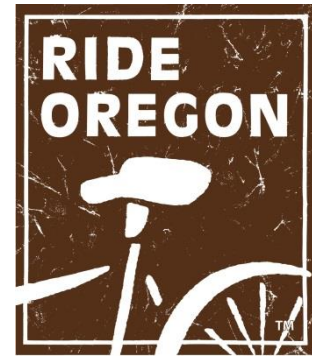




Oregon Bicycle Tourism by the Numbers



Nastassja 'Staj' Pace
Travel Oregon
Destination Development Specialist
Staj@TravelOregon.com

Oregon Outback Scenic Bikeway

June 2014

10.7%+



Travel & tourism industry employs more than

260 million people worldwide

Each day, travelers spend more than

\$2 billion (US)

America's travel and tourism industry is seen as a primary driver of our nation's economy

Travel Exports
up 13.7%
in 2011



120,000 jobs
created by the
travel and tourism
industry in 2011



Travel exports
growing at an
annual rate of
10% in 2012



81,000 additional
jobs added during
2012



How does this translate in Oregon?





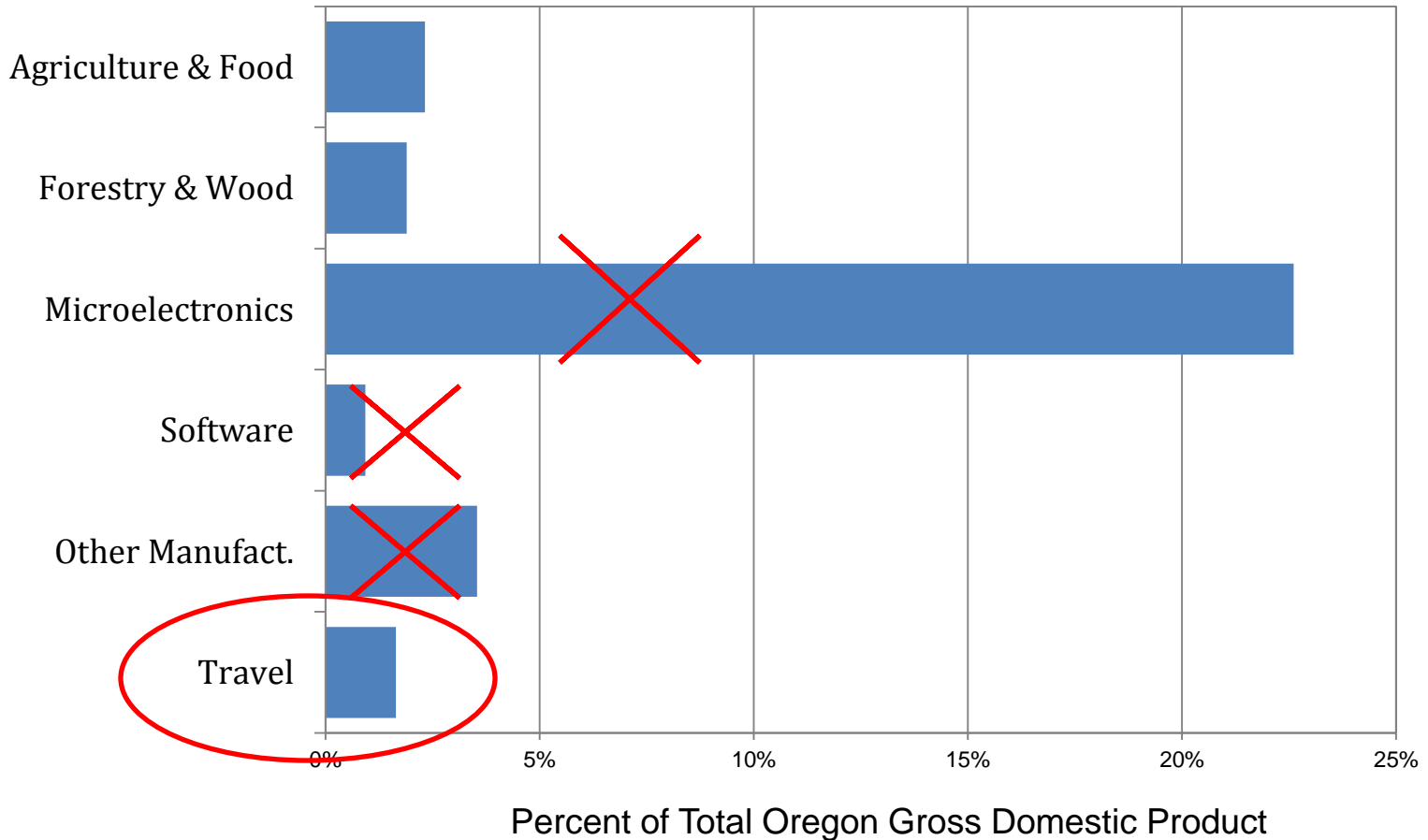
Why Tourism Matters To Oregon

2013

- Tourism in Oregon generates \$9.6 billion in direct travel spending
- Tourism directly generates 94,000 jobs in Oregon & indirectly creates another 41,000 jobs
- Tourism is one of the top three industries for employment in rural Oregon counties



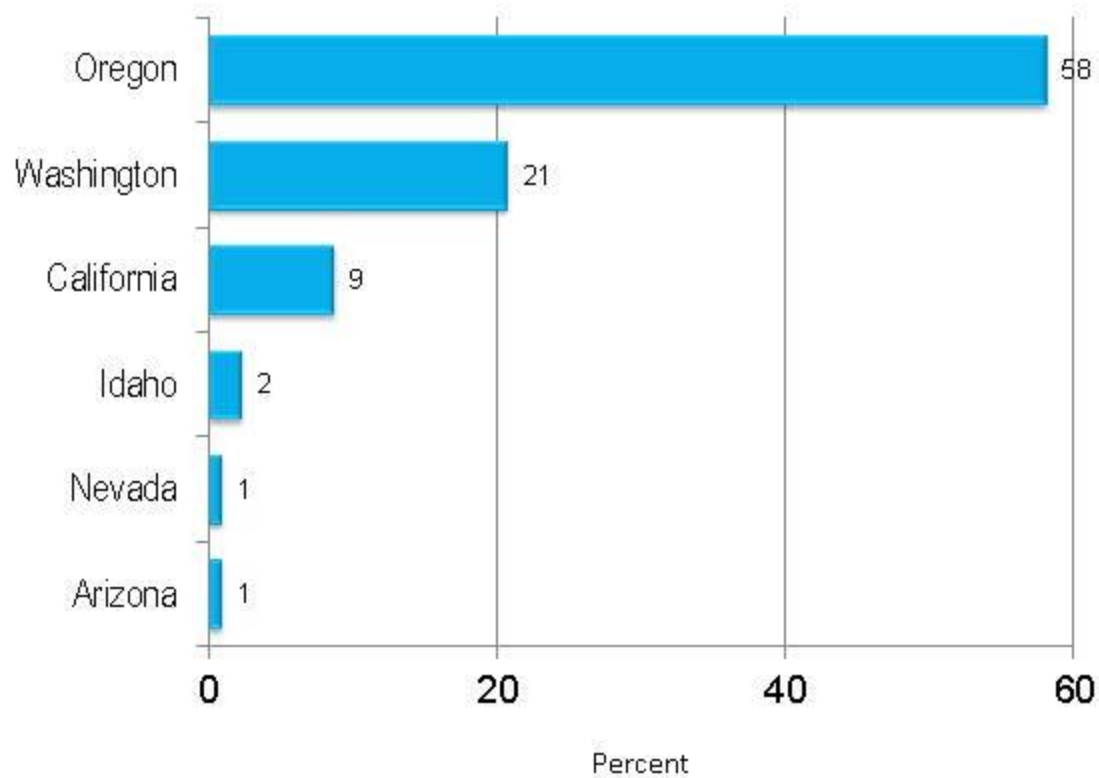
GDP of Leading Export-Oriented Industries (2013)



State Origin Of Trip



Base: Overnight Marketable Trips





Canada - #1

Japan

Australia

UK

China

Germany

TOURISM & HOSPITALITY INDUSTRY CLUSTER MAP

The Industry Cluster map is designed to be a visual narrative of the relationships or categories that make up an industry. It immediately demonstrates the strategic interdependence that defines an industry. The map can be developed on multiple levels to show additional corresponding relationships that support any given sector or the whole industry, (examples: agriculture, real estate development, production and processing services). This specific map has been created to show what makes up the tourism industry from the standpoint of what the consumer experiences and what is actually marketed and sold. It is important to understand that the industry benefits as a whole when each of the categories is healthy and vibrant—it's what makes Oregon a destination point rather than a stop-over point.











A Bike-Obsessed Culture Has Been Brewing



Over a quarter of all Americans cycle.

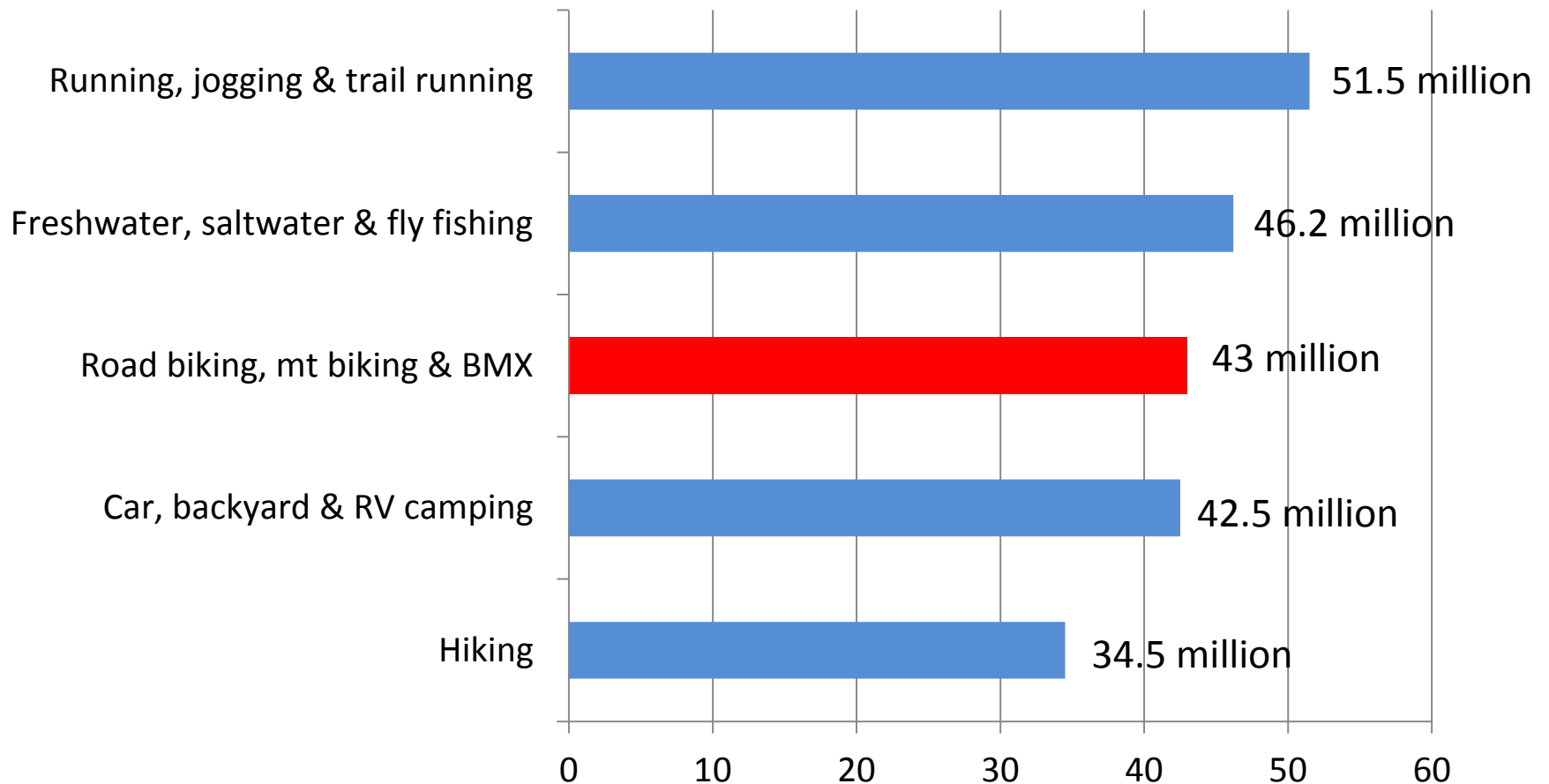


For every car sold, three bikes are sold.



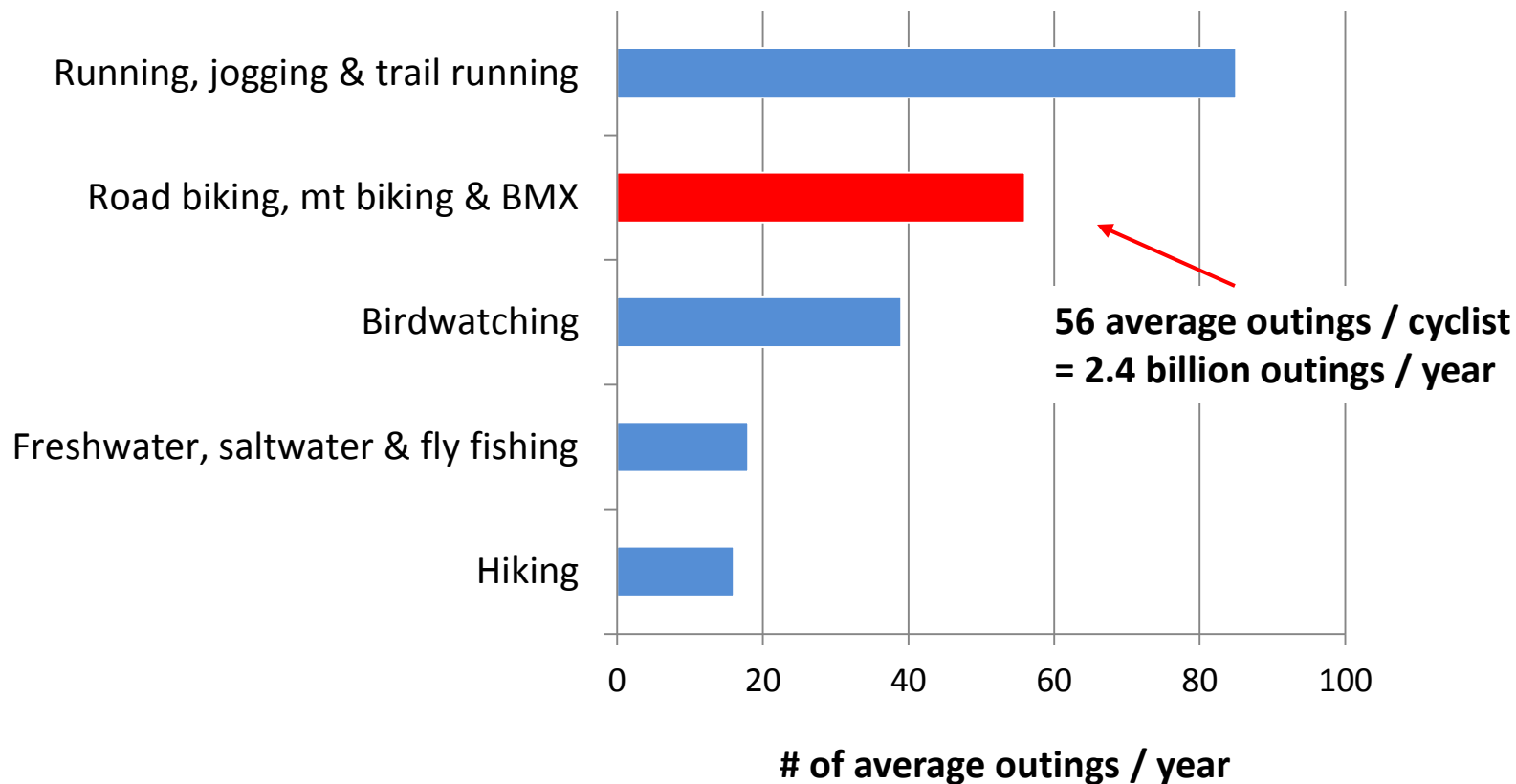
More Americans cycle than golf, ski, or play tennis combined.

Top Outdoor Recreation Activities by Participation Rate



Source: *Outdoor Recreation Participation Report*, Outdoor Industry Foundation, 2012

Outdoor Recreation Activities by Frequency of Participation



Bicycle Travel in Oregon



Economic Significance of Bicycle-Related Travel in Oregon, 2013

Conducted by Dean Runyan Associates
Made possible by: Travel Oregon



THE BIG ROUND HAIRY #s

Travelers in Oregon who participated in a planned bicycle-related activity while on the trip made travel expenditures of approximately...

**\$400 million
in 2012**

(approximately \$1.1 million is spent per day)

The Oregon Bicycle Travel Survey
Making Oregon a Better Place to Ride

THE BIG ROUND HAIRY #s

Travelers who participated in bicycle-related activities spent...

\$175 million on accommodation & food services

\$72 million on motor fuel

\$54 million on groceries

\$32 million on event fees

\$28 million on bicycle repairs, clothing & gear

The Oregon Bicycle Travel Survey
Making Oregon a Better Place to Ride

THE BIG ROUND HAIRY #s

In addition, this bicycle-related travel spending directly supported approximately...

4,600 jobs

\$102 million in earnings

The Oregon Bicycle Travel Survey
Making Oregon a Better Place to Ride

THE BIG ROUND HAIRY #s

The bicycle-related travel spending also generated...

**Local and state tax receipts of nearly
\$18 million in 2012**

This includes lodging taxes, motor fuel, and travel-generated state income tax

The Oregon Bicycle Travel Survey
Making Oregon a Better Place to Ride

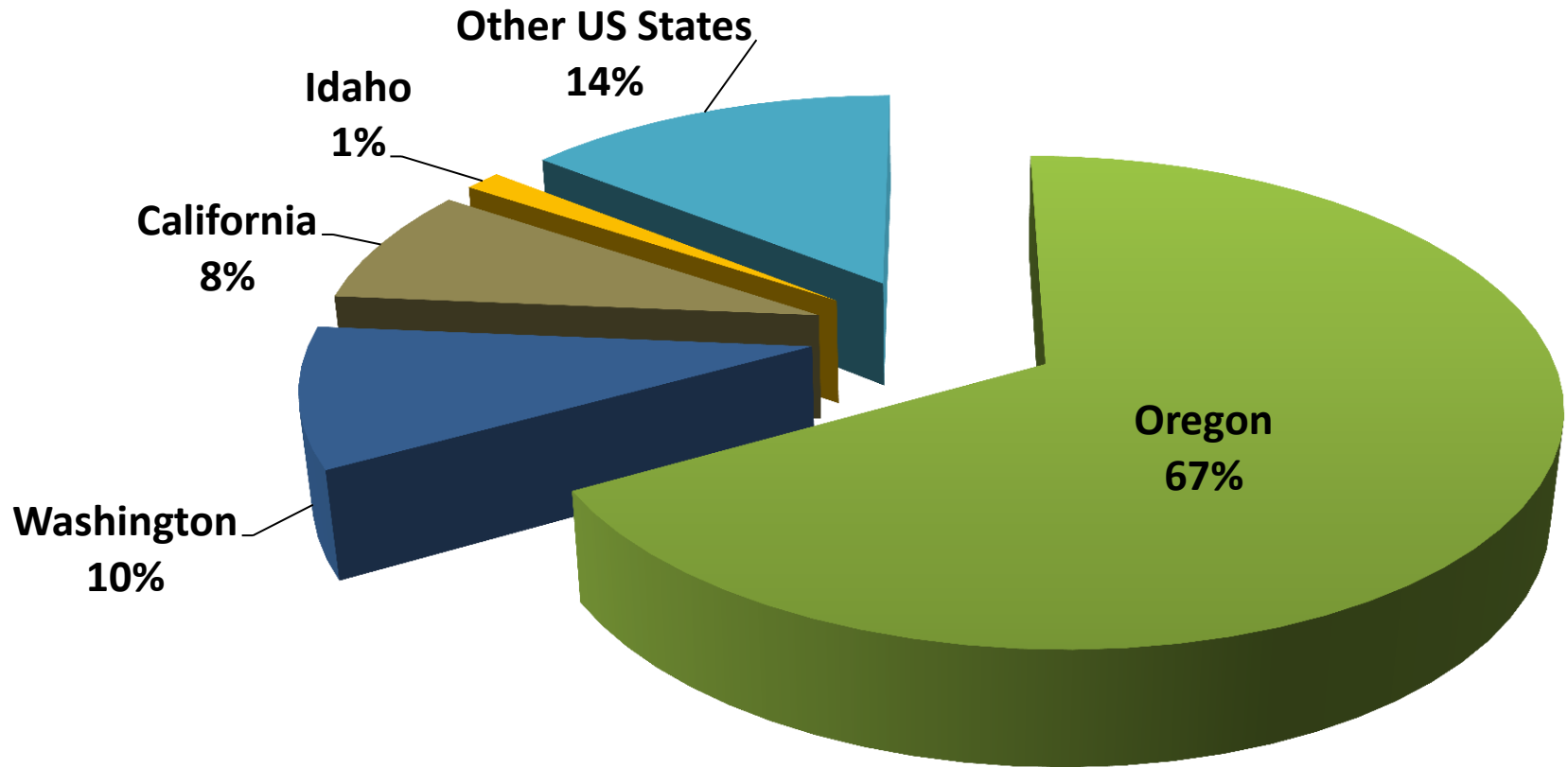
THE BIG ROUND HAIRY #s

The bicycle traveler **spends \$124 more per trip** in Oregon than the average traveler – this is about **20% more, on average.**

The Oregon Bicycle Travel Survey
Making Oregon a Better Place to Ride



Where are they from?





Who are they?

- 65% are men
- 46% are 35-54
- 26% are 55-64
- 78% have a Bachelors or Masters degree
- 58% have household income above \$75k
- 9% have household income above \$200k

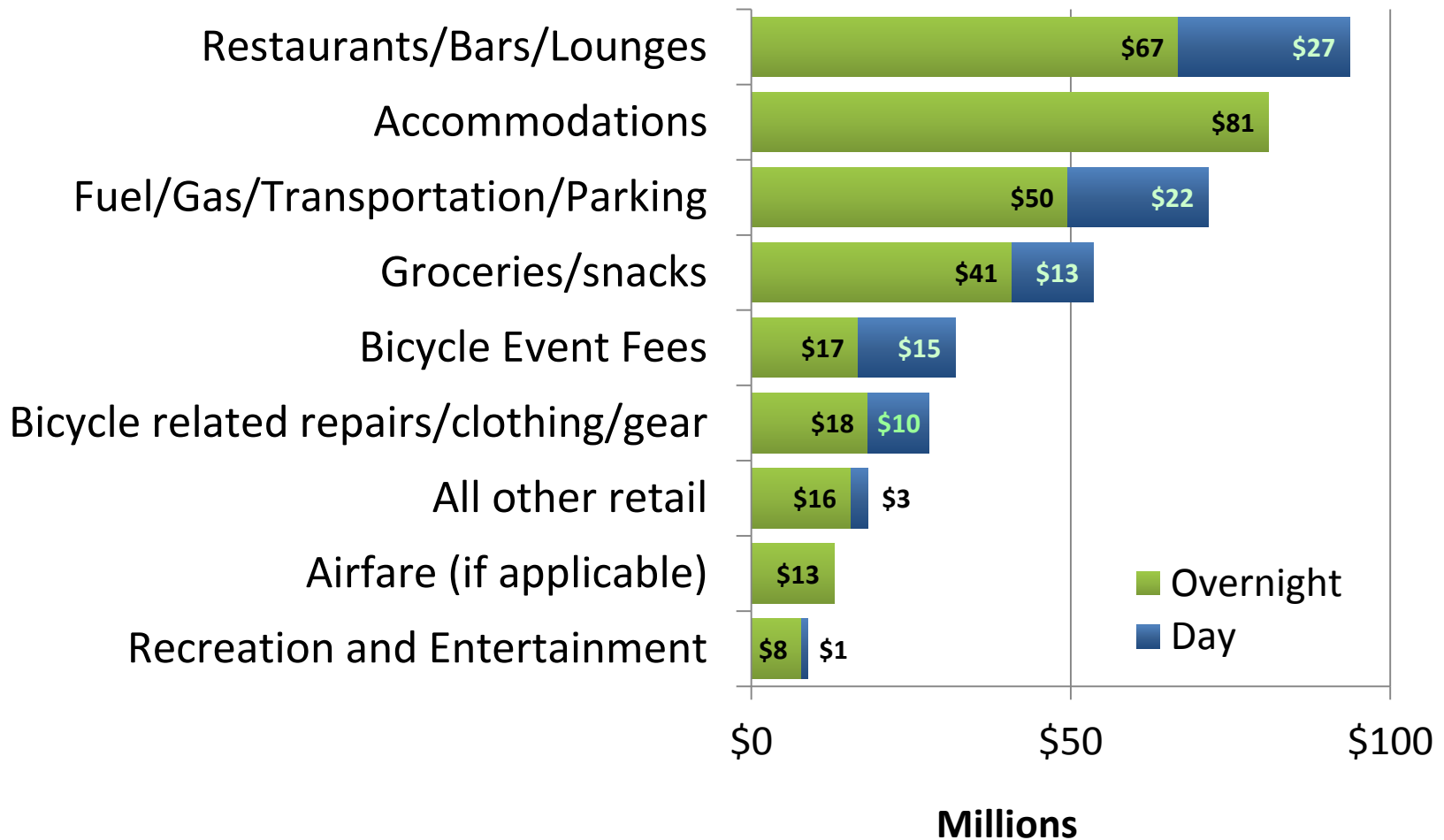


Who are they: Other Activities

- Hiking – 83%
- Exploring the town – 75%
- Eating at an establishment – 71%
- Visiting a farmers market – 62%
- Visiting a microbrewery – 58%



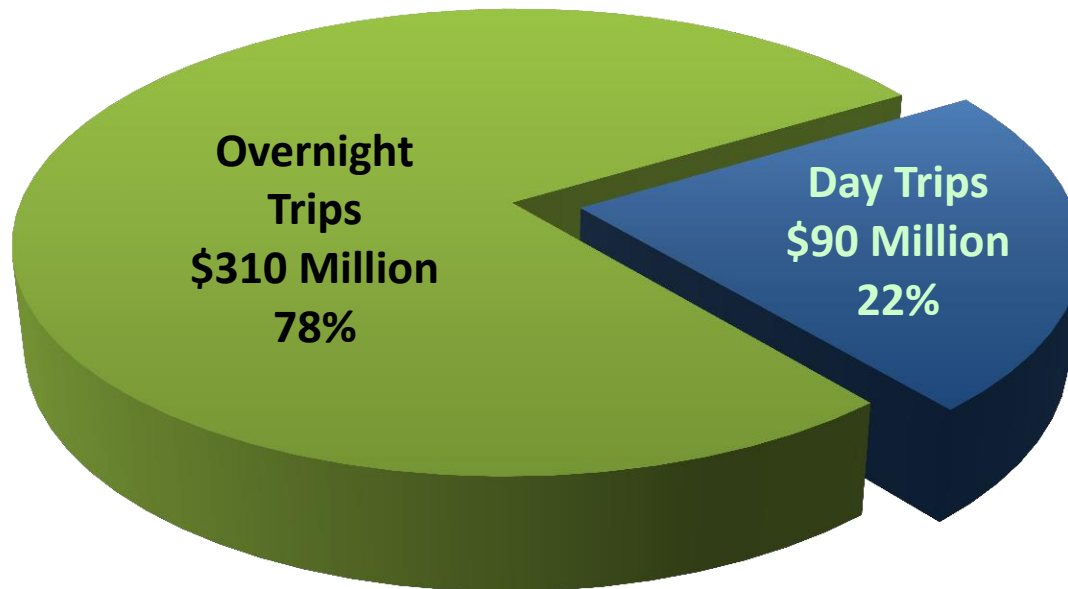
Total Trip Expenditures by Category, 2012





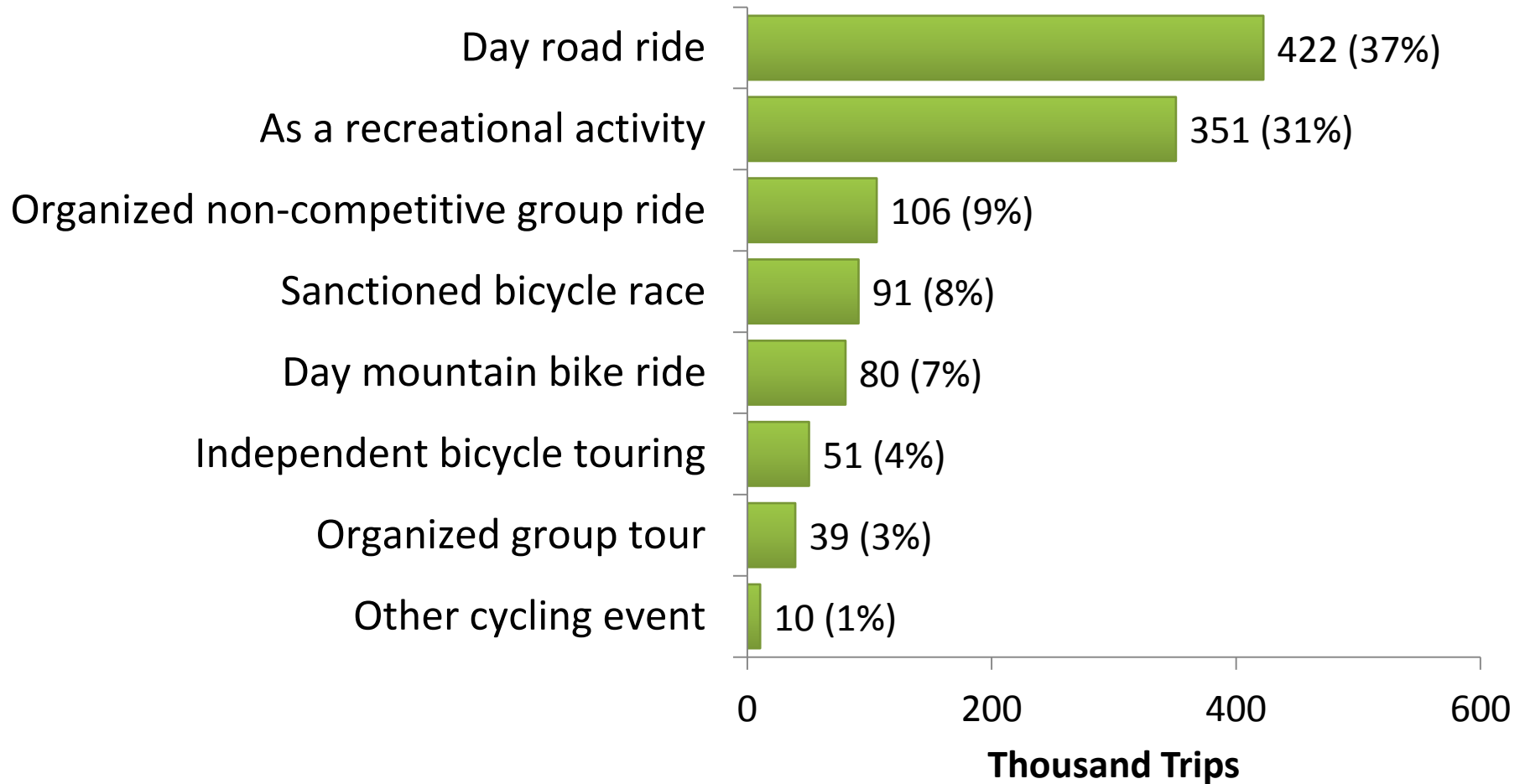
Spending – Day vs. Overnight

overnight = 3 x the impact





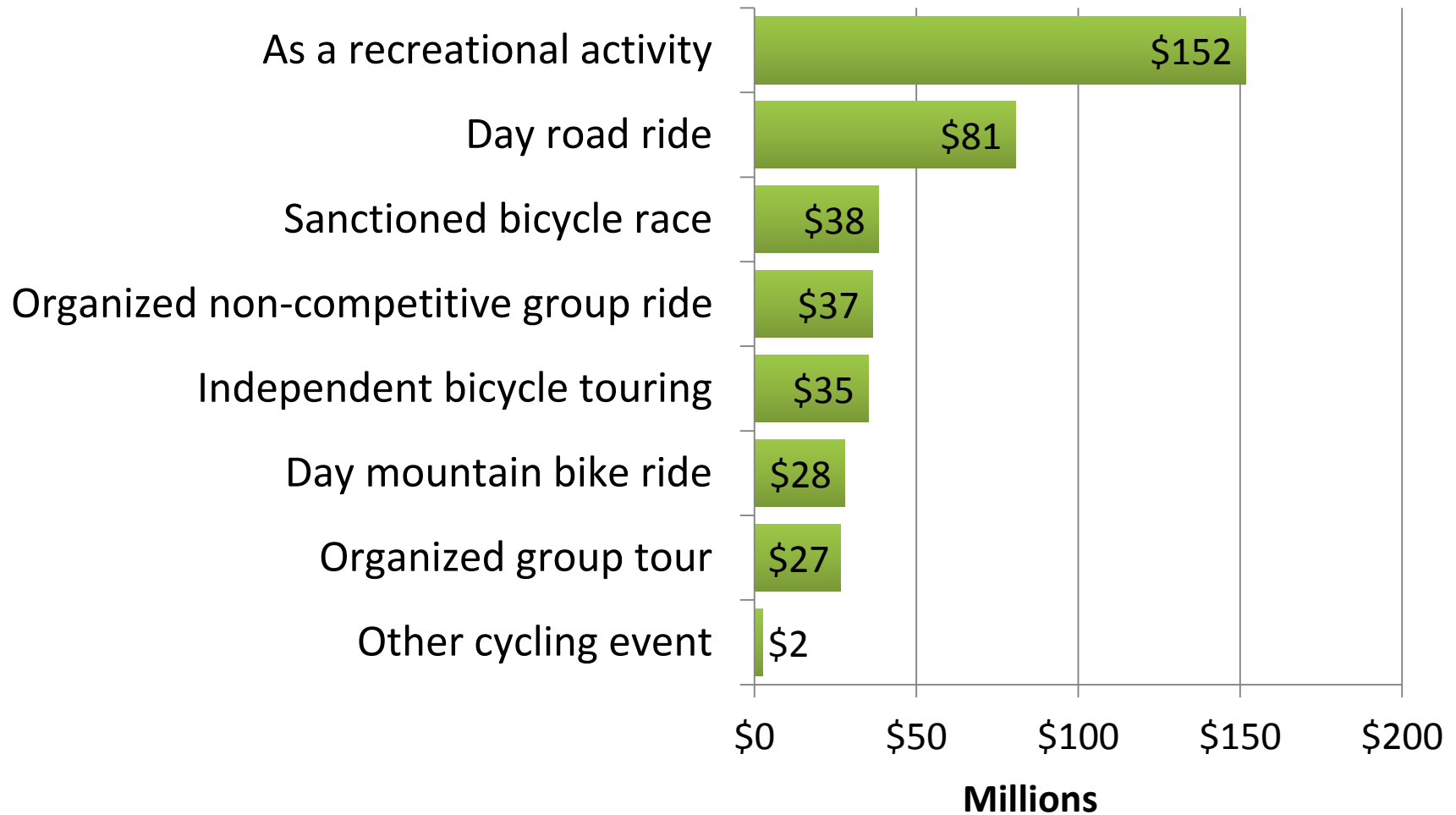
Party-Trips by Type, 2012



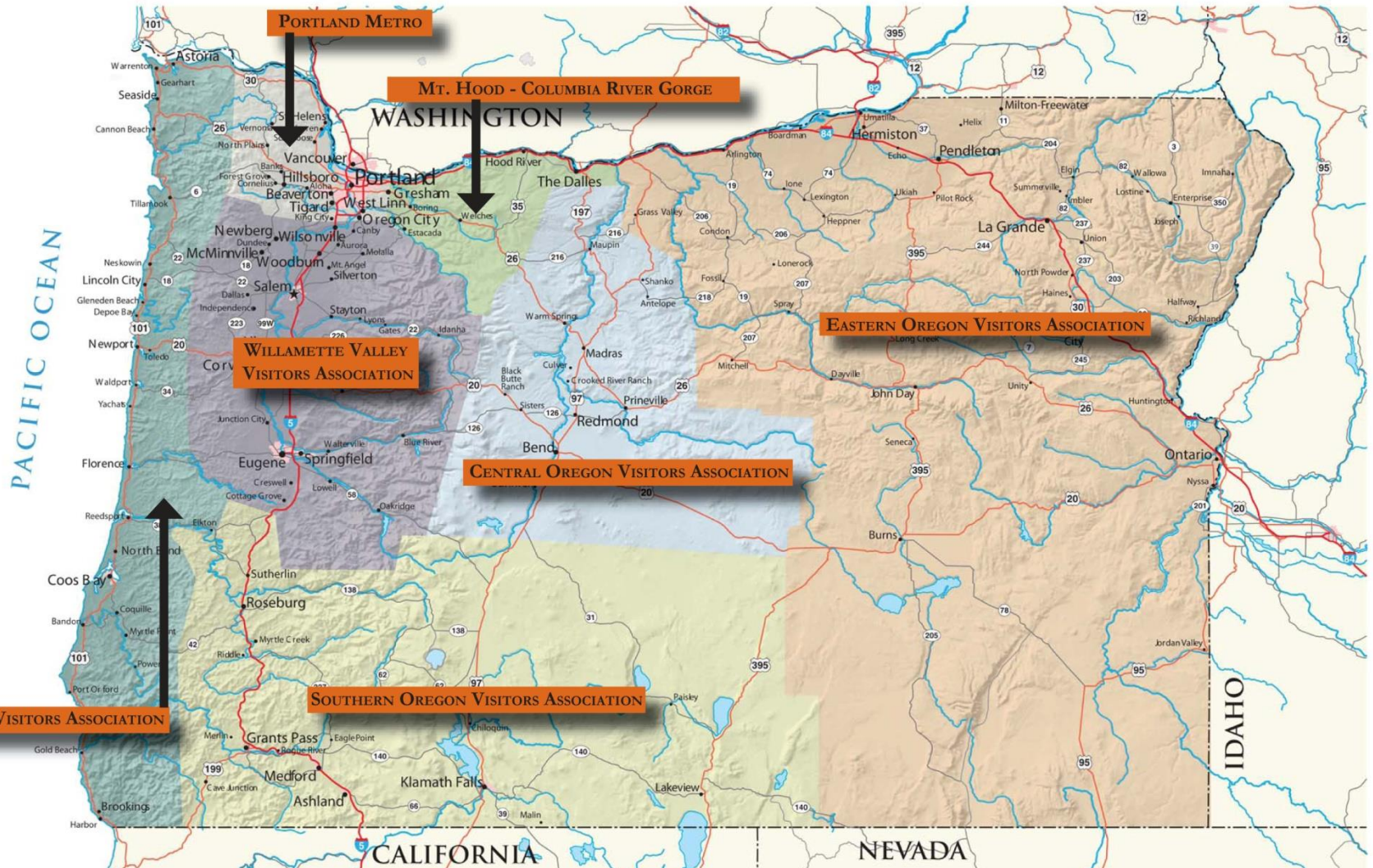
Note: average party size (adults + children) is 3.4 people (overnight trips) and 2.7 people (day trips)



Total Trip Expenditures by Type, 2012

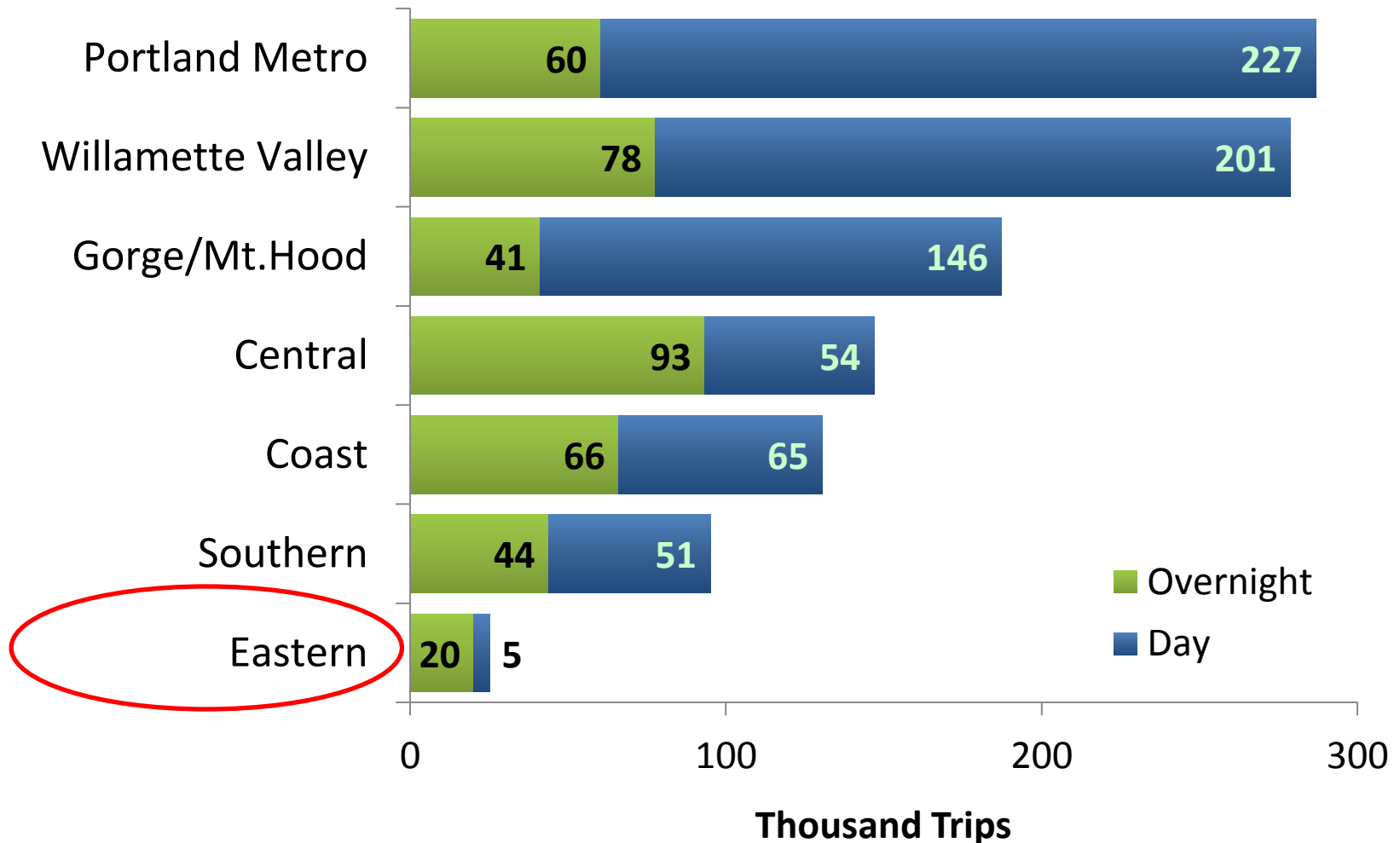


Oregon's Tourism Regions





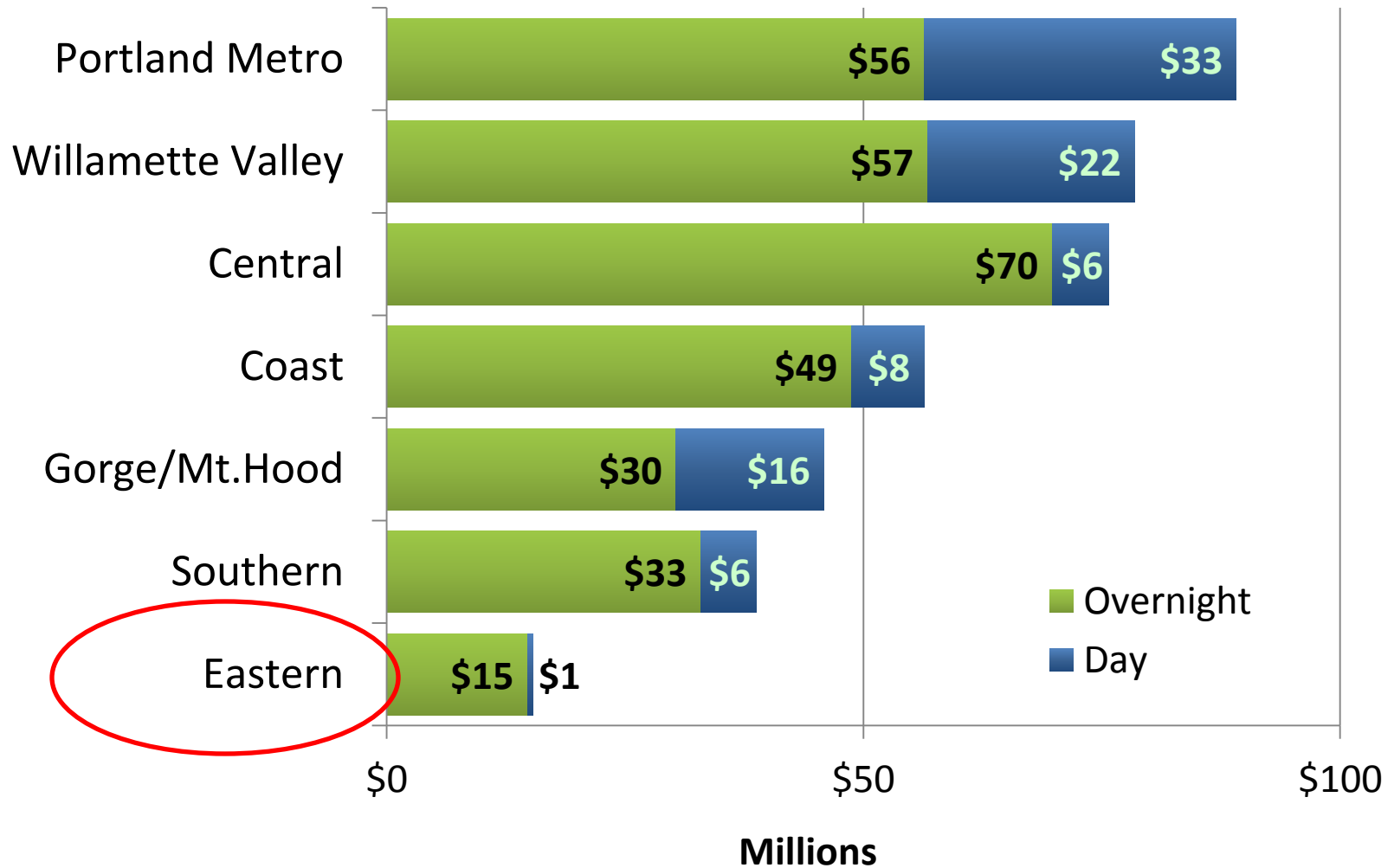
Party-Trips by Region, 2012



Note: average party size (adults + children) is 3.4 people (overnight trips) and 2.7 people (day trips)

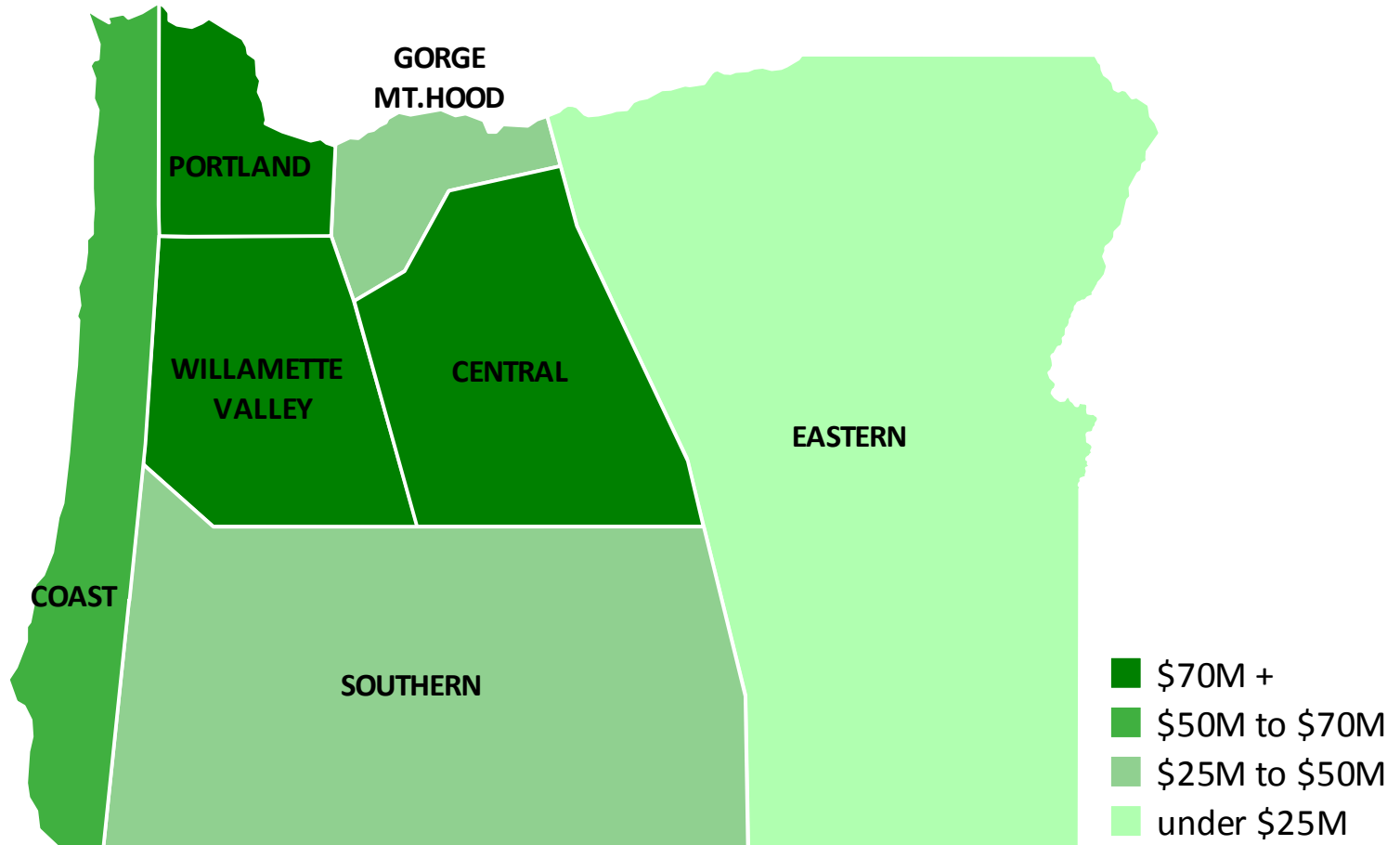


Total Trip Expenditures by Region, 2012



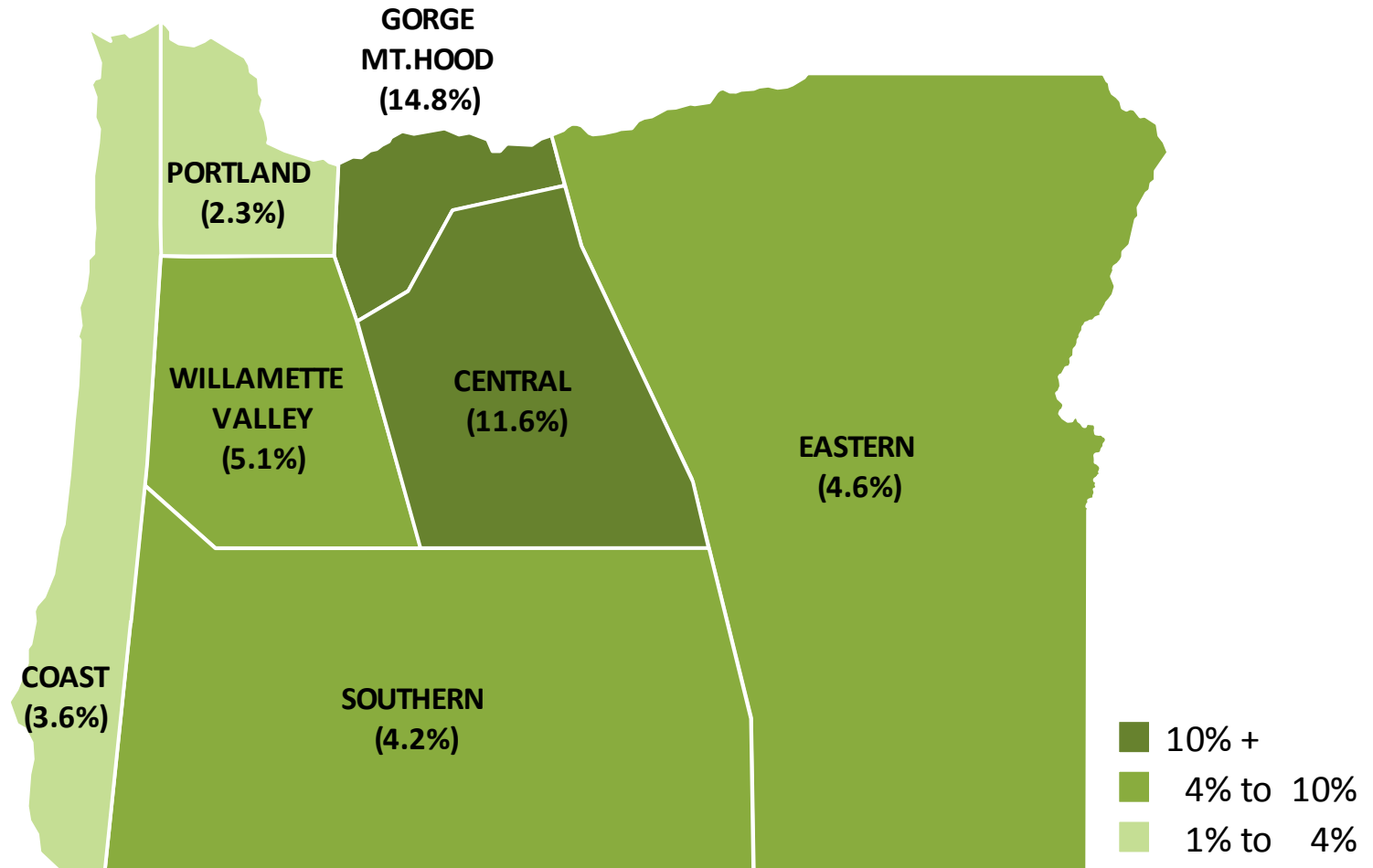


Total Trip Expenditures by Region, 2012





Bicycle-Related Share of Travel Spending, 2012



THE BIG ROUND HAIRY #s

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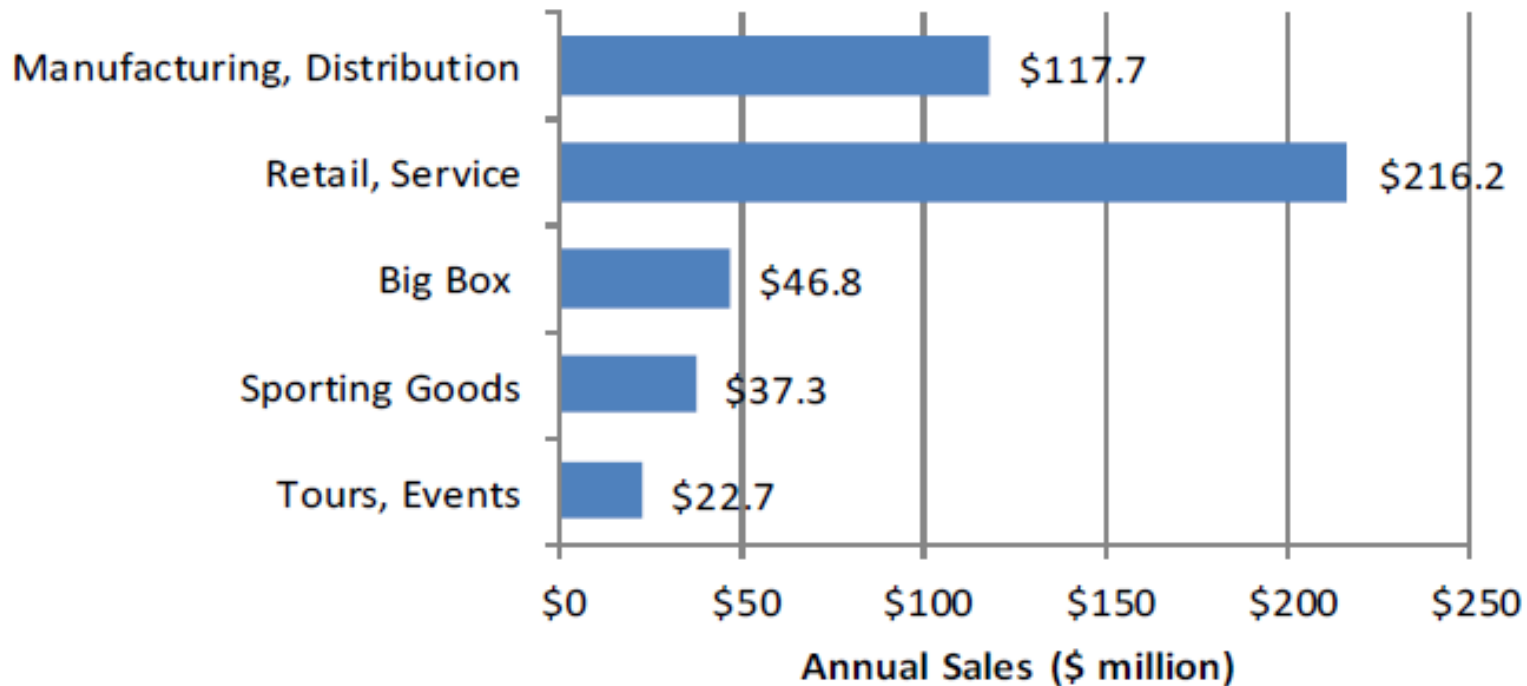
Oregon Bicycle Industry Survey, 2014

Conducted by Dean Runyan Associates

Made possible by: People for Bikes, Cycle Oregon & Travel Oregon



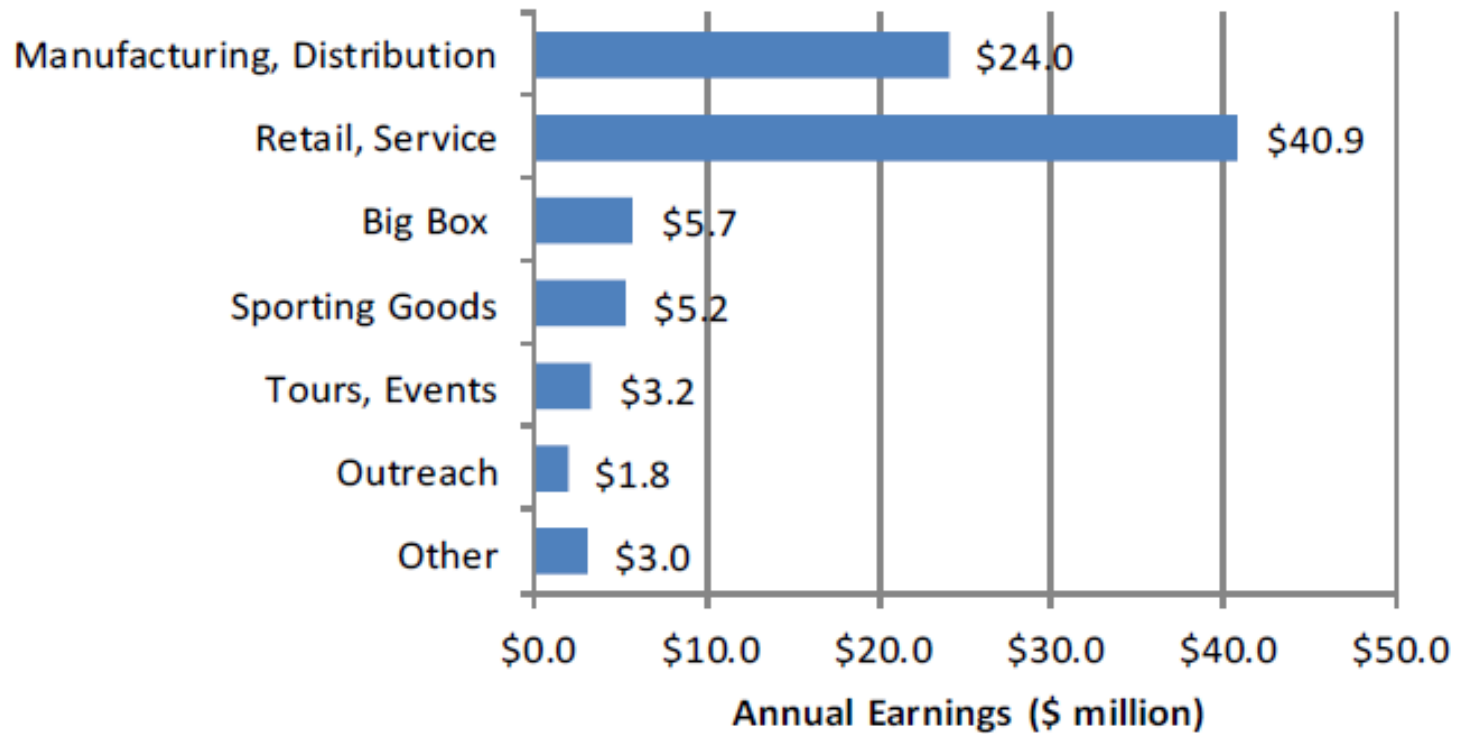
Bicycle Industry Sales, by Industry Category, 2012



- Bicycle industry sales in Oregon are **\$440 million** annually
- Bicycle industry manufacturers sell approximately 22% of their output locally in Oregon and **export 53%** to other US locations and 15% outside the US

The Oregon Bicycle Industry Survey

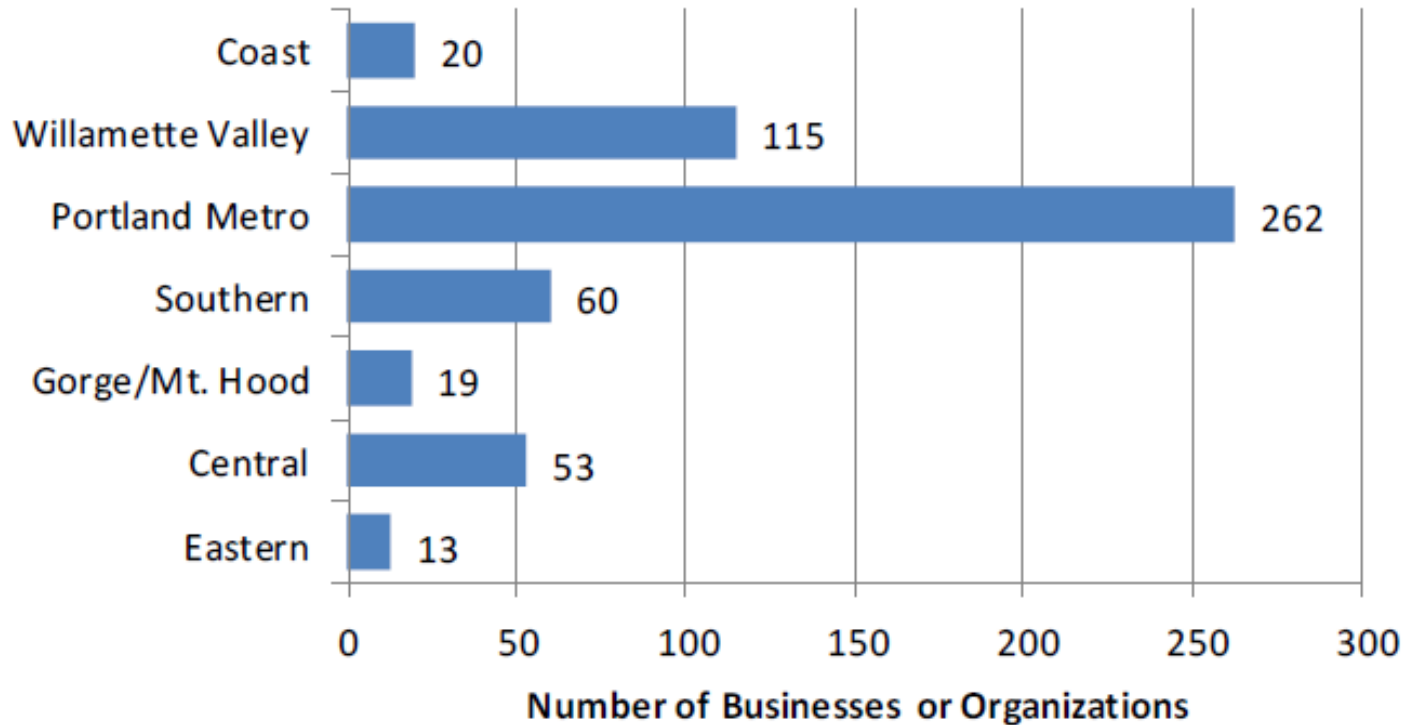
Total 2012 Earnings, Oregon Bicycle Industry, by Category



- Earnings from the bicycle industry amount to **\$83.3 million** in Oregon – with Manufacturing/Distribution and Retail/Service being the largest categories

The Oregon Bicycle Industry Survey

Bicycle Industry Business and Organization Location



The Oregon Bicycle Industry Survey

Full reports available at:

Industry.TravelOregon.com/CyclingResearch

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