

10.7%+



7,500,000 direct jobs

14,000,000 total jobs

Resulting from visitors traveling the US  
**and spending \$, Euros, Yen, RMB...**

\$1,800,000,000,000

in total spending

# America's travel and tourism industry is seen as a primary driver of our nation's economy

Travel Exports  
up 13.7%  
in 2011



120,000 jobs  
created by the  
travel and tourism  
industry in 2011



Travel exports  
growing at an  
annual rate of  
10% in 2012



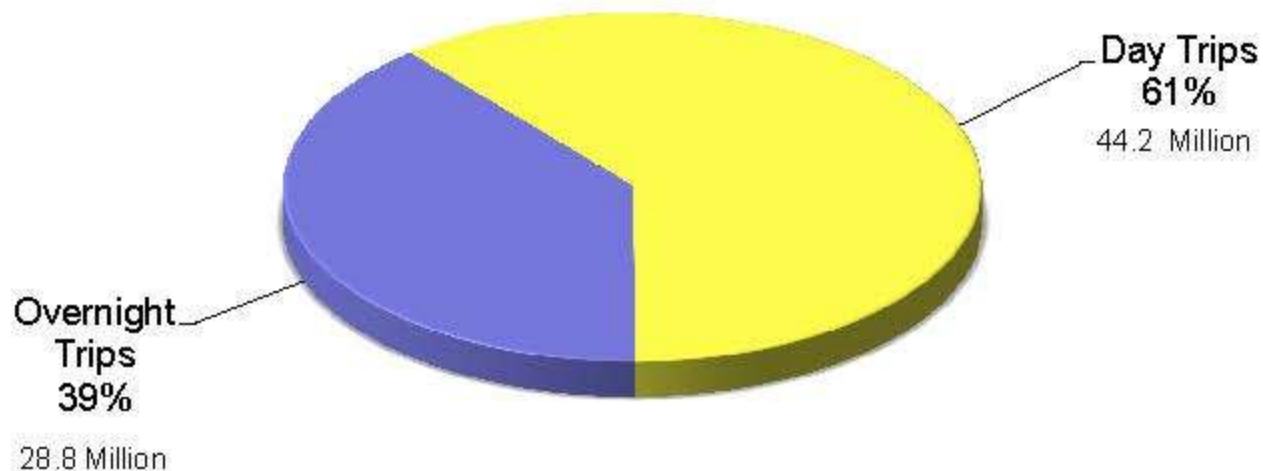
81,000 additional  
jobs added during  
2012



# Total Size of Oregon's Travel Market



**Total Person-Trips\* = 73 Million**



\*Total volume includes both adults and children

*Oregon 2011 Visitor Report, Longwoods International*  
Available at: [www.Industry.TravelOregon.com](http://www.Industry.TravelOregon.com)<sup>12</sup>



Canada - #1  
Japan  
China  
Australia  
UK  
Germany  
France



# Why Tourism Matters To Oregon

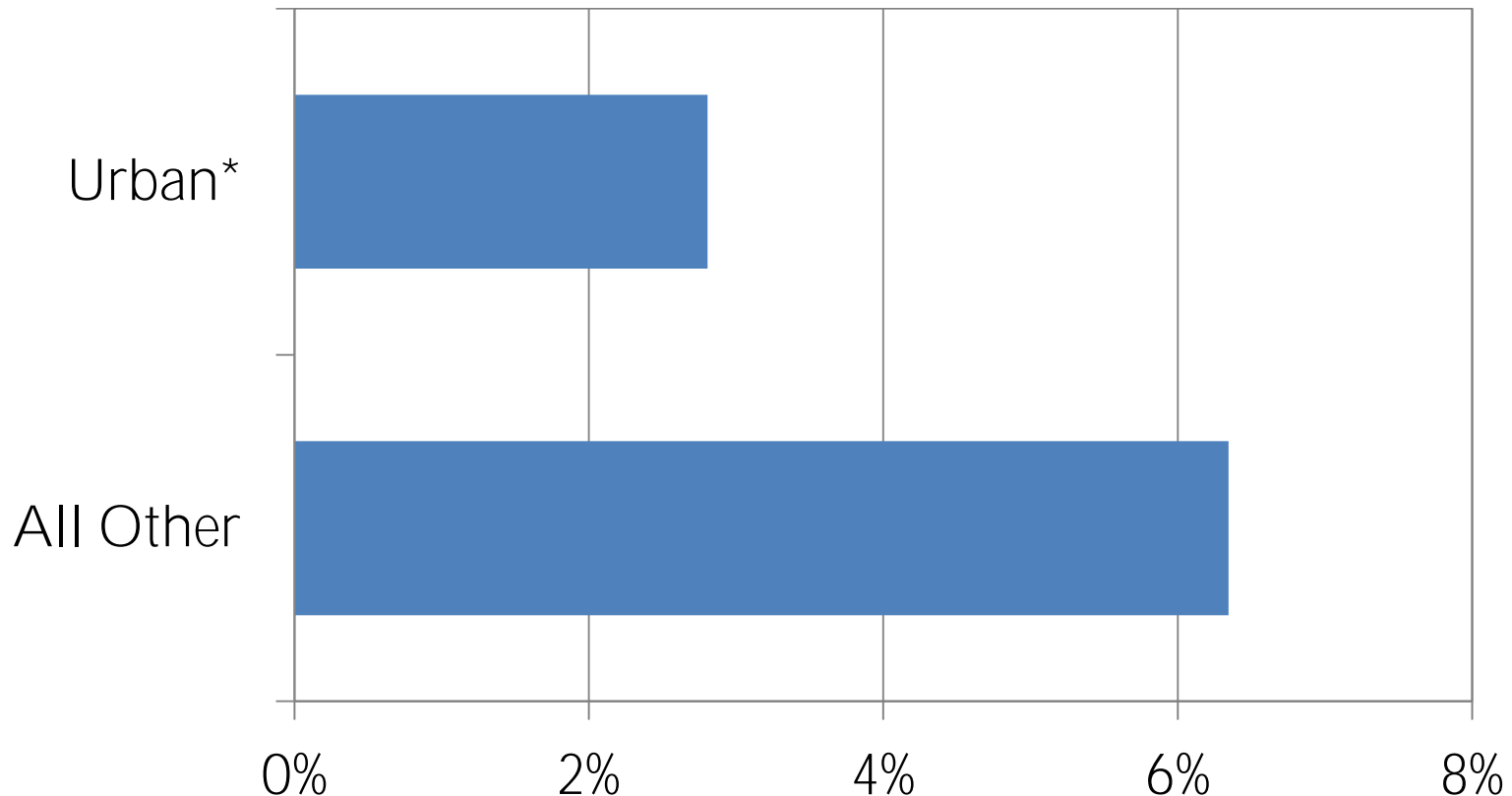
## 2012

- \$9.2 billion in direct travel spending (+3.2%)
- \$2.2 billion in travel generated earnings
- \$363 million in local and state taxes (+3.3%)
- GDP of the travel industry = \$3.4 billion
- Tourism = one of Oregon's top **export-oriented** industries



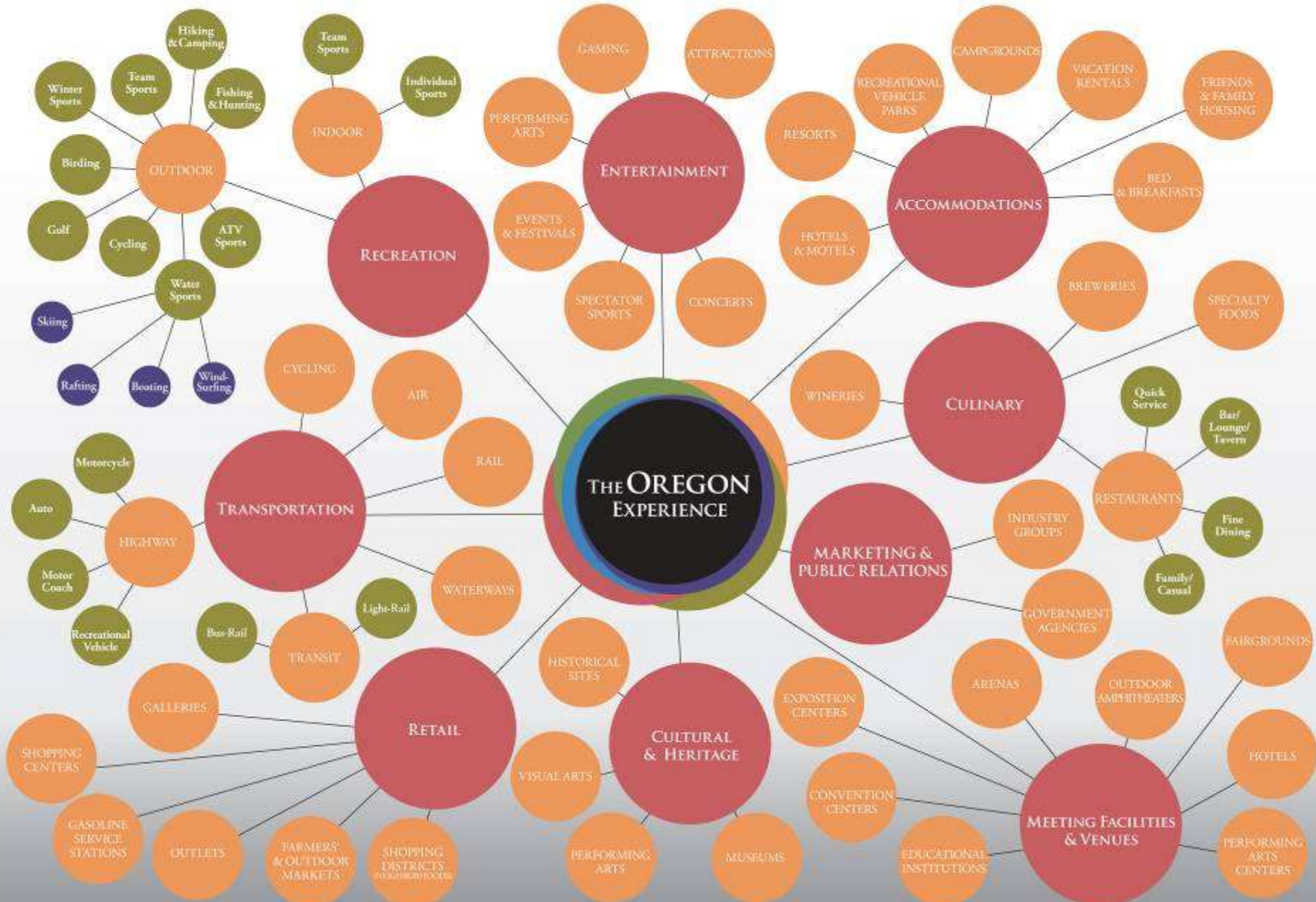
# Rural vs. Urban Impact (2011)

Travel Generated Employment as a % of Total Employment



# TOURISM & HOSPITALITY INDUSTRY CLUSTER MAP

The Industry Cluster map is designed to be a visual narrative of the relationships or categories that make up an industry. It immediately demonstrates the strategic interdependence that defines an industry. The map can be developed on multiple levels to show additional corresponding relationships that support any given sector or the whole industry, (examples: agriculture, real estate development, production and processing services). This specific map has been created to show what makes up the tourism industry from the standpoint of what the consumer experiences and what is actually marketed and sold. It is important to understand that the industry benefits as a whole when each of the categories is healthy and vibrant—it's what makes Oregon a destination point rather than a stop-over point.







How does this translate in Oregon?

91,100 Oregonians DIRECTLY employed (2011)

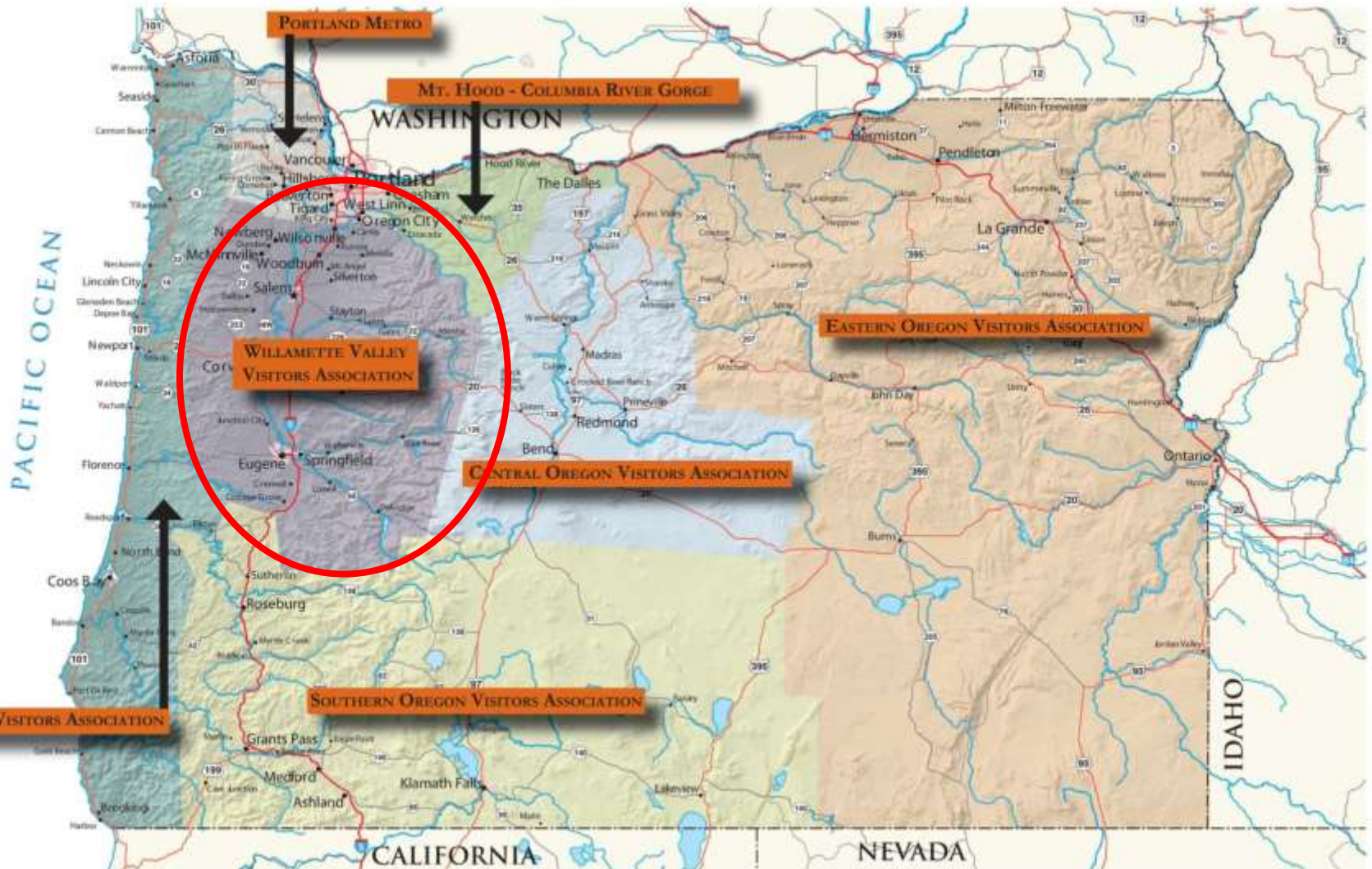
Direct: lodging properties, restaurants, attractions, guide & outfitter businesses, tour operators, visitor information centers, convention and visitor bureaus

41,000 jobs supported INDIRECTLY (2011)

Indirect: farms, wineries, printing services, professional services, transportation and more...



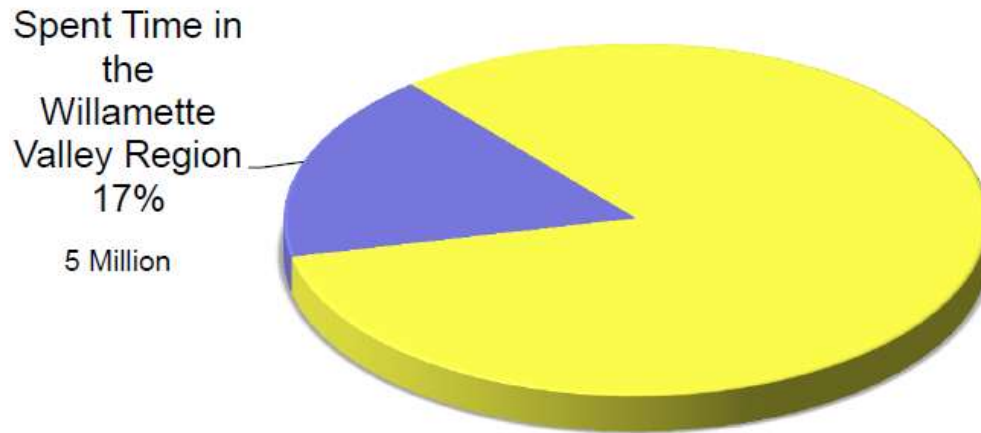
# Oregon's Tourism Regions



# WILLAMETTE VALLEY TRENDS

# Size of the Willamette Valley Overnight Travel Market

**Total Overnight Trips to Oregon\* = 28.8 Million**

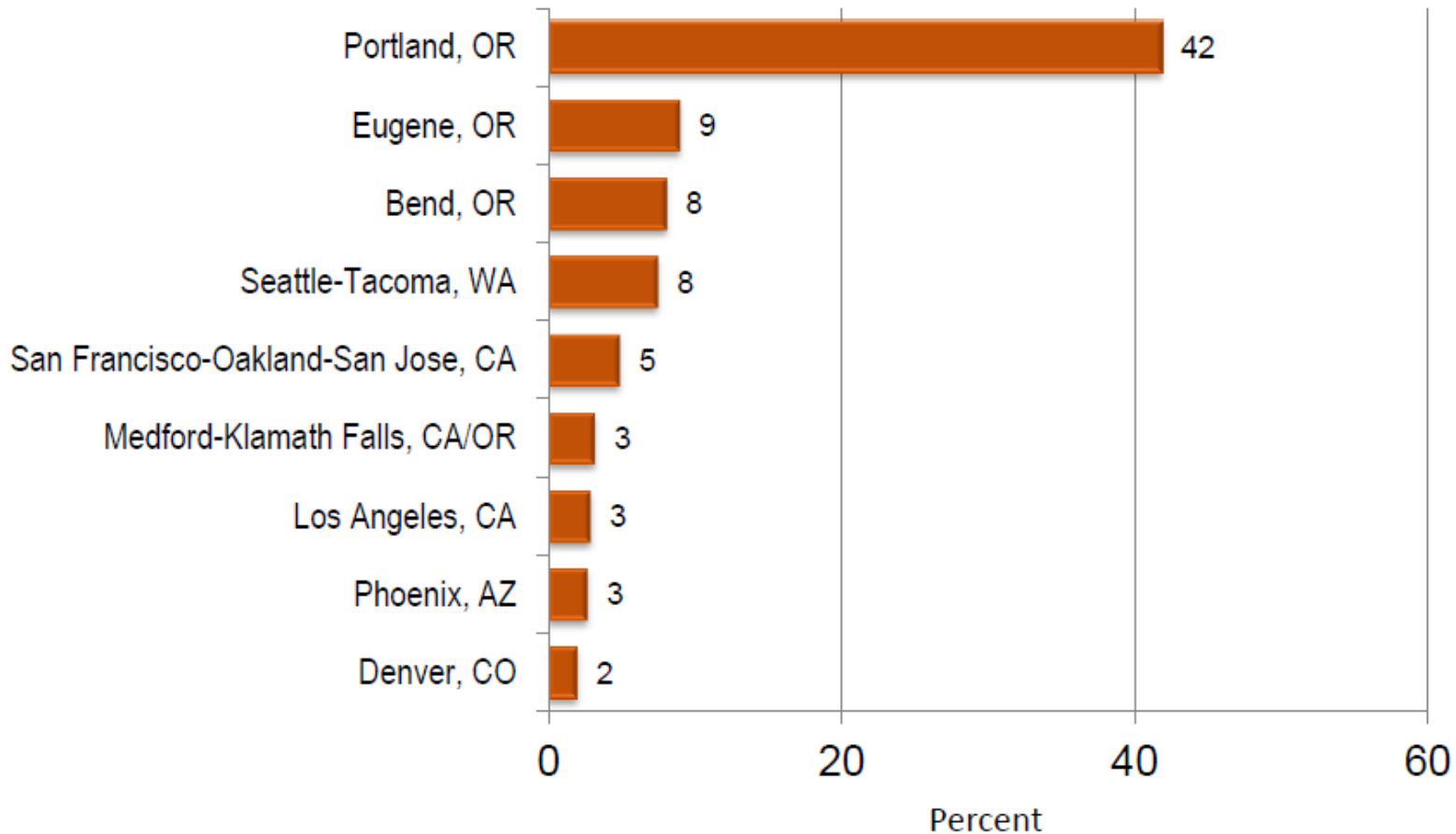


\*Includes both adults and children

*Oregon 2011 Regional Visitor Report, Regional Visitor Research*

*Longwoods International*

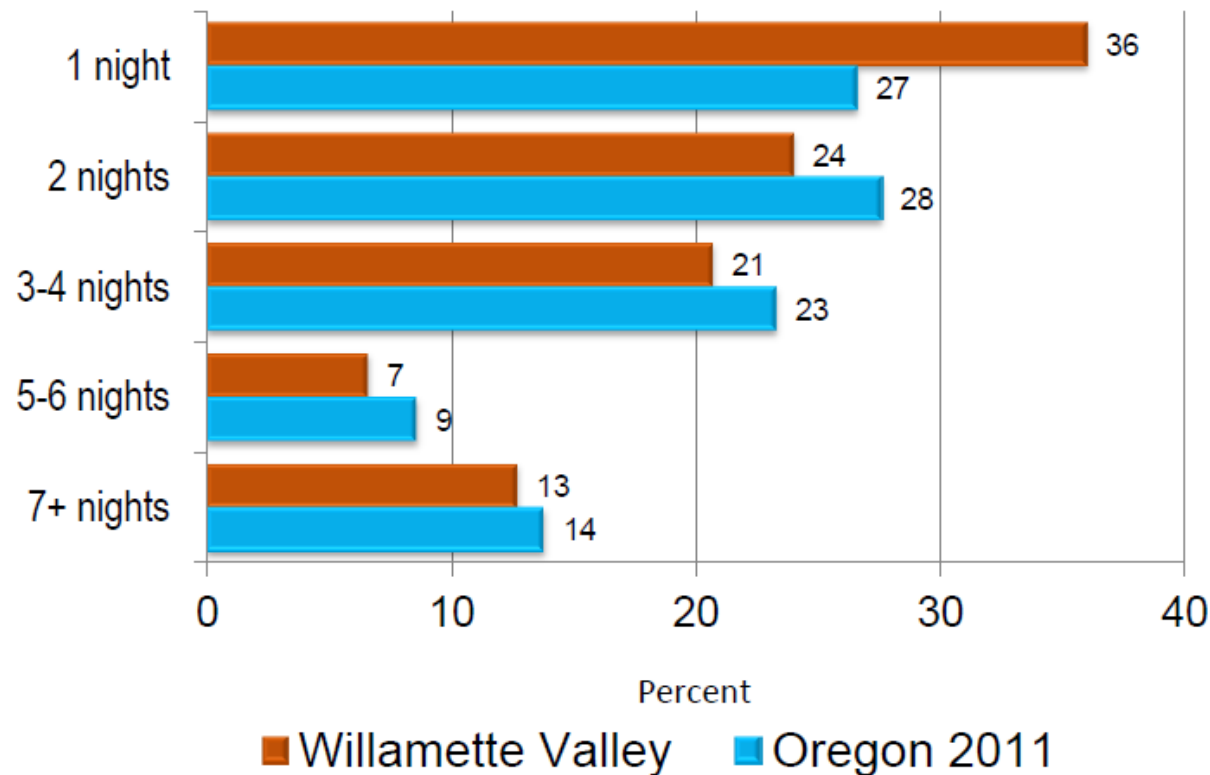
# Origin of Overnight Trip to Willamette Valley(2011)



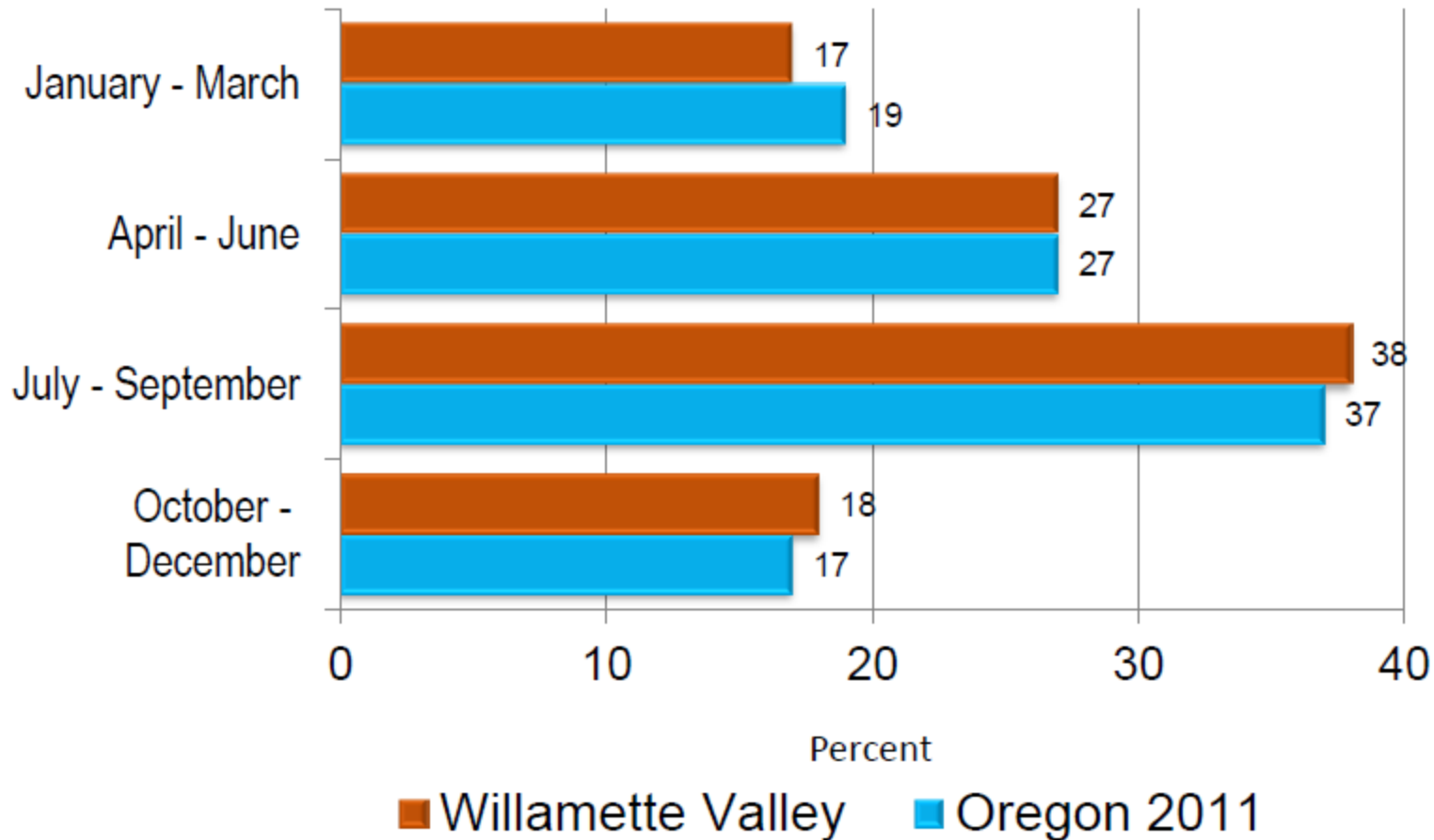
# Total Nights Away on Trip (2011)

**Average  
Willamette Valley  
= 3.5 Nights**

**Average  
Oregon  
= 3.8 Nights**

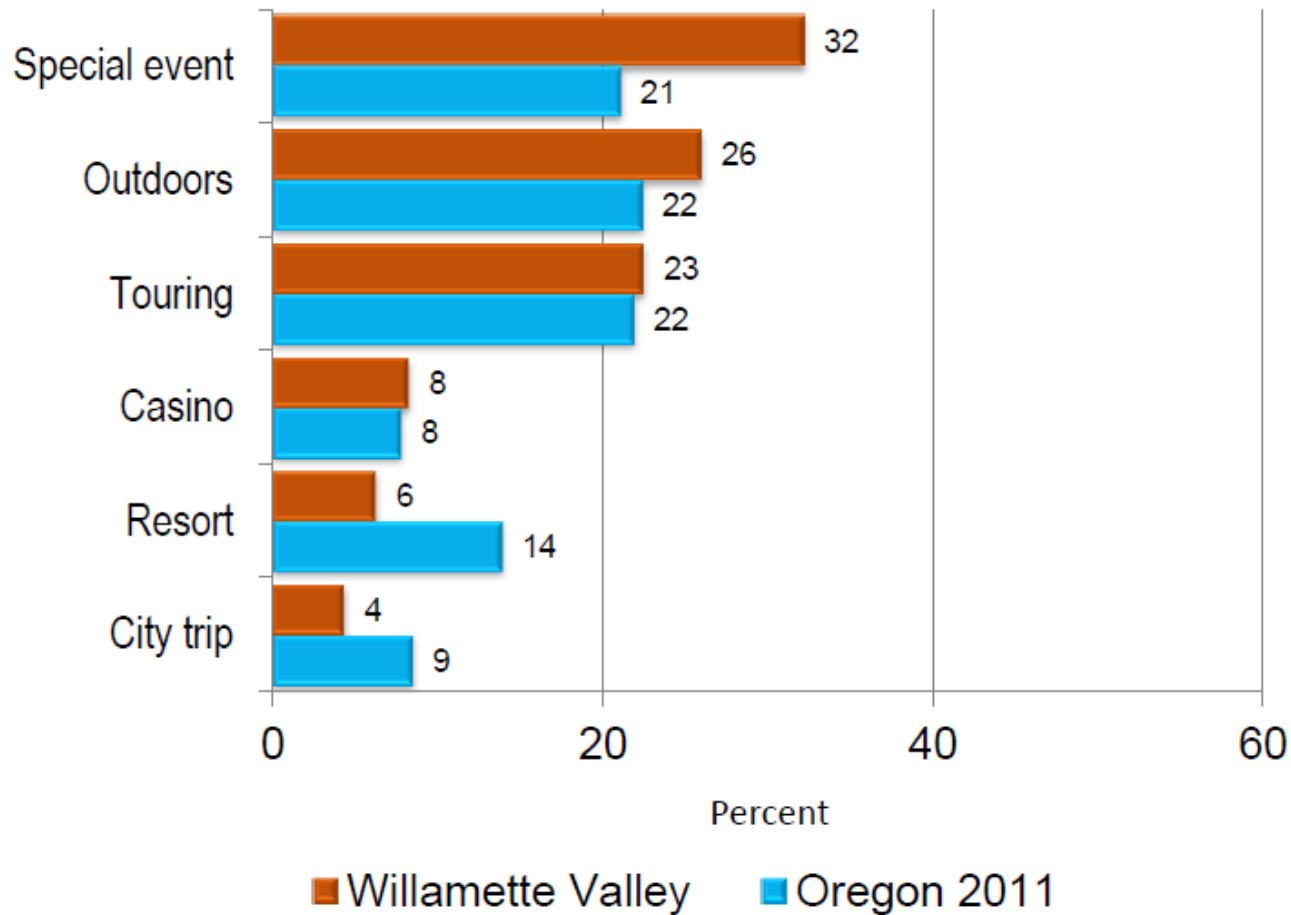


# Season of Trip (2011)

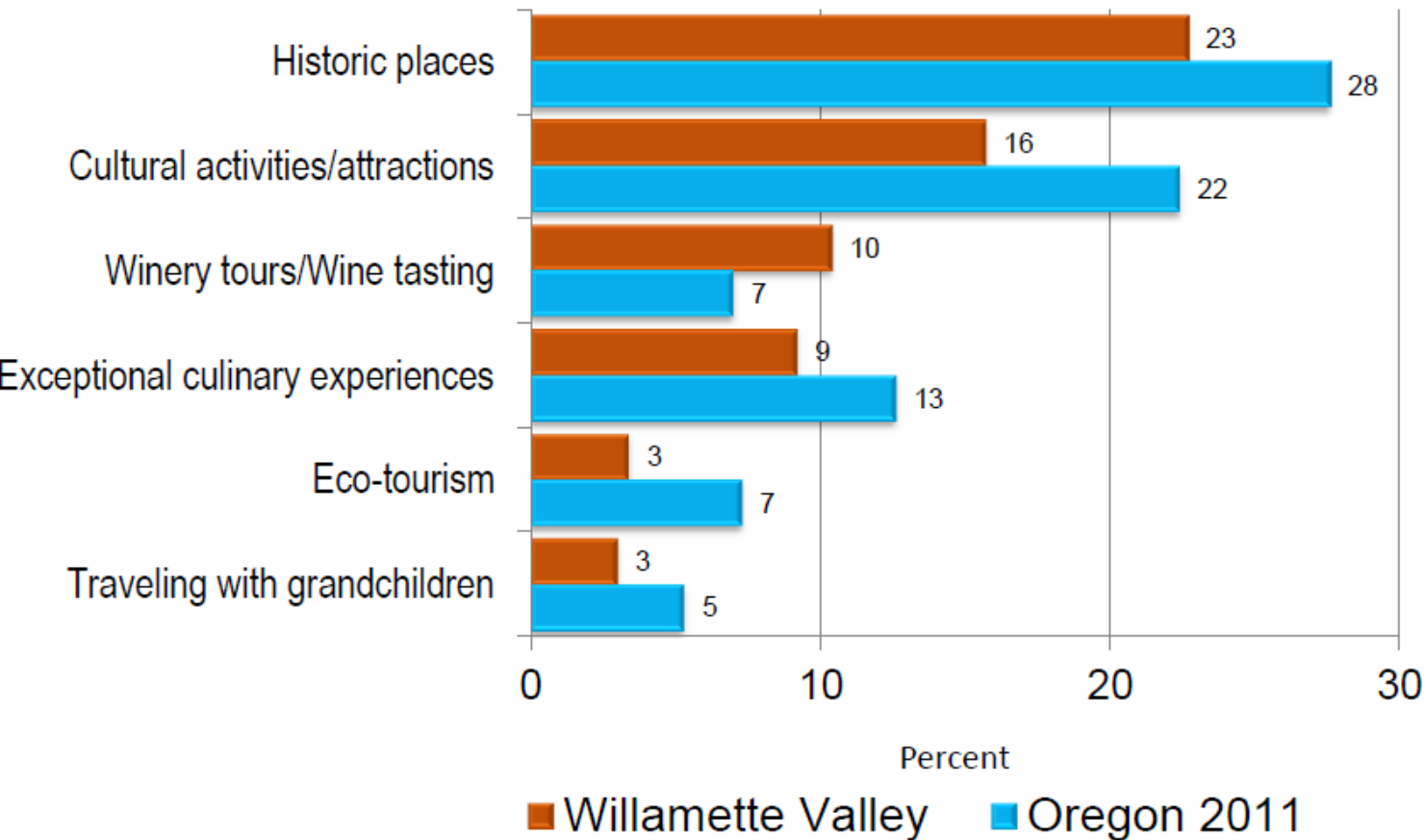




# Main Purpose of Marketable Trip – Willamette Valley vs. State Norm (2011)

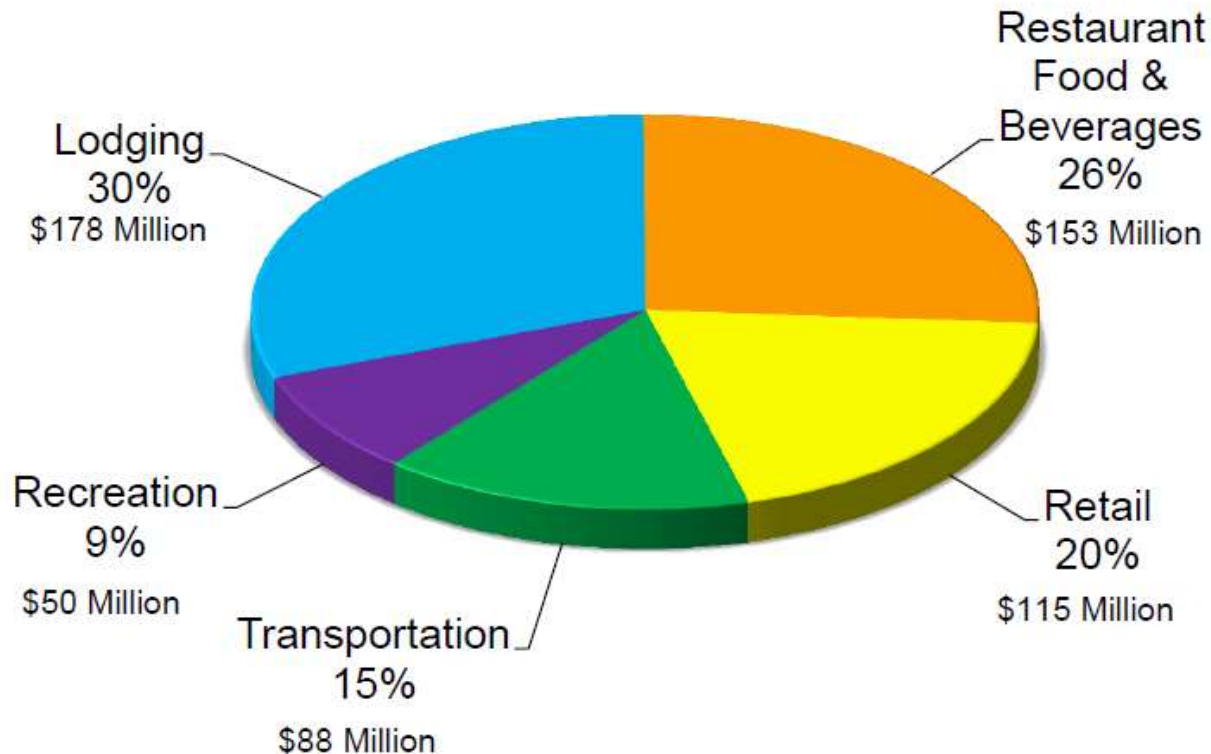


# Notable Visitor Activities Willamette Valley (2011)

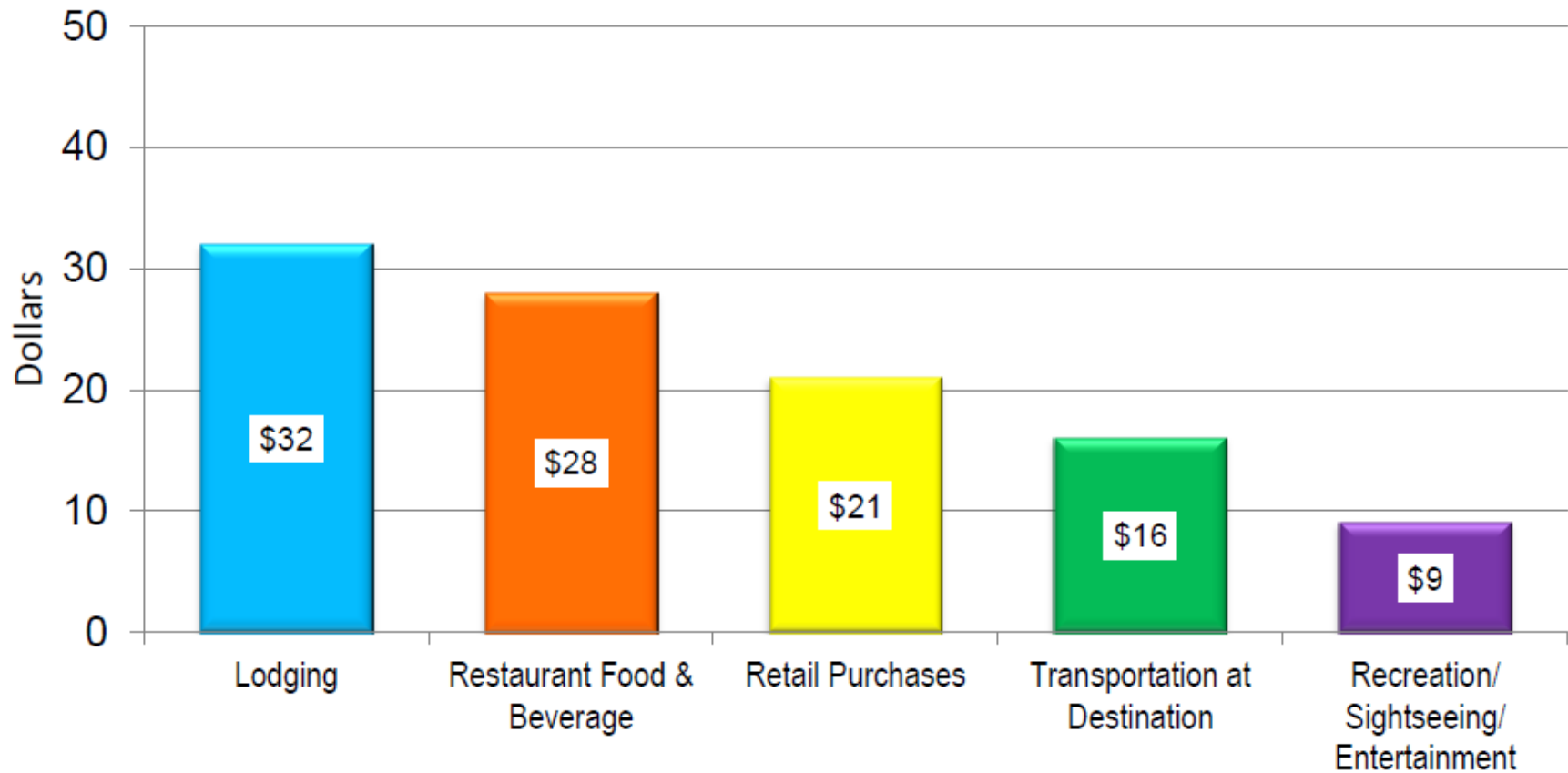


# 2011 Overnight Spending – by Sector

**2011 Willamette Valley Region Spending = \$584 Million**



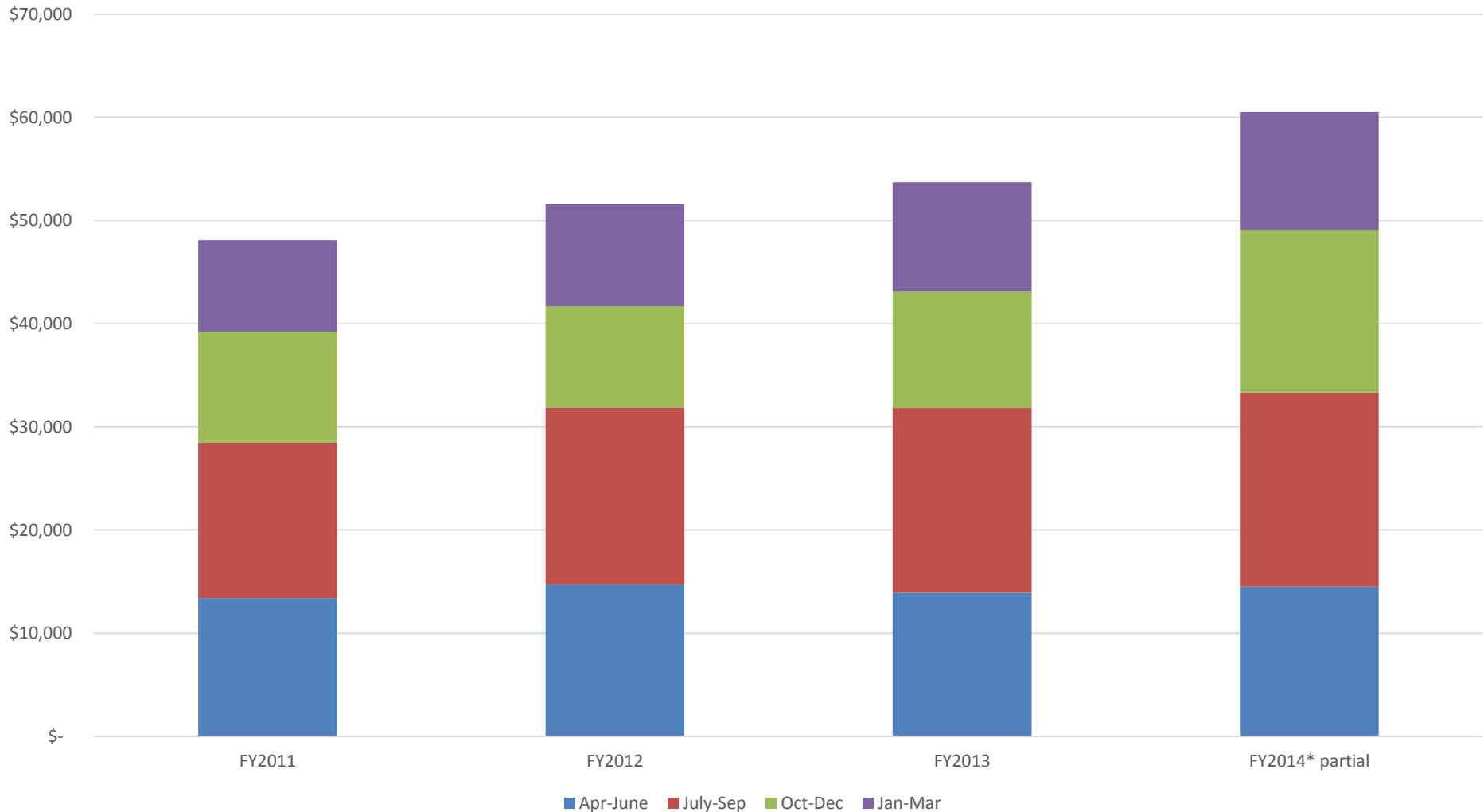
# Average per person expenditure on overnight trips



# Local Room Tax Collections, 2008-12

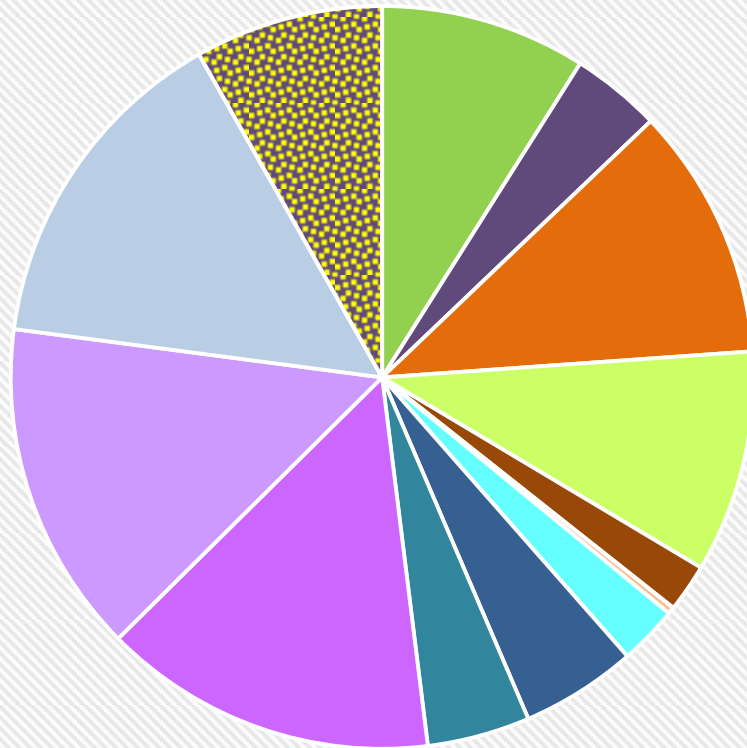
## Polk County

Dallas/Monmouth Combined Transient Room Tax by Season, FY2011-FY2014



# Percent of Total Non-Farm Jobs Related to Tourism, Polk County 2002-2012

2013 Non-farm Employment by Sector, Polk County



- Natural Resources & Mining
- Construction
- Manufacturing
- Trade
- Transportation, Warehousing & Utilities
- Information
- Financial Activities
- Professional & Business Services
- Other Services
- Education & Health Services- private sector
- Education and Health Services-government
- Other Government
- Leisure & Hospitality