

ECONOMIC ANALYSIS OF OUTDOOR RECREATION IN OREGON: 2022 UPDATE



EXECUTIVE SUMMARY

Oregon offers thousands of outdoor recreational opportunities for hiking, camping, biking, picnicking, hunting, and more. The outdoor recreation industry brings billions of dollars to the state's economy. In 2019, and in recognition of this, Travel Oregon, the Oregon Office of Outdoor Recreation (OREC), and Oregon Department of Fish and Wildlife (ODFW) commissioned a study by Earth Economics to assess the economic contribution of the outdoor recreation economy (see Mojica et al., 2021). Here, Earth Economics has provided a 2022 update in partnership with Oregon Parks and Recreation Department (reported in 2023 USD).

The present study found that **in 2022, outdoor recreation in Oregon supported \$16 billion in spending** at businesses throughout the state, which then rippled through Oregon's economy as income and wages are re-spent, driving economic effects in sectors not directly tied to outdoor recreation. Total consumer spending on outdoor recreation in 2022 **supported 192,000 full and part-time jobs in Oregon**, associated **with \$8.2 billion in wages** and other compensation. The analysis further categorized spending by locals and visitors, where local recreation is defined as Oregonians who travel fewer than 50 miles to reach their recreation destination and visitors includes both Oregonians who travel 50 or more miles and out-of-state visitors. This distinction allows us to understand how much new money is entering a regional economy. In 2022, visitors in Oregon spent \$3.4 billion in trip-related spending, which supports 37,000 full and part-time jobs. Local recreation amenities also proved to be important to our economy. Local recreation, such as the spending effects associated with picnicking at a park near your home, supported \$2.9 billion in spending in 2022.

These results are intended to bring greater awareness of the enormous economic value produced by those who enjoy recreating in Oregon's outdoor spaces. Well-informed policies can help to maintain a high quality of life for residents while providing sustainable access to locals and visitors alike. Detailed results are available for each county, while activity-specific estimates are provided at the state level. One of the goals of this project was to establish a reliable, scalable framework to monitor outdoor recreation participation and associated spending. This framework can be shared across agencies to standardize data collection, address data gaps, and support comparison across jurisdictional and agency boundaries.

HOW THIS COMPARES TO OTHER ANALYSES

This analysis is consistent with findings from other research conducted on Oregon's outdoor recreation economy. In 2017, the Outdoor Industry Association estimated that \$16.4 billion was spent on outdoor recreation trips and gear purchases in Oregon, an estimate slightly higher than the one presented here. The U.S. Bureau of Economic Analysis (BEA) estimated that spending on outdoor recreation in Oregon in 2022 contributed \$7.5 billion to Oregon's GDP and supported 72,700 jobs. While these estimates vary from the findings of this analysis, it is important to understand that the BEA analysis does not consider local recreation in their analysis, making the results more comparable to the visitor expenditure estimate presented earlier. Furthermore, BEA data does not include sole proprietors in their jobs estimation.

BENEFITS NOT INCLUDED IN THIS STUDY

While this report estimates the significant economic contribution of outdoor recreation in Oregon, it does not present the full benefits that outdoor recreation and natural spaces provide, such as consumer surplus, and health or environmental benefits. In 2024, the Oregon Parks and Recreation Department (OPRD) estimated the consumer surplus for Oregon recreationists was \$57.1 billion annually, based on 2022 visitation. Consumer surplus (willingness-to-pay that exceeds spending) is a measure of nonmarket social benefits. Parks and natural spaces promote physical and mental health, with lower medical and insurance costs for those living active outdoor lifestyles. Researchers from Oregon State University estimated that the physical activity associated with outdoor recreation led to \$2.965 billion in insurance savings, reducing overall healthcare expenditures in the state by 10 percent (Rosenberger, 2023).

The environmental benefits provided by parks and green spaces include clean, drinkable water (reducing filtration costs), carbon sequestration (reducing future climate impacts), scenic beauty (increasing home values), and habitat for plants and animals (strengthening food webs). While not measured here, these benefits can be monetized to show the value of stewarding outdoor spaces for a more resilient future.

OREGON OUTDOOR RECREATION SPENDING

TOTALED
\$16 BILLION

AND SUPPORTED 192,000
FULL- AND PART-TIME JOBS



Photo Credit: TravelOregon.com (photographer: Joni Kabana)

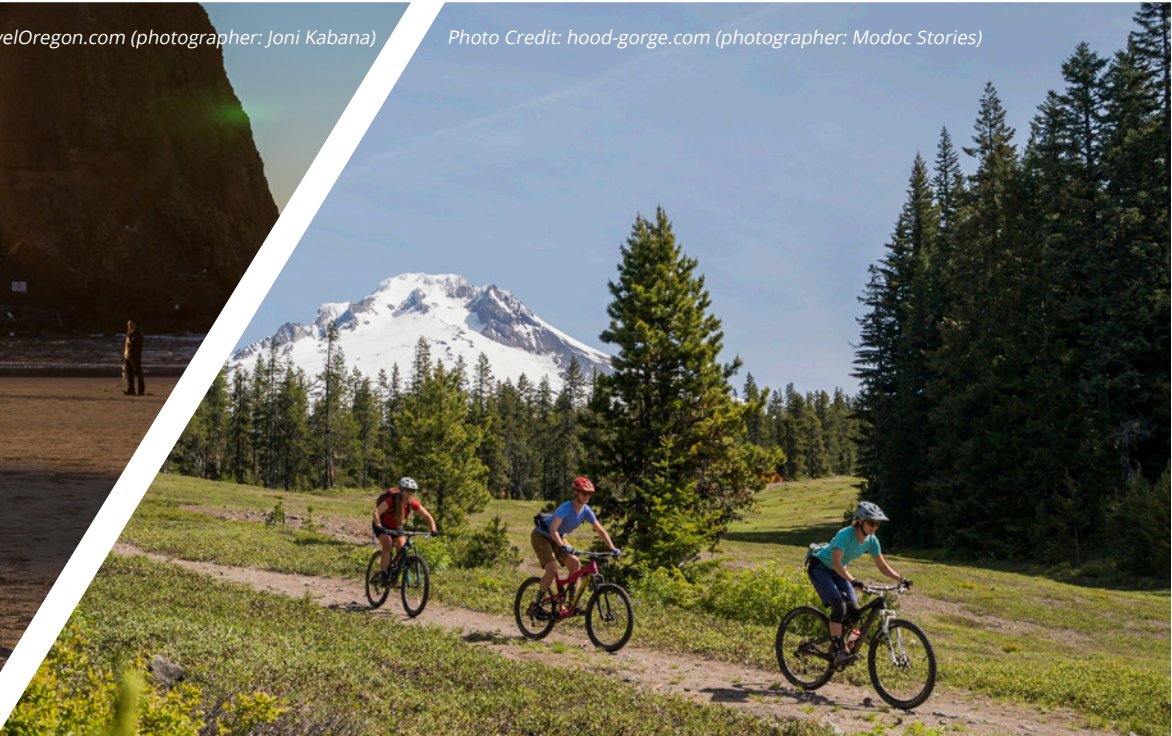


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1 INTRODUCTION

Oregon is home to scenic wonders and abundant natural resources. Many of these areas, and the activities they support carry national name recognition: windsurfing in the Columbia River Gorge, hiking in the Cascades, camping at Crater Lake, fishing the Oregon Coast, and jet boat tours in Hells Canyon. Yet there are many locations in Oregon that hold a lower degree of fame, special places that are less traveled. Oregon’s impressive landscapes—well known or not—lend themselves to boundless outdoor recreation opportunities.

Outdoor recreation is an important part of Oregon’s identity. An overwhelming majority of Oregonians participate in outdoor recreation (95%), while scenic beauty and outdoor recreation are primary drivers of visitation to and around the state (OPRD, 2024; Tourism Economics, 2019). However, less understood are the quantifiable benefits that outdoor recreation participants have on Oregon’s economy.

This report quantifies the economic benefits of outdoor recreation, including the trip length, consumer spending, and economic effects associated with engaging in outdoor recreation activities in Oregon by residents and out-of-state visitors.

As Oregon’s population increases, visitation grows, and as the popularity of outdoor recreation expands, it is necessary to understand the role of outdoor recreation in the state’s economy. Understanding how outdoor recreation fits within Oregon’s present economy also provides us with insights into economic development opportunities for the future. Recognizing this, Travel Oregon, the Oregon Office of Outdoor Recreation (OREC), and Oregon Department of Fish and Wildlife (ODFW) came together to commission the original study based on 2019 data (Mojica et al., 2021), and Oregon Parks and Recreation Department (OPRD) recognized the importance of continuing to update this data. Our goal is to accurately understand the impact of outdoor recreation on Oregon’s economy, present the information in a digestible and usable format, and provide resources that can help inform effective decision and policymaking.

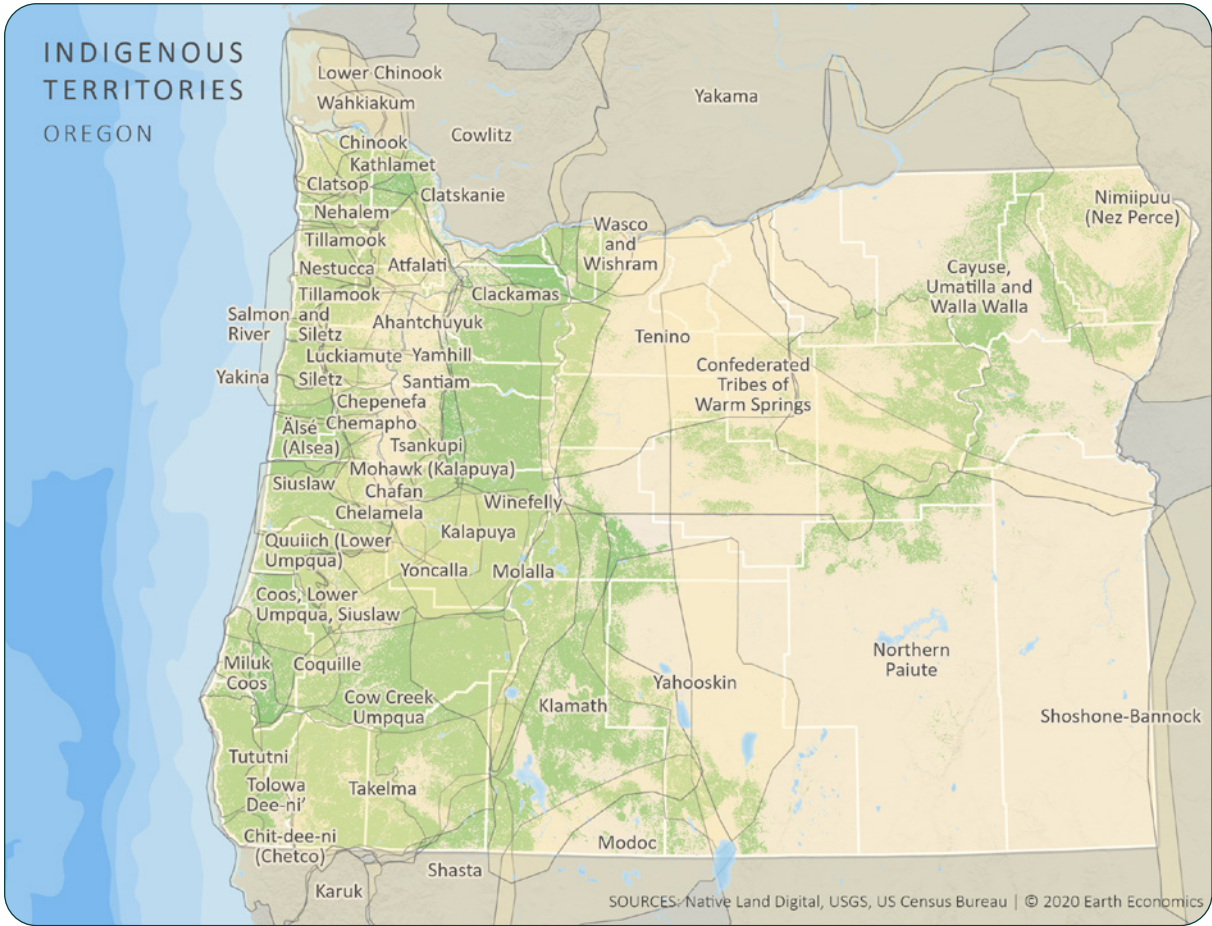
FIGURE 1. STATE OF OREGON



INDIGENOUS PEOPLES LAND ACKNOWLEDGEMENT

More than 60 tribes and bands of Indigenous peoples have lived in the northwest region since time immemorial. The people survived season to season on their sacred foods and environments, providing them with a strong sense of identity, culture and spirituality. After the treaties of 1855, only nine tribes were federally recognized in what is now Oregon, while other treaties went unratified and unrecognized. Today, these nine tribes work extensively to manage the resources throughout their original territories playing active roles in their regions, counties, states, and communities, leveraging their extensive knowledge and history of the area. In 1996, for example, Governor John Kitzhaber signed Executive Order (EO) 96-30, directing state agencies to develop working relationships with Oregon’s nine federally-recognized Indian Tribes. Outdoor recreation occurs on the ancestral lands of these original peoples and caretakers.

FIGURE 2. INDIGENOUS TERRITORIES, OREGON



REPORT OVERVIEW

This report on Oregon’s outdoor recreation economy is organized as follows:

- The current chapter, Chapter 1, introduces the outdoor recreation environment in Oregon and provides a brief summary of Oregon’s long history of natural resource richness. This section recognizes the ancestral stewardship of Oregon’s native tribes.
- Chapter 2 reviews the concepts and methods used to estimate total spending associated with outdoor recreation in Oregon.
- Chapter 3 quantifies recreation participation, trip-related spending, and equipment-related spending.
- Chapter 4 estimates the economic contribution and impact of the spending calculated in Chapter 3, offering readers estimates on jobs, wages, taxes, Gross Domestic Product (GDP) contributions, and total spending associated with outdoor recreation.
- Chapter 5 focuses on the spending and economic impacts made by in-state residents vs. travelers (Oregonians traveling 50 or more miles) and out-of-state tourists.
- Chapter 6 summarizes the results of the economic analysis and the opportunities to use outdoor recreation for economic development, as well as suggestions on how to improve outdoor recreation data and industry information.
- The appendices include a list of lands included in this study; breakout data by county and activity type; input-output sector mapping; and references.



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Photo Credit: Noel Dong

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2 KEY CONCEPTS AND METHODS

DEFINING OUTDOOR RECREATION

This report defines outdoor recreation as activities participated in for personal pleasure and health that occur in nature-based environments outdoors. Oregon’s landscapes allow recreationists to off-road vehicle (ORV) throughout the openness of Eastern Oregon; head to the Columbia River Gorge for world-class windsurfing; take epic rafting trips down the Rogue River; hike through the Cascade Mountains and depart on one of many charter boats for ocean sport fishing.

In 2017, the Oregon Parks and Recreation Department (OPRD) identified 56 recreation activities known to occur in Oregon, which they group into eight categories:

- a. nature study activities

b. motorized activities

c. non-motorized snow activities

d. outdoor leisure and sporting activities

e. non-motorized and electric trail or related activities

f. vehicle-based camping activities

g. hunting and fishing activities

h. non-motorized water-based and beach activities

Because each of the 56 unique activities could not be directly tied to recreational trips where monetary transactions occurred, Appendix C of this report provides participation and spending estimates for 32 of these recreation activities.

ESTIMATING RECREATION PARTICIPATION AND SPENDING

When Oregonians and out-of-state visitors participate in outdoor recreation, they spend money – \$10 here, \$60 there – and it adds up to billions of dollars in spending throughout local economies in Oregon. Local residents stop in at coffee shops on their way to the park; residents from Portland take weekend trips to the Oregon Coast and spend money at boutique retailers and restaurants; and out-of-state visitors soak up all that Oregon has to offer while spending money at hotels, retail stores, and on guide services. These expenditures are referred to as **trip-related spending**—spending that occurs while participating in, or traveling to participate in, an outdoor recreation activity. An outdoor recreation trip is not dependent on how far the participant travels from their home – both close to home and travel-related recreation are considered in this analysis.

A second form of spending valued in this report is **equipment-related spending**—spending on outdoor recreation gear, equipment, and apparel (e.g., bikes, fishing rods, binoculars, jackets, backpacks, and seasonal rentals). These expenditures are not directly tied to any specific outdoor recreation trip, but are purchased for their use in outdoor recreation.

Participants were classified as **locals**, those travelling fewer than 50 miles to participate in recreation, and **travelers**, which includes both Oregonians who travel 50 or more miles and out-of-state visitors. This distinction is important for several reasons—in-state travelers and out-of-state visitors inject “new” money into a local community, and different visitor types contribute differing levels of spending across varying industries. For instance, an out-of-state recreationist is more likely to spend money at a hotel than a local participant, while both may be just as likely to stop at a local brewery. Spending by visitor types is collected and organized into spending profiles—or average expenditures by a unique visitor group.

In addition to classifying recreation participants by visitor type, recreation participation and expenditure data is further categorized by land manager. We categorize land managers into two groups: 1) public agencies, and 2) private landholders who allow for recreational access on their property. For example, the U.S. Forest Service, OPRD, and the Bend Park and Recreation District are examples of federal, state, and local agencies that manage recreation lands; while land trust-owned conservation lands, Weyerhaeuser-owned timberlands, private campgrounds, and private hunting lands are all managed by private landholders, representing the wide range of land owners

To estimate the total spending associated with outdoor recreation, we documented the total days of outdoor recreation participation across different recreation agencies and recreation activities. Next, we collected spending profile data for the various agencies and activities. With the addition of spending on equipment, gear and apparel, the product of these two components—recreation days and average daily spending—is used to calculate total recreation spending (i.e., **trip-related spending plus equipment-related spending equals total spending on outdoor recreation**). The data collected is visitor type and site specific, aggregated, and presented at county-level.

CALCULATING ECONOMIC CONTRIBUTIONS AND IMPACTS

Measuring the magnitude of outdoor recreation’s contribution to the economy provides meaningful insight to those tasked with budgetary and policy decisions that may affect the access to and quality of outdoor recreational opportunities. Critical economic indicators include total spending on outdoor recreation trips and equipment, job creation, incomes, and tax revenues. Other useful indicators of economic health include economic output (or the total spending associated with outdoor recreation, including secondary effects) and the contribution outdoor recreation spending makes to the state’s Gross Domestic Product (GDP).



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Total economic effects resulting from consumer spending are called economic contributions and are described in detail in Figure 3. Each of these contribution types can be broken out into direct, indirect, and induced effects. **Direct effects** are the immediate impacts that occur from the expenditure—impacts at hotels, campsites, restaurants, gas stations, and outdoor recreation gear retailers. The impacts of direct effects ripple out to the businesses and employees which support the operation of the directly impacted businesses, classified as secondary effects. Secondary effects are further broken out into indirect and induced effects. **Indirect effects** are the impacts that are driven by business-to-business transactions. For instance, hotels need fresh linens, restaurant owners purchase meat, dairy and vegetables, and river fishing charters buy fishing gear. This secondary spending creates additional economic contributions and impacts. **Induced effects** are the additional economic effects resulting from employees spending their earnings, such as on rent, food, and leisure in Oregon. Secondary effects continue to push money through Oregon's economy until it is either placed into savings or used to purchase goods and services from outside the state (leakage). The longer money circulates within the regional economy, the larger the economic impacts are (often called multiplier effects).

The impacts in Figure 3 can be calculated through an economic contribution analysis. An economic contribution analysis demonstrates the contribution of a given industry to the surrounding economy, at current levels of production. Contribution analyses can be useful in demonstrating the relative size of an industry—in this case recreation—within the larger economy.

To conduct the economic contribution analysis, input-output (IO) modeling is used, which characterizes the financial linkages between industries within a regional economy. Simply put, it shows how spending in one industry ripples throughout the economy. This analysis used a multi-region IO model, allowing us to measure how spending in one region not only contributes to the immediate regional economy (such as a county), but also how these economic effects ripple throughout the rest of the state. This analysis used an industry standard IO modelling software called IMPLAN and uses IMPLAN economic data from 2022.

FIGURE 3. ECONOMIC CONTRIBUTION TYPES

JOBS

Spending on outdoor recreation supports full and part-time employment in counties throughout Oregon. Employees of hotels, gas stations, guide services, and specialty retailers all directly benefit from recreation expenditures. These expenditures also indirectly support jobs in industries that provide necessary services to these sectors, such as greenspace maintenance, government services, real estate and medicine.

LABOR INCOME

In addition to the number of jobs supported, the IO model estimates the wages paid to workers (salary plus benefits) who are supported by outdoor recreation spending. As employees of directly impacted businesses pay for necessities such as food and housing, the wages of workers in other industries are supported. Additionally, directly impacted businesses use recreation income to purchase the goods and services they need to function as businesses.

TAX REVENUE

While Oregon does not have a statewide sales tax, outdoor recreation spending generates local and state tax revenues through income and property taxes paid by recreation supported businesses and their employees. Other taxes and assessments on people participating in outdoor recreation may include items such as: transient lodging, rental cars, fuel, airports, alcohol, and marijuana.

ECONOMIC OUTPUT

The initial spending on outdoor recreation leads to additional spending within Oregon – classified as economic activity. The total economic activity by industries directly and indirectly supported by outdoor recreation expenditures can be understood as the total economic output of that investment. In essence, economic output is a measure of all spending that results from the initial expenditure.

VALUE ADDED

Value added, often referred to as GDP, is a subset of total economic output, calculated by removing the value of intermediate inputs (e.g., raw materials, semi-finished goods, and business-to-business services) from the total economic output to better represent the value of final goods and services added to the regional economy.

3 PARTICIPATION & SPENDING

Throughout 2022, Oregonians and out-of-state visitors participated in 209 million days of recreation. Most of this recreation occurred on public lands, such as national forests, state parks, and local parks, but private recreation was also an important provider of recreation, specifically land conservancies and private hunting lands. Through trip-related spending and equipment-related spending, total outdoor recreation spending is estimated to be \$16 billion in 2022.

Trip-related spending (both by local recreationists and visitors) totaled \$11.3 billion in 2022. Oregon's beaches carry national prominence, attracting visitors from throughout the state and around the world. Recreation at Oregon's beaches was the lead driver of consumer spending, supporting \$3.8 billion in annual spending. For this reason, Oregon's coastal counties, such as Coos, Lane, and Lincoln, lead the state in consumer spending by county.

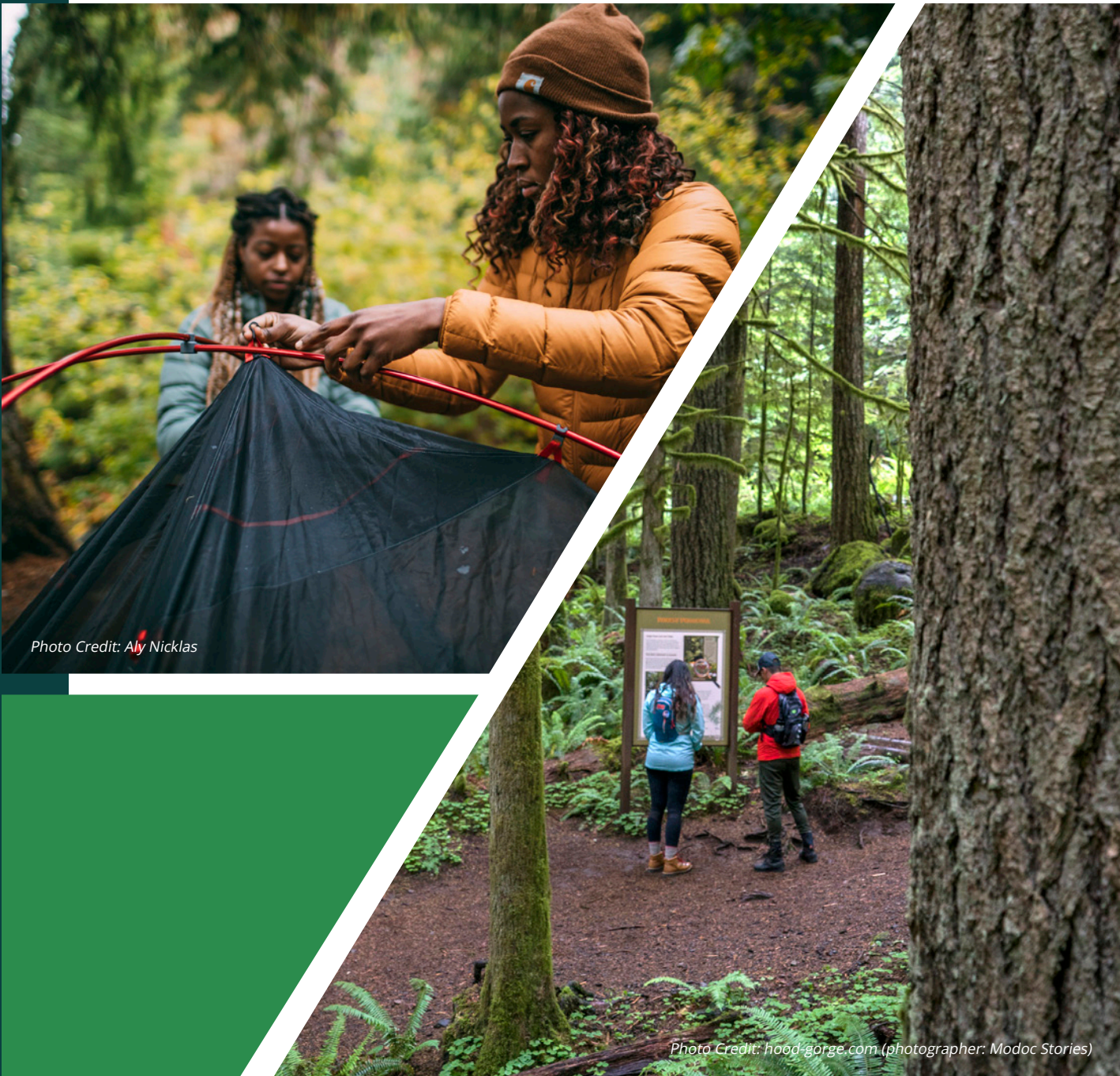


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FIGURE 4. TRIP-RELATED SPENDING BY COUNTY

County	Trip-Related Spending (000s)
Baker	\$124,938
Benton	\$84,076
Clackamas	\$244,881
Clatsop	\$823,255
Columbia	\$45,631
Coos	\$1,276,746
Crook	\$63,954
Curry	\$533,591
Deschutes	\$421,800
Douglas	\$524,278
Gilliam	\$3,493
Grant	\$28,622
Harney	\$284,659
Hood River	\$62,488
Jackson	\$345,481
Jefferson	\$130,523
Josephine	\$216,532
Klamath	\$202,051
Lake	\$30,296
Lane	\$1,203,505
Lincoln	\$2,278,172
Linn	\$153,119
Malheur	\$114,266
Marion	\$295,290
Morrow	\$15,984
Multnomah	\$355,165
Polk	\$79,594
Sherman	\$9,537
Tillamook	\$731,420
Umatilla	\$83,953
Union	\$61,827
Wallowa	\$23,185
Wasco	\$70,412
Washington	\$276,161
Wheeler	\$17,165
Yamhill	\$88,421
Grand Total	\$11,304,471

The purchase of gear, equipment, and apparel within Oregon by residents and nonresidents totaled \$4.4 billion in 2022. A large portion of equipment-related expenditures were associated with the purchase of motor vehicles and parts, followed by sporting goods and apparel. Though these expenditures are not directly tied to Oregon's well-known history of designing and manufacturing quality outdoor equipment and accessories, and estimating this relationship is outside the scope of this analysis, some of these purchases are associated with products made in Oregon and/or by Oregon-based companies, for which the dollars remain local and lead to higher multiplier effects.

FIGURE 5. EQUIPMENT-RELATED SPENDING BY INDUSTRY

Industry	Equipment Expenditures (000s)
Retail - Motor vehicle and parts dealers	\$951,177
Retail - Building material and garden equipment and supplies stores	\$11,282
Retail - Clothing and clothing accessories stores	\$111,346
Retail - Sporting goods, hobby, musical instrument and book stores	\$2,144,013
Personal and household goods repair and maintenance	\$1,041,314
Other personal services	\$117,350
TOTAL	\$4,376,481

4 ECONOMIC CONTRIBUTIONS

Statewide, it was found that recreation trips and equipment purchases supported \$15.7 billion in expenditures in 2022. These recreation expenditures supported 192,000 full and part-time jobs in Oregon. 155,000 of these jobs were a direct result of recreation expenditures, and the remaining 37,000 jobs resulted from indirect and induced effects.

These results clearly demonstrate how jobs directly supported by outdoor recreation have immense ripple effects throughout Oregon’s economy. The industries with the highest employment were grocery and sporting goods retailers, sit-down restaurants, the amusement and recreation industry, such as golf courses and ski facilities, and hotels (top 15 industries are provided in Figure 6). Total compensation for employees of outdoor recreation related industries was \$8.2 billion. The average annual salary of employees in these industries is \$42,600.

FIGURE 6. OUTDOOR RECREATION RELATED EMPLOYMENT BY INDUSTRY - TOP 15 INDUSTRIES

Sector	Employment*	Compensation	Average Compensation
Retail - Sporting goods, hobby, musical instrument and book stores	32,246	\$1,157,657,161	\$35,901
Retail - Food and beverage stores	25,381	\$995,456,167	\$39,221
Full-service restaurants	24,050	\$1,026,473,022	\$42,681
Other amusement and recreation industries	19,563	\$635,932,931	\$32,507
Hotels and motels, including casino hotels	18,038	\$725,574,057	\$40,224
Retail - Miscellaneous store retailers	11,165	\$431,167,500	\$38,619
Personal and household goods repair and maintenance	7,284	\$402,671,648	\$55,283
Retail - Motor vehicle and parts dealers	6,347	\$551,697,992	\$86,928
Other real estate	6,315	\$300,740,930	\$47,620
Other accommodations	4,204	\$203,010,831	\$48,286
Employment services	2,188	\$133,086,795	\$60,813
Other federal government enterprises	2,129	\$232,759,498	\$109,322
Limited-service restaurants	2,018	\$72,438,012	\$35,904
All other food and drinking places	1,966	\$82,802,780	\$42,114
Management of companies and enterprises	1,962	\$303,699,484	\$154,795

*Employment data is generated based on spending activity and may not align with other datasets. Appendix D details how spending was attributed to industry sectors for analysis in IMPLAN.

Outdoor recreation also generates revenue for the state. Oftentimes, the impact that outdoor recreation has on the state’s budget is viewed only as the revenue generated by entrance fees and license sales. A more comprehensive picture is gained by also looking at the tax contributions generated by consumer spending on gas, hotel/lodging/camping, car rental, and airport taxes, and from employment gains through payroll and personal income taxes. In 2022, \$1.5 billion in state and local tax revenues were generated through outdoor recreation spending. Trip-related spending produced 70 percent of these revenues, with the remaining 30 percent resulting from equipment-related spending.

The economic output of outdoor recreation expenditures totaled \$20.6 billion. Economic output represents the total spending associated with an initial expenditure plus secondary spending effects made by businesses and employees. Industries with the highest direct economic output include restaurants, hotels, grocery stores, and sporting goods and apparel retailers. Economic output of \$20.6 billion can also be interpreted as every \$1 spent on outdoor recreation, an additional \$0.31 of revenue is generated for a total economic effect of \$1.31 per \$1.

Finally, a standard measure of economic productivity for an industry is its contribution to the region’s GDP. Outdoor recreation contributed \$12.4 billion to Oregon’s GDP, equaling 4% of Oregon’s \$310 billion GDP. This estimate represents the monetary value of finished products. The U.S. Bureau of Economic Analysis (BEA) estimated that spending on outdoor recreation in Oregon in 2022 contributed \$7.5 billion to Oregon’s GDP and supported 73,000 jobs. The primary difference between the data presented here and BEA data is the inclusion of local recreation, which accounts for approximately 44% trip-related spending.

FIGURE 7. ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION IN OREGON

Impact Type	Employment	Labor Income (000s)	Output (000s)	Value Added (000s)
Direct Effect	155,200	\$5,958,000	\$13,807,524	\$8,571,000
Indirect Effect	10,700	\$757,000	\$2,296,460	\$1,185,800
Induced Effect	25,900	\$1,453,100	\$4,489,805	\$2,660,816
Total Effect	191,800	\$8,168,131	\$20,593,789	\$12,417,606



5 TOURISM CONTRIBUTIONS

ECONOMIC IMPACT OF OUTDOOR RECREATION-BASED TOURISM

Outdoor recreation-based tourism brings dollars from outside the region into the local economy. The injection of new dollars into an economy supports jobs and incomes in the regional economy and provides an additional revenue stream for government agencies through tax contributions. Non-local recreation visitors are defined as Oregonians who travel 50 or more miles (“non-local travelers”), and tourists are defined as visitors coming from out-of-state (“out-of-state tourists”).

Travelers bring dollars into communities from outside the region. Travelers also spend more than their local counterparts. For instance, across all state parks in Oregon, nonlocal overnight travelers spend 68% more than overnight locals (\$165.07 vs. \$98.45 per party, per trip), and nonlocal day visitors spend 138% more than day locals (\$40.90 vs. \$17.18 per party, per trip). When Oregonian’s take trips within Oregon, it keeps the money local and reduces economic leakages. Due to the nature of data aggregation, it’s difficult to definitively separate the spending, visitation, and impacts of out-of-state travelers from non-local in-state travelers.

The economic contribution exclusively by of out-of-state tourists represents new money flowing into the state. It is assumed that these visitors would travel elsewhere or stay at home, and the revenue flows from their visit would go with them. In 2022, out-of-state tourists spent an estimated \$3.1 billion participating in outdoor recreation in Oregon. Tourists account for 44% of all recreation spending in Oregon. Dollars such as these provide an economic development opportunity for communities with rich recreation opportunities to capture.

The \$3.1 billion spent on outdoor recreation by tourists generated substantial economic activity in Oregon. 32,175 jobs are associated with this spending, 27,382 of which are direct jobs, with the remaining 4,792 jobs stemming from indirect and induced spending effects. Industry sectors most benefiting from tourists are accommodations, restaurants, and amusement and recreation industries. Economic output, or total spending associated with direct expenditures of \$3.1 billion is estimated to be \$3.3 billion, meaning for every \$1 spent on outdoor recreation by out-of-state visitors, \$0.04 is re-spent with Oregon’s economy for a total spending impact of \$1.04.

FIGURE 8. ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION VISITORS IN OREGON

Visitor Type	Consumer Spending (000s)	Employment	Labor Income (000s)	Output (000s)	Value Added (000s)
In-state Residents	\$4,024,038	39,042	\$1,587,586	\$4,012,367	\$2,398,450
Out-of-state Tourists	\$3,140,218	32,175	\$1,263,670	\$3,262,088	\$1,964,237
All Visitors	\$7,164,256	71,217	\$2,851,256	\$7,274,454	\$4,362,688



Photo Credit: traveloregon.com

Photo Credit: Austin Shepard

6 CONCLUSION AND DISCUSSION

Outdoor recreation is an important and significant part of Oregon’s overall economy. Spending on outdoor recreation in Oregon totaled \$16 billion in 2022 and had GDP contributions equal to 4% of Oregon’s economy. Outdoor recreation also supported 7.3% of all employment in Oregon at 192,000 full and part time jobs. The average wage – including benefits—was estimated to be \$42,600 per year.

Spending by out-of-state tourists (\$3.1 billion) made up approximately 44% of trip-related spending. The continued investment in stewardship of lands, development of recreation amenities, and promotion of outdoor recreation by state and regional tourism agencies ensures these dollars continue to flow into the state.

The analysis also found that coastal Oregon counties—specifically, Lincoln, Lane, and Coos—had the highest percent of the labor force employed by outdoor recreation spending. This emphasizes the importance of outdoor recreation in these communities, particularly because a large share of these dollars come from outside the region (55-65% of all recreation spending within the counties). Policies that strengthen and promote outdoor recreation will have important implications for these economies. In 2020 outdoor recreation stakeholders, including the agency that commissioned this study, developed recommendations through the Governor’s Task Force on the Outdoors: 2020 Framework for Action. That report details several consensus policies to support economic development in rural and urban areas, increase outdoor recreation participation among traditionally underserved communities, and balance improved outdoor recreation access with resource protection.

The estimates above provide a strong baseline of Oregon’s outdoor recreation economy, providing a benchmark for future studies. The importance for agencies to collect visitation data, and in a consistent way, has also been realized, which can help reveal the value of their presence and relationship with local communities.

It also presents the challenges that agencies face when doing so. Due to the dispersed nature of outdoor recreation, accurately counting recreation visitors can be a challenging task at facilities with little or no access control. This report recognizes these challenges exist and used best available science to estimate visitation. New opportunities to monitor use are emerging, such as social media and anonymized cell phone data, and should be emphasized in future studies.

Other common concerns with the data presented are the double counting of park visitors, double counting of people who engage in multiple types of recreation on a given day, and differences in methods for estimation used by various facilities and management agencies. To adjust for double counting, nonprimary visitors (or visitors whose primary trip purpose was not recreation at the site) were treated as local day visitors, limiting their spending impacts.

While this report estimates the significant economic contribution of outdoor recreation in Oregon, it does not represent the full suite of economic benefits that outdoor recreational spaces and activities generate, for example:

- **CONSUMER SURPLUS**

An economic concept that refers to the value people get from recreation over and above what they pay, consumer surplus is an important measure of societal welfare. In 2022, the OPRD estimated the consumer surplus, or total net economic value, for recreation participation in Oregon by Oregonians to be \$57.1 billion annually.

- **PUBLIC HEALTH**

Parks and natural spaces promote physical and mental health. Those who participate in outdoor recreation are shown to have lower medical and insurance costs than their non-active counterparts. Oregon State University has estimated the economic value of this physical activity to be \$3 billion in insurance savings per year. These savings are equivalent to 10 percent of total health care expenditures in the state.

- **ENVIRONMENTAL BENEFITS**

Among other public benefits, recreational spaces in Oregon provide clean, drinkable water (thus reducing filtration costs); carbon sequestration (avoiding economic impacts associated with increased CO2); scenic beauty (increasing home values); and habitat for plants and animals (strengthening food webs). While these benefits have not been quantified or valued across all outdoor recreation spaces in Oregon, nearby studies suggest this value can be immense. For example, Earth Economics estimated that each year, Washington state’s public lands provide between \$216 billion and \$264 billion in environmental benefits.

The findings presented in this report provide a baseline of the outdoor recreation economy in Oregon. The analysis also provides a structure for collecting and organizing

visitation and spending data. Using this approach allows for future updates to be directly comparable. As Oregon’s population continues to grow, and preferences and demand for outdoor recreation evolves, this study should be updated every five years, on a parallel planning track with the Statewide Comprehensive Outdoor Recreation Plan. Important future studies should also increase our understanding of:

- **EQUITABLE ACCESS**

The equitable access to outdoor recreation has not been studied in this analysis. The authors recognize that not all populations have equal access to and/or feel comfortable in outdoor spaces, notably, people of color are underrepresented within the outdoor space.

- **OVERCROWDING**

This report does not discuss the impact that outdoor recreation has on our landscapes. Park agencies are tasked with weighing visitor demand with ecosystem needs. Economic contribution analysis and other benefit analyses (as highlighted above) can highlight the importance of investment in our natural spaces.

- **CLIMATE CHANGE**

Oregon’s susceptibility to natural disasters impacting recreational landscapes is heightened through climate change. Wildfires, excessive heat, and warmer winters have a noticeable impact on recreation use. Rising sea levels, invasive species, and water temperatures may result in long-term impacts to use. Of recent relevance, wildfires are not only dangerous to the immediate population, but wildfire smoke can make recreation unhealthy to engage in throughout the state. Wildfires can later cause drought by not allowing water to recharge aquifers in burned areas, further impacting water-based recreation.



Photo Credit: traveloregon.com



Photo Credit: Carter Reschke (unsplash.com)

APPENDIX A

RECREATIONAL LANDS INCLUDED IN THIS STUDY

NATIONAL PARK SERVICE

Crater Lake National Park, John Day Fossil Beds National Monument, Lewis And Clark National Historical Park, Oregon Caves National Monument and Preserve

U.S. FISH AND WILDLIFE SERVICE

Bear Valley National Wildlife Refuge, Malheur National Wildlife Refuge, Bandon Marsh National Wildlife Refuge, Lewis and Clark National Wildlife Refuge, Nestucca Bay National Wildlife Refuge, William L. Finley National Wildlife Refuge, Cold Springs National Wildlife Refuge, McKay Creek National Wildlife Refuge, Umatilla National Wildlife Refuge, Klamath Marsh National Wildlife Refuge, Upper Klamath National Wildlife Refuge, Tualatin River National Wildlife Refuge, Siletz Bay National Wildlife Refuge, Lower Klamath National Wildlife Refuge, Oregon Islands National Wildlife Refuge, Ankeny National Wildlife Refuge, Baskett Slough National Wildlife Refuge, Cape Meares National Wildlife Refuge, Three Arch Rocks National Wildlife Refuge

OREGON PARKS AND RECREATION DEPARTMENT

Arizona Beach State Recreation Site, Ellmaker State Wayside, Emigrant Springs State Heritage Area, Face Rock State Scenic Viewpoint, Farewell Bend State Recreation Area, Fogarty Creek State Recreation Area, Fort Rock State Natural Area, Fort Stevens State Park, Fort Yamhill State Heritage Site, Bald Peak State Scenic Viewpoint, Geisel Monument State Heritage Site, Gleneden Beach State Recreation Site, Golden And Silver Falls State Natural Area, Bandon State Natural Area, Governor Patterson Memorial State Recreation Site, Guy W. Talbot State Park, H.B. Van Duzer Forest State Scenic Corridor, Harris Beach State Park, Hat Rock State Park, Heceta Head Lighthouse State Scenic Viewpoint, Hilgard Junction State Park, Bates State Park, Hug Point State Recreation Site, Humbug Mountain State Park, Illinois River Forks State Park, Iwetemlaykin State Heritage Site, Battle Mountain Forest State Scenic Corridor, Jackson F. Kimball State Recreation Site, Jasper State Recreation Site, Jessie M. Honeyman Memorial State Park, Beachside State Recreation Site, Koberg Beach State Recreation Site, L.L. "Stub" Stewart State Park, Lake Owyhee State Park, Lapine State Park, Lewis And Clark State Recreation Site, Lost Creek State Recreation Site, Lowell State Recreation Site, Luckiamute State Natural Area, Manhattan Beach State Recreation Site, Maud Williamson State Recreation Site, Mayer State Park, Agate Beach State Recreation Site, Mcvay Rock State Recreation Site, Memaloose State Park, Milo Mciver State Park, Minam State Recreation Area, Molalla River State Park, Munson Creek State Natural Area, Benson State Recreation Area, Nehalem Bay State Park, Neptune State Scenic Viewpoint, Neskowin Beach State Recreation Site, North Santiam State Recreation Area, Oceanside Beach State Recreation Site, Ochoco State Scenic Viewpoint, Ontario State Recreation Site, Beverly Beach State Park, Oswald West State Park, Otter Crest State Scenic Viewpoint, Otter Point State Recreation Site, Paradise Point State Recreation Site, Peter Skene Ogden State Scenic Viewpoint, Pilot Butte State Scenic Viewpoint, Pistol River State Scenic Viewpoint, Port Orford Heads State Park, Portland Women's Forum State Scenic Viewpoint, Prineville Reservoir State Park, Roads End State Recreation Site, Rocky Creek State Scenic Viewpoint, Rooster Rock State Park, Saddle Mountain State Natural Area, Samuel H. Boardman State Scenic Corridor, Sarah Helmick State Recreation Site, Seal Rock State Recreation Site, Seneca Fouts Memorial State Natural Area, Seven Devils State Recreation Site, Bob Straub State Park, Shore Acres State Park, Silver Falls State Park, Siuslaw North Jetty , Boiler Bay State Scenic Viewpoint, Smelt Sands State Recreation Site, Smith Rock State Park, South Beach State Park, Starvation Creek State Park, Ainsworth State Park, Sumpter Valley Dredge State Heritage Area, Sunset Bay State Park, Sunset Beach State Recreation Site, The Cove Palisades State Park, Tolovana Beach State Recreation Site, Tou Velle State Recreation Site, Tseriadun State Recreation Area, Tumalo State Park, Ukiah-Dale Forest State Scenic Corridor, Umpqua Lighthouse State Park, Umpqua State Scenic Corridor, Unity Lake State Recreation Site, Valley Of The Rogue State Park, Viento State Park, W.B. Nelson State Recreation Site, Wallowa Lake State Park, Booth State Scenic Corridor, Warm Springs State Recreation Site, White River Falls State Park, Willamette Mission State Park, William M. Tugman State Park, Winchuck State Recreation Site, Yachats Ocean Road State Natural Site, Yachats State Recreation Area, Yaquina Bay State Recreation Site, Bradley State Scenic Viewpoint, Brian Booth State Park, Bridal Veil Falls State Scenic Viewpoint, Bullards Beach State Park, Cape Arago State Park, Cape Blanco State Park, Cape Lookout State Park, Cape Meares State Scenic Viewpoint, Cape Sebastian State Scenic Corridor, Carl G. Washburne Memorial State Park, Catherine Creek State Park, Champoege

State Heritage Area, Alfred A. Loeb State Park, Clay Myers State Natural Area, Cline Falls State Scenic Viewpoint, Clyde Holliday State Recreation Site, Collier Memorial State Park, Cottonwood Canyon State Park, Crissey Field State Recreation Site, Crown Point State Scenic Corridor, D River State Recreation Site, Dabney State Recreation Area, Dalton Point Recreation Site, Del Rey Beach State Recreation Site, Deschutes River State Recreation Area, Detroit Lake State Recreation Area, Devil'S Lake State Recreation Area, Devil'S Punch Bowl State Natural Area, Arcadia Beach State Recreation Site, Dexter State Recreation Site, Driftwood Beach State Recreation Site, Ecola State Park, Elijah Bristow State Park

OREGON DEPARTEMENT OF FORESTRY

Clatsop State Forest, Santiam State Forest, Tillamook State Forest, Coos District, Klamath-Lake District

UNITED STATES ARMY CORPS OF ENGINEERS

Blue River Lake, Bonneville Lock and Dam, Cottage Grove Lake, Detroit Lake, Dexter Lake, Dorena Lake, Fall Creek Lake, Fern Ridge Lake, Foster Lake, Green Peter Lake, Hills Creek Lake, John Day Lock And Dam, Lake Umatilla, Lookout Point Lake, Lost Creek Lake, McNary Lock And Dam, Willow Creek

U.S. FOREST SERVICE

Columbia River Gorge National Scenic Area, Deschutes National Forest, Fremont-Winema National Forest, Malheur National Forest, Mt. Hood National Forest, Ochoco National Forest, Rogue River-Siskiyou National Forests, Siuslaw National Forest, Umatilla National Forest, Umpqua National Forest, Wallowa-Whitman National Forest, Willamette National Forest

GOLF COURSES

Counties with golf courses; specific courses not included to protect privacy.

Baker County Golf Course, Benton County Golf Course, Clackamas County Golf Course, Clatsop County Golf Course, Columbia County Golf Course, Coos County Golf Course, Crook County Golf Course, Curry County Golf Course, Deschutes County Golf Course, Douglas County Golf Course, Grant County Golf Course, Harney County Golf Course, Hood River County Golf Course, Jackson County Golf Course, Jefferson County Golf Course, Josephine County Golf Course, Klamath County Golf Course, Lake County Golf Course, Lane County Golf Course, Lincoln County Golf Course, Linn County Golf Course, Malheur County Golf Course, Marion County Golf Course, Morrow County Golf Course, Multnomah County Golf Course, Polk County Golf Course, Tillamook County Golf Course, Umatilla County Golf Course, Union County Golf Course, Wallowa County Golf Course, Wasco County Golf Course, Washington County Golf Course

LOCAL PARKS

Baker City, Baker County, Benton, Benton County, Benton County Fairgrounds, City Of Unity And Baker County, Clackamas, Clackamas County, Clackamas County Historical Society, Clatsop, Clatsop County, Columbia, Columbia County, Coos, Coos County, Crook County Parks And Recreation District, Curry, Curry County, Deschutes, Douglas, Douglas County, Douglas County Fairgrounds, Gilliam, Gilliam County, Grant, Grant County, Harney, Harney County, Harney County Little League , Hood River, Hood River County, Jackson, Jackson County, Jefferson, Jefferson County, Josephine, Josephine County, Klamath, Klamath County, Lake, Lake County, Lane, Lane County, Lincoln, Lincoln County, Linn, Linn County, Malheur, Malheur County, Marion, Marion County, Morrow, Morrow County, Multnomah, North County Recreation District, Northern Wasco County Parks And Recreation District, Polk, Polk County, Sherman, Sherman County, Tillamook, Tillamook County, Tillamook County - Disavowed, Tillamook County Pioneer Museum, Umatilla, Umatilla County, Union, Union County, Wallowa, Wallowa County, Wasco, Wasco County, Washington, Washington County, Wheeler, Wheeler County, Yamhill, Yamhill County

APPENDIX B

COUNTY LEVEL RESULTS

County level results are estimated for trip-related spending and do not include expenditures on equipment (outdoor recreation gear, apparel, equipment, and repair), which are measured at the state-level. Trip-related spending occurs while participating in, or traveling to participate in, an outdoor recreation activity. The results below show the economic effects associated with direct spending and their secondary effects occurring within the county. Secondary effects measure how direct spending ripples out to the businesses and employees which support the operation of directly impacted businesses. Results presented here to not include statewide economic effects.

FIGURE 9. OREGON COUNTIES

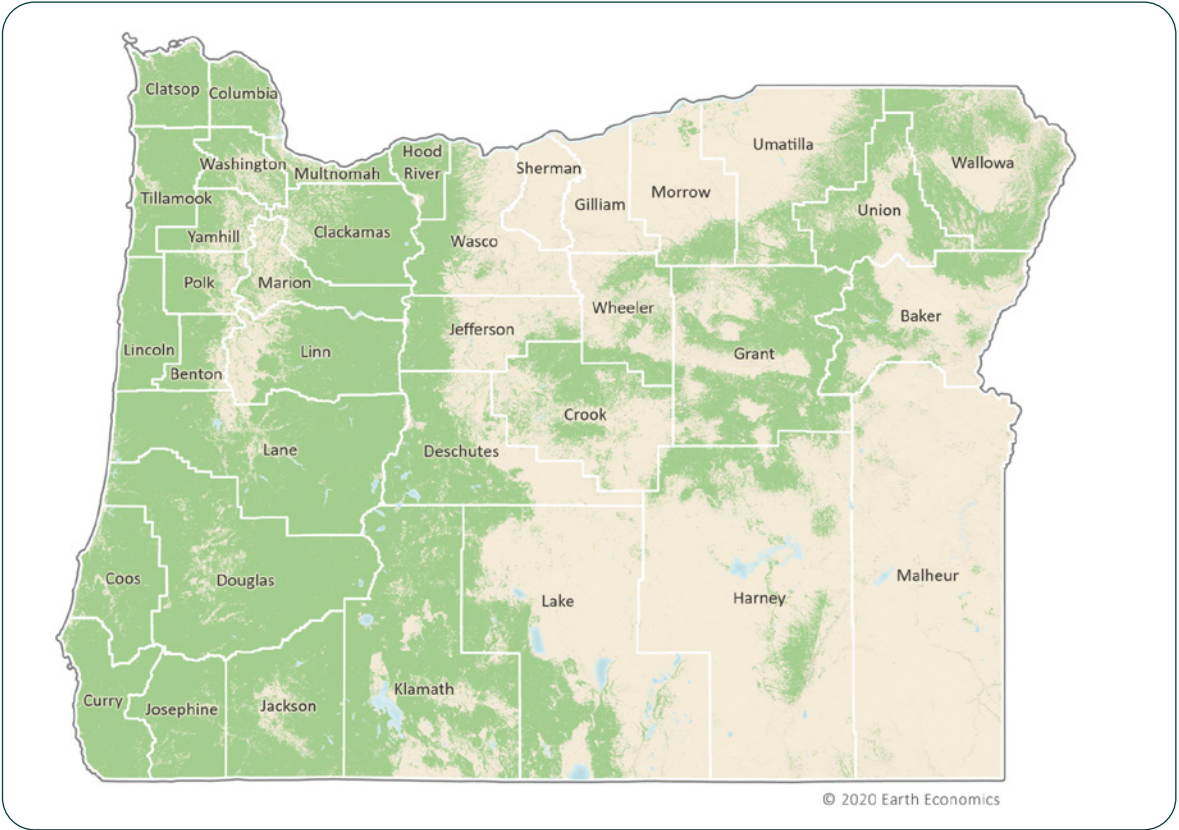


FIGURE 10. ECONOMIC CONTRIBUTION OF OUTDOOR RECREATION IN OREGON – COUNTY-LEVEL RESULTS

County	Trip-Related Spending (000s)	Employment	Labor Income (000s)	Output (000s)	GDP Contributions (000s)	State and Local Tax (000s)
Baker	\$124,938	1,398	\$42,201	\$119,582	\$66,041	\$9,632
Benton	\$84,076	948	\$37,682	\$98,936	\$60,039	\$8,501
Clackamas	\$244,881	2,531	\$112,188	\$263,041	\$165,687	\$20,543
Clatsop	\$823,255	9,096	\$401,042	\$1,008,466	\$625,933	\$82,103
Columbia	\$45,631	516	\$17,731	\$46,083	\$27,129	\$4,056
Coos	\$1,276,746	12,566	\$533,772	\$1,342,689	\$830,749	\$116,676
Crook	\$63,954	764	\$26,089	\$71,222	\$42,403	\$7,199
Curry	\$533,591	6,093	\$184,652	\$538,214	\$304,113	\$51,331
Deschutes	\$421,800	4,840	\$200,918	\$477,745	\$303,799	\$46,266
Douglas	\$524,278	6,234	\$217,332	\$599,776	\$347,395	\$54,011
Gilliam	\$3,493	40	\$1,319	\$3,431	\$1,864	\$210
Grant	\$28,622	348	\$8,325	\$26,557	\$13,297	\$2,173
Harney	\$284,659	2,996	\$112,106	\$292,380	\$173,893	\$28,225
Hood River	\$62,488	598	\$25,633	\$62,719	\$38,775	\$5,182
Jackson	\$345,481	3,811	\$153,596	\$379,985	\$232,557	\$35,503
Jefferson	\$130,523	1,562	\$56,469	\$141,812	\$85,084	\$12,560
Josephine	\$216,532	2,213	\$110,153	\$249,367	\$158,722	\$23,621
Klamath	\$202,051	2,391	\$83,899	\$216,629	\$130,495	\$22,053
Lake	\$30,296	351	\$10,207	\$29,480	\$16,493	\$3,089
Lane	\$1,203,505	13,722	\$560,949	\$1,436,219	\$871,330	\$130,211
Lincoln	\$2,278,172	26,428	\$1,018,569	\$2,684,013	\$1,621,086	\$218,307
Linn	\$153,119	1,740	\$65,449	\$168,555	\$100,646	\$14,588
Malheur	\$114,266	1,246	\$38,357	\$106,295	\$60,720	\$10,868
Marion	\$295,290	3,324	\$138,130	\$344,306	\$211,188	\$29,574
Morrow	\$15,984	177	\$5,995	\$15,992	\$9,162	\$1,156
Multnomah	\$355,165	3,910	\$171,378	\$390,227	\$253,951	\$36,511
Polk	\$79,594	896	\$31,366	\$82,777	\$48,183	\$6,076
Sherman	\$9,537	94	\$4,539	\$10,322	\$6,477	\$929
Tillamook	\$731,420	8,535	\$318,685	\$870,137	\$517,578	\$75,506
Umatilla	\$83,953	997	\$33,654	\$84,435	\$50,398	\$7,933
Union	\$61,827	761	\$24,232	\$68,529	\$38,088	\$6,364
Wallowa	\$23,185	240	\$8,224	\$21,918	\$12,483	\$1,839
Wasco	\$70,412	740	\$27,654	\$73,539	\$43,573	\$6,948
Washington	\$276,161	3,084	\$134,452	\$316,362	\$200,901	\$26,140
Wheeler	\$17,165	228	\$5,942	\$18,885	\$9,312	\$1,303
Yamhill	\$88,421	1,056	\$39,458	\$100,910	\$61,138	\$9,285
GRAND TOTAL	\$11,304,471	126,473	\$4,962,346	\$12,761,535	\$7,740,681	\$1,116,473



APPENDIX C

SPENDING BY OUTDOOR RECREATION ACTIVITY

In 2017, the Oregon Parks and Recreation Department (OPRD) categorized outdoor recreation into 56 unique activity types. Because each of the 56 unique activities could not be directly tied to recreational trips where monetary transactions occurred, Figure 11 of this report provides the average spending associated with each recreation trip, and the total trip-related spending for 32 of these recreation activities. Additionally, because recreation activities are oftentimes combined in the same trip (e.g., hiking and camping), the estimates in Figure 11 represent the participants primary activity to avoid double counting.



FIGURE 11. SPENDING BY OUTDOOR RECREATION ACTIVITY

Recreation Activity	Activity Days	\$/Activity Day	Total Spending (000's)
Attending outdoor concerts, fairs, or festivals	2,772,782	\$30	\$84,280
Beach activities – Lakes, reservoirs, rivers	3,828,727	\$74	\$284,472
Beach activities – Ocean	24,624,288	\$156	\$3,839,032
Camping, vehicle-based	2,752,160	\$71	\$195,742
Cross-country/Nordic skiing	500,205	\$104	\$51,962
Downhill (alpine) skiing or snowboarding	2,628,949	\$55	\$144,455
Fishing	4,000,738	\$66	\$263,271
Flat water canoeing, sea kayaking, rowing, stand-up paddling, tubing, floating	1,193,740	\$41	\$49,160
Going to dog parks or off-leash areas	15,262,566	\$21	\$322,656
Golfing	9,182,705	\$99	\$912,832
Hunting	1,924,624	\$111	\$214,309
Long-distance hiking (backpacking)	1,638,660	\$77	\$126,261
Motorized trail activity	2,365,771	\$105	\$247,388
Nature observation (e.g. birds, other wildlife, forests, wildflowers)	17,334,229	\$61	\$1,049,419
Outdoor photography, painting, drawing	5,763,183	\$108	\$624,199
Pedaling bicycles on paved paths or natural trails (including mountain biking)	6,077,341	\$53	\$322,435
Pedaling bicycles on streets or sidewalks	11,328,713	\$82	\$925,983
Picnicking, nature immersion (e.g. relaxing, escaping heat or noise)	16,403,027	\$13	\$212,453
Playing sports at parks	31,149,564	\$13	\$403,451
Power-boating (cruising or water skiing)	710,697	\$62	\$44,036
Shellfishing/clamming	404,438	\$98	\$39,765
Sightseeing/driving	4,717,912	\$90	\$424,875
Snowmobiling	199,505	\$141	\$28,136
Traveling for collecting/foraging (e.g. rocks, plants, mushrooms, berries)	2,161,086	\$36	\$77,310
Using personal watercraft, such as jet ski	356,460	\$62	\$22,087
Visiting historic sites or history-themed parks (e.g. museums, outdoor displays, visitor centers)	3,002,332	\$66	\$198,763
Visiting nature centers (e.g. zoo, botanical garden, arboretum)	2,439,010	\$53	\$129,688
White-water canoeing, kayaking, rafting	645,747	\$33	\$21,236
Wind-surfing, kiteboarding, sailing	236,866	\$189	\$44,812
Total	175,606,029	\$75	\$11,304,471

APPENDIX D

INPUT-OUTPUT SECTOR MAPPING

SPENDING CATEGORY	IMPLAN CODE	IMPLAN DESCRIPTION
Gas and oil	154	Petroleum refineries
Other auto expenses	402	Retail - Motor vehicle and parts dealers
Home garden equipment (i.e., bird baths) for wildlife watching	405	Retail - Building material and garden equip-ment and supplies stores
Groceries	406	Retail - Food and beverage stores
Recreation apparel	409	Retail - Clothing and clothing accessories stores
Gear, sporting goods and boat equipment	410	Retail - Sporting goods, hobby, musical instru-ment and book stores
Souvenirs and other expenses	412	Retail - Miscellaneous store retailers
Local transportation	418	Transit and ground passenger transportation
Parking	420	Scenic and sightseeing transportation and sup-port activities for transportation
Private land use fees	447	Other real estate
Rental Vehicles	450	Automotive equipment rental and leasing
Attractions/Entertainment and recreation fees	504	Other amusement and recreation industries
Guide fees	504	Other amusement and recreation industries
Hotels and motels, hotel cabins	507	Hotels and motels, including casino hotels
Airbnb, Homeaway, etc.	508	Other accommodations
Camping	508	Other accommodations
Restaurants and bars	509	Full-service restaurants
Other auto expenses	512	Automotive repair and maintenance, except car washes
Other boat expenses	516	Personal and household goods repair and maintenance
Processing and taxidermy, hunt-ing and fishing	520	Other personal services
Admission fees, federal	528	Other federal government enterprises
Entry fees, state	531	Other state government enterprises
Entry fees, local	534	Other local government enterprises



Photo Credit: hood-gorge.com (photographer: Modoc Stories)

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