and create inclusive events. • Build awareness of adaptive infrastructure and resources, such as adaptive equipment, to reduce barriers to participation in the Central UP.

7. The Solo Backcountry Adventurer

Demographics	Ages 25–45, men or women, independent travelers, often from urban areas looking for solitude and a challenge.
Interests	Backpacking, bikepacking, dispersed camping, and off-grid exploration.
Needs and Preferences	<ul style="list-style-type: none"> • Remote trails and campsites with minimal infrastructure. • Reliable maps, GPS wayfinding, and emergency communication options. Ensure emergency contact information is clearly displayed at trailheads, including information on where there is limited or no cell coverage, as well as where there is coverage. • Local outfitters with specialized gear and trip-planning resources.
Opportunities	<ul style="list-style-type: none"> • Develop and promote long-distance routes for hiking and biking with designated camping areas. • Support businesses offering gear rentals, shuttle services, and guided backcountry experiences. • Offer training and courses in topics including outdoor navigation, first aid, and survival to prepare adventurers for solo exploration.

8. The Urban Escapee

Demographics	Ages 30–50, professionals seeking a retreat from city life, often traveling solo or in small groups.
Interests	Wellness-focused activities like nature walks, paddling, yoga in scenic settings, outdoor photography, astro-tourism (stargazing, northern lights), and cabin getaways.
Needs and Preferences	<ul style="list-style-type: none"> • Easy-to-access nature experiences that don't require extensive planning. • Cozy lodging with modern amenities, including eco-lodges and boutique cabins. • Activities that blend relaxation with light adventure, like guided nature tours or silent sports.
Opportunities	<ul style="list-style-type: none"> • Expand wellness-focused tourism offerings, for example, meditation hikes, nature therapy, outdoor yoga, and forest bathing experiences. • Develop travel packages that combine outdoor recreation with luxury accommodations and local food experiences. • Improve arts and cultural offerings, like galleries and locally made goods. Local events, including farmers markets and art festivals, appeal to this segment.

9. The International Visitor

Demographics	Ages 25–55, solo travelers, adventure seekers, and families.
Countries of Origin	Canada, Germany, United Kingdom, Netherlands, China, and Japan (countries with strong outdoor recreation cultures and top countries to visit Michigan).
Interests	Outdoor recreation, wildlife viewing and photography, and cultural experiences (e.g., mining history, Indigenous heritage, shipwrecks, and lighthouses).
Needs and Preferences	<ul style="list-style-type: none"> • Typical stay is 5–10 days, longer than domestic visitors usually stay. • Lodges, cabins, eco-friendly resorts with cultural character, camping and glamping sites, especially full-service options to allow visitors to rent gear. • Prefer local food, craft beer/beverages, and sustainable travel options.
Opportunities	<ul style="list-style-type: none"> • Multi-language friendly signage and map tools. • Tailored marketing in target international markets, aligning with Pure Michigan/statewide and Midwest regional efforts. • Multi-day experience packages, including mid-week options or flexible start and end dates, that include gear rental and guides.

10. The Consumptive User

Demographics	Ages 30–70, primarily male (77 percent), however, Millennial women are one of the fastest growing demographics of consumptive users. Youth hunts or youth categories in tournaments encourage child participation, typically with a father or an uncle. Generally experienced anglers, hunters, and forgers.
Interests	Access to vast public lands (state and national forests), high-quality game and fish populations in remote settings, and attraction to the Central UP's long history of hunting, fishing, and foraging.
Needs and Preferences	<ul style="list-style-type: none"> • Ease of identifying and getting to sites suitable for use by the general public. • Ease of identifying and obtaining proper permits. • Lodging in proximity to prime game, fishing, and foraging areas. • The average hunting trip ranges from 7 days (small game) to 12 days (large game). Hunters average 6–8 trips per year.
Opportunities	<ul style="list-style-type: none"> • This segment relies heavily on technological tools, like GPS and apps for mapping and tracking (onX, HuntWise, Fishbrain) and social media for tutorials and forums, so ensuring robust telecommunication networks are in place will appeal to these users. • Simplified permitting and licensing processes for non-resident visitors and guided experience packages catering to hunters and anglers. • There is an increasing interest in improving food security through hunting and foraging, especially from women. Target this demographic and appeal to the sustainability and conservation aspects of hunting, angling, and foraging in the Central UP.

Source(s): International Snowmobile Manufacturers Association, [Snowmobiling Statistics and Facts](#), (web page); US Department of Agriculture, Forest Service, [Snowmobiling Fact Book](#), (undated PDF); US Fish & Wildlife Service, [2022 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation](#) (completed every five years); Richard C. Stedman, et al., "Hunting and the Local Food Movement: Insights from Central New York State," *Wildlife Society Bulletin*, vol. 41, issue 4, December 2017; Michigan Department of Natural Resources, [Michigan Statewide Comprehensive Outdoor Recreation Plan \(SCORP\) 2023–2027](#); Michigan Economic Development Corporation, [Focus Industry: Outdoor Recreation](#), (web page); Outdoor Industry Association, Outdoor Foundation, [2024 Outdoor Participation Trends Report](#); Outdoor Industry Association, [Stepping into Segmentation: A Look at Hikers](#), (2024 PDF); Michigan Adaptive Sports, a chapter of Move United, [Michigan Adaptive Sports](#), (web page); Pure Michigan, [Research and Reports](#) (links to PDFs); Travel Marquette, [Outdoor Adventure](#), (web page); and TIP Strategies, Inc.



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