Overview of Oregon’s Outdoor Recreation Industry

ECONorthwest
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Introduction

**Economic Impact:** Outdoor recreation creates jobs and aligns with conservation and economic objectives for public lands.

**Participation:** Walking/jogging, cycling, and day hiking all continue to see growth in Oregon.

**Advantages:** High proportion of wild and scenic rivers, which attract people to state.
Economic Impact of Outdoor Recreation in Oregon
Oregon has a strong industry cluster in the outdoor recreation industry.

14,100 in direct Jobs (2008)
$82,700 in avg. compensation (2009)
11.6 percent in job growth (2001-2009)

Source: Oregon Business Plan
Economic impact of outdoor recreation: Oregon, 2011

$4 billion in total wages and salaries
$12.8 billion in total consumer spending
$955 million in total state/local tax revenue

Source: Outdoor Industry Association, 2012
Recreation Participation
Recreation participation across the nation

**Popularity:** Running was the most popular outdoor activity

**Diversity:** 73 percent of outdoor recreation participants were White/Caucasian (slight improvement)

**Motivation:** Exercise was listed as the primary motivator for outdoor recreation

Source: Outdoor Recreation Participation Topline Report, 2016
Recreation participation in Oregon 2011

**Participation:** 92% of Oregonians participated in at least one outdoor recreation activity

**Priorities:** Oregonians identified better access to soft-surface trails and waterways as key concerns

**Tourism:** Oregonians place a lower relative value on using outdoor recreation to promote tourism

Most popular activities for Oregon residents 2011

92% of Oregon Residents Participate in Outdoor Recreation Activities.

Figure 6. Top Ten Activities for Oregon Residents, 2011, User Occasions

- Walking on local streets / sidewalks: 386 million user occasions
- Walking on local trails / paths: 121 million user occasions
- Dog walking / going to dog parks / off-leash areas: 107 million user occasions
- Bicycling on roads, streets / sidewalks: 88 million user occasions
- Relaxing, hanging out, escaping heat / noise, etc.: 75 million user occasions
- General play at a neighborhood park / playground: 71 million user occasions
- Jogging / running on streets / sidewalks: 67 million user occasions
- Sightseeing / driving or motorcycling for pleasure: 47 million user occasions
- Walking / day hiking on non-local trails / paths: 40 million user occasions
- Bicycling on paved trails: 39 million user occasions

Oregonians are more active: Oregon vs. region and nation participation 2011

- Developed Camping
- Day Hiking
- Attending Outdoor Concerts
- Snowshoeing
- Sightseeing
- Off-highway Vehicle Driving
- Backpacking

Oregon participation rate minus regional and national rates

Trends in Outdoor Recreation
3-Year growth in national participation rate 2012-2015

Source: Outdoor Recreation Participation Topline Report, 2016
Projected recreation demand: Western Oregon BLM lands, 2012-2060

Total recreation participation on western Oregon BLM-managed lands and average annual rate of change, 2012 to 2060

- Wildlife Viewing, Interpretation, and Nature Study: +1.0%
- Driving for Pleasure (Along Designated BLM Roadways): +0.9%
- Camping and Picknicking: +0.9%
- Nonmotorized Travel (Hiking, Biking, and Horseback Riding): +1.1%
- Hunting (Big Game, Upland Game, and Migratory Game Birds): +0.4%
- Motorized Off-Highway Vehicle Travel: +0.8%
- Fishing: +0.8%
- Specialized Nonmotorized Activities and Events: +0.9%
- Swimming and Other Water-Based Activities: +1.1%
- Nonmotorized Boating: +0.9%
- Motorized Boating: +1.1%
- Nonmotorized Winter Activities: +1.4%
- Snowmobile and other Motorized Winter Activities: +0.9%

Source: BLM Western Oregon RMP 2016
The resident-visitor continuum is smoothing

<table>
<thead>
<tr>
<th></th>
<th>Oregon</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in Total Housing Stock, 2005-2014</td>
<td>1.0% per year</td>
<td>0.8% per year</td>
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<tr>
<td>Increase in Second Homes(^1) 2005-2014</td>
<td>5.7% per year</td>
<td>3.9% per year</td>
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</tbody>
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\(^1\)Housing units labeled as vacant for seasonal, recreational, or occasional use

Source: American Community Survey 1-Year Estimates
Oregon’s Competitive Advantage
Oregon is an outdoor destination

• A higher percentage of Oregon visitors come for “outdoors”
  – Oregon visitors: 23% as primary purpose of visit
  – National Average: 14% as primary purpose of visit

• More overnight visitors camp in Oregon:
  – Campground/trailer park/RV Park: 17%
  – National Average: 8%

Source: Longwoods International 2013 Oregon Visitors Report
Oregon=natural beauty and outdoor recreation

“What U.S. residents rate Oregon highest for — natural beauty and access to outdoor recreation — are among the top things Oregonians value about living in the state”

– Adam Davis, DHM Research
More overnight visitors to Oregon participate in Outdoor recreation activities:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Oregon</th>
<th>US Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach/waterfront</td>
<td>30%</td>
<td>19%</td>
</tr>
<tr>
<td>National/State Park</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Hiking/backpacking</td>
<td>21%</td>
<td>10%</td>
</tr>
<tr>
<td>Camping</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Fishing</td>
<td>10%</td>
<td>8%</td>
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</tbody>
</table>

Source: Longwoods International 2013 Oregon Visitors Report
Oregon’s competitive advantage

• **Easy access to recreation:** travel times are low and options are high near major transportation/population centers

• **Recreation costs are low:** access costs are low, no sales tax, flights into PDX are relatively inexpensive

• **Rivers and Trails:** Oregon in particular has high quality, highly accessible, and long user seasons for river and trail sports.
Activity participation vs. primary reason for trip to Oregon

Source: MMGY Global Travel Horizons Survey
Outdoor recreation accessibility in Western Oregon

Source: ECONorthwest and BLM, 2015
Key conclusions

• Recreation can play an important economic role for public land contributions to local communities and economies

• Strategic design must consider demand and supply including substitutes and complements (e.g. timber industry)

• Recreation participants are becoming more diverse, but minorities still lag behind Caucasians in participation
Questions?