



THRIVE

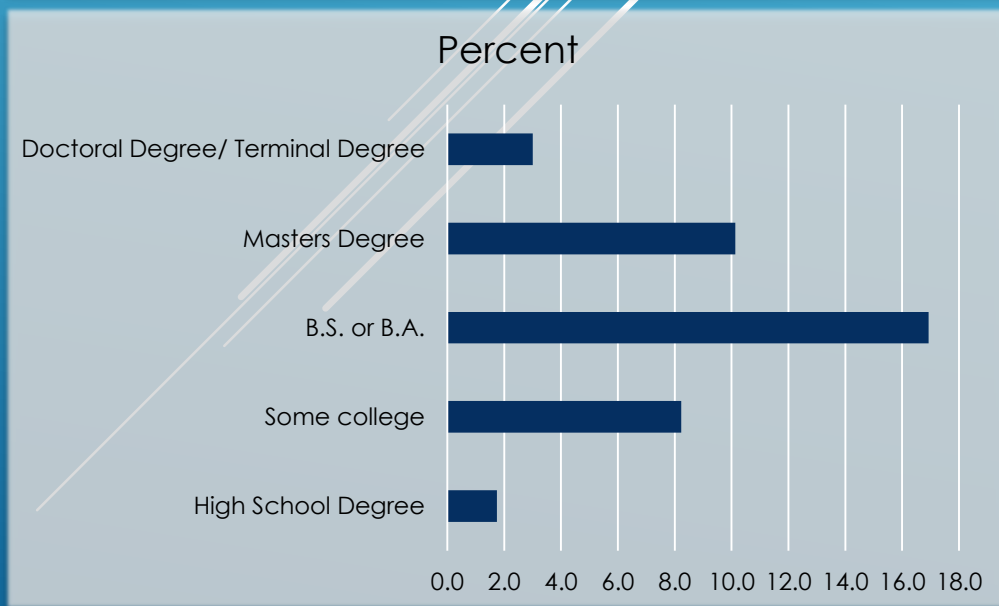
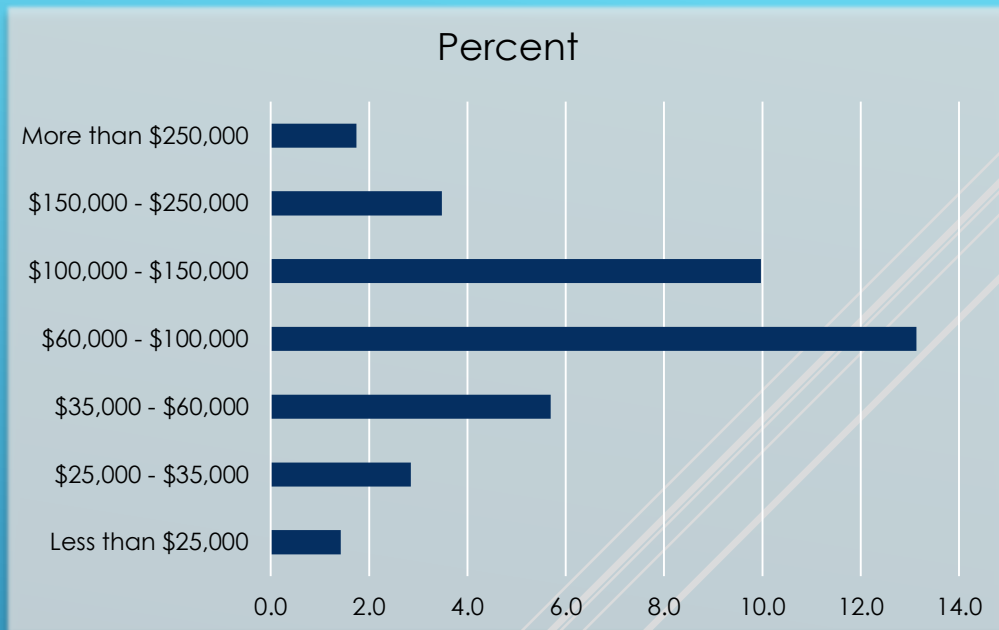
Regional Partnership



Preliminary Report

Survey Sample Description (Non-random)

A total of 632 people responded to the survey, representing 17 activity groups. Nearly two-thirds of respondents were female (62%) and the average age was 47. Diversity of education and income was well-represented, but ethnic diversity was lacking, especially when compared to regional census data.

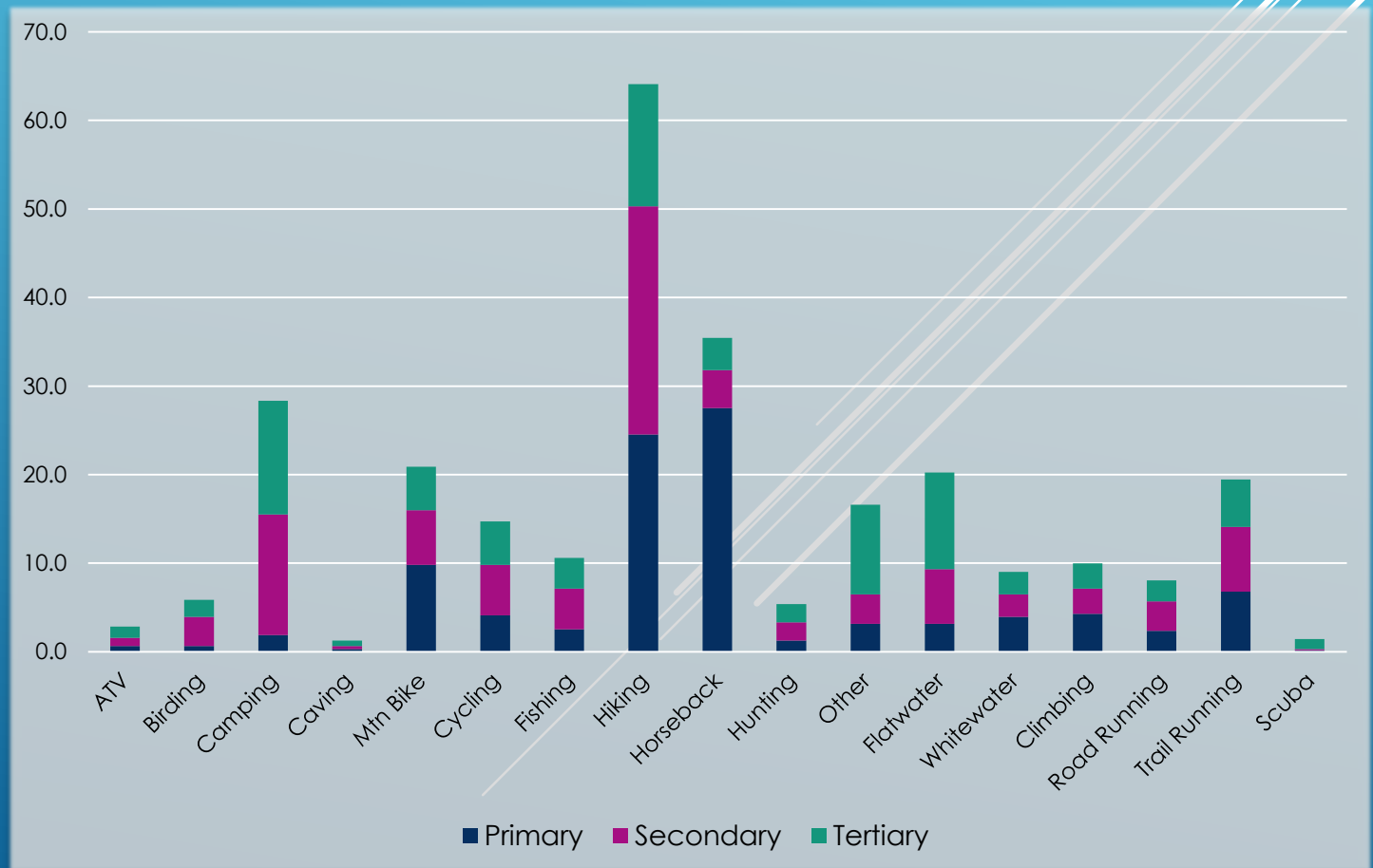


■ Asian/Pacific Islander 0.5% ■ Black 0%
■ Hispanic 1.1% ■ Native-American 0.6%
■ Other 1% ■ White 94%

Recreation Participation

Popular activities included Hiking, Horseback Riding, Camping, Mountain Biking and Running. Of significant interest is the breakdown of primary and secondary activities. Flatwater paddling and camping, for instance, are more popular as secondary and tertiary activities. These may not be a primary pull factor for tourists, but they can prolong visits and encourage return visits. Horseback riders do not commonly participate in other outdoor activities, but hiking is enjoyed by all.

(Note: As this is not a random survey and not all user groups responded equally, user totals are less relevant than primary, secondary, and tertiary data).



ACTIVITY CATEGORIES

To simplify the data, a factor analysis was conducted on the activities to see which ones “cluster” together (i.e. users participate in both). This provides insight into similarities in users across activity groups for collaboration, marketing, and recreation planning. The best grouping resulted in six categories, with clusters illustrated below (in blue). The new clusters were named based on the highest loading variable (column names). Some items (i.e. camping) were not unique across categories, and some loaded negatively (i.e. birding, horseback) within their clusters, meaning they are very different from the others in the cluster.

Rotated Component Matrix ^a						
	Component					
Activities	Runners	Hikers	Fishing	Cycling	ClimbWW	Specialized
RoadRun	0.688	-0.029	-0.044	0.018	-0.127	0.038
TrailRun	0.680	0.004	-0.142	-0.010	0.160	-0.009
Camping	-0.385	-0.150	-0.266	0.312	-0.015	0.304
Horseback	-0.224	-0.819	-0.094	0.124	-0.224	-0.160
Hiking	-0.273	0.574	-0.212	0.166	-0.442	0.117
Flatwater	-0.305	0.397	-0.067	-0.074	0.155	-0.164
Fishing	-0.059	0.076	0.788	0.041	-0.019	-0.014
Hunting	-0.068	-0.115	0.731	0.021	-0.001	0.055
Mtn Bike	-0.047	0.085	-0.028	-0.664	0.185	-0.141
Birding	0.111	0.253	0.065	0.597	0.007	-0.350
Cycling	0.239	0.215	-0.016	-0.505	-0.289	-0.045
Whitewater	-0.125	0.026	0.007	-0.033	0.719	-0.105
Climbing	0.115	0.164	-0.055	0.003	0.469	0.197
Scuba	0.039	0.065	0.048	0.110	0.116	0.643
Caving	-0.009	0.016	0.002	-0.076	-0.071	0.634

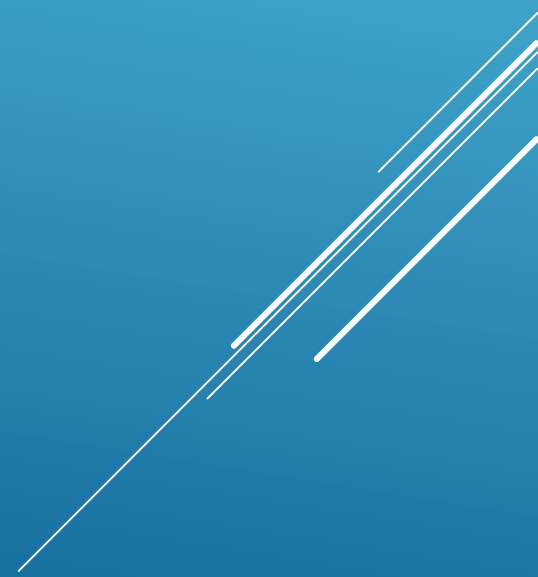
Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

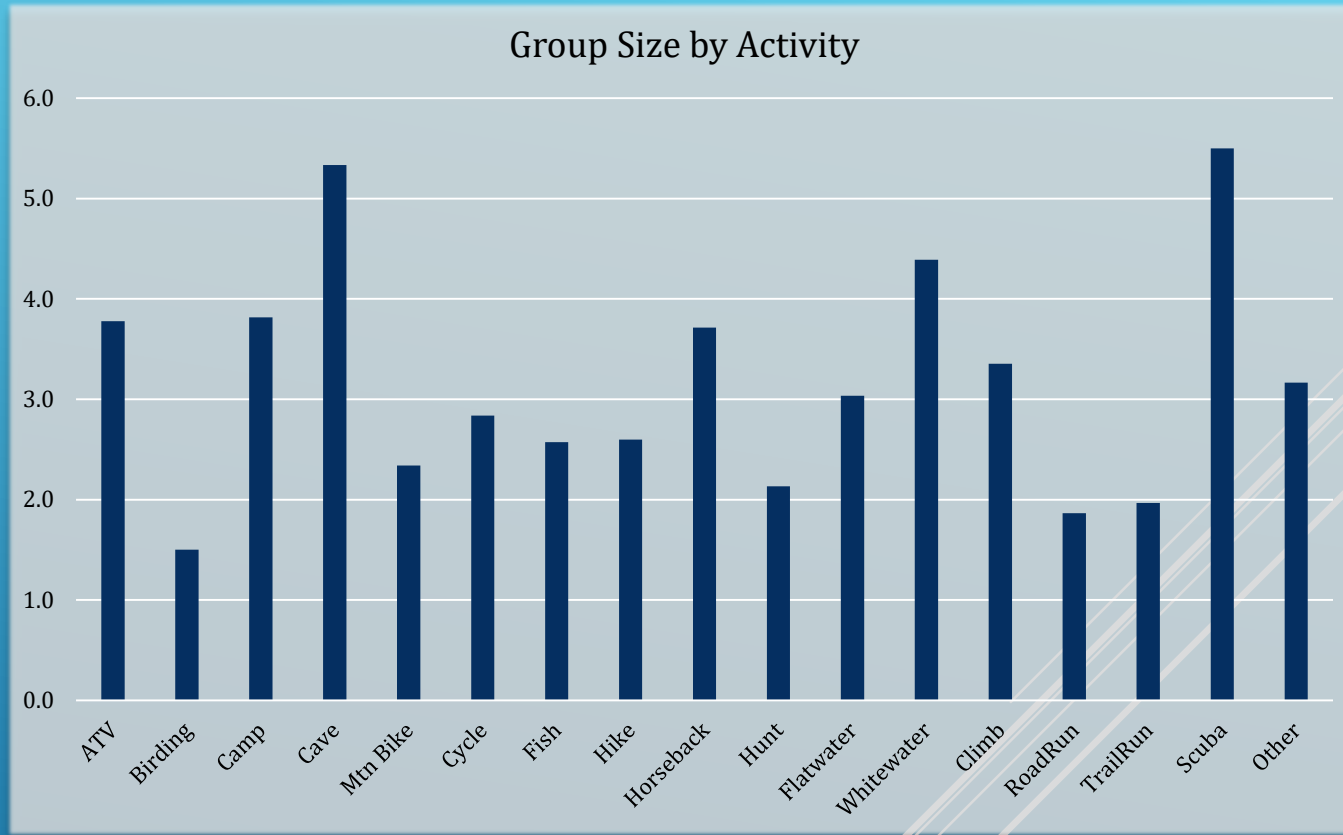
Items in the same column with scores higher than 0.300 are highly related to one another. Negative scores < -0.3 indicate significant differences from others in that column.

These clusters come as no surprise, but there are some interesting highlights. Horseback riders are unique from all other activities and don't often participate in other types of recreation. Climbers and whitewater kayakers may be similar user groups, as are the technical activities of scuba and caving, which require specialized equipment and access. Birders didn't cluster well with any group, though they are closest to the hikers and flatwater paddlers.

RESERVED FOR REGIONAL
RECREATION DATA



Group Size

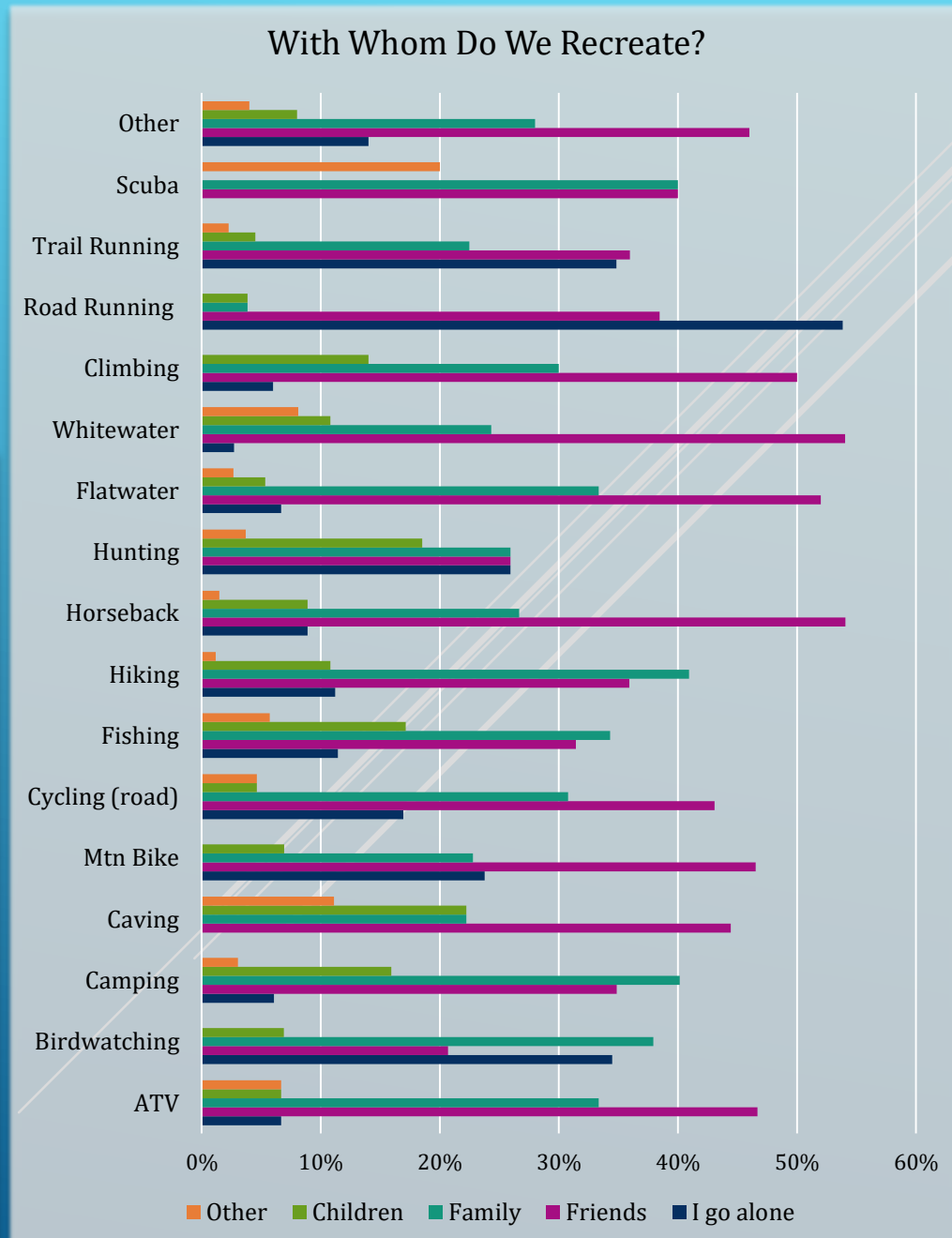


	ATV	Birding	Camp	Cave	Mtn Bike	Cycle	Fish	Hike	Horseback	Hunt	Flatwater	Whitewater	Climb	RoadRun	TrailRun	Scuba	Other
Mean	3.8	1.5	3.8	5.3	2.3	2.8	2.6	2.6	3.7	2.1	3.0	4.4	3.4	1.9	2.0	5.5	3.2
N	9.0	18.0	71	3	65	49	21	174	84	15	56	23	31	22	63	2	30
Std. Dev	1.6	0.5	1.9	1.2	1.0	1.8	1.4	1.3	1.6	1.0	1.6	1.5	1.3	1.8	1.2	2.1	1.8

Group Composition

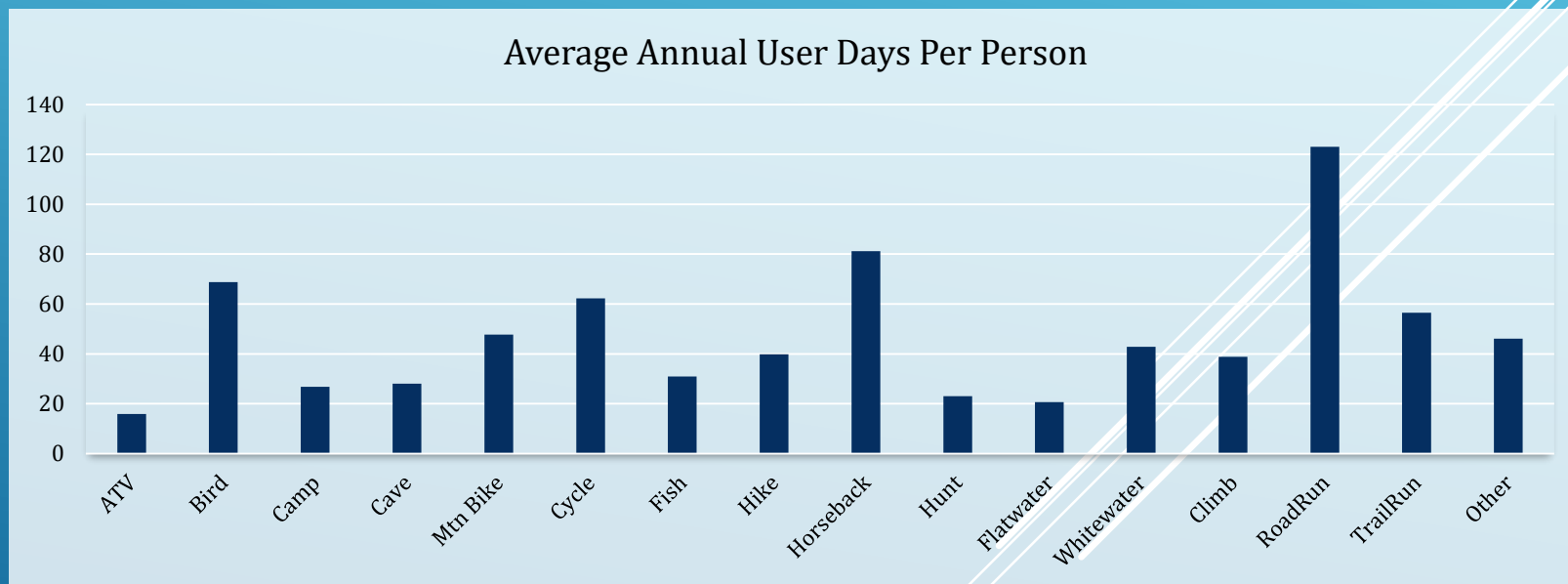
Group composition can be as relevant as group size. Families with children require different accommodations than a group of individual adults. For recreational tourism, families tend to stay longer and spend more, as well.

	I go alone	Friends	Family	Children	Other	Total N
ATV	7%	47%	33%	7%	7%	15
Birdwatching	34%	21%	38%	7%	0%	29
Camping	6%	35%	40%	16%	3%	132
Caving	0%	44%	22%	22%	11%	9
Mtn Bike	24%	47%	23%	7%	0%	101
Cycling (road)	17%	43%	31%	5%	5%	65
Fishing	11%	31%	34%	17%	6%	35
Hiking	11%	36%	41%	11%	1%	259
Horseback	9%	54%	27%	9%	1%	135
Hunting	26%	26%	26%	19%	4%	27
Flatwater	7%	52%	33%	5%	3%	75
Whitewater	3%	54%	24%	11%	8%	37
Climbing	6%	50%	30%	14%	0%	50
Road Running	54%	38%	4%	4%	0%	26
Trail Running	35%	36%	22%	4%	2%	89
Scuba	0%	40%	40%	0%	20%	5
Other	14%	46%	28%	8%	4%	50



Annual (2019) User Days by Activity Type

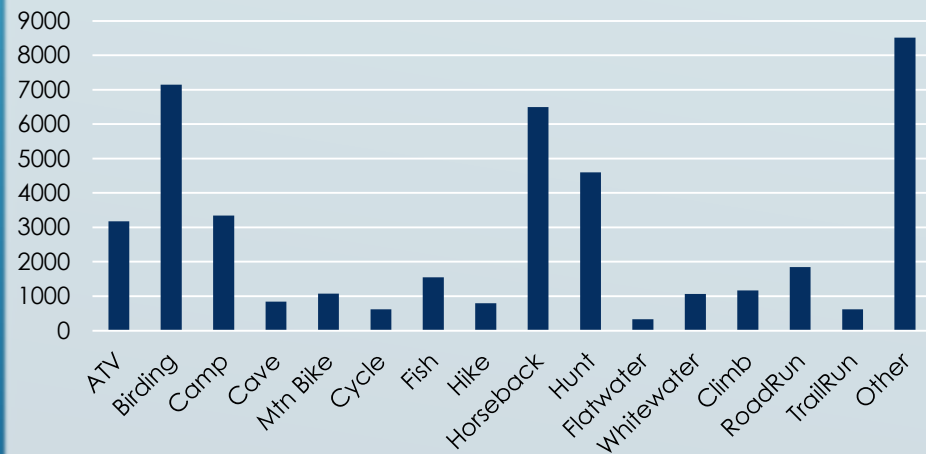
Activities that are more accessible and require less specialized equipment (i.e. running, birding) are enjoyed more often by users.



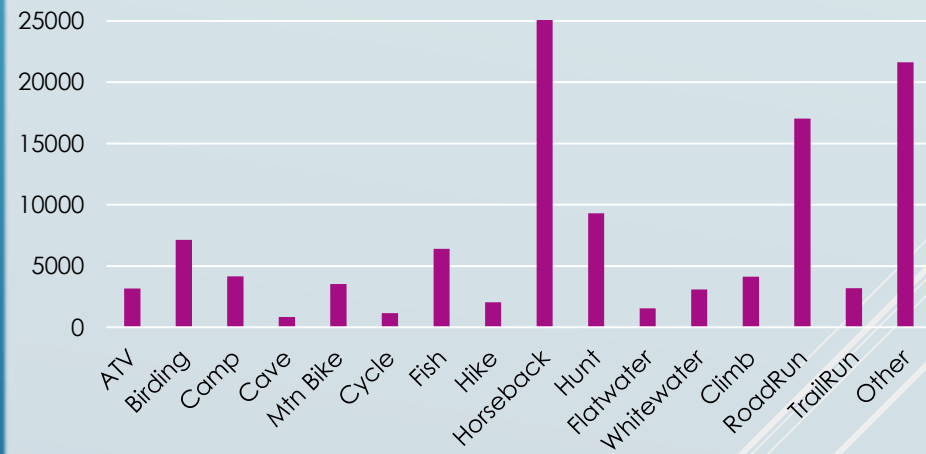
Recreation Expenditures

Spending varies across user types, as some activities are more resource-intensive. Total expenditures here include only purchases made on a single, "typical" outing, so larger gear purchases are excluded. A conservative estimate can be provided by using the Median score for each participant, as the Mean is skewed by those who spend large amounts. These estimates are for annual spending per person, based on the average number of user days. Total users for each activity category remain unknown, so overall estimates are speculative.

Total Annual Expenditures per person x User Group (Median)



Potential Annual Expenditures per person x User Group (Mean)



	ATV	Birding	Camp	Cave	Mtn Bike	Cycle	Fish	Hike	Horseback	Hunt	Flatwater	Whitewater	Climb	RoadRun	TrailRun	Other
Annual User Days	16	69	27	28	48	62	31	40	81	23	21	43	39	123	56	46
Mean Trip \$pp	200	104	155	30	74	19	207	51	528	405	75	72	107	139	57	470
Median Trip \$pp	200	104	125	30	23	10	50	20	80	200	16	25	30	15	11	185
Annual Median \$pp	3180	7145	3348	840	1074	622	1548	797	6493	4600	330	1070	1165	1845	621	8516
Annual Mean \$pp	3180	7145	4151	840	3531	1158	6412	2040	42859	9315	1552	3080	4143	17036	3202	21635

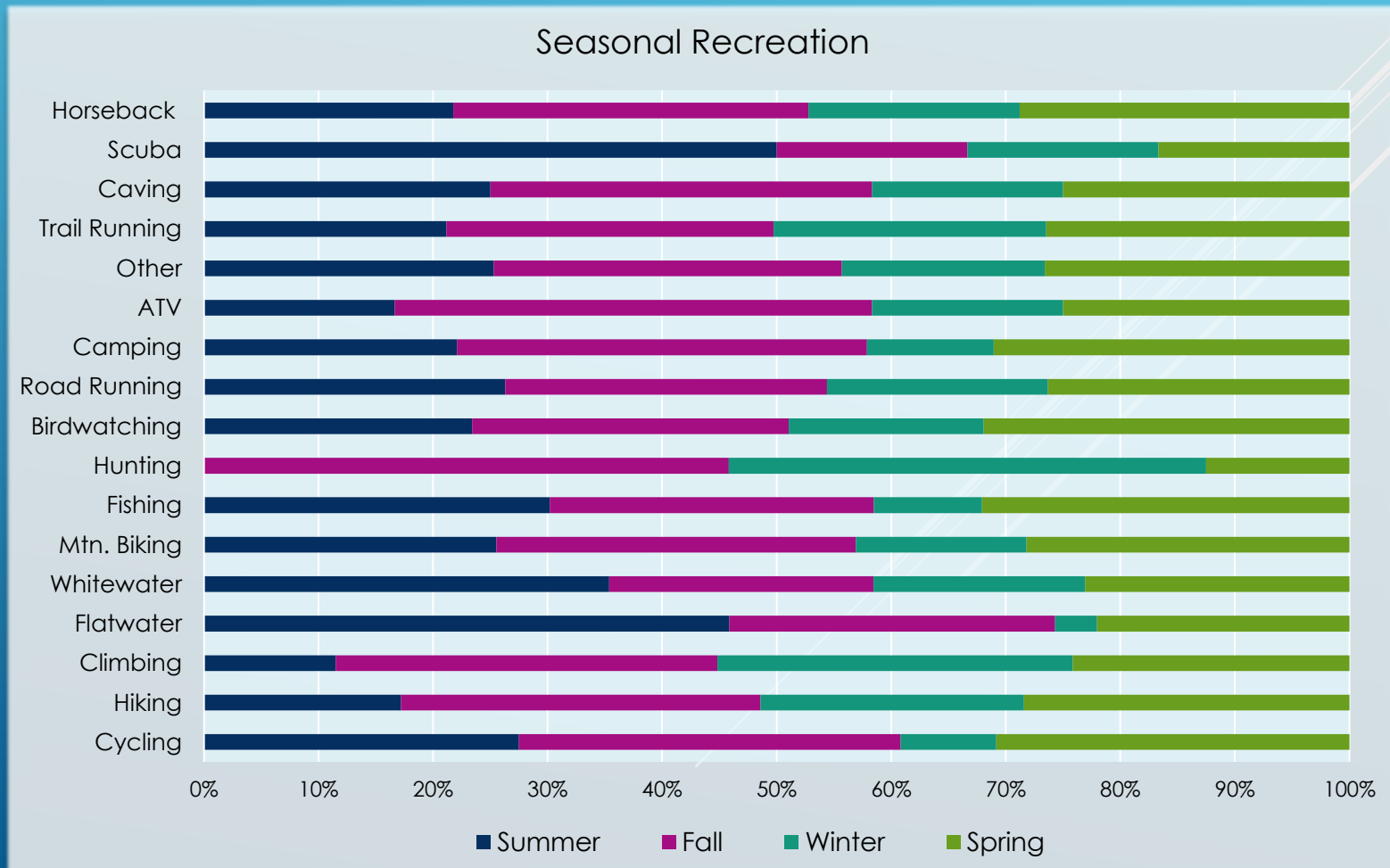
Full Expenditure Data for all Categories (N= 239)

	ATV			Birding			Camping			Caving			Mtn Bike			Cycling			Fishing			Hiking		
	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median
Transportation	200		200	104	136	104	155	133	125	30		30	74	138	23	19	26	10	207	295	50	51	90	20
Lodging	200		200	65	92	65	67	29	50	15		15	63	130	0	30	63	0	210	399	6	39	100	0
Food	200		200	80	28	80	102	88	75	25		25	74	98	33	33	39	20	234	349	100	56	68	30
Gear	20		20	50	71	50	7	12	0	5		5	42	60	5	12	17	5	316	528	100	73	147	0
Entertainment	20		20	0	0	0	0	0	0	0		0	28	73	0	0	0	0	0	0	0	10	34	0

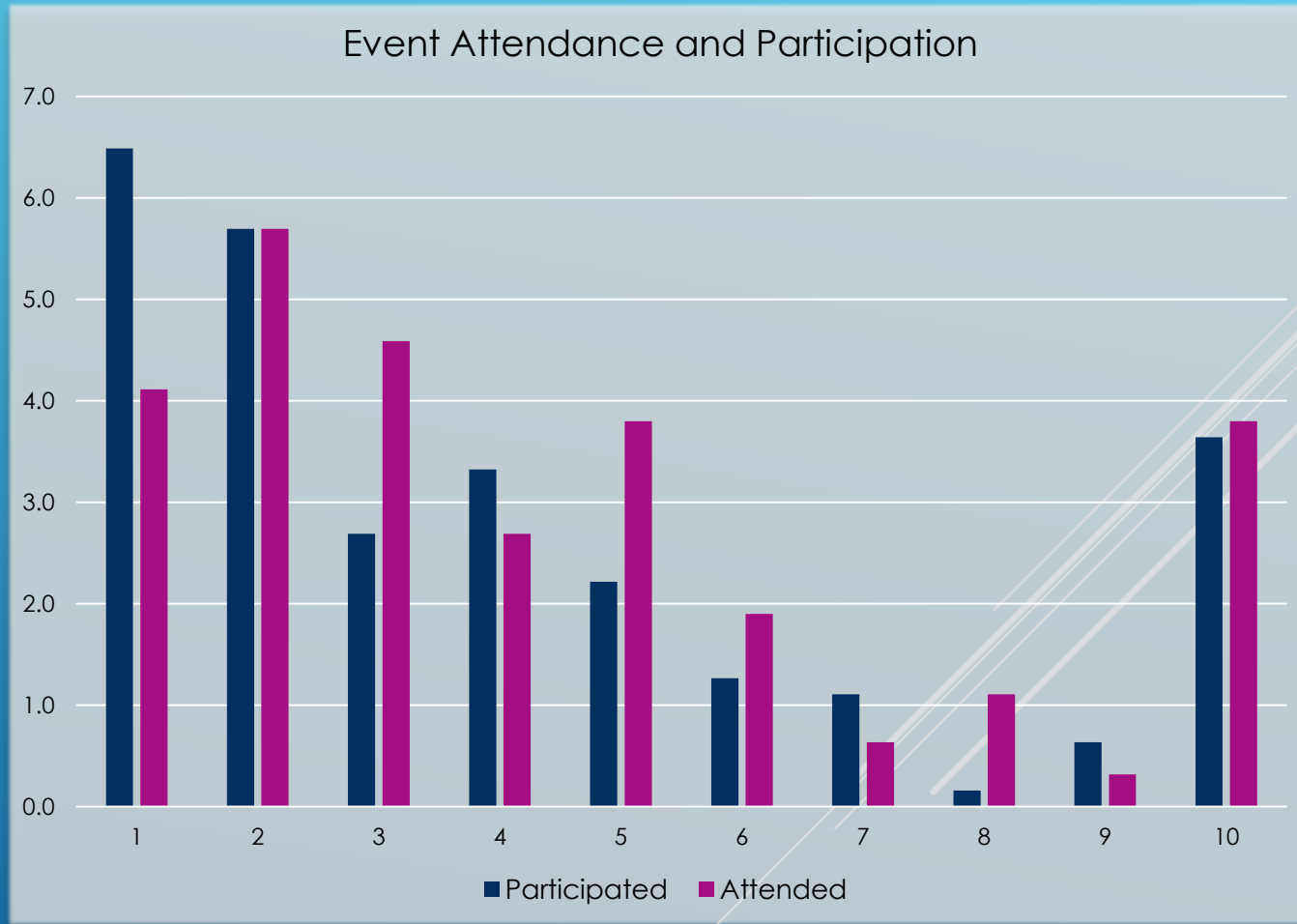
Horseback			Hunting			Other			Flatwater			Whitewater			Climbing			Road Running			Trail Running			Total		
Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median	Mean	Std. Dev	Median
528	1143	80	405	524	200	470	694	185	75	115	16	72	151	25	107	163	30	139	349	15	57	113	11	220	671	30
356	1139	90	83	104	50	75	150	0	75	109	25	6	11	0	18	23	20	61	120	0	68	105	0	147	655	19
232	440	75	90	96	50	169	230	85	165	290	20	53	89	20	117	252	40	184	448	10	89	140	20	129	284	40
865	2373	50	175	282	25	67	115	0	46	86	10	169	503	0	66	162	0	23	49	0	61	105	28	313	1352	20
47	159	0	10	14	10	250	500	0	153	298	5	5	9	0	0	0	0	33	82	0	23	72	0	30	124	0

Seasonal Recreation

Planning for seasonal recreation and tourism can maximize local impact and help accommodate various user groups. The Thrive region is largely a “shoulder season” destination, as Spring and Fall provide pleasant weather. However, watersports (paddling, scuba) are popular during the hot summer months, while hunting and climbing keep areas busy throughout the winter.



Overall Participation and Attendance at events (2019)



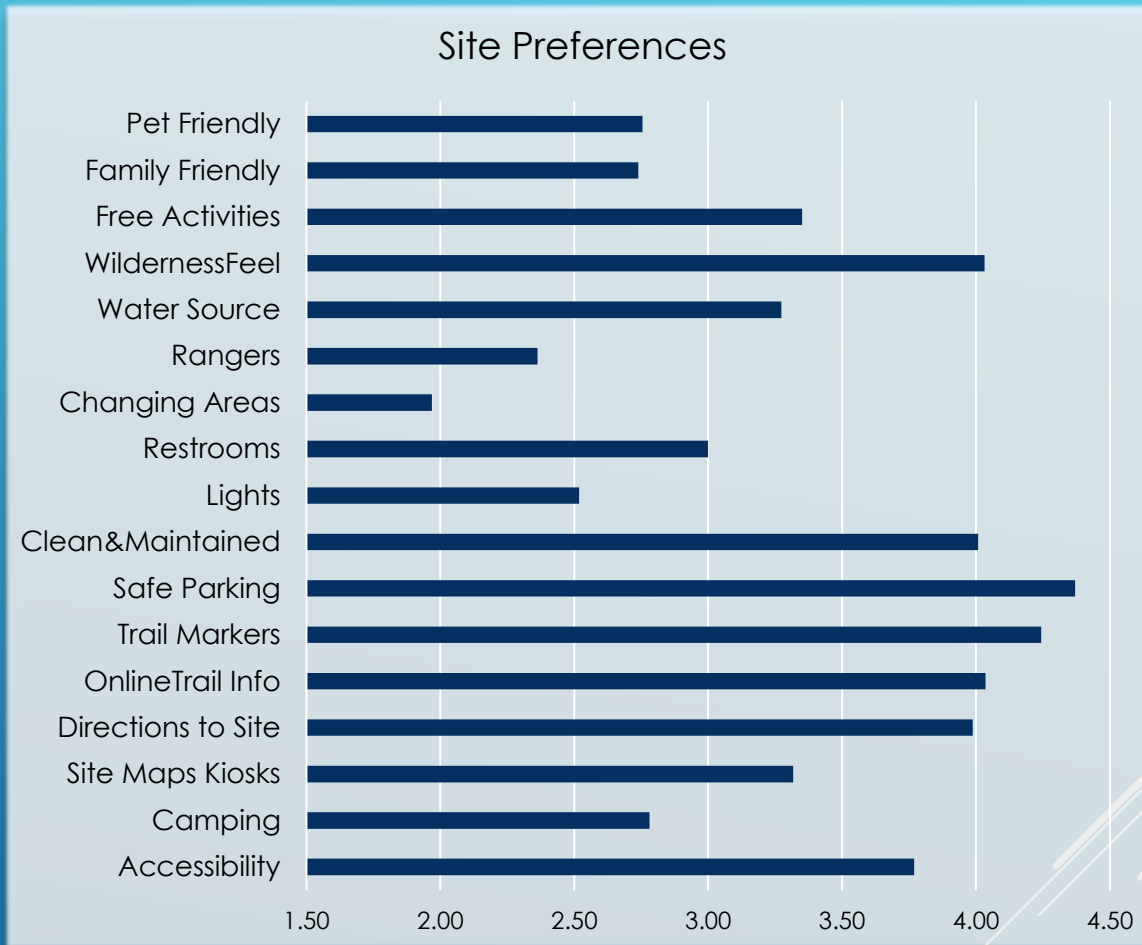
EVENT ATTENDANCE BY ACTIVITY

EVENT ATTENDANCE/PARTICIPATION

■ AttendEvents ■ ParticipateEvents



General site Preferences (All Users)

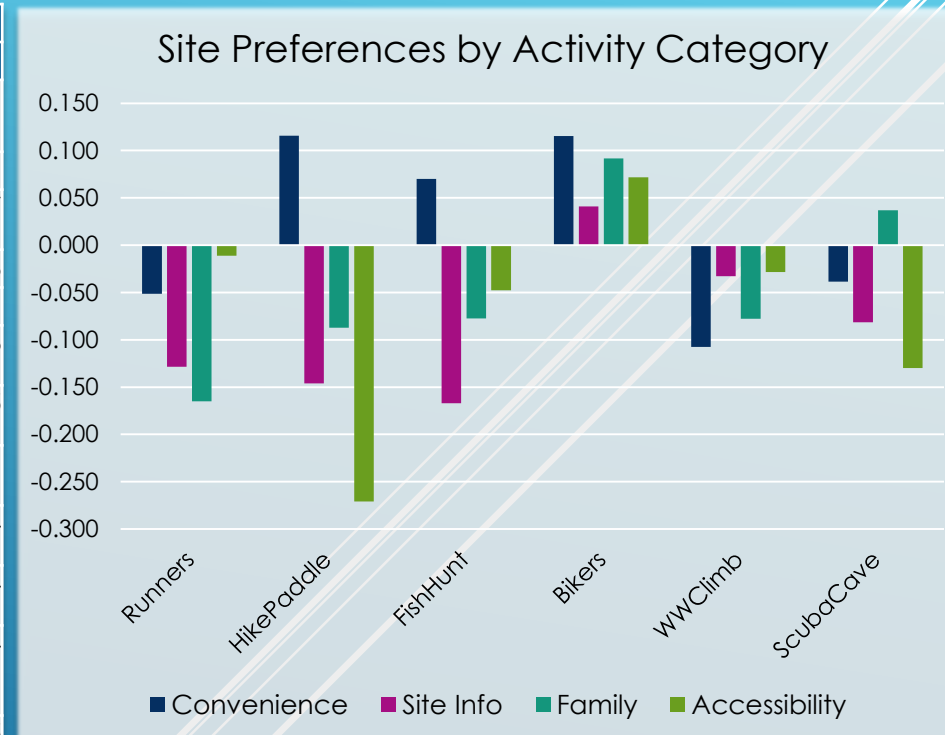


As a whole, outdoor recreationalists prioritize site information (trail markers, online info) and maintenance above other variables. Maintaining a wilderness feel and making areas accessible for all, are also highly valued.

Site Preference Categories

When Site Preference variables are clustered, we find four logical categories. Of interest is the negative relationship of Accessibility and Wilderness Feel, which requires a delicate balance when planning recreation sites.

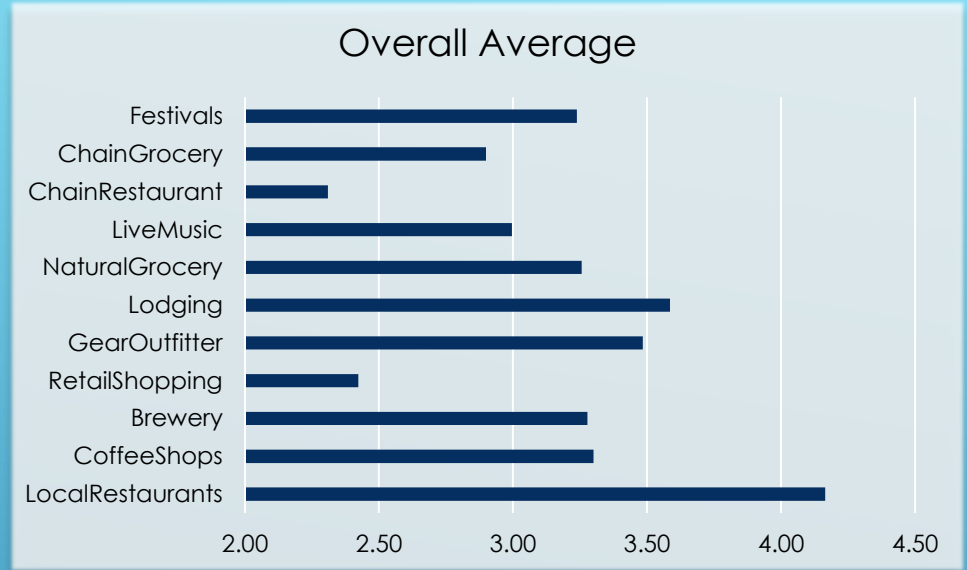
Rotated Component Matrix ^a				
	Component			
	Convenience	Information	Family	Accessible
Restrooms	0.824	0.183	0.015	0.089
Changing Areas	0.803	-0.013	0.148	0.077
Rangers	0.765	0.201	0.101	0.046
Lights	0.751	0.261	0.088	0.051
Water Source	0.557	0.277	0.366	-0.023
Online Trail Info	0.051	0.792	0.033	-0.095
Trail Markers	0.208	0.741	0.024	0.091
Directions to Site	0.147	0.718	0.192	0.304
Safe Parking	0.226	0.620	-0.025	-0.124
Site Maps & Kiosks	0.199	0.587	0.373	0.294
Clean & Maintained	0.489	0.506	0.019	-0.235
Pet Friendly	0.120	0.117	0.699	0.023
Family Friendly	0.231	0.057	0.613	0.082
Camping	0.188	0.358	0.610	0.201
No Cost Activities	-0.061	-0.124	0.494	-0.131
Accessibility	0.075	0.102	0.210	0.695
Wilderness Feel	-0.027	0.120	0.442	-0.685



Interesting patterns emerge when looking at relationships between activity categories and site preferences. Priorities for site development should be catered to the desired user groups, which vary widely.

SITES LIKELY TO RECEIVE TOURISM DOLLARS

Overall popular businesses would include local restaurants, affordable lodging, gear stores and natural grocers. Chain businesses are less appealing to all users. When viewed by activity category, divergent preferences emerge. Key users for each business type can be seen in the area map below



Likely Customers by Activity Category

