

The Social and Economic Impact of the Removal of the Gold Ray Dam: Establishing 2010 Baseline Data

Southern Oregon University Research Center

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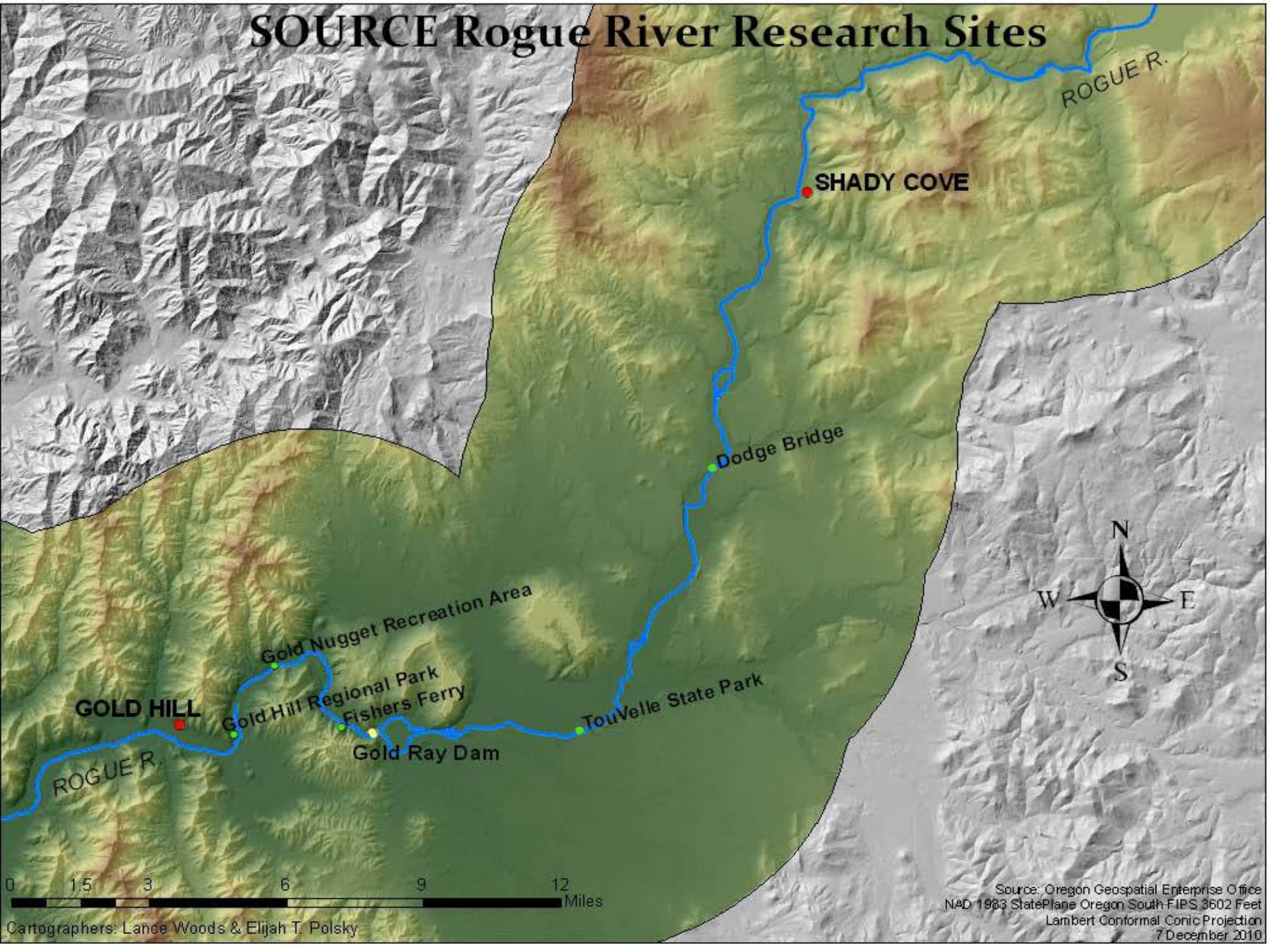
Research Directive: Establish baseline data to assess the social and economic impact of dam removal

1. Recreational use (visitor counts)
2. Recreational experience (visitor surveys)
3. Property values and predicted changes
4. Revenue generated by businesses that utilize the Rogue
5. Working conditions for businesses that utilize the Rogue

Interviews with:

- Fishing Guides
- Rafting Companies
- Rental Companies

SOURCE Rogue River Research Sites



0 1.5 3 6 9 12 Miles

Cartographers: Lance Woods & Elijah T. Polsky

Source: Oregon Geospatial Enterprise Office
NAD 1983 StatePlane Oregon South FIPS 3602 Feet
Lambert Conformal Conic Projection
7 December 2010

Methodology

How we approached gathering data:

Visitor Counts and Surveys

Sites

Tou velle Picnic area/Boat Launch/Beach	Population Counts - Hourly Average
Fishers Ferry	Unique Hourly Count
Dodge Bridge	Unique Count - twice daily
Nugget Falls Park	Population Count - twice daily
Gold Hill Sports Park	Included a count later in research (we discovered a separate park area)

Comparison Site

Shady Cove	Unique Hourly Count- Saturday 7/3 & Sunday 7/11
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Days

Saturday	Sunday	Monday
6/12/2010	6/6/2010	8/9/2010
6/19/2010	7/4/2010	
7/3/2010	7/11/2010	
7/17/2010	8/22/2010	

Times

Daily from 9 a.m. to 4 p.m.

Methodology

Sampling

Visitor Counts:

- Population Count vs.
Unique/Actual count
- Tou velle Picnic and Tou velle Beach

Total Population count
Hourly/daily averages

Visitor Surveys:

In person Interviews

- Targeted diversity among respondents

Fishing Guides:

Phone Interviews

- We gathered a list of 100 Rogue River fishing guides from:

Oregon State Marine Board

Rogue River Guides Association
Website

Asking guides to give us list of
contractors they knew

73% Response Rate!!!

Methodology

How we approached gathering the data:

Non-Rafter Surveys

- Where respondent was from
- Current recreational activity
- How long they have been engaging in river activity
- How much respondent spent on food/gas locally
- What makes for an enjoyable experience on the river
- Basic demographic questions

Guided Rafter Surveys

- Where respondent was from
- Why respondent was in the area
- How much respondent spent locally
- What makes for an enjoyable experience on the river
- Basic demographic questions

Methodology

How we approached gathering the data:

Fishing Guide Interview

Phone calls made between 8/30 – 11/19

Inquiry:

- What kind of fishing they guide
- How many paid days on the river for 2009 and 2010
- How much they charged per person/boat
- Ideal river flow
- How dam removal might affect their business

Rafting Company Interview

Phone calls made between 10/26 - Present

Inquiry:

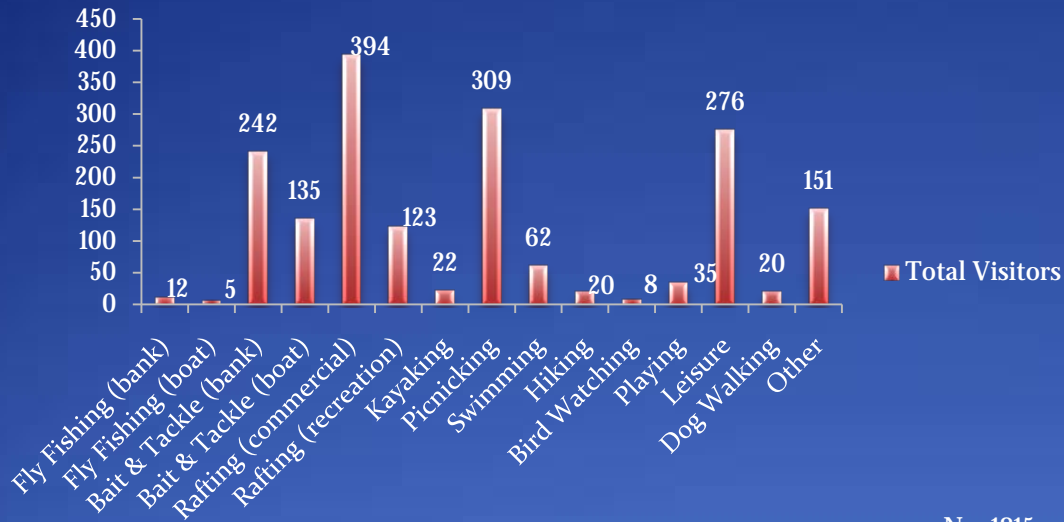
- Type of trips they offer
- How many trips they booked for 2009 and 2010
- Labor costs of operation (guides, vans, drivers, etc.)
- Importance of the Nugget/Powerhouse run
- How business might change now that the dam has been removed

Recreational User Findings

- Breakdown of most popular activities for each site
- How far river users travel to get to the Rogue
- How long people have been using the river for recreation
- Revenue generated by river users
- Qualities river users have identified as essential for a positive recreational experience

Visitor Counts

River Activity (cumulative)

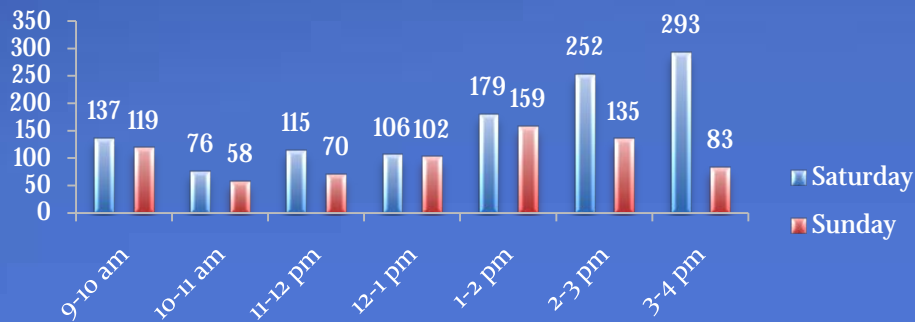


N = 1815

River Activity

Rafting (commercial)	22%
Fishing (all)	22%
Picnicking	17%
Leisure	15%
Other	8%
Rafting (recreation)	7%
Swimming	3%
Playing	2%
Kayaking	1%
Hiking	1%
Dog Walking	1%
Bird Watching	0%

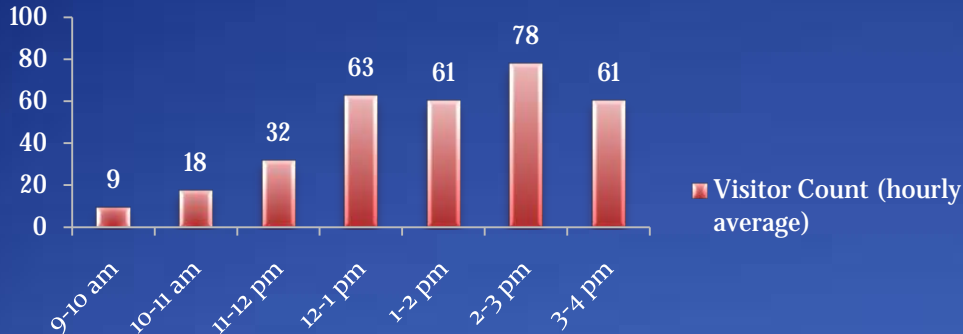
Total Hourly Usage (cumulative)



Based on Count Totals from all Saturday and Sundays

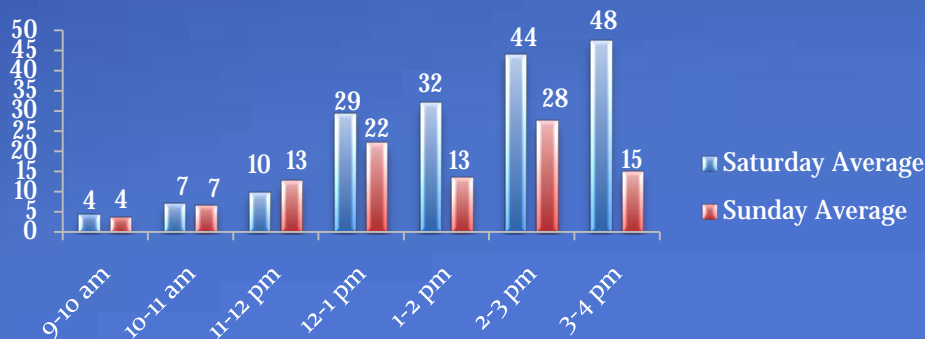
Visitor Counts

Tou velle Picnic Hourly Usage (All Days)



Base on an hourly total population count

Tou velle Picnic Hourly Usage (Saturday vs. Sunday)



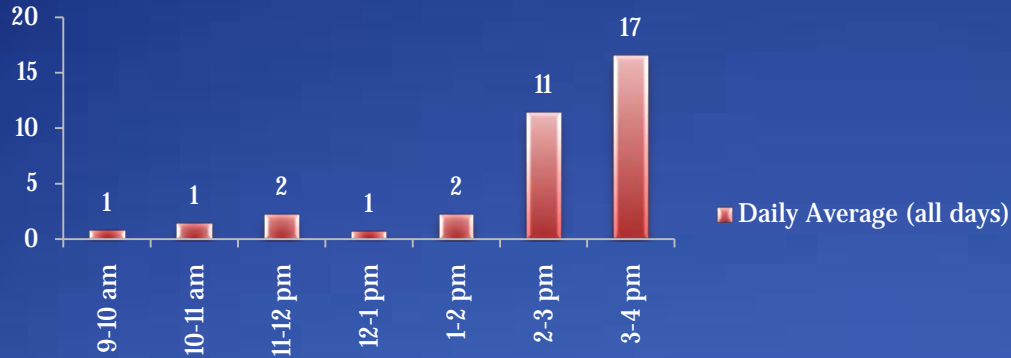
Based on an hourly total population count

Tou velle Activity

Picnicking	77%
Leisure	8%
Playing	5%
Swimming	2%
Other	2%
Bait & Tackle (boat)	2%
Bait & Tackle (bank)	1%
Dog Walking	1%
Hiking	1%
Rafting (commercial)	1%
Rafting (recreation)	0%
Bird Watching	0%
Fly Fishing (bank)	0%
Fly Fishing (boat)	0%
Kayaking	0%

Visitor Counts

Tou velle Beach Hourly Usage (All Days)



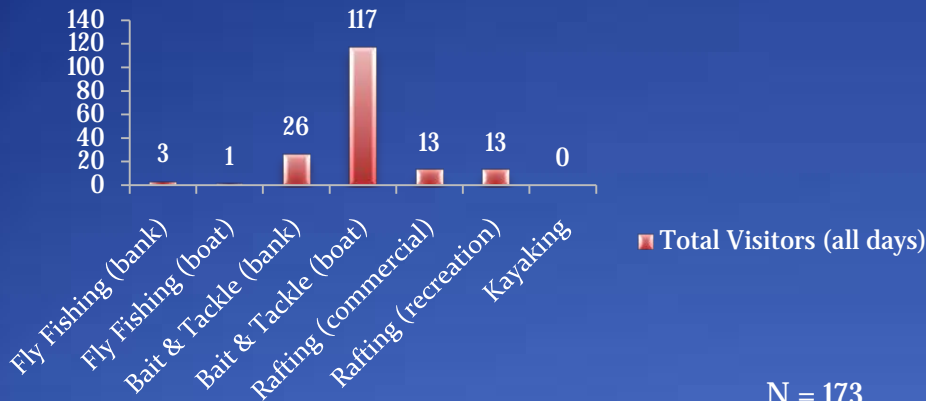
Based on an hourly total population count

Tou velle Beach Activity

Picnicking	57%
Swimming	19%
Leisure	14%
Playing	8%
Dog Walking	1%
Other	1%
Hiking	0%
Bird Watching	0%

Visitor Counts

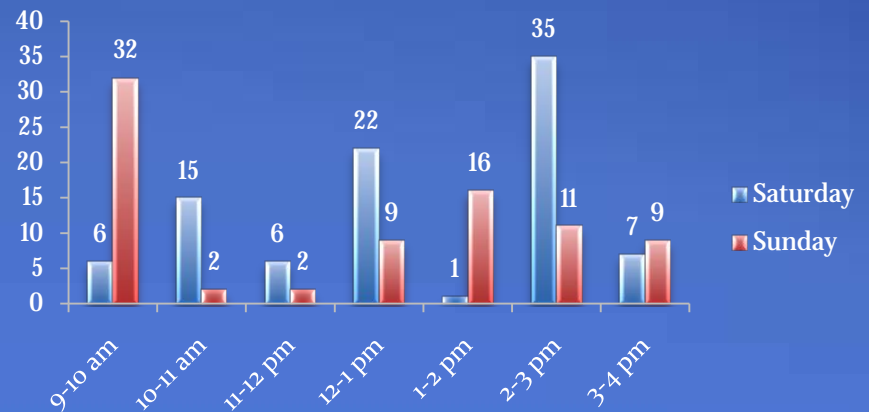
Tou velle Boat Ramp Usage (Activity)



Based on an actual hourly count

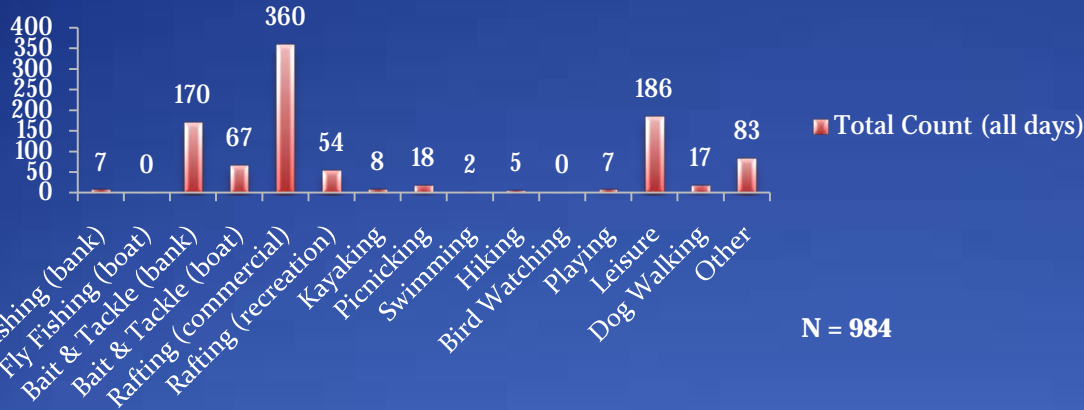
N = 173

Tou velle Boat Ramp (Saturday vs. Sunday)



Visitor Counts

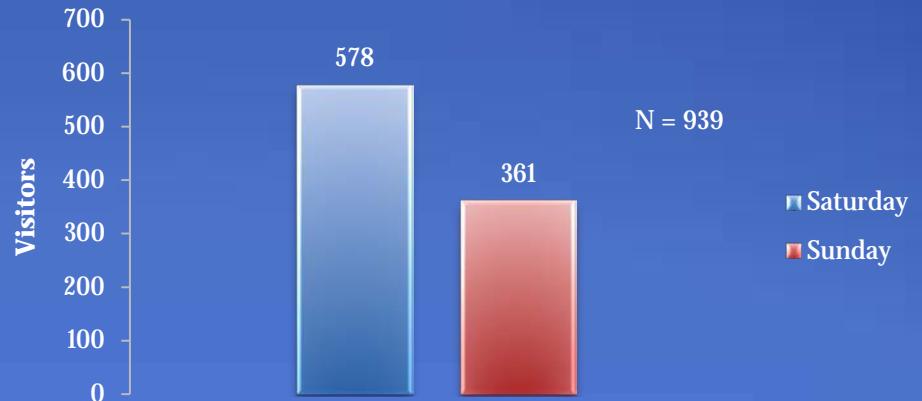
Fishers Ferry Usage (Activity)



Top 5 Activities at Fishers Ferry:

1. Commercial Guided Rafting – 37%
2. Bait & Tackle Fishing – 24%
3. Leisure – 19%
4. Other – 8%
5. Recreational Rafting – 5%

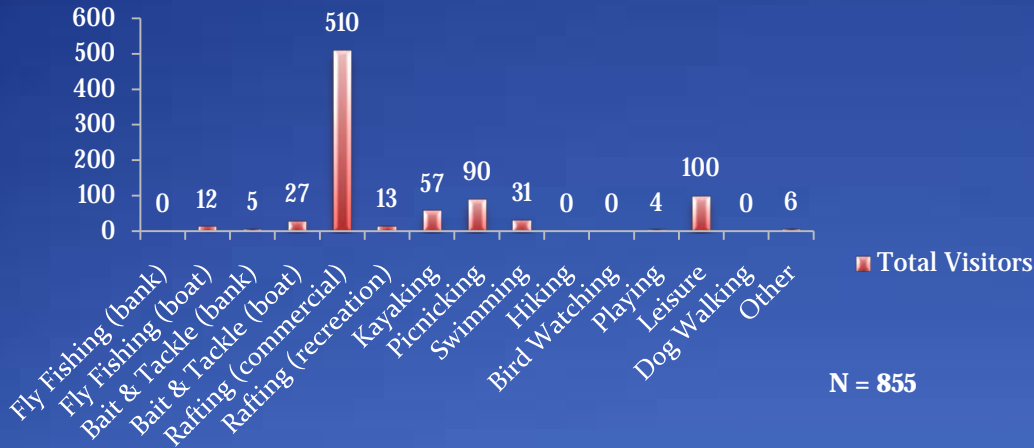
Fishers Ferry (Saturday vs Sunday)



Based on an actual count from all days

Visitor Counts

Shady Cove Usage (Activity)

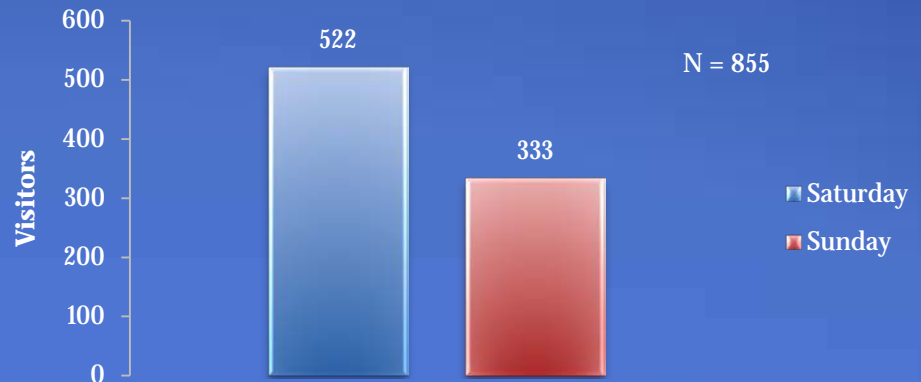


N = 855

Top Activities at Shady Cove:

1. Commercial Rental Rafting – 60%
2. Leisure – 12%
3. Picnicking – 11%
4. Kayaking – 7%

Shady Cove Usage (Saturday vs. Sunday)



N = 855

Based on an actual count from all Saturday and Sundays

Non- Rafter Visitor Survey

N = 101

Most of our respondents were locals!

- 87% of all non-rafter respondents lived within 30 miles of the river
- 67% lived within 15 miles

Just over half of all non-rafter respondents spent money locally on food or gas during their visit to the River.

- 57% spent less than \$20
- 30% spent between \$21 and \$40
- 12% spent between \$41 and \$80

Where our respondents are from:

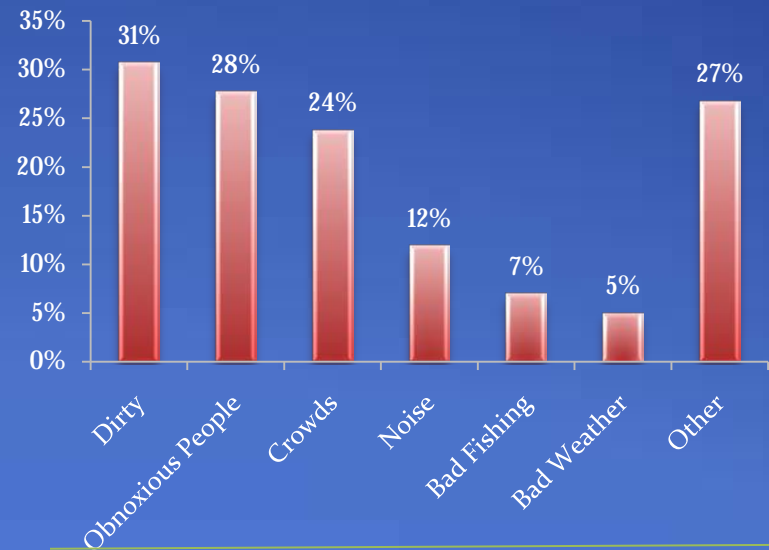
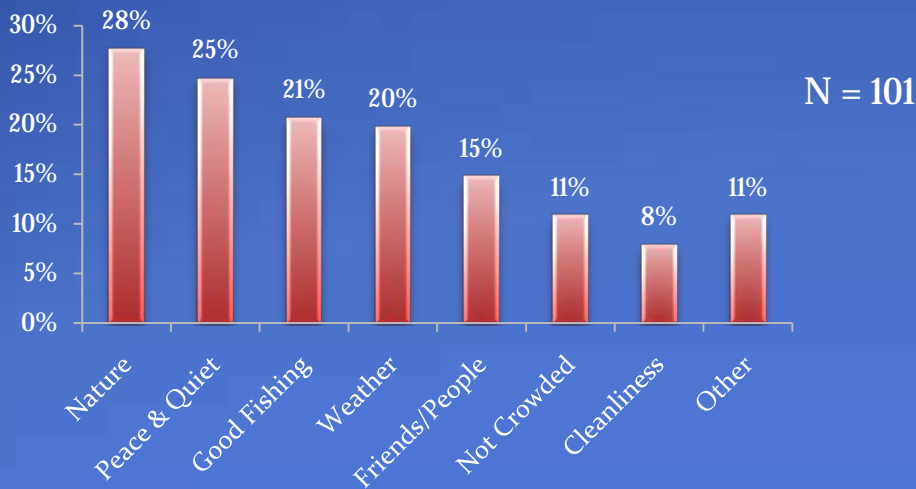
Oregon	93%
California	3%
Other (Texas, New Mexico, Nevada & Florida)	4%

Non-Rafter Visitor Survey

How long have our respondents been coming to the Rogue River?

		1950s	1960s	1970s	1980s	1990s	2000
Fly Fishing	N = 17	-	12%	18%	18%	24%	29%
Bait/Tackle	N = 53	2%	8%	11%	19%	25%	36%
Rafting	N = 26	-	-	8%	12%	23%	58%

What makes for a pleasant experience on the Rogue?



What detracts from a pleasant experience on the Rogue?

Guided Rafter Survey

N = 15

5 of the 14 who responded, came to the area for OSF

Most of the rest were passing through, here for vacation, or visiting family.

Total \$\$ Spent Locally:

Raft Trip	\$ 924.00
Hotel	\$ 1,495.00
Camping	\$ 28.00
Restaurant	\$ 550.00
Groceries	\$ 430.00
Entertainment	\$ 120.00
Total	\$ 3,547.00
Average/person	\$ 253.36

Where our respondents are from:

Oregon	13%
California	67%
Other (Nevada, Minnesota & Maryland)	20%

→ We suspect these numbers are extremely underestimated

More About our Respondents

Non-Rafters

Age

18-34	20%
35-54	53%
55+	27%

N = 101

Gender

Female	37%
Male	63%

N = 101

Race/Ethnicity

White/Caucasian	86%
Hispanic	5%
Asian	2%
American Indian/Alaska Native	2%

N= 99

Occupation

Skilled Labor	18%
Service (food, hospitality, etc.)	12%
Professional	11%
Healthcare	7%
Admin/Office Worker	5%
Education	4%
Technical	2%
Other	19%

N = 99

Retired	21%
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Retired Non-Rafters

- 36% skilled laborers
- 23% former military
- 14% in education

More About our Respondents

Guided Rafters

Age		Gender	
18-34	40%	Female	47%
35-54	53%	Male	53%
55+	7%		
N = 15		N = 15	

Race/Ethnicity	
White/Caucasian	80%
Hispanic	7%
Asian	13%
N= 15	

How will the dam removal affect property values?

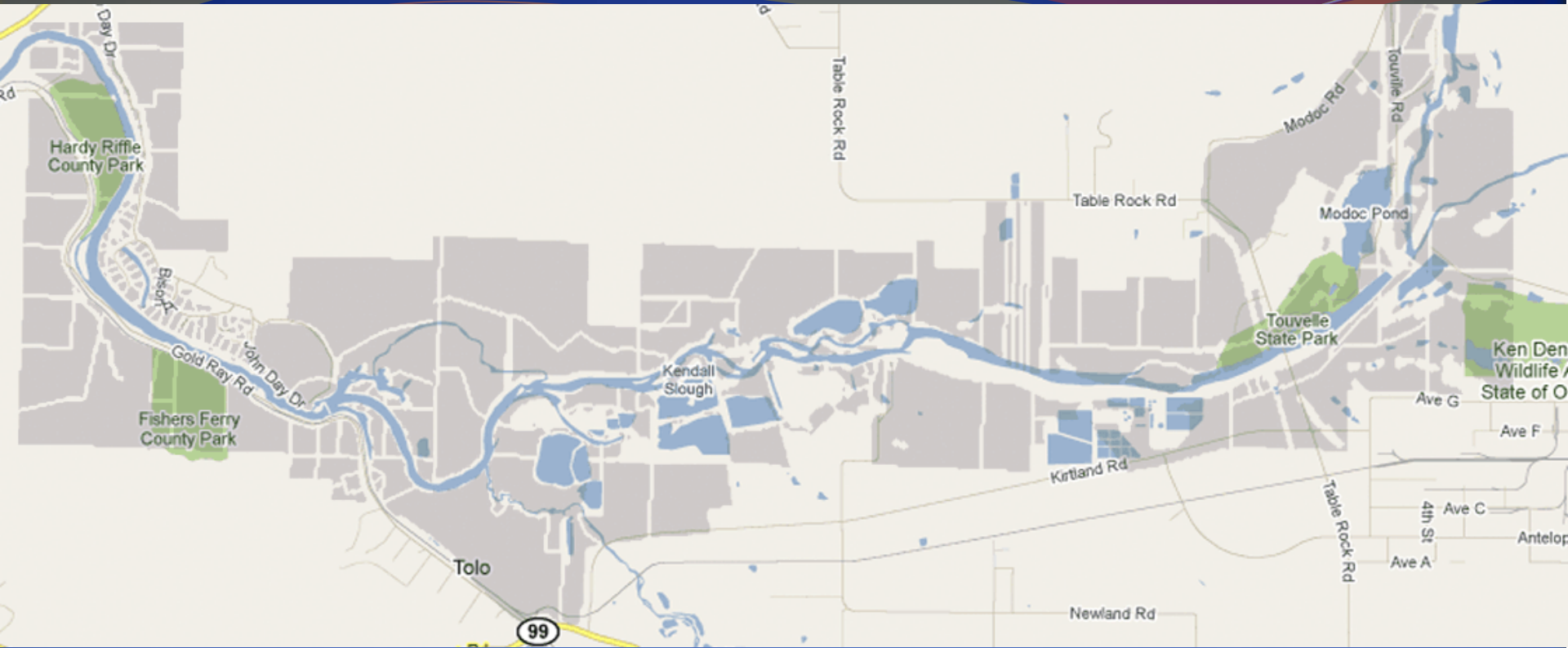
- Results from studies in other locations
- Interviews with local realtors
- Analysis of local real estate values (future)
- Issues are different for residential and agricultural or commercial properties

Factors affecting agricultural and commercial properties:

- Water availability (for agricultural)
- Potential recreation use





Factors affecting residential values:

- Free-flowing water (vs. impoundment)
- Water quality
- Easy river access
- Recreation access and fishery health
- Greenbelts, open spaces, developed parks



Property Values Analysis Gold Ray Dam Study Area

Within 1,000 ft of Rogue River,
between Hwy 234 and Touville Road

-  Study Area Tax Lots (217 Total)
-  Water
-  Roads
-  Parks

Preliminary conclusions:

- **Agric and commercial:**
 - Water availability
 - Potential future development pressure
- **Residential:**
 - Downstream probably no major changes
 - Upstream changes
 - Water flow
 - Fishing
 - Recreation

Fishing Guide Interview

N = 73

How will dam removal affect fishing guides?

Initial Response

Negatively	32%	
Positively	26%	45%
Positive in the long run	19%	
Not Sure	23%	

26 of the guides told us how:

Better for river and improve fish habitat.	33%
Better fish runs.	
Mud and Turbidity	25%
Increased or changed area	9%
No fish counting stations	9%
Big changes for the next few years	7%
Concern for environment and wildlife	7%
Fishing hole below dam	7%
Affects River Downstream	2%
Lack of Consideration for the affects felt by the fishermen	2%
Gate key	2%

“Positively, better for fish runs and good for the natural ecology of the river.”

“Already has – the murky water smells , I’ve had to cancel trips.”

“For the next 3-5 years the Gold Ray fish will suffer, but in the long run, it is positive.”

Fishing Guide Interview

N = 73

Will removal of the dam increase the area where anglers guide?

Yes	65%
No	32%
Not Sure	3%

“Better access between Tou velle and Fishers Ferry. Don't need a key to access private sections of the river.”

43 Fishing guides told us how it might affect the area where they guide on the river:

Better access to the river/Longer runs/New place to explore	60%
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Thought there was potential	23%
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Concerned about losing the fishing hole below the dam	9%
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Annoyed because gate key no longer gives them private access	7%
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“Not yet, but future trips will go down through that section definitely. I'm excited to explore some new fishing holes that have maybe been created.”

“Actually , it will decrease it because the dam was a good place to guide since it backed up fish.”

Lessons Learned and Next Steps:

1. Continue analysis of interviews with fishing guides
 - Overall revenue generated by fishing guides along Rogue from Shady Cove to Gold Hill in 2009 and 2010
2. Continue collecting and analyzing interview data from 8 commercial rafting companies and 4 rental companies
 - Overall revenue generated by commercial rafting companies and rental companies
 - Early findings include new rafting runs and modifications of existing rafting trips, excitement over new opportunities
3. Follow-up research in four years
 - Modify data collection to interview rafting and rental businesses starting in late summer.