

UW research highlights outdoor industry needs

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A recently published report highlights opportunities and challenges for the state's growing outdoor recreation industry.

The University of Wyoming's Jay Kemmerer Wyoming Outdoor Recreation, Tourism and Hospitality Institute released a comprehensive outdoor business needs assessment that gives policymakers, support organizations and industry stakeholders information about both challenges and growth opportunities facing businesses.

Outdoor recreation accounted for \$2.3 billion, or 4.5%, of Wyoming's gross domestic product in 2024.

"Wyoming's outdoor recreation economy is large, and it has not been studied to this degree before. This report changes that," Dan McCoy, director of the university's WORTH Institute, said in a news release. "For the first time, we have a clear, data-driven picture of who these businesses are; what they're up against; and what they need to grow. We hope this report becomes a foundational resource for the industry and the state."

As the industry's economic contribution to the state has grown in the past several years, the state has increased its investment in outdoor recreation. The state's Outdoor Recreation Trust Fund awarded its first round of grants in July, which includes a \$117,500 award for improvements to the



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Despite the growing role that outdoor recreation plays in the state's economy, business owners in the industry say that outdoor recreation plays second fiddle to the energy industry when it comes to governmental support. Grazing and energy development have been prioritized on public lands, survey respondents said.

Bureau of Land Management's Dry Creek Petrified Tree Special Recreation Management Area in Johnson County. The county sponsored the application.

"That was a nice job, a very good example of collaboration between the entities," Commission Chairman Bill Novotny said at Tuesday's commission meeting.

The university's report is based on a survey of 111 Wyoming outdoor businesses and in-depth interviews with 19 business owners, including guides, outfitters, retailers,

lodging operators, rental companies, venue and infrastructure providers and manufacturers, as well as research insights contributed by the university's Outdoor Recreation and Tourism Management degree capstone class, according to the news release. The university worked with Founded Outdoors, a consultant on the outdoor recreation industry, in developing the report.

Six Johnson County businesses were surveyed, according to the report. Around the state, the majority of survey respondents

have been in business for 10 years or more. While longevity is a good sign, the lack of new outdoor businesses creates questions about whether barriers to entry are too significant to overcome for new businesses, the report notes.

Among businesses surveyed, nearly half reported 2025 sales below expectations, and pessimism outpaced optimism. The most common operational challenges cited by respondents include seasonality, weather-related disruptions, rising operating costs, workforce hiring

and retention difficulties, and marketing.

Activities that are less weather dependent, such as hunting, have fared better than snow- or water-based activities due to drought conditions, the report showed.

Regulatory barriers affect 73% of responding businesses. Those barriers include permitting, licensing and compliance, insurance and risk management, access to public lands and taxation.

Guides and outfitters were impacted by regulatory challenges, as well as costs associated with liability insurance.

Lodging businesses also cited insurance as a challenge. Retailers are most challenged by larger and online retailers and tariffs.

Businesses also note that outdoor recreation plays second fiddle to the energy industry when it comes to governmental support. Grazing and energy development are uses of public lands that have been prioritized, respondents said. The full needs assessment is available on the University of Wyoming's website.

"Wyoming's outdoor entrepreneurs are resilient, creative and deeply committed to their communities, but they're navigating real headwinds without nearly enough support," said Enhao Li, chief operating officer for Founded Outdoors, in a news release. "This report gives us the evidence base we need to design programs that fit what these businesses are dealing with."