

# OREGON OUTDOOR RECREATION ECONOMIC IMPACT STUDY

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# OREGON OUTDOOR RECREATION ECONOMIC IMPACT STUDY

- Key definitions
- Economic contribution of outdoor recreation in Oregon
- Methods
- Monitoring visitation and spending
- Estimating economic effects
- Examples of data collection

# INDIGENOUS LAND ACKNOWLEDGEMENT



# DEFINITIONS

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## Outdoor Recreation

Activities participated in for personal pleasure and health that occur in nature-based environments outdoors.

## Economic Contribution Analysis

The economic effects resulting from outdoor recreation in Oregon.

## Participant Types

**Local:** Travelling fewer than 50 miles from their residence

**Nonlocal:** Travelling 50 or more miles from their residence

**Resident:** An Oregon resident

**Nonresident:** A non-Oregon resident



# RESEARCH QUESTION

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*What is the role of outdoor recreation within Oregon's economy? How can we present this data in a usable and digestible format that can inform effective decision and policy-making?*



# RESULTS

## ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION

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**\$15.6 billion**

in annual consumer spending

**Employment: 224,000 full and part time jobs**

**Wages: \$9.3 billion in compensation**

**Economic Output: \$24.2 billion**

**GDP Contributions: \$13 billion**

**Tax Contributions: \$1.1 billion**



# RESEARCH DESIGN

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*Spending on outdoor recreation supports jobs, wages, and taxes in Oregon through direct and multiplier effects.*



# RESEARCH DESIGN: CORE EQUATION

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$$\begin{aligned} & \textit{Trip-Related Spending} + \textit{Equipment-Related Spending} \\ & = \\ & \textit{Total Spending on Outdoor Recreation} \end{aligned}$$





# RESEARCH DESIGN: CORE EQUATION

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$$\begin{aligned} & \textit{Number of Participants} \times \textit{Average Expenditures} \\ & = \\ & \textit{Trip-Related Spending} \end{aligned}$$



# DATA:

## NUMBER OF PARTICIPANTS

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### Categorizing Outdoor Recreation Participation

- Local, nonlocal; resident, nonresident
- Day and overnight



# DATA:

## NUMBER OF PARTICIPANTS

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### Agency Examples

**National Parks Service:** Integrated Resource Management Applications (IRMA)

**U.S. Forest Service:** National Visitor Use Monitoring Program (NVUM)

**Bureau of Land Management:** Recreation Management Information System (RMIS)

**Army Corps of Engineers:** Regional Economic System (RECONS)

**Oregon Parks and Recreation Department:** camping days, trail counters, and surveys

**Oregon Department of Fish and Wildlife:** License sales and harvest reports



# DATA:

## EXPENDITURES | TRIP-RELATED SPENDING

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- Defined by participant type; local, nonlocal, resident, nonresident
- Measures spending by industry; hotels/motels, campgrounds, restaurants, grocery stores, gasoline, retail stores, entry fees



# DATA:

EXPENDITURES | TRIP-RELATED SPENDING

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**\$12.4 billion**  
in trip-related expenditures



# DATA:

EXPENDITURES | EQUIPMENT-RELATED SPENDING

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## Annual Equipment Expenditures

- Vehicle parts and accessories
- Apparel
- Outdoor equipment
- Repair and maintenance

# DATA:

EXPENDITURES | EQUIPMENT-RELATED SPENDING

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**\$3.2 billion**  
in equipment-related expenditures



# DATA:

TOTAL SPENDING | ALL OUTDOOR RECREATION-RELATED EXPENDITURES

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**\$12.4 billion** + **\$3.2 billion**  
in trip-related expenditures in equipment-related expenditures

**\$15.6 billion**  
in annual consumer spending



# RESULTS

## ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION

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**\$15.6 billion**

in annual consumer spending

**Employment: 224,000 full and part time jobs**

**Wages: \$9.3 billion in compensation**

**Economic Output: \$24.2 billion**

**GDP Contributions: \$13 billion**

**Tax Contributions: \$1.1 billion**



# RESULTS

## ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION | NONLOCAL PARTICIPANTS

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**\$7 billion**

**in annual consumer spending by nonlocal participants**

**Employment: 114,000 full and part time jobs**

**Wages: \$4.2 billion in compensation**

**Economic Output: \$12.8 billion**

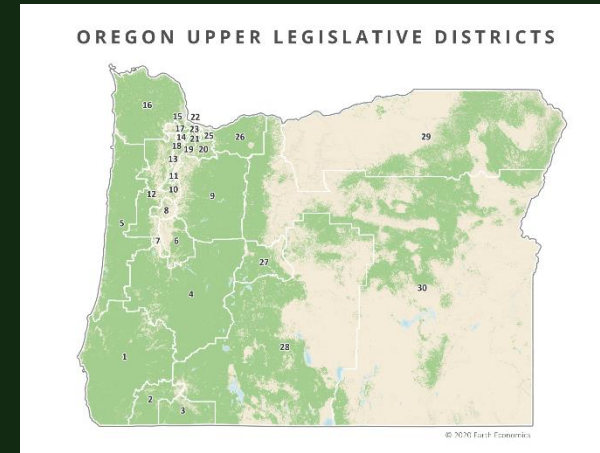
**GDP Contributions: \$5.8 billion**

**Tax Contributions: \$490 million**



# Data Breakdowns:

## PARTICIPANT DAYS, EXPENDITURES, AND ECONOMIC CONTRIBUTIONS



# DATA COLLECTION

## FRAMEWORK FOR COLLECTING RECREATION DATA

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### Key Attributes

- The number of outdoor recreation participants
  - Average group size
  - Average length of stay
  - Visitor origin
- Survey visitors to estimate average participant expenditures

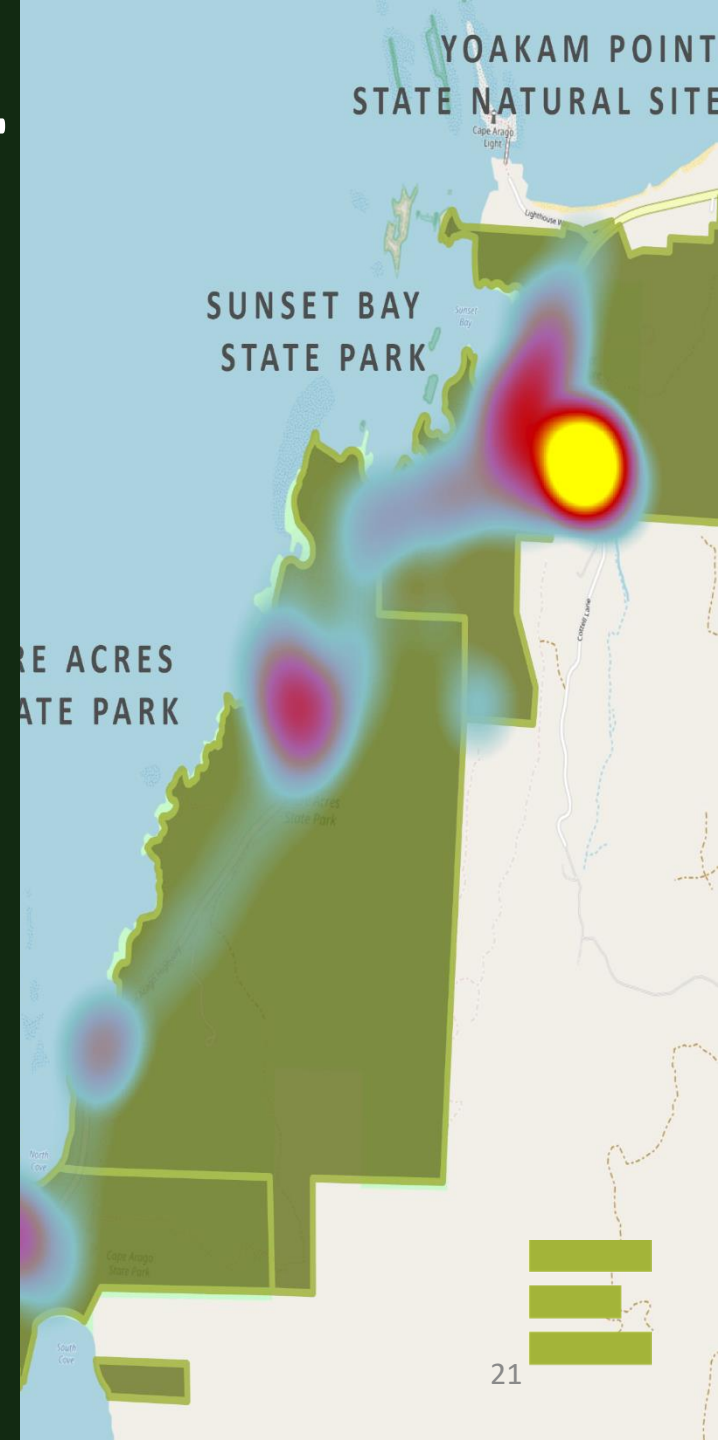


# DATA COLLECTION SPOTLIGHT

## ANONYMIZED CELL PHONE DATA

### Purpose:

- Validate current data
- Additional participant insights
  - Where participants come from
  - How long they stay
  - How often they visit



# DATA COLLECTION SPOTLIGHT

## SURVEY ON HUNTING, FISHING, AND WILDLIFE WATCHING

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### Research Questions:

- What region(s) do participants take trips to?
- Public vs private access
- Party size and trip length
- On an average trip, how much do people spend and on what



# HUNTING, FISHING, & WILDLIFE WATCHING

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## Approach:

- Sample size: 2,947
  - Representative by county of residence and gender
- Open period: April 6, 2020 – April 23, 2020
  - Weekly reminders
- Number of responses (N): 589
- Response rate: 20 percent
- 13 different expenditure categories



# HUNTING, FISHING, & WILDLIFE WATCHING

*Per person, per day expenditures*





# HUNTING, FISHING, & WILDLIFE WATCHING

*Per person, per day expenditures*



# HUNTING, FISHING, & WILDLIFE WATCHING

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## Hunting

Days of Hunting	2,031,211
Total Trip-related Expenditures	\$225,941,037
Per-person, per-day	\$111.23

## Fishing

Days of Fishing	3,630,472
Total Trip-related Expenditures	\$396,865,949
Per-person, per-day	\$109.32

## Wildlife Watching

Days of Wildlife Watching	8,359,851
Total Trip-related Expenditures	\$578,752,499
Per-person, per-day	\$69.23

# ROUND TABLE DISCUSSION

