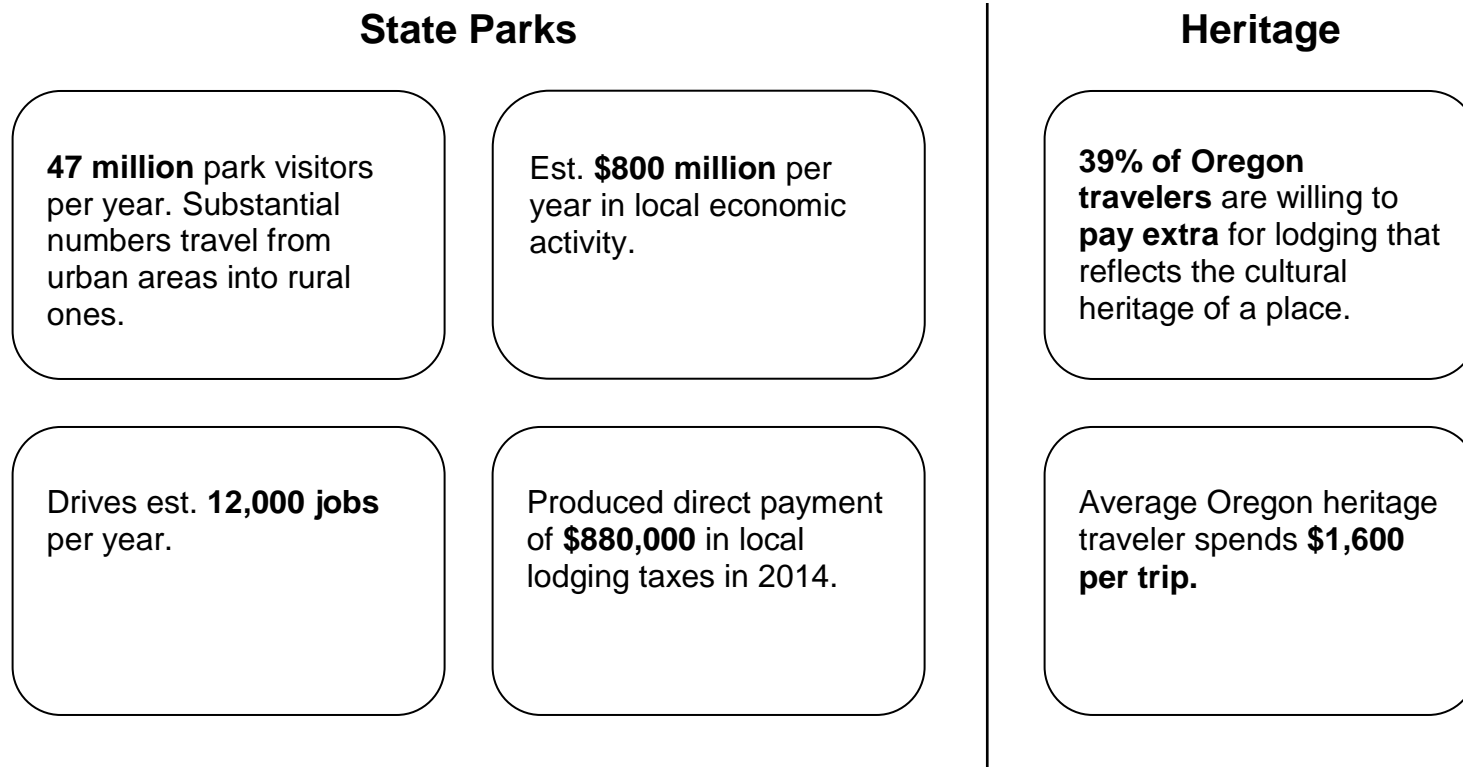


Excerpted from 2015-2017 Ways & Means Budget Presentation

- d. *Economic role:* The purpose of a state park system is to satisfy the basic human need for recreation. Along with purposeful benefits—improved mental and physical health, preserved scenery—a properly designed and funded park system also produces significant economic impacts as a secondary benefit.



Economic Activity from Recreation at Oregon State Parks Units

Eric M. White

Darren Goodding

Randall S. Rosenberger

Terry Bergerson



Nature
HISTORY
Discovery

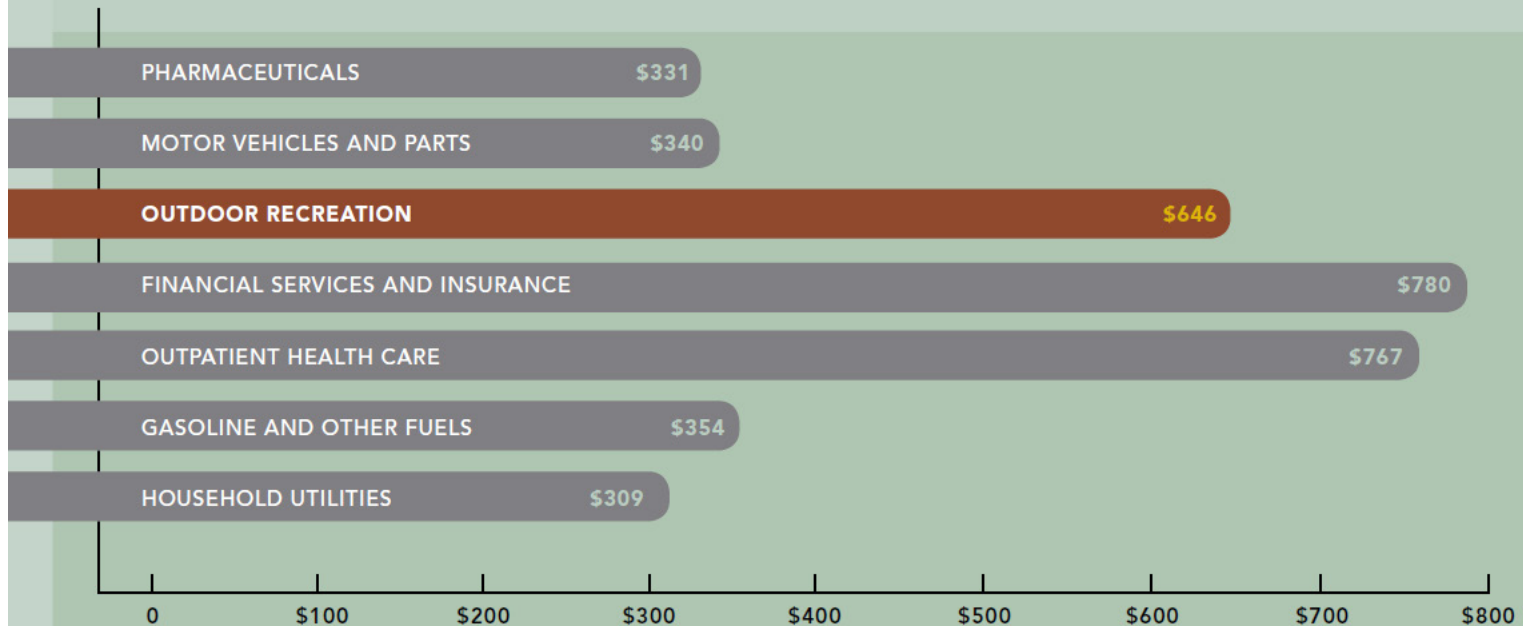
Benefits of Park Systems

- **Environmental**
 - Air and water quality
 - Wildlife/habitat
- **Social**
 - Mental and physical health
 - Education
 - Community glue
- **Economic**
 - Tax Benefits
 - Tourism
 - Direct revenue (park fees, concessions)

The Outdoor Recreation Economy

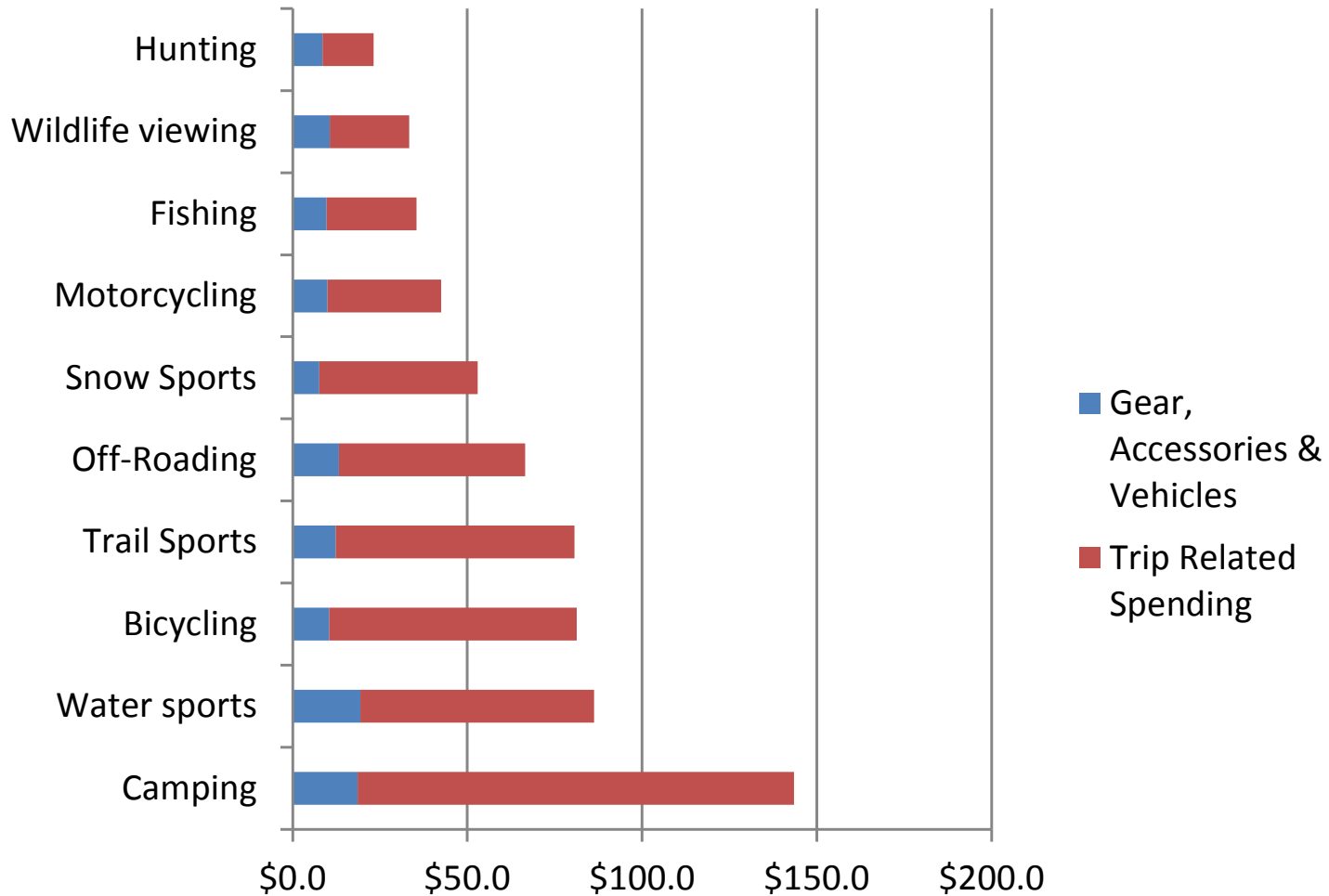
An Overlooked Economic Giant

Annual Consumer Spending, in Billions



Source: Bureau of Economic Analysis, Personal Consumption Expenditures by Type of Product, based on available 2010 data.

Product Sales and Trip and Travel-Related Spending



The US Outdoor Recreation Economy

- 725+ million visits to state parks provided \$20 billion economic benefit to communities near state parks.
- Outdoor rec economy grew 5 percent annually 2005-2011 when many sectors were shrinking due to the recession.



Estimating Economic Role

Three things needed to estimate economic role:

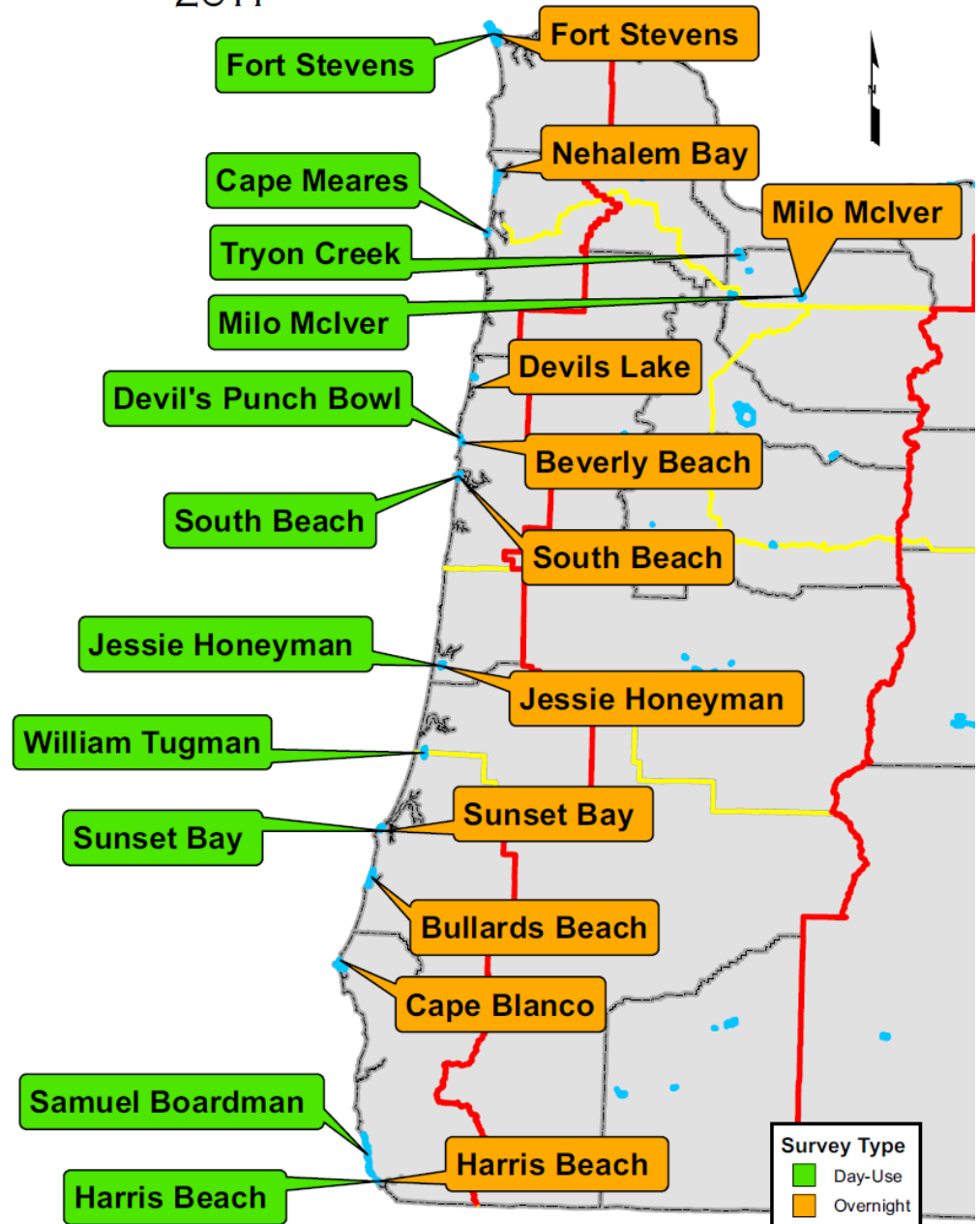
- 1) Average visitor spending from the OPRD visitor survey.
- 2) Recreation use from OPRD annual figures.
- 3) Economic model describing local communities.



PARK'S SURVEY LOCATIONS 2011



Oregon State Park Visitor Use Survey Project

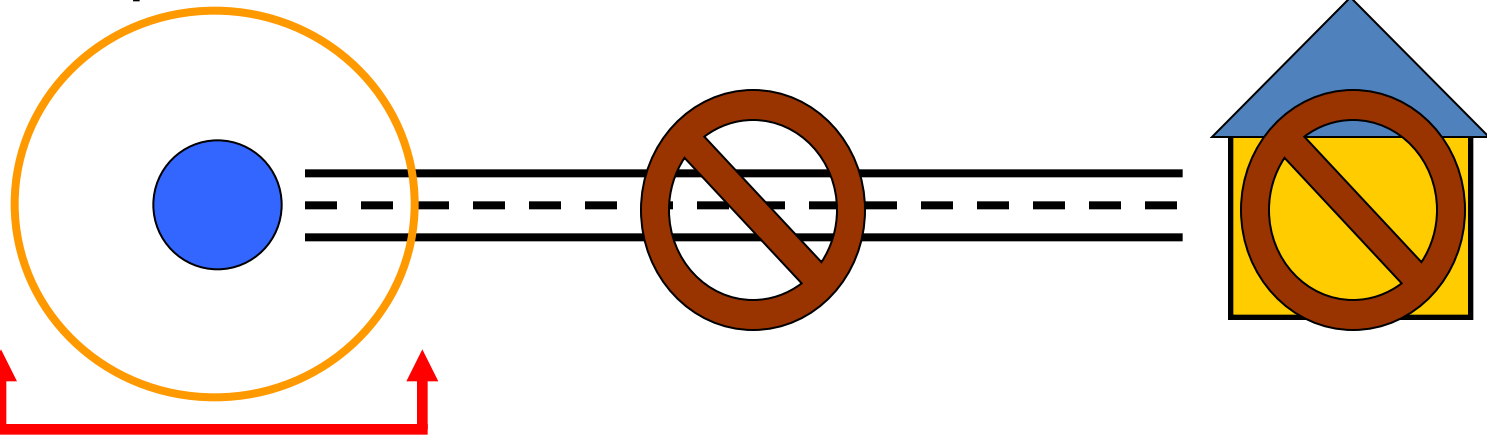


Measuring Recreation Spending

At or near the
park

Enroute

At home



Only locally-incurred
expenditures

Spending for Different Types of Visitors

Non-local day trips
Non-local overnight

Local day trips
Local overnight

Non-primary
(visits where park is not the primary
reason for the trip)



Visitor Spending Averages, North Coast

Average spending of visitors to <u>North Coast</u> units, \$ per party per trip					
Spending categories	Non-local Day	Non-local Overnight	Local Day	Local Overnight	Non-primary
Lodging	0.00	12.62	0.00	13.42	58.94
Camping	0.00	50.79	0.00	19.92	25.04
Restaurant	23.15	38.99	11.18	19.76	42.07
Groceries	10.55	48.66	16.00	35.35	33.90
Gasoline	24.95	51.03	11.22	27.50	43.82
Entry fees	8.74	11.47	3.58	6.40	6.62
Rec. & entert.	1.96	4.71	1.82	4.50	3.43
Souvenirs, etc.	<u>6.55</u>	<u>22.82</u>	<u>0.45</u>	<u>5.33</u>	<u>18.77</u>
Total	75.90	241.09	\$44.25	132.18	\$232.59
Sample size	84	813	55	105	605

Visitor Spending Averages, Milo McIver

Average spending of visitors to <u>Milo McIver SP</u> , \$ per party per trip					
Spending categories	Non-local Day	Non-local Overnight	Local Day	Local Overnight	Non-primary
Lodging	0.00	1.95	0.00	0.32	2.29
Camping	0.00	38.96	0.00	43.47	19.06
Restaurant	4.45	15.78	4.45	7.13	14.63
Groceries	13.71	36.76	13.71	50.85	23.66
Gasoline	11.55	33.74	11.55	25.62	37.07
Entry fees	5.91	6.14	5.91	11.65	6.50
Rec. & entert.	2.62	9.20	2.62	4.73	1.46
Souvenirs, etc.	<u>0.13</u>	<u>8.29</u>	<u>0.13</u>	<u>0.70</u>	<u>5.74</u>
Total	38.37	150.82	38.37	144.48	\$110.40
Sample size	112	148	112	150	107

Amount of recreation use

Location	Non-local Day	Non-local Overnight	Local Day	Local Overnight	Non-primary	Sum
North Coast	8%	19%	5%	2%	66%	100%
Central Coast	15%	22%	11%	2%	50%	100%
South Coast	9%	16%	16%	4%	55%	100%
Coastal Avg.	12%	19%	11%	3%	55%	100%
Milo McIver SP	13%	8%	45%	10%	24%	100%

2011 Economic Impact

Coastal Region total				
Effect	Sales \$000's	Jobs	Labor Income \$000's	Value Added \$000's
Direct Effects	\$275,869	4,990	\$89,217	\$152,262
Secondary effects	95,561	952	26,374	55,714
Total Effects	\$371,430	5,942	\$115,591	\$207,976

Unit-level Economic Impact

Table 14—Unit-level economic activity generated from recreation visitor trip spending, 2011

Unit	Day visits	Overnight visits	Total spending (\$000's)	Total spending—non-locals (\$000's)	Economic contribution			Economic impact (non-local visitors only)		
					Jobs	Labor income (\$000's)	Value added (\$000's)	Jobs	Labor income (\$000's)	Value added (\$000's)
North Coast zone										
ARCADIA BEACH SRS	287,292		5,599	5,171	72	1,386	2,495	67	1,283	2,309
BOB STRAUB SP	128,808		2,510	2,319	32	621	1,119	30	575	1,035
BRADLEY SSV	96,956		1,889	1,745	24	468	842	23	433	779
CAPE LOOKOUT SP	132,484	108,002	8,338	7,829	111	2,178	3,912	104	2,054	3,689
CAPE MEARES SSV	421,352		8,211	7,585	106	2,033	3,660	98	1,882	3,387
CLAY MYERS SNA AT										
WHALEN ISLAND	54,660		1,065	984	14	264	475	13	244	439
DEL REY BEACH SRS	89,468		1,744	1,610	22	432	777	21	400	719
ECOLA SP	331,866		6,467	5,974	83	1,601	2,883	77	1,482	2,668
FORT STEVENS HA	144,884		2,823	2,608	36	699	1,258	34	647	1,165
FORT STEVENS SP	877,424	213,677	30,976	27,743	409	7,978	14,353	368	7,194	12,933
HUG POINT SRS	210,084		4,094	3,782	53	1,014	1,825	49	938	1,689
MANHATTAN BEACH SRS	69,164		1,348	1,245	17	334	601	16	309	556
MUNSON CREEK FALLS										
SNS	42,786		834	770	11	206	372	10	191	344
NEHALEM BAY SP	390,024	139,217	15,908	14,458	210	4,115	7,399	192	3,763	6,763
OCEANSIDE BEACH SRS	280,156		5,460	5,043	70	1,352	2,433	65	1,251	2,252
OSWALD WEST SP	418,150	0	9,839	8,327	129	2,494	4,494	110	2,127	3,830
SADDLE MOUNTAIN SNA	55,778	1,663	1,087	1,004	14	269	484	13	249	448
SUNSET BEACH	77,700		1,514	1,399	20	375	675	18	347	625
TOLOVANA BEACH SRS	547,584		10,671	9,857	137	2,642	4,756	127	2,446	4,402
Central Coast zone										
AGATE BEACH SRS	205,262		4,510	4,115	61	1,171	2,111	56	1,075	1,938
ALSEA BAY HIP	0		0	0	0	0	0	0	0	0
BEACHSIDE SRS	60,992	35,562	2,788	2,572	38	732	1,317	35	680	1,223
BEAVER CREEK SNA	32,235		708	646	10	184	331	9	169	304
BEVERLY BEACH SP	164,184	149,623	10,045	9,445	136	2,645	4,761	128	2,500	4,499

Let the assumptions roll ...

- Parks and visitors are lumped by zones ...
Ecola SP = North Coast zone average spending.
- Spending patterns may not apply to waysides and specialized parks.

Return on Investment

Coastal Region Maintenance & Operations Expenditures & Park User Fees Revenue Fiscal Year 2012 (July 1, 2011 - June 30, 2012)

M&O Expenditures

Personal Services	\$9,813,915
Services & Supplies	\$2,815,163
Total Expenditures	\$12,629,078

User Fees Revenue

Park User Fees	\$9,514,015
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\$1 spent on to operate coast parks = \$32.50 in visitor spending.

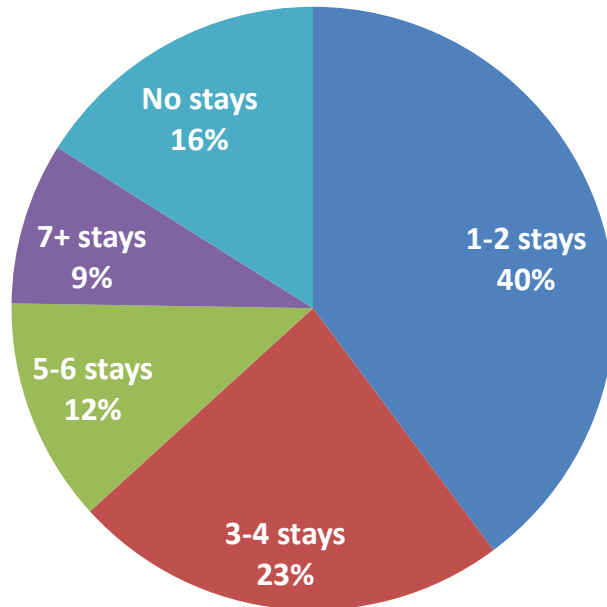
2013 visitor phone survey

Response to Oregon State Park rate increase proposal

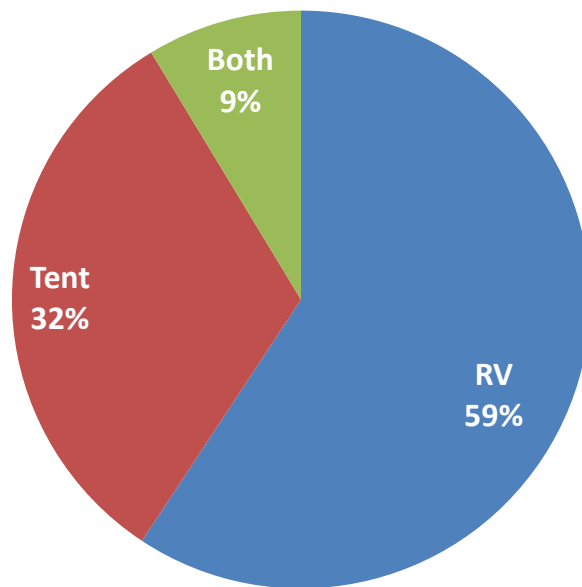
n=638

Estimated margin of error = 3.8%

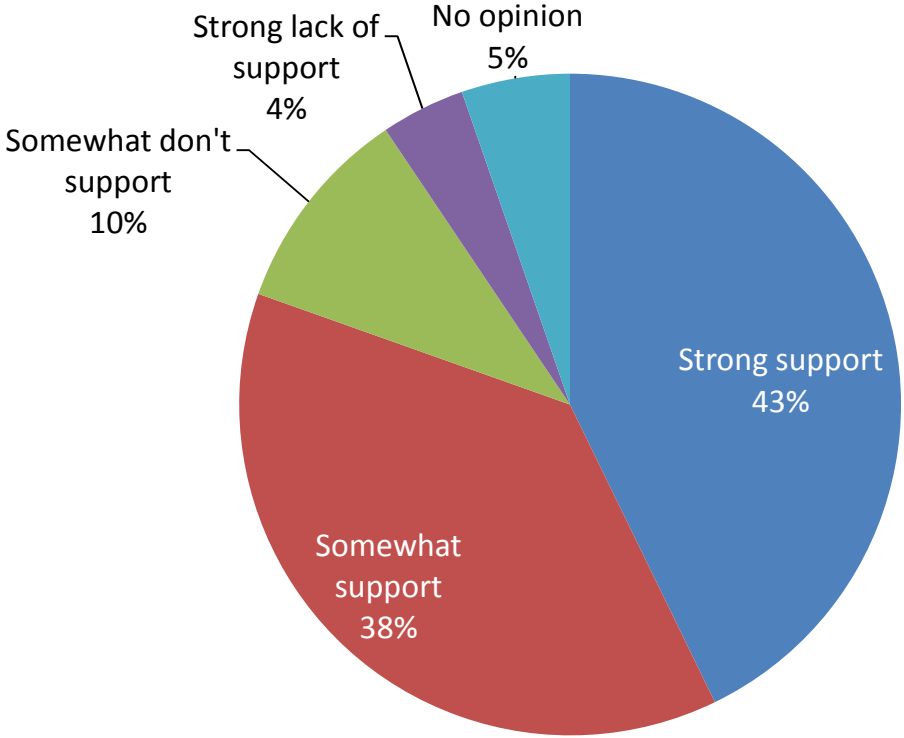
How often did you camp in a state park last year?



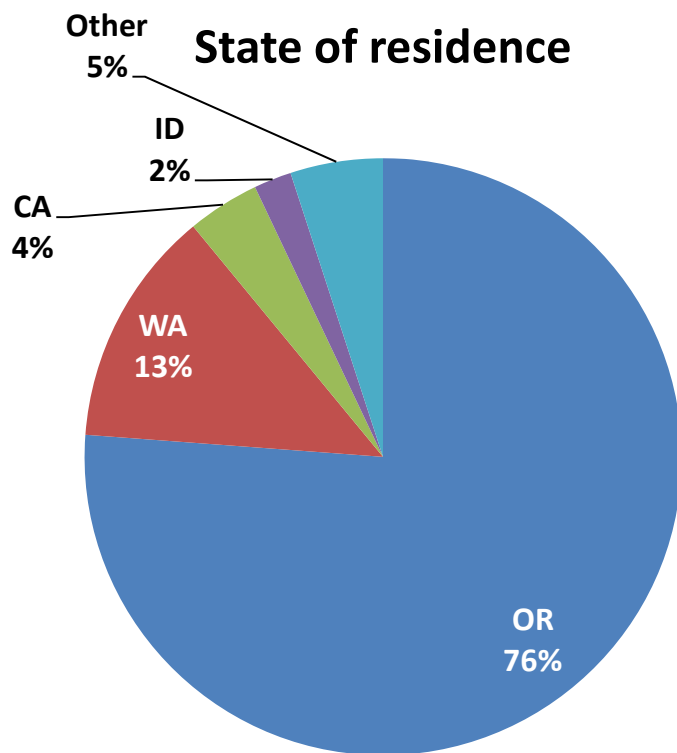
Do you usually rent tent sites, RV sites, or did you rent both equally?



How would you feel if full-hookup RV campsite rate was raised by 4 dollars a night, to 28 dollars?



State of residence



Cultural Heritage Travelers in Oregon by the Numbers

The number	The fact
19.6 billion	Amount of dollars spent by cultural and heritage travelers on their most recent trip to Oregon.
83	Percent of leisure travelers in Oregon who consider themselves cultural and heritage travelers.
47.5 million	Number of people who are cultural heritage travelers within Oregon and its feeder markets.
1,618	Average amount of dollars spent by a cultural heritage traveler on a leisure trip in Oregon. This is nearly 60 percent higher than cultural heritage travelers spend nationally.
45	Percent of Oregonians who spend more on cultural heritage activities while they are on a trip.
39	Percent of travelers will to pay more for lodging that reflects the cultural heritage destination they are visiting.
1,200	Number of cultural heritage organizations in Oregon.

Source: "Oregon Cultural and Heritage Travelers Study, October 2012," by Mandala Research, LLC, a study organized by the Oregon Heritage Commission and paid for with donations to the Oregon Cultural Trust. See www.oregonheritage.org for a copy of the full study.