

# Oregon Resident Outdoor Recreation Demand Analysis – Tillamook County Summary

2013-2017 Oregon Statewide Comprehensive Outdoor Recreation Plan Supporting  
Documentation

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## **Background**

In preparation for the 2013-2017 Oregon Statewide Comprehensive Outdoor Recreation Plan (SCORP), the Oregon Parks and Recreation Department (OPRD) contracted with Oregon State University (OSU) to conduct a statewide survey of Oregon residents regarding their 2011 outdoor recreation participation in Oregon, as well as their opinions about parks and recreation management. This report summarizes key findings of the survey for Tillamook County. For review of statewide survey results, please see the full survey report, Oregon Resident Outdoor Recreation Demand Analysis, online at: [http://www.oregon.gov/oprd/PLANS/docs/scorp/2013-2018\\_SCORP/Demand\\_Analysis.pdf](http://www.oregon.gov/oprd/PLANS/docs/scorp/2013-2018_SCORP/Demand_Analysis.pdf)

## **Survey Methodology**

The survey was conducted using a random sample of Oregon households. In order to generate sufficient responses for each county, the sample was stratified by county. Separate random samples were drawn from each county. Surveying Oregonians consisted of 50,150 mail outs, with 46,348 of the surveys deliverable (92%). Of those delivered, 8,860 completed surveys were obtained, for an overall response rate of 19%. This response rate is typical of statewide, general population surveys that are long and do not include token financial incentives. Sample data were weighted to represent county-level population proportions and statewide age-related proportions. For a detailed description of the survey methodology, please see the full survey report at the web link provided above.

## Outdoor Recreation Activities

Based on previous SCORP outdoor recreation activity lists and input from the SCORP steering committee comprised of parks and recreation managers across Oregon, seventy (70) recreation activities were identified as important recreation activity types. These activities were grouped into eight (8) categories, including Non-motorized Trail Activities, Motorized Activities, Non-motorized Snow Activities, Outdoor Leisure / Sporting Activities, Nature Study Activities, Vehicle-based Camping Activities, Fishing / Hunting / Shooting Activities, and Non-motorized Water-based and Beach Activities.

## User Occasions and Participation in Outdoor Recreation

User occasions (number of times people engage in an activity) and percent of the population that participates in an activity are presented for Tillamook County in the following tables. The top activities for Tillamook County both user occasions (based on where the activity occurred) and proportion of Tillamook County residents are included in Table 1. County totals for all seventy recreation activities are included in Table 2.

**Table 1. Top Ten Activities in Tillamook County, 2011**

User Occasions Where Activity Occurred		% Population Participating	
Activity	User Occasions	Activity	% Population Participating
Beach activities – ocean	1,929,171	Walking on local trails / paths	59.8
Walking on local streets / sidewalks	1,642,142	Sightseeing / driving or motorcycling for pleasure	58.0
Relaxing, hanging out, escaping heat / noise, etc.	1,188,593	Beach activities – ocean	55.8
Sightseeing / driving or motorcycling for pleasure	1,182,036	Walking on local streets / sidewalks	53.5
Walking / day hiking on non-local trails / paths	973,390	Visiting historic sites / history-themed parks	44.2
Walking on local trails / paths	964,517	Picnicking	43.7
Dog walking / going to dog parks / off-leash areas	832,206	Relaxing, hanging out, escaping heat / noise, etc.	40.9
General play at a neighborhood park / playground	655,520	Exploring tidepools	38.6
Exploring tidepools	636,491	Attending outdoor concerts, fairs, festivals	37.0
Other nature / wildlife / forest / wildflower observation	544,916	Walking / day hiking on non-local trails / paths	34.4

**Table 2. User Occasions and Participation in Outdoor Recreation Activities, Tillamook County Residents, 2011**

Activity	User Occasions	% Population Participating
<b>Non-motorized Trail Activities</b>		
Walking on local streets / sidewalks	1,642,142	53.5
Walking on local trails / paths	964,517	59.8
Walking / day hiking on non-local trails / paths	973,390	34.4
Long-distance hiking (back packing)	92,021	4.6
Jogging / running on streets / sidewalks	52,740	7.2
Jogging / running on trails / paths	34,052	5.4
Horseback riding	45,882	6.5
Bicycling on unpaved trails	80,025	10.9
Bicycling on paved trails	54,488	12.1
Bicycling on roads, streets / sidewalks	136,581	22.8
Bicycle touring on paved roads / paths (long day / multi-day rides)*		5.9
<b>Motorized Activities</b>		
Class I – All-terrain vehicle riding (3 & 4 wheel ATVs, straddle seat and handle bars)	369,513	16.4
Class II – Off-road 4-wheel driving (jeeps, pick-ups, dune buggies, SUVs)	386,453	13.6
Class III – Off-road motorcycling	281,018	4.6
Class IV – Riding UTVs / side-by-side ATVs (non-straddle seat, driver and passenger sit side-by-side in the vehicle, steering wheel for steering control)	7,277	<1.0
Snowmobiling	<1,000	1.4
Personal water craft – jet ski	<1,000	1.1
Power boating (cruising / water skiing)	59,018	13.6
<b>Non-motorized Snow Activities</b>		
Downhill (alpine) skiing / snowboarding	<1,000	6.7
Cross-country / Nordic skiing / skijoring on groomed trails	<1,000	2.0
Cross-country / Nordic skiing / skijoring on ungroomed trails / off designated trails	<1,000	<1.0
Snowshoeing	<1,000	1.5
Sledding, tubing, or general snow play	21,815	13.1
<b>Outdoor Leisure / Sporting Activities</b>		
Sightseeing / driving or motorcycling for pleasure	1,182,036	58.0
Picnicking	313,983	43.7
General play at a neighborhood park / playground	655,520	31.5
Dog walking / going to dog parks / off-leash areas	832,206	21.4
Relaxing, hanging out, escaping heat / noise, etc.	1,188,593	40.9
Attending outdoor concerts, fairs, festivals	39,748	37.0
Tennis (played outdoors)	4,438	3.9
Outdoor court games other than tennis (basketball, beach volleyball, badminton, etc.)	17,816	6.6
Baseball / softball	23,945	5.5
Football, soccer, lacrosse, rugby, ultimate frisbee	12,666	3.7

<b>Activity</b>	<b>User Occasions</b>	<b>% Population Participating</b>
Golf	28,302	9.9
Disc golf	<1,000	1.8
Skateboarding, inline skating, roller skating, roller skiing	2,136	2.9
Rock climbing, bouldering, mountaineering	14,349	1.5
Orienteering, geocaching	33,484	3.3
Hang gliding, sky diving, paragliding	<1,000	<1.0
Visiting historic sites / history-themed parks (history-oriented museums, outdoor displays, visitor centers, etc.)	202,467	44.2
<b>Nature Study Activities</b>		
Bird watching	456,258	24.4
Whale watching	164,578	26.6
Exploring tidepools	636,491	38.6
Other nature / wildlife / forest / wildflower observation	544,916	30.4
Visiting botanical gardens	7,838	11.9
Visiting nature centers	52,811	16.9
Outdoor photography, painting, drawing	402,439	20.0
Collecting (rocks, plants, mushrooms, berries)	290,224	31.7
<b>Vehicle-based Camping Activities</b>		
RV / motorhome / trailer camping	379,810	26.5
Car camping with a tent	557,549	25.7
Motorcycle camping with a tent	106,690	1.8
Yurts / camper cabins	46,375	2.8
<b>Fishing, Hunting, Shooting Activities</b>		
Fly fishing	116,887	4.9
Fishing from a boat (other than fly fishing)	153,851	26.2
Fishing from a bank or shore (other than fly fishing)	132,870	22.9
Crabbing	321,775	30.0
Shellfishing / clamming	199,554	27.5
Big game hunting with a gun	99,485	14.8
Big game hunting with a bow	7,955	2.6
Waterfowl hunting	9,714	1.6
Upland bird or small game hunting	11,137	1.4
Target / skeet shooting / archery	74,295	13.2
<b>Non-motorized Water-based and Beach Activities</b>		
White-water canoeing, kayaking, rafting	10,466	4.8
Flat-water canoeing, sea kayaking, rowing, stand-up paddling, tubing / floating	63,770	10.4
Surfing / ocean stand-up paddling	81,218	3.1
Windsurfing / kiteboarding	<1,000	<1.0
Sailing	2,618	<1.0
Beach activities – ocean	1,929,171	55.8
Beach activities – lakes, reservoirs, rivers	368,987	26.8
Swimming / playing in outdoor pools / spray parks	34,645	6.3
Snorkeling / SCUBA diving	8,486	1.6

\*Bicycle touring was asked as a separate question regarding participation only.

### Camping Likelihood and Priority Needs

This set of questions asked people to rate various camping types using 5-point Likert scales according to the likelihood of using a type of camping when or if the individual went camping at an Oregon State Park campground (1 = Not at all likely to 5 = Very likely), and to rate their perceived need for more of each type of camping near the individual's community (1 = Lowest priority need to 5 = Highest priority need).

For Tillamook County residents, drive-in tent sites had the highest likelihood of use, while hiker-biker sites had the lowest likelihood of use (Table 3). Similarly, drive-in tent sites had the highest priority need, while hiker-biker sites had the lowest priority need.

**Table 3. Likelihood and Priority Need for Camping Type, Tillamook County**

Camping Type	How likely to use camping type in state park*	Level of priority need for camping type near your community*
RV sites	2.9	2.5
Cabins or yurts w/ heat, lights	2.8	3.0
Cabins or yurts w/ heat, lights, bathroom, kitchen	2.9	3.0
Drive-in tent sites	3.4	3.1
Hike-in tent sites	2.5	2.6
Hiker-biker sites	1.9	2.3
Other type	2.3	2.6

\* Means scores for 5-point Likert Scale (1 = "Not at all likely" or "Lowest priority need" to 5 = "Very likely" or "Highest priority need")

### Priorities for the Future

Survey participants were asked about their opinions on priorities for the future in and near their community. Respondents were asked to rate several items for investment by park and forest agencies using a 5-point Likert scale (1 = Lowest priority need to 5 = Highest priority need). Items were developed by the steering committee, representing several municipal-type areas and beyond.

Table 4 reports Tillamook County results, with items listed in descending order by mean priority ratings. The top priority needs for Tillamook County residents are soft surface walking trails, nature and wildlife viewing areas and access to waterways. Picnic areas for small visitor groups, playgrounds with natural materials (Natural Play Areas) and off-street bicycle trails rated high as well. Tennis and basketball courts, off-highway vehicle trails / areas and baseball / softball fields rated the lowest on priority investments.

**Table 4. Priorities for the Future, What Park and Forest Agencies Should Invest In, Tillamook County—Mean For 5-Point Likert (1 = “Lowest priority need” to 5 = “Highest priority need”)**

<b>Item</b>	<b>Mean</b>
Dirt / other soft surface walking trails and paths	3.7
Nature and wildlife viewing areas	3.5
Public access sites to waterways	3.5
Picnic areas and shelters for <u>small</u> visitor groups	3.4
Children’s playgrounds and play areas made of natural materials (logs, water, sand, boulders, hills, trees)	3.3
Off-street bicycle trails and pathways	3.3
Paved / hard surface walking trails and paths	3.0
Community gardens	3.0
Off-leash dog areas	3.0
Picnic areas and shelters for <u>large</u> visitor groups	2.9
Designated paddling routes for canoes, kayaks, rafts, driftboats	2.9
Children’s playgrounds and play areas built with manufactured structures like swing sets, slides, and climbing apparatuses	2.7
Multi-use fields for soccer, football, lacrosse, etc.	2.6
Baseball / softball fields	2.4
Off-highway vehicle trails / areas	2.4
Basketball courts	2.3
Outdoor tennis courts	2.1

**Value and Delivery for Benefits of Parks and Recreation Services**

Tillamook County residents that participated in outdoor recreation activities were also asked their opinions related to the benefits provided by park and recreation agencies. First, respondents were asked to rate each benefit type based on how valued it is using a 5-point Likert scale (1 = Least valued to 5 = Most valued). Next, they were asked to rate how well park and recreation agencies are currently delivering each benefit type using a similar scale (1 = Currently does not deliver at all to 5 = Currently delivers extremely well).

Ranging from a mean score of 3.3 to 4.4 on the 5-point scale, improving physical health, community desirability and preserve open space and the environment rated the highest valued in Tillamook County. Lowest valued benefits in Tillamook County included help attract new residents / businesses, provide opportunities for social interaction and increase property values. Delivery of benefits ranged from a mean score of 2.7 to 3.5, with preserve open space and the environment, promote tourism and community desirability rated the highest delivered in Tillamook County. Lowest delivered benefits in Tillamook County included help attract new residents / businesses, increase property values and help reduce crime.

**Table 5. Value and Delivery for Benefits of Parks and Recreation Services, Tillamook County**

<b>Value For Benefits of Parks and Recreation Services—Mean for 5-point Likert (1 = "Least valued" to 5 = "Most valued")</b>		<b>Delivery of Benefits of Parks and Recreation Services—Mean for 5-point Likert (1 = "Currently does not deliver at all" to 5 = "Currently delivers extremely well")</b>	
<b>Benefit</b>	<b>Value Mean</b>	<b>Benefit</b>	<b>Delivery Mean</b>
Improve physical health and fitness	4.4	Preserve open space and the environment	3.5
Make your community a more desirable place to live	4.3	Promote tourism	3.5
Preserve open space and the environment	4.3	Make your community a more desirable place to live	3.4
Improve mental health and reduce stress	4.2	Preserve historical features in your community	3.3
Help reduce crime	3.9	Improve mental health and reduce stress	3.2
Preserve historical features in your community	3.9	Enhance a sense of place and community	3.2
Enhance a sense of place and community	3.9	Improve physical health and fitness	3.1
Promote tourism	3.5	Provide opportunities for social interaction	2.9
Increase property values in your community	3.4	Help reduce crime	2.8
Provide opportunities for social interaction	3.4	Increase property values in your community	2.8
Help attract new residents and businesses	3.3	Help attract new residents and businesses	2.7