

Oregon Travel Impacts ***1992-2016p***

May 2017

Prepared for

Oregon Tourism Commission
Salem, Oregon

OREGON TRAVEL IMPACTS, 1992-2016P

STATEWIDE PRELIMINARY ESTIMATES

DETAILED COUNTY ESTIMATES

OVERNIGHT VISITOR VOLUME

May 2017

Prepared for

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EXECUTIVE SUMMARY

This report provides detailed statewide, regional and county travel impact estimates for Oregon from 1992 to 2016. The report also provides average spending and volume estimates for overnight visitors for most counties. The estimates for 2016 are preliminary. Secondary impacts and travel industry GDP are provided at the state level.

TRAVEL SPENDING, EMPLOYMENT AND EARNINGS CONTINUE TO EXPAND

The Oregon travel industry continued to exhibit strong growth in 2016, as all measures of travel activity were up over 2015.

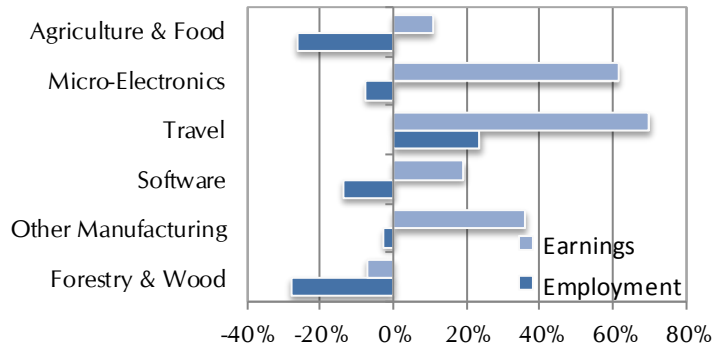
- **Spending.** Total direct travel spending in Oregon was \$11.3 billion in 2016. The annual increase from 2015 was 4.3 percent in current dollars. In real, inflation-adjusted, dollars travel spending increased by 4.8 percent due to the decline in transportation costs (motor fuel and airfares). Visitor spending, excluding transportation, increased by 5.2 percent in current dollars. This is the seventh consecutive year of growth in travel spending following the recession.
- **Travel Activity.** An estimated 28.4 million overnight visitors traveled to Oregon destinations in 2016 (preliminary). This represents a 2.5 percent increase over 2015. Since 2010, overnight person-trips have increased by 2.6 percent per year. Domestic visitor air arrivals to Oregon (3.8 million) increased by 10.5 percent for the year. Room demand, as measured by STR, Inc., increased by 3.2 percent for the year.¹
- **Employment.** Total travel generated employment was 109,500 in 2016p. This represents a 3.5 percent increase over 2015, the sixth consecutive year of employment growth following the steep decline from 2008 to 2010. Employment has increased by 3.3 percent per year since 2010.
- **Secondary Impacts.** The re-spending of travel-generated revenues by businesses and employees generates additional impacts. In 2016, these secondary impacts were equivalent to 56,900 jobs with earnings of \$2.6 billion. Most of these jobs were in various professional and business services.
- **GDP.** The Gross Domestic Product of the travel industry was \$4.7 billion in 2015. Overall, the travel industry is one of the three largest export-oriented industries in rural Oregon counties (the other two being agriculture/food processing and logging/wood products).

¹ The STR reports were prepared for the Oregon Tourism Commission.

THE OREGON TRAVEL INDUSTRY IS A LEADING EXPORT-ORIENTED INDUSTRY

Travel and tourism is one of the most important **“export-oriented”** industries in Oregon. It is especially important in the non-metropolitan areas of the state, where manufacturing and traded services are less prevalent. Over the past decade, travel industry employment and earnings growth also compares favorably to other industries.

Change in Earnings and Employment (2003-2015)
Selected Export-Oriented Industries

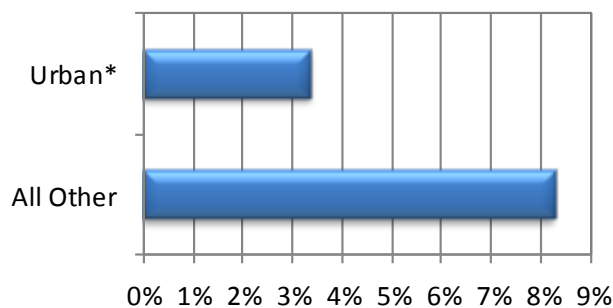


(Note: The most current data is for 2015.)

THE TRAVEL INDUSTRY BENEFITS ALL REGIONS OF OREGON

Although most travel spending and related economic impacts occur within Oregon’s urban areas, the travel industry is important throughout the state. In general, travel-generated employment is relatively more important in rural counties.

Travel-Generated Employment as a Percent of Total Employment (2015)



*The urban counties are Clackamas, Lane, Marion, Multnomah and Washington. The most current data is for 2015.

Oregon Travel Impacts, 1992-2016p

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PREFACE

The purpose of this study is to document the economic significance of the travel industry in Oregon and its thirty-six counties and seven tourism regions from 1992 to 2016. These findings show the level of travel spending by visitors traveling to and within the state, and the impact this spending had on the economy in terms of earnings, employment and tax revenue. Estimates of overnight visitor volume and average spending are also provided for all tourism regions and most counties. The estimates for 2016 are preliminary.

Dean Runyan Associates prepared this study for the Travel Oregon. Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984. With respect to economic impact analysis, the firm developed and currently maintains the Regional Travel Impact Model (RTIM), a proprietary model for analyzing travel economic impacts at the state, regional and local level. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research and travel and tourism planning.

Many individuals and agencies provided information and advice for this report. The state agencies that provided essential information were the Parks and Recreation Department and the Department of Revenue. At the federal level, data was obtained from the U.S. Forest Service, the Department of Labor and the Bureau of Economic Analysis. Additionally, numerous local governments and visitor bureaus throughout Oregon provided information.

Finally, special thanks are due to Michael Sturdevant, Director of Global Marketing Services , and Todd Davidson, Chief Executive Officer of Travel Oregon, for their support and assistance.

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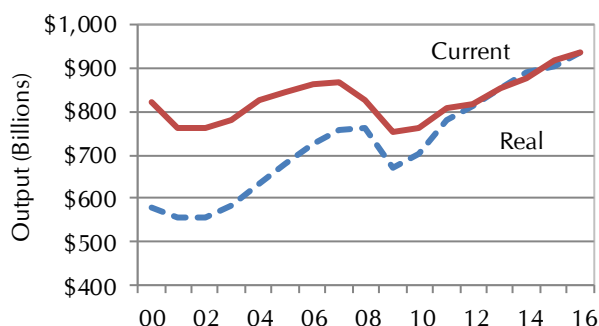
I. U.S. TRAVEL



The national level data in this section focuses on visitor spending trends in current and real dollars, resident and foreign visitor spending in the U.S., and trends in travel-generated employment.

The following two graphs are derived from the Bureau of Economic Analysis Travel and Tourism Satellite Accounts.¹ Both graphs show direct tourism output for the United States – spending by resident and foreign visitors.

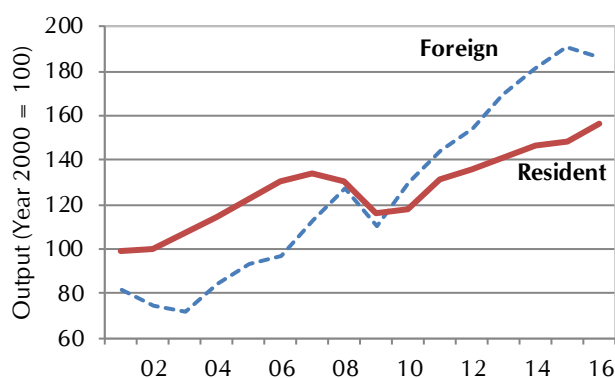
Annual Direct Travel Spending in U.S. 2000-2016



Spending by resident and foreign visitors was \$938 billion in 2016 in current dollars. This represents a 3.6 percent increase over 2015. When adjusted for changes in prices (real dollars), spending increased by 2.3 percent from 2015 to 2016 – compared to a 4.7 percent increase for the preceding year.

Spending by Foreign* and Resident Travelers in U.S.

(Current Dollars; Year 2000 = 100)



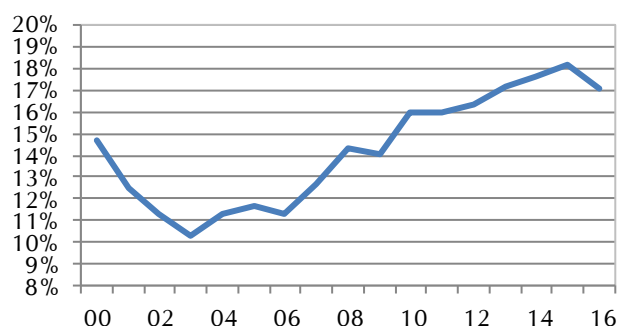
*Note: Foreign visitor spending does not include expenditures on health and educational services or expenditures by short term seasonal workers.

The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2016, the increase in spending by resident visitors (5.4 percent) compares to a 2.1 percent decrease in non-resident spending. Visitor spending by non-residents increased by 5.2 percent from 2014 to 2015. (*Note: The non-resident spending estimates for 2014 and 2015 were revised upward from those previously reported in 2015.*)

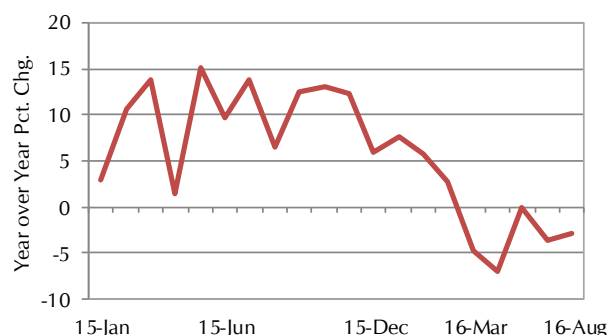
¹ See <http://www.bea.gov/industry/index.htm#satellite>.

The foreign share of U.S. internal travel declined by more than a full percent point from 2015 to 2016 (18.2 percent to 17.1 percent). This has been due to two factors. First, overseas arrivals began to show a decreasing rate of growth in the beginning of 2016 and actually declined in absolute numbers in the most recently reported months. Secondly, the value of foreign currencies has fallen relative to the U.S. dollar. This not only discourages travel to the U.S., but also means that foreigners that do travel to the U.S. have less money to spend on goods and services.

**Foreign Share of U.S.
Internal Travel Spending**

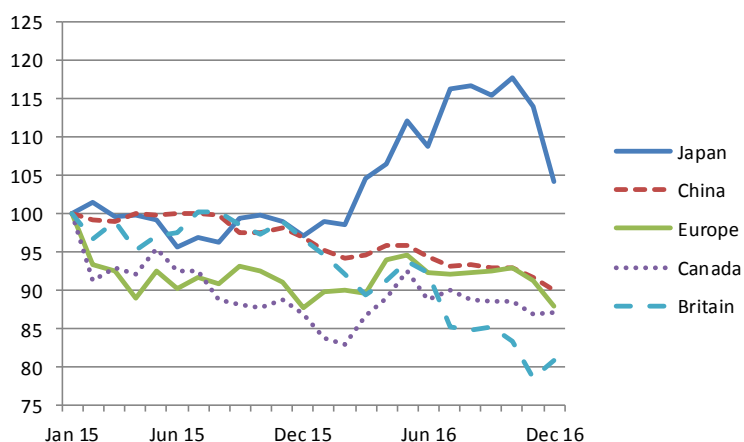


Overseas Arrivals
(Year over Year Percent Change)



**Relative Value of Selected Foreign
Currencies compared to U.S. Dollar**

Monthly Averages, Jan 2015 through Dec 2016



Sources:

Foreign Share of U.S Internal Travel: Bureau of Economic Analysis Travel & Tourism Satellite Accounts and International Transactions.

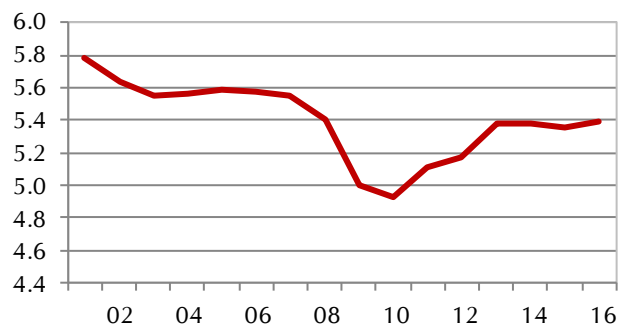
Overseas Arrivals: Office of Travel and Tourism Industries, U.S. Department of Commerce.

Relative Value of Selected Foreign Currencies: XE Corporation. (www.x-rates.com)

The following two graphs show employment trends since 2000 and the composition of travel industry employment since the recession. The first graph shows that travel-generated employment recovered from the 2008-09 recession by 2013. Since then, however, there has been no significant employment growth in the industry.

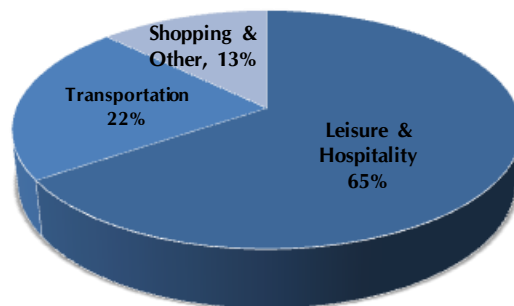
In recent years, the leisure and hospitality sector has accounted for almost two-thirds of all travel industry employment while air and ground transportation and related services have account for somewhat more than 20 percent. (In 2000, the leisure and hospitality sector accounted for 61 percent of all employment.)

U.S. Travel Industry Employment



Source: Bureau of Economic Analysis
Travel & Tourism
Satellite Accounts.

Components of U.S. Travel Industry Employment, 2012-2016



Source: See above graph. Leisure & hospitality includes accommodations, food services, and arts, entertainment & recreation. Transportation and other includes retail and all other industries.

II. OREGON TRAVEL IMPACTS



The multi-billion dollar travel industry in Oregon is a vital part of the state and local economies. The industry is represented primarily by retail and service firms, including lodging establishments, restaurants, retail stores, gasoline service stations and other types of businesses that sell their products and services to travelers. The money that visitors spend on various goods and services while in Oregon produces business receipts at these firms, which in turn employ Oregon residents and pay their wages and salaries. State and local government units also benefit from the tax receipts that travel generates. The state government collects taxes on lodging, motor fuel and the income of travel industry employees. Local governments also collect taxes on lodging and auto rentals.

IMPACTS OF TRAVEL IN OREGON: A SUMMARY

- Visitation and spending increased for the seventh consecutive year. In real dollars (adjusted for inflation), spending has increased by 3.4 percent per year since 2010. Over the same period, overnight person-trips have increased by 2.6 percent per year.
- Direct travel spending in 2016 was \$11.3 billion, an increase of 4.3 percent in current dollars. In real dollars, spending increased by 4.8 percent due to the decline in transportation costs.¹ An estimated 28.4 million overnight visitors traveled to Oregon destinations in 2016 (preliminary). This represents a 2.5 percent increase over 2015. Domestic visitor air arrivals to Oregon (3.8 million) increased by 10.5 percent for the year.
- Total travel generated employment was 109,500 in 2015p. This represents a 3.5 percent increase over 2015, the sixth consecutive year of employment growth following the steep decline from 2008 to 2010. Employment has increased by 3.3 percent per year since 2010.
- The Gross Domestic Product of the travel industry was \$4.7 billion in 2016. Overall, the travel industry is one of the three largest export-oriented industries in rural Oregon counties (with agriculture/food processing and logging/wood products).
- The re-spending of travel-generated revenues by businesses and employees generates additional impacts. In 2016, these secondary impacts were equivalent to 56,900 jobs with earnings of \$2.6 billion.

¹ All spending estimates in this report are expressed in current dollars unless otherwise noted.

ANNUAL TRAVEL TRENDS

Total direct travel spending in Oregon was \$11.3 billion in 2016. The annual increase from 2015 was 4.3 percent in current dollars and 4.8 percent in real, inflation-adjusted dollars. Visitor spending, excluding transportation, increased by 5.2 percent in current dollars. This is the seventh consecutive year of growth in travel spending following the recession. Travel-generated employment increased for the sixth consecutive year (109,500 jobs in 2015). Employment has increased by 3.3 percent per year since 2010.

Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Billions)							
Total (Real 2016\$)	8.0	8.6	9.2	10.7	11.3	4.8%	2.2%
Total	6.2	7.4	8.7	10.8	11.3	4.3%	3.8%
Other	0.9	0.9	1.2	1.4	1.4	5.3%	2.8%
Visitor	5.3	6.5	7.5	9.4	9.8	4.1%	3.9%
Non-transportation	4.1	4.9	5.5	7.2	7.6	5.2%	3.9%
Transportation	1.2	1.6	2.0	2.2	2.2	0.4%	3.8%
Earnings (\$Billions)							
Earnings	1.6	1.8	2.1	2.8	3.1	8.2%	4.1%
Employment (Thousands)							
Employment	83.5	86.9	90.0	105.8	109.5	3.5%	1.7%
Tax Revenue (\$Millions)							
Total	570	670	779	1,049	1,132	7.9%	4.4%
Local	82	103	122	201	218	8.4%	6.3%
State	148	174	198	263	289	9.8%	4.3%
Federal	340	392	460	584	625	6.9%	3.9%

Other spending includes resident air travel, travel arrangement and reservation services, and convention and trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way fares.

Earnings include wages & salaries, earned benefits and proprietor income.

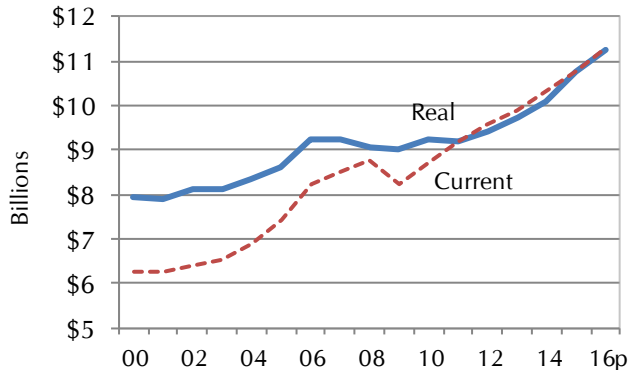
Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes and airport passenger facility charges paid by visitors.

State tax revenue includes lodging and motor fuel tax payments of visitors, and the income tax payments attributable to the travel industry income of businesses and employees.

Federal tax revenue includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

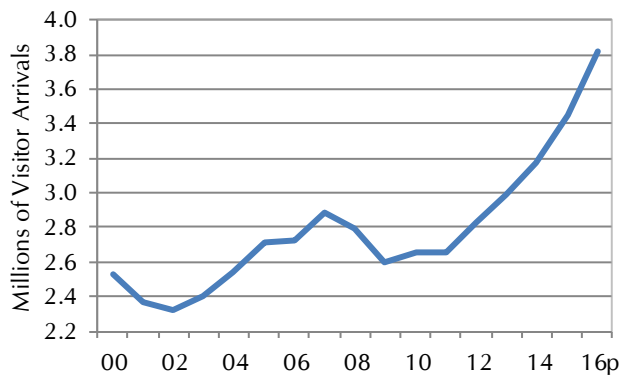
Oregon Direct Travel Spending Real and Current Dollars



Real travel spending (adjusted for inflation) increased by 4.8 percent from 2015 to 2016p, compared to the 4.3 percent increase in current dollars. Room rates were the only item that showed significant increase, while motor fuel prices and airfares declined.

Sources: STR Inc., Energy Information Administration, U.S. Department of Transportation Origin and Destination Survey, and Bureau of Labor Statistics CPI-West Urban.

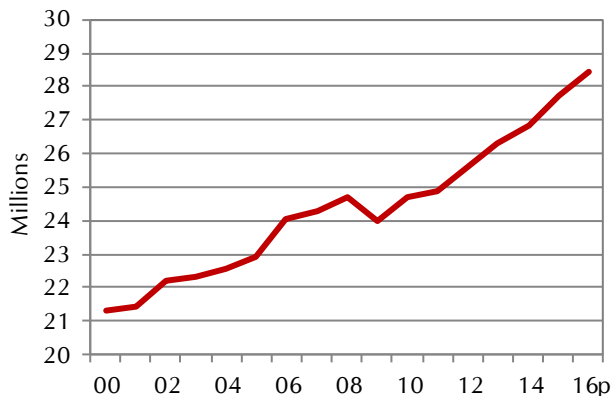
Air Passenger Visitor Arrivals to Oregon U.S. Air Carriers



Domestic visitor air arrivals to Oregon increased by 10.5 percent from 2015 to 2016(p). Domestic visitor air travel to Oregon has increased at a greater rate than U.S. air travel for the past four years.

Sources: U.S. Department of Transportation Origin and Destination Survey and Dean Runyan Associates.

Oregon Overnight Person-Trips



There were 28.4 million overnight person-trips to Oregon destinations in 2016, an increase of 2.5 percent from 2015.

Source: See table notes on following page.

OVERNIGHT VISITOR VOLUME AND AVERAGE SPENDING

Overnight visitor volume figures for Oregon are based on the economic findings of this report and other source data. Day travel estimates are not provided because of data limitations. Although volume estimates derived from different methodologies and source data will necessarily vary to some extent, it should be noted that the overnight volume estimates reported here are consistent with other data, such as room demand, visitor air travel and other visitor surveys.

Average Expenditures for Overnight Visitors, 2016p

By Type of Accommodation and Mode of Transportation

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*						
All Modes	\$380	\$950	\$164	\$405	2.3	2.5
Air	\$398	\$1,390	\$214	\$747	1.9	3.5
Other	\$373	\$868	\$153	\$357	2.4	2.3
Private Homes						
All Modes	\$102	\$404	\$45	\$173	2.3	4.0
Air	\$118	\$748	\$67	\$425	1.8	6.3
Other	\$83	\$296	\$34	\$122	2.4	3.6
Other Overnight	\$122	\$456	\$37	\$137	3.3	3.7
All Overnight	\$204	\$665	\$84	\$270	2.4	3.3

Oregon Overnight Visitor Volume, 2014-2016p

	Person-Nights (Millions)			Party-Nights (Millions)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	28.5	30.0	31.2	12.3	12.9	13.5
Private Home	41.9	42.8	43.4	18.2	18.7	19.0
Other Overnight	16.6	16.9	17.2	5.0	5.1	5.2
All Overnight	87.0	89.7	91.7	35.5	36.7	37.7

	Person-Trips (Millions)			Party-Trips (Millions)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	11.6	12.2	12.6	4.9	5.2	5.4
Private Home	10.8	11.0	11.2	4.6	4.7	4.8
Other Overnight	4.5	4.5	4.6	1.3	1.4	1.4
All Overnight	26.8	27.7	28.4	10.9	11.3	11.6

*Includes all lodging where a lodging tax is collected except campgrounds.

Sources: Estimates prepared by Dean Runyan Associates from other source data, including TNS TravelsAmerica visitor survey, Smith Travel Research reports prepared for Oregon Tourism Commission, U.S. Department of Transportation Origin and Destination survey, Oregon State Parks, and lodging tax receipts information collected by jurisdictions within the state and the Oregon Department of Revenue.

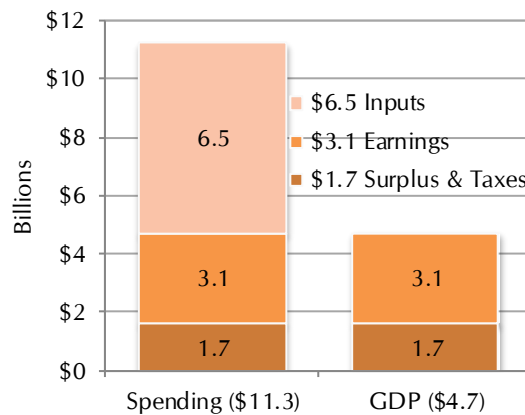
OREGON TRAVEL INDUSTRY GROSS DOMESTIC PRODUCT

In concept, the Gross Domestic Product (GDP) of a particular industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always smaller than output or sales because GDP measures the “value added” of an industry and does not include the cost of the inputs that are also necessary to produce a good or service.

Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits, dividends, interest and other payments). Estimates of travel spending and travel industry GDP are shown in the chart below. Oregon travel industry GDP amounted to \$4.7 billion in 2016.

More than 60 percent of all travel spending in Oregon is attributed to intermediate inputs and goods resold at retail. Intermediate inputs cover a range of goods and services that are purchased by travel industry businesses for the purpose of creating a product or service for the traveler. For example, lodging establishments purchase cable television services. Restaurants purchase food and beverages from vendors. In both cases, these inputs are classified as the GDP of other industries. In addition, travel spending occurs at many retail establishments where the goods purchased from the retailer are purchased as finished goods from suppliers. These resold goods are also counted as products of other industries. This would include motor fuel, groceries and most of the commodities sold at retail establishments.²

Oregon Travel Industry Gross Domestic Product, 2016p



Sources: Dean Runyan Associates, Bureau of Economic Analysis, and Minnesota Implan Group. Details may not sum to totals due to rounding.

² Over 40 percent of these intermediate inputs are purchased from other Oregon businesses.

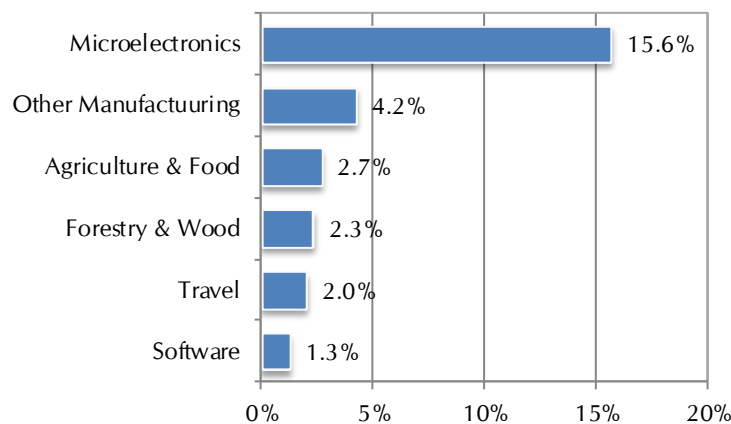
A COMPARISON OF OREGON EXPORT-ORIENTED INDUSTRIES

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations.³ Agriculture, extractive industries such as logging, and manufacturing are the best examples of goods producing export-oriented industries. In addition, many professional services have a significant export-orientation. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do the exports of other industries.

Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength – in part because they generate income that contributes to the development of other local services and amenities. Such industries characterize the “comparative advantage” of the local economy within larger regional, national and global markets.

A comparison of the GDP’s of the leading export-oriented industries in Oregon is shown below for 2015. It should be noted that the largest industry, microelectronics, is concentrated in the urbanized areas of Oregon, primarily Washington County. The primary export-oriented industries in most rural counties are agriculture & food processing, forestry & wood products, and the travel industry.

Oregon Gross Domestic Product, 2015
Share of Selected Export-Oriented Industries

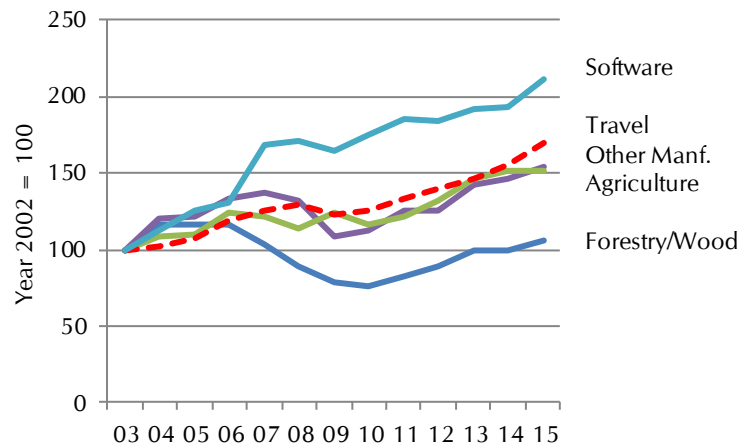


Source: Dean Runyan Associates and Bureau of Economic Analysis. *Note: The “other manufacturing” category is not a distinct industry. It is shown for comparative purposes only. The most current data is for 2015. GDP estimates by Dean Runyan Associates.

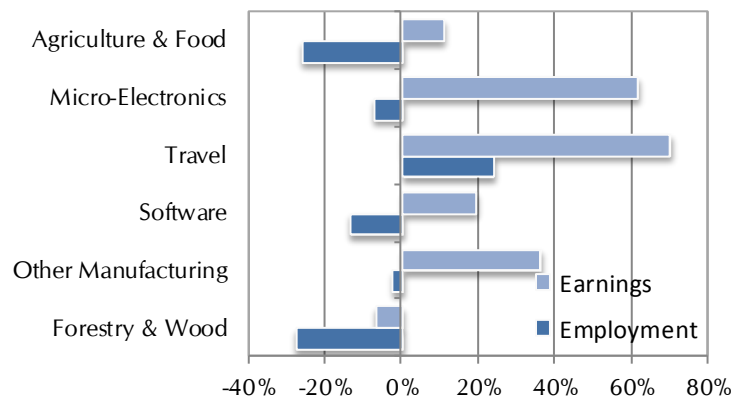
³ See also Appendices A and E.

The following two graphs provide additional comparisons of these export-oriented industries. The first chart shows the change in GDP from 2003 through 2015. The second chart shows changes in employment and earnings for the same period. Micro-electronics is not included in the GDP graph because of its extraordinary growth.⁴ The travel industry compares favorably to the other export industries for all measures (excluding the GDP of micro-electronics).

Change in Oregon Gross Domestic Product, 2003-2015 Selected Export-Oriented Industries



Change in Earnings and Employment, 2003-2015 Selected Export-Oriented Industries



⁴ Micro-electronics value in 2015 was 290 – an increase of 290 percent. However, most of this growth was due extraordinary gains in operating surplus, rather than employee compensation (see bottom graph). In recent years, employee compensation has accounted for less than 15 percent of micro-electronics GDP in Oregon. This compares to two-thirds share for the travel industry. (See preceding graph on travel industry GDP.)

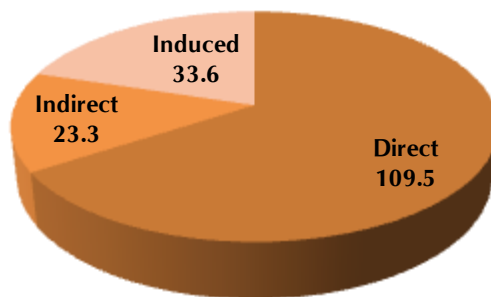
SECONDARY IMPACTS

Travel spending within Oregon brings money into many Oregon communities in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-related revenues creates *indirect and induced impacts*. To summarize:

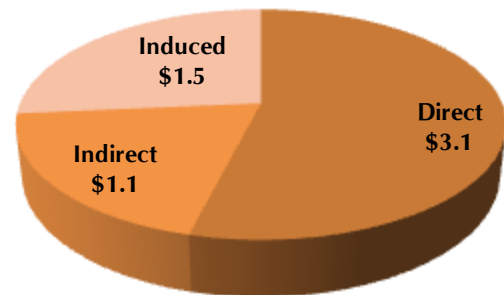
- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses throughout the state.
- **Indirect** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (i.e., those that receive money directly from travelers throughout the state).
- **Induced** impacts represent the employment and earnings that result from purchases for food, housing, transportation, recreation, and other goods and services made by travel industry employees, and the employees of the indirectly affected industries.

Total Employment and Earnings Generated by Travel Spending in Oregon, 2016p

Employment (Thousands)



Earnings (Billions)



Note: Indirect and induced impacts estimated by Dean Runyan Associates with IMPLAN model (Implan Group, LLC.). Percentages may not add to 100% due to rounding. Total direct and secondary employment was 166,300 jobs. The employment multiplier is 1.52 (166.3/109.5). Total direct and secondary earnings were \$5.7 billion. The earnings multiplier is 1.85 (\$5.7/\$3.1).

The impacts in this section are presented in terms of the employment and earnings of eleven major industry groups. These industry groups are similar, but not identical to the business service (or commodity) categories presented elsewhere in this report. (The specific industries that comprise these major groups are listed in Appendix D.) Direct travel impacts, such as those discussed in the first part of this section and the regional and county impacts presented elsewhere in this report are found in the following industry groups:

- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Trade**
- **Transportation**

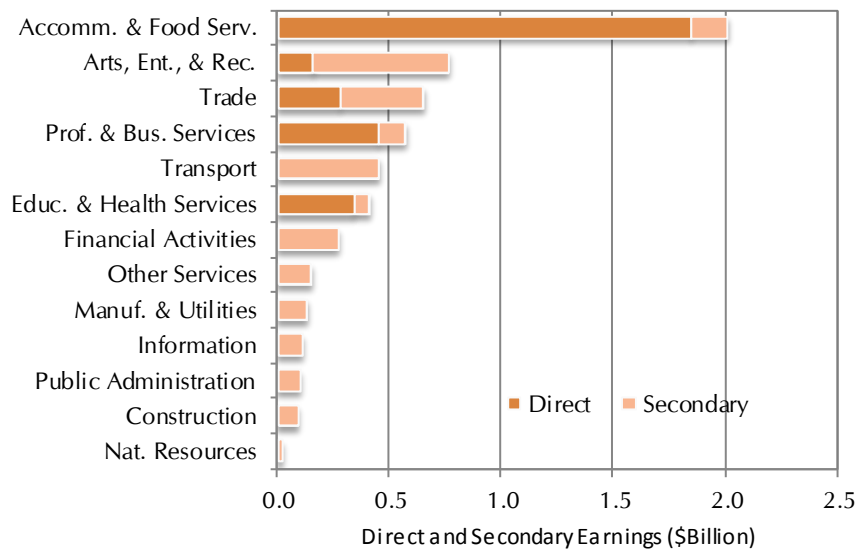
As is indicated in the following tables and graphs, the total direct employment and earnings of these four industry groups is identical to the total direct employment and earnings shown in the first part of this section. The only difference is that these industry groups represent industry groupings (firms) rather than commodity or business service groupings.

The indirect and induced impacts of travel spending are found in all thirteen industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

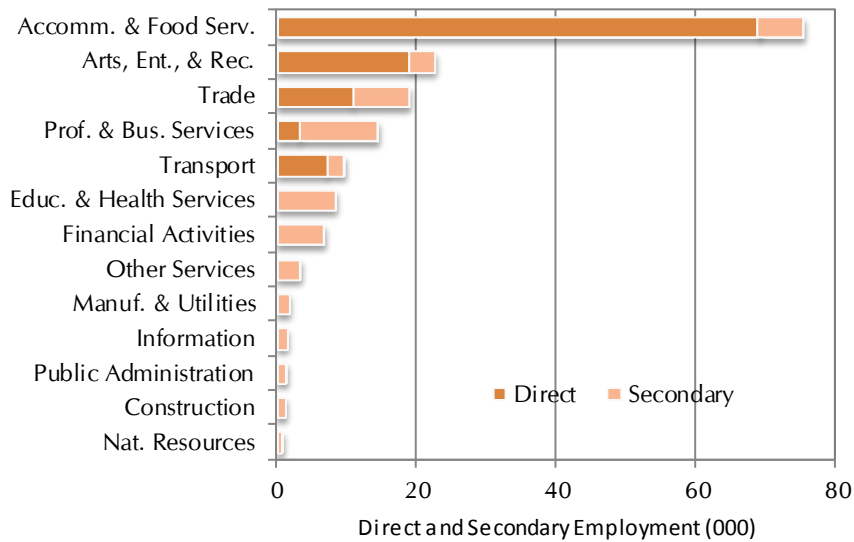
- **Professional & Business Services** (11,200 jobs and \$600 million earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Education and Health Services** (8,400 jobs and \$450 million earnings). The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services
- **Financial Activities** (6,800 jobs and \$270 million earnings). Both businesses and individuals make use of banking and insurance institutions.
- **Other Services** (3,400 jobs and \$150 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops.

It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire state of Oregon and do not necessarily reflect economic patterns for individual counties, regions or sub-regions within the state. While total economic impacts can be calculated on a county or regional level, such a detailed analysis is not included in this study. In general, geographic areas with lower levels of aggregate economic activity will have smaller secondary impacts within those same geographic boundaries.

Direct and Secondary Earnings Generated by Travel Spending in Oregon, 2016p



Direct and Secondary Employment Generated by Travel Spending in Oregon, 2015p



See notes at end of table on page 16.

Detailed estimates are reported in the following table. It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire state of Oregon and do not necessarily reflect economic patterns for individual counties, regions or sub-regions within the state. While total economic impacts can be calculated on a county or regional level, such a detailed analysis is not included in this study. In general, geographic areas with lower levels of aggregate economic activity will have smaller secondary impacts within those same geographic boundaries.

Direct and Secondary Travel-Generated Earnings in Oregon, 2016p

(Million)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	\$1,840	\$60	\$90	\$160	\$2,000
Professional & Business Services	\$160	\$420	\$170	\$600	\$760
Trade	\$280	\$60	\$310	\$370	\$650
Transportation	\$450	\$80	\$50	\$120	\$570
Education and Health Services		\$0	\$450	\$450	\$450
Arts, Entertainment & Recreation	\$340	\$40	\$20	\$70	\$410
Financial Activities		\$120	\$150	\$270	\$270
Other Services		\$60	\$100	\$150	\$150
Manufacturing & Utilities		\$80	\$50	\$130	\$130
Public Administration		\$70	\$40	\$110	\$110
Information		\$70	\$40	\$100	\$100
Construction		\$50	\$40	\$90	\$90
Natural Resources & Mining		\$10	\$10	\$20	\$20
All Industries	\$3,080	\$1,120	\$1,510	\$2,630	\$5,710

Direct and Secondary Travel-Generated Employment in Oregon, 2016p

(thousand jobs)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	69.0	2.5	3.9	6.3	75.4
Arts, Entertainment & Recreation	19.1	2.4	1.2	3.6	22.6
Trade	11.0	0.8	7.2	8.0	19.0
Professional & Business Services	3.3	7.9	3.3	11.2	14.4
Transportation	7.2	1.6	0.9	2.5	9.7
Education and Health Services		0.2	8.3	8.4	8.4
Financial Activities		3.1	3.7	6.8	6.8
Other Services		0.9	2.5	3.4	3.4
Manufacturing & Utilities		1.1	0.7	1.8	1.8
Information		1.0	0.5	1.5	1.5
Construction		0.7	0.7	1.4	1.4
Public Administration		0.8	0.5	1.2	1.2
Natural Resources & Mining		0.5	0.4	0.8	0.8
All Industries	109.5	23.3	33.6	56.9	166.3

Sources: Dean Runyan Associates and Implan Group, LLC.

Note: These industry groups are not equivalent to the categories used in the direct impact tables used in this report. See Appendix D.

Detailed direct travel impacts for 1992 through 2016p follow.

Oregon Travel Impacts, 1992-2004

	1992	1994	1996	1998	2000	2002	2004
Total Direct Travel Spending (\$Million)							
Destination Spending	3,485	3,860	4,330	4,702	5,323	5,566	6,042
Other Travel*	559	620	703	830	920	806	830
Total Direct Spending	4,044	4,480	5,033	5,532	6,244	6,372	6,873
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel*	1,497	1,691	1,917	2,048	2,316	2,402	2,638
Private Home	839	910	997	1,067	1,195	1,199	1,305
Campground	230	239	246	268	302	341	367
Vacation Home	66	74	87	95	114	119	132
Day Travel	854	946	1,084	1,224	1,396	1,505	1,601
Destination Spending	3,485	3,860	4,330	4,702	5,323	5,566	6,042
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	557	636	737	817	926	963	1,043
Food Service	800	885	965	1,056	1,164	1,289	1,381
Food Stores	273	301	336	373	411	456	493
Local Tran. & Gas	479	525	586	561	740	725	940
Arts, Ent. & Rec.	467	511	598	669	735	796	825
Retail Sales	627	688	749	789	864	910	896
Visitor Air Tran.	281	314	359	436	483	425	465
Destination Spending	3,485	3,860	4,330	4,702	5,323	5,566	6,042
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	549	612	679	746	828	898	961
Arts, Ent. & Rec.	137	150	175	197	217	235	238
Retail**	122	133	147	158	173	177	193
Ground Tran.	25	29	32	36	41	45	47
Visitor Air Tran.	62	70	78	87	102	94	82
Other Travel*	157	175	197	219	248	223	194
Total Direct Earnings	1,051	1,169	1,308	1,443	1,609	1,672	1,716
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	41.5	42.2	44.6	45.5	47.9	51.0	51.3
Arts, Ent. & Rec.	13.3	14.4	14.4	16.2	15.7	16.6	16.3
Retail**	8.4	8.5	8.9	8.8	9.1	9.1	9.5
Ground Tran.	1.5	1.7	1.8	1.8	1.9	2.0	2.0
Visitor Air Tran.	1.5	1.7	1.9	2.1	2.3	2.2	1.9
Other Travel*	5.1	5.6	6.0	6.4	6.6	5.8	4.8
Total Direct Employment	71.4	74.2	77.5	80.8	83.5	86.6	85.8
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	36	51	61	68	82	89	95
State Tax Receipts	104	117	125	133	148	150	165
Federal Tax Receipts	223	248	275	303	340	353	371
Total Direct Tax Receipts	363	416	461	504	570	592	631

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. Hotel, motel includes all lodging where a lodging tax is collected, except campgrounds. **Retail includes gasoline.

Oregon Travel Impacts, 2006-2016p

	2006	2008	2010	2012	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	7,151	7,686	7,531	8,377	9,060	9,431	9,819
Other Travel*	1,056	1,087	1,187	1,192	1,275	1,364	1,436
Total Direct Spending	8,207	8,774	8,719	9,568	10,335	10,795	11,256
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel*	3,310	3,715	3,571	4,057	4,516	4,803	5,117
Private Home	1,500	1,636	1,679	1,809	1,873	1,915	1,934
Campground	379	422	391	417	445	445	454
Vacation Home	149	167	164	177	180	178	178
Day Travel	1,813	1,747	1,727	1,917	2,047	2,090	2,137
Destination Spending	7,151	7,686	7,531	8,377	9,060	9,431	9,819
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1,307	1,431	1,361	1,573	1,806	2,037	2,205
Food Service	1,590	1,697	1,768	1,953	2,179	2,336	2,482
Food Stores	525	574	564	621	676	710	715
Local Tran. & Gas	1,281	1,561	1,339	1,632	1,601	1,395	1,390
Arts, Ent. & Rec.	899	886	870	918	979	1,023	1,059
Retail Sales	968	935	953	1,020	1,070	1,109	1,132
Visitor Air Tran.	581	602	675	659	748	821	836
Destination Spending	7,151	7,686	7,531	8,377	9,060	9,431	9,819
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1,134	1,252	1,221	1,379	1,564	1,716	1,844
Arts, Ent. & Rec.	265	301	279	292	311	328	344
Retail**	208	217	214	231	252	268	281
Ground Tran.	54	57	54	60	67	73	81
Visitor Air Tran.	92	93	99	108	127	143	165
Other Travel*	232	237	242	268	289	314	362
Total Direct Earnings	1,984	2,157	2,109	2,339	2,610	2,844	3,078
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	55.8	58.6	55.3	59.2	63.4	66.6	69.0
Arts, Ent. & Rec.	17.1	18.4	16.9	17.3	18.1	18.5	19.1
Retail**	9.9	9.9	9.4	9.9	10.5	10.8	11.0
Ground Tran.	2.1	2.1	1.9	2.0	2.1	2.2	2.3
Visitor Air Tran.	1.9	2.0	1.7	1.7	1.9	2.0	2.2
Other Travel*	5.3	5.5	4.8	5.0	5.3	5.6	5.9
Total Direct Employment	92.0	96.4	90.0	95.1	101.3	105.8	109.5
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	117	127	122	142	175	201	218
State Tax Receipts	190	204	198	231	247	263	289
Federal Tax Receipts	426	460	460	453	539	584	625
Total Direct Tax Receipts	733	791	779	826	962	1,049	1,132

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. Hotel, motel includes all lodging where a lodging tax is collected, except campgrounds. **Retail includes gasoline.

III. REGIONAL TRAVEL IMPACTS



North Coast

Clatsop
Tillamook

Central Coast

Douglas (West)
Lincoln
Lane (West)

South Coast

Coos
Curry

Willamette Valley

Benton
Clackamas (South)
Lane (East)
Linn
Marion
Polk
Yamhill

Greater Portland

Clackamas (West)
Columbia
Multnomah (West)
Washington

Southern

Douglas (East)
Jackson
Josephine
Klamath
Lake

Central

Crook
Deschutes
Jefferson
Wasco (South)

Mt. Hood/Gorge

Clackamas (East)
Multnomah (East)
Hood River
Wasco (North)

Eastern

Baker
Gilliam
Grant
Harney
Malheur
Morrow
Sherman
Umatilla
Union
Wallowa
Wheeler

2016p Regional Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment (thousand)	Tax Revenue (\$Million)		
	All Travel	Destination			Local	State	Total
Willamette Valley	1,815	1,582	493	21.4	20	54	74
North Coast	779	774	237	8.2	12	20	32
Central Coast	767	741	216	8.8	14	19	33
South Coast	396	389	126	5.3	2	11	13
Oregon Coast	1,942	1,917	580	22.3	28	50	79
Greater Portland	3,667	3,667	1,256	34.4	132	112	243
Southern	1,002	917	284	11.7	13	29	42
Central	851	790	232	9.2	14	23	37
Eastern	352	340	116	5.7	4	11	15
Mt. Hood/Gorge	400	383	117	4.8	6	11	17

Note: The sum of destination spending for the regions will be less than statewide destination spending because of the treatment of transportation expenditures (only a portion of ground transportation is allocated to destination spending).

2016p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	19.9	7.8	6.6	2.6
North Coast	6.5	2.4	2.4	0.9
Central Coast	6.5	2.4	2.3	0.9
South Coast	4.2	1.5	1.5	0.5
Oregon Coast	17.2	6.2	6.1	2.3
Greater Portland	25.6	12.6	8.3	4.0
Southern	11.7	4.5	3.8	1.5
Central	8.9	3.4	3.0	1.2
Eastern	4.9	1.8	1.8	0.7
Mt. Hood/Gorge	3.5	1.4	1.2	0.5

Note: The sum of trips for the regions will be greater than the statewide trip count because some travelers visit multiple destinations on a single trip within the state.

WILLAMETTE VALLEY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$78,450
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$88,535
Additional employment if each resident household encouraged one additional overnight visitor	1,130

Visitor Shares

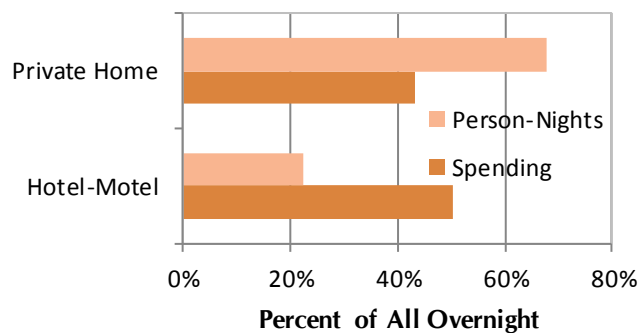
Travel Share of Total Employment (2015)*	3.4%
Overnight Visitor Day Share of Resident Population (2016p)**	4.6%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	2,188	4,651	\$609
Private Home	3,943	13,379	\$469
Other Overnight	510	1,913	\$72
All Overnight	6,640	19,943	\$1,150

Willamette Valley Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	1,020	1,278	1,481	1,745	1,815	4.0%	3.7%
Other	104	130	204	220	234	6.2%	5.2%
Visitor	916	1,148	1,277	1,525	1,582	3.7%	3.5%
Non-transportation	777	938	1,017	1,272	1,333	4.8%	3.4%
Transportation	139	210	260	253	249	-1.8%	3.7%
Earnings (\$Millions)							
Earnings	251	304	349	458	493	7.8%	4.3%
Employment (Thousands)							
Employment	15.8	17.5	17.7	20.8	21.4	3.3%	1.9%
Tax Revenue (\$Millions)							
Total	36.7	45.2	49.8	67.6	73.6	8.8%	4.4%
Local	8.2	10.8	11.7	18.2	20.0	9.8%	5.7%
State	28.5	34.4	38.0	49.5	53.6	8.4%	4.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Willamette Valley Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,296	1,277	1,424	1,456	1,488	1,525	1,582
Other Travel*	190	204	217	222	226	220	234
Total Direct Spending	1,486	1,481	1,641	1,677	1,714	1,745	1,815
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	183	171	197	207	222	248	274
Food Service	306	318	358	372	386	411	435
Food Stores	127	126	141	144	149	156	157
Local Tran. & Gas	251	211	263	257	249	211	203
Arts, Ent. & Rec.	228	225	240	244	247	257	263
Retail Sales	173	177	192	194	195	201	204
Visitor Air Tran.	28	49	34	38	40	42	45
Destination Spending	1,296	1,277	1,424	1,456	1,488	1,525	1,582
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	204.0	198.3	224.3	233.3	248.4	273.2	295.2
Arts, Ent. & Rec.	81.8	76.8	74.6	76.5	78.2	82.1	85.6
Retail**	41.4	41.0	45.0	46.0	47.6	50.4	52.6
Ground Tran.	6.7	6.4	7.0	7.1	7.6	8.1	8.8
Visitor Air Tran.	1.6	1.3	1.4	1.5	1.7	1.9	2.2
Other Travel*	25.5	25.2	32.5	35.3	37.8	42.2	49.0
Total Direct Earnings	360.9	349.0	384.8	399.7	421.2	457.8	493.5
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	10.5	9.8	10.6	11.0	11.3	11.9	12.3
Arts, Ent. & Rec.	5.3	4.9	4.9	5.0	5.1	5.2	5.4
Retail**	2.0	1.9	2.0	2.1	2.1	2.1	2.2
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.9	0.9	1.0	1.1	1.1	1.2	1.3
Total Direct Employment	19.0	17.7	18.8	19.4	19.9	20.8	21.4
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	13.0	11.7	13.6	14.8	16.1	18.2	20.0
State Tax Receipts	39.4	38.0	45.2	46.2	47.0	49.5	53.6
Total Local & State	52.4	49.8	58.8	61.0	63.1	67.6	73.6

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Willamette Valley Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	934	916	1,023	1,046	1,074	1,102	1,150
Hotel, Motel*	457	433	500	519	542	569	609
Private Home	410	420	457	458	463	463	469
Other Overnight	67	62	66	69	70	71	72
Campground	54	49	52	55	56	56	58
Vacation Home	13	13	14	14	14	14	14
Day Travel	362	361	401	409	414	423	432
Spending at Destination	1,296	1,277	1,424	1,456	1,488	1,525	1,582

Willamette Valley Visitor Volume and Visitor Spending

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$314	\$673	\$131	\$279	2.4	2.1
Private Home	\$88	\$303	\$35	\$119	2.5	3.4
Other Overnight	\$127	\$476	\$38	\$141	3.4	3.8
All Overnight	\$147	\$442	\$58	\$173	2.5	3.0

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	4,259	4,484	4,651	1,776	1,869	1,942
Private Home	12,897	13,167	13,379	5,107	5,219	5,316
Other Overnight	1,848	1,883	1,913	547	557	565
All Overnight	19,004	19,533	19,943	7,430	7,645	7,823

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,006	2,112	2,188	830	873	906
Private Home	3,801	3,881	3,943	1,489	1,521	1,547
Other Overnight	493	502	510	146	148	151
All Overnight	6,300	6,495	6,640	2,464	2,543	2,603

*Includes all lodging where a lodging tax is collected, except campgrounds.

NORTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$94,860
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,590
Additional employment if each resident household encouraged one additional overnight visitor	60

Visitor Shares

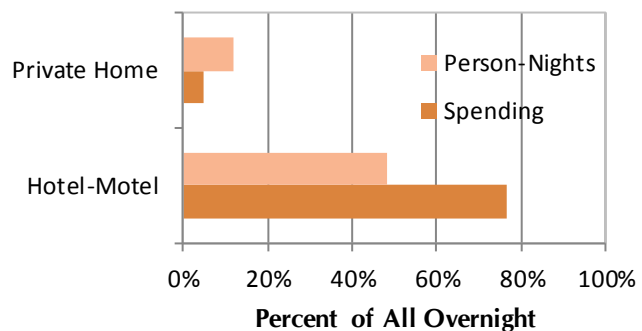
Travel Share of Total Employment (2015)*	21.7%
Overnight Visitor Day Share of Resident Population (2016p)**	27.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,463	3,152	\$378
Private Home	223	750	\$21
Other Overnight	718	2,561	\$87
All Overnight	2,403	6,464	\$486

North Coast Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	391	485	591	769	779	1.3%	4.4%
Other	3	13	17	5	5	-1.1%	2.9%
Visitor	388	472	574	764	774	1.4%	4.4%
Non-transportation	357	425	513	698	713	2.1%	4.4%
Transportation	31	47	61	66	62	-6.2%	4.4%
Earnings (\$Millions)							
Earnings	111	137	174	225	237	5.2%	4.9%
Employment (Thousands)							
Employment	6.0	6.5	7.1	8.0	8.2	2.5%	2.0%
Tax Revenue (\$Millions)							
Total	13.7	17.5	21.6	30.3	32.0	5.8%	5.5%
Local	4.9	6.2	7.8	12.0	12.3	2.4%	6.0%
State	8.8	11.2	13.8	18.3	19.8	7.9%	5.2%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

North Coast Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	586	574	620	674	732	764	774
Other Travel*	15	17	19	6	6	5	5
Total Direct Spending	600	591	639	680	738	769	779
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	129	129	138	150	165	182	190
Food Service	159	164	176	196	218	233	240
Food Stores	57	55	60	65	70	73	72
Local Tran. & Gas	72	61	73	75	78	66	62
Arts, Ent. & Rec.	82	80	83	90	97	102	102
Retail Sales	86	86	90	98	104	108	107
Destination Spending	586	574	620	674	732	764	774
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	123.6	121.3	130.4	143.7	153.8	167.4	176.5
Arts, Ent. & Rec.	28.1	25.7	26.0	26.1	27.7	29.2	30.8
Retail**	19.3	18.7	19.9	21.6	23.5	25.0	25.6
Ground Tran.	2.3	2.2	2.4	2.6	3.0	3.2	3.4
Other Travel*	4.1	5.8	6.1	0.6	0.7	0.7	0.7
Total Direct Earnings	177.5	173.7	184.8	194.6	208.6	225.4	237.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,020	4,790	4,790	5,080	5,250	5,570	5,780
Arts, Ent. & Rec.	1,510	1,290	1,190	1,190	1,220	1,230	1,220
Retail**	940	880	910	970	1,030	1,070	1,080
Ground Tran.	80	70	80	80	90	90	90
Other Travel*	70	70	90	20	20	30	30
Total Direct Employment	7,620	7,110	7,050	7,340	7,620	7,990	8,190
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.8	7.8	8.5	9.5	10.6	12.0	12.3
State Tax Receipts	14.1	13.8	15.3	16.2	17.2	18.3	19.8
Total Local & State	21.9	21.6	23.9	25.7	27.8	30.3	32.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

North Coast Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	365	357	382	416	454	478	486
Hotel, Motel*	268	263	283	313	349	372	378
Private Home	19	18	20	21	21	21	21
Other Overnight	78	75	79	83	84	85	87
Campground	52	50	52	56	57	58	59
Vacation Home	26	25	27	27	28	28	28
Day Travel	221	217	237	258	277	286	288
Spending at Destination	586	574	620	674	732	764	774

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$294	\$633	\$120	\$259	2.4	2.2
Private Home	\$71	\$240	\$28	\$93	2.6	3.4
Other Overnight	\$112	\$399	\$34	\$121	3.3	3.6
All Overnight	\$206	\$539	\$75	\$202	2.7	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	3,029	3,189	3,152	1,238	1,303	1,289
Private Home	746	748	750	288	289	290
Other Overnight	2,487	2,531	2,561	755	768	777
All Overnight	6,263	6,468	6,464	2,281	2,360	2,355

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,409	1,484	1,463	576	606	598
Private Home	222	222	223	86	86	86
Other Overnight	697	710	718	212	216	218
All Overnight	2,328	2,415	2,403	874	908	902

*Includes all lodging where a lodging tax is collected, except campgrounds.

CENTRAL COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$86,970
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$7,655
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

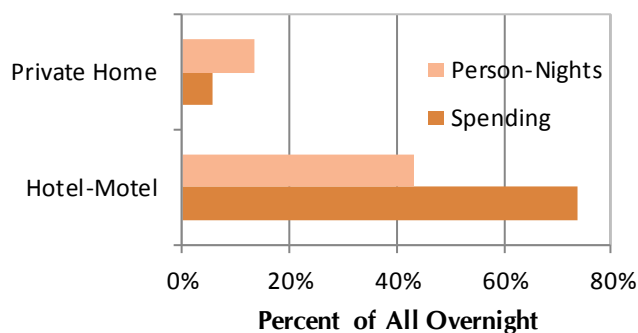
Travel Share of Total Employment (2015)*	24.3%
Overnight Visitor Day Share of Resident Population (2016p)**	27.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,384	3,028	\$408
Private Home	241	825	\$27
Other Overnight	707	2,657	\$101
All Overnight	2,332	6,510	\$537

Central Coast Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	408	488	587	717	767	7.0%	4.0%
Other	14	10	16	24	26	7.8%	4.1%
Visitor	394	478	571	693	741	7.0%	4.0%
Non-transportation	363	430	509	632	680	7.6%	4.0%
Transportation	32	48	62	61	61	0.6%	4.2%
Earnings (\$Millions)							
Earnings	109	128	161	201	216	7.5%	4.4%
Employment (Thousands)							
Employment	6.3	6.9	7.8	8.5	8.8	3.6%	2.0%
Tax Revenue (\$Millions)							
Total	15.1	18.9	23.9	30.7	33.4	8.8%	5.1%
Local	5.9	7.5	10.1	13.3	14.0	4.9%	5.5%
State	9.2	11.4	13.8	17.4	19.4	11.8%	4.8%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Central Coast Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	584	571	585	621	665	693	741
Other Travel*	18	16	20	22	23	24	26
Total Direct Spending	602	587	605	642	688	717	767
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	143	143	144	151	164	181	192
Food Service	143	147	149	162	178	191	212
Food Stores	59	57	60	64	68	71	73
Local Tran. & Gas	74	62	71	72	73	61	61
Arts, Ent. & Rec.	84	81	80	85	91	95	103
Retail Sales	82	82	82	87	91	94	100
Destination Spending	584	571	585	621	665	693	741
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	113.9	111.3	115.8	123.2	131.6	140.8	151.1
Arts, Ent. & Rec.	26.5	24.0	25.1	23.8	24.5	25.8	27.2
Retail**	18.8	18.2	18.6	19.8	21.3	22.6	24.5
Ground Tran.	2.1	2.0	2.1	2.3	2.5	2.7	3.2
Other Travel*	5.5	5.1	6.7	7.4	7.8	8.8	9.8
Total Direct Earnings	166.8	160.7	168.2	176.4	187.9	200.7	215.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,480	5,230	5,130	5,320	5,500	5,590	5,780
Arts, Ent. & Rec.	1,640	1,550	1,570	1,590	1,620	1,580	1,640
Retail**	910	850	850	900	940	970	1,020
Ground Tran.	70	70	70	70	80	80	90
Other Travel*	150	140	170	190	200	220	230
Total Direct Employment	8,240	7,830	7,790	8,070	8,340	8,450	8,750
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.7	10.1	9.9	10.9	11.9	13.3	14.0
State Tax Receipts	14.4	13.8	15.0	15.6	16.5	17.4	19.4
Total Local & State	23.0	23.9	24.9	26.6	28.4	30.7	33.4

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Central Coast Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	419	410	416	441	475	499	537
Hotel, Motel*	305	298	298	318	350	373	408
Private Home	24	24	26	27	27	27	27
Other Overnight	90	88	92	96	98	99	101
Campground	64	62	64	69	70	71	73
Vacation Home	26	26	28	28	28	28	29
Day Travel	165	161	169	180	190	194	205
Spending at Destination	584	571	585	621	665	693	741

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$330	\$721	\$135	\$295	2.4	2.2
Private Home	\$86	\$295	\$33	\$114	2.6	3.4
Other Overnight	\$127	\$476	\$38	\$143	3.3	3.8
All Overnight	\$228	\$616	\$82	\$230	2.8	2.7

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,582	2,719	3,028	1,056	1,112	1,238
Private Home	804	805	825	310	310	318
Other Overnight	2,576	2,622	2,657	777	790	801
All Overnight	5,962	6,146	6,510	2,142	2,213	2,357

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,181	1,244	1,384	483	509	566
Private Home	235	235	241	91	91	93
Other Overnight	685	698	707	206	210	213
All Overnight	2,102	2,177	2,332	780	810	872

*Includes all lodging where a lodging tax is collected, except campgrounds.

SOUTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$74,170
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.40

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,923
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

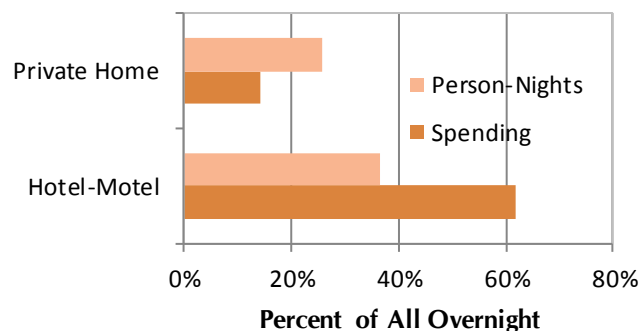
Travel Share of Total Employment (2015)*	12.3%
Overnight Visitor Day Share of Resident Population (2016p)**	13.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	734	1,571	\$168
Private Home	303	1,044	\$36
Other Overnight	426	1,577	\$63
All Overnight	1,463	4,192	\$266

South Coast Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	237	302	322	388	396	1.9%	3.2%
Other	7	9	9	7	6	-5.9%	-0.3%
Visitor	230	293	313	381	389	2.1%	3.3%
Non-transportation	206	253	269	336	347	3.2%	3.3%
Transportation	25	40	44	45	42	-6.1%	3.3%
Earnings (\$Millions)							
Earnings	68	84	92	119	126	6.0%	3.9%
Employment (Thousands)							
Employment	4.5	4.8	4.7	5.1	5.3	4.5%	1.0%
Tax Revenue (\$Millions)							
Total	7.4	9.4	9.8	12.3	13.2	7.0%	3.7%
Local	1.4	1.8	1.7	2.0	2.0	3.9%	2.4%
State	6.0	7.6	8.1	10.4	11.2	7.6%	3.9%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

South Coast Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	337	313	339	357	369	381	389
Other Travel*	11	9	9	8	8	7	6
Total Direct Spending	348	322	348	366	377	388	396
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	68	63	68	71	74	82	87
Food Service	84	83	89	97	102	109	114
Food Stores	37	35	37	40	41	43	43
Local Tran. & Gas	51	41	50	50	49	41	39
Arts, Ent. & Rec.	51	48	50	52	54	56	57
Retail Sales	42	40	42	44	45	46	46
Visitor Air Tran.	4	3	3	4	3	4	4
Destination Spending	337	313	339	357	369	381	389
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	66.5	62.2	67.6	71.0	75.4	83.3	88.8
Arts, Ent. & Rec.	16.7	14.7	14.8	15.8	15.4	16.2	16.6
Retail**	11.0	10.3	10.9	11.6	12.1	12.8	13.3
Ground Tran.	1.3	1.2	1.3	1.4	1.5	1.6	1.7
Visitor Air Tran.	1.6	1.7	2.1	2.7	2.8	3.3	3.8
Other Travel*	1.8	2.0	1.6	1.2	1.4	1.3	1.5
Total Direct Earnings	98.9	92.1	98.3	103.6	108.7	118.6	125.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,210	2,830	2,940	2,970	2,990	3,180	3,340
Arts, Ent. & Rec.	1,290	1,230	1,210	1,210	1,170	1,200	1,240
Retail**	530	490	490	500	530	550	560
Ground Tran.	40	40	40	40	50	50	50
Visitor Air Tran.	40	30	40	50	50	60	60
Other Travel*	60	60	40	40	40	40	40
Total Direct Employment	5,180	4,680	4,770	4,810	4,820	5,060	5,290
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.9	1.7	1.6	1.7	1.8	2.0	2.0
State Tax Receipts	8.7	8.1	9.2	9.5	9.8	10.4	11.2
Total Local & State	10.6	9.8	10.8	11.2	11.5	12.3	13.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

South Coast Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	233	214	231	243	251	260	266
Hotel, Motel*	142	128	140	148	155	163	168
Private Home	34	33	35	36	36	36	36
Other Overnight	57	53	56	60	60	61	63
Campground	50	47	49	52	53	54	55
Vacation Home	7	7	7	7	7	7	7
Day Travel	105	99	108	114	118	121	123
Spending at Destination	337	313	339	357	369	381	389

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$262	\$560	\$107	\$229	2.4	2.1
Private Home	\$87	\$301	\$34	\$117	2.6	3.5
Other Overnight	\$136	\$504	\$40	\$147	3.4	3.7
All Overnight	\$176	\$491	\$64	\$182	2.8	2.8

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,469	1,547	1,571	602	634	644
Private Home	1,037	1,042	1,044	405	407	408
Other Overnight	1,521	1,550	1,577	444	452	460
All Overnight	4,027	4,139	4,192	1,451	1,494	1,511

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	687	723	734	281	296	301
Private Home	301	303	303	117	118	118
Other Overnight	411	418	426	120	122	124
All Overnight	1,399	1,444	1,463	518	536	543

*Includes all lodging where a lodging tax is collected, except campgrounds.

OREGON COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$87,270
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$20,987
Additional employment if each resident household encouraged one additional overnight visitor	240

Visitor Shares

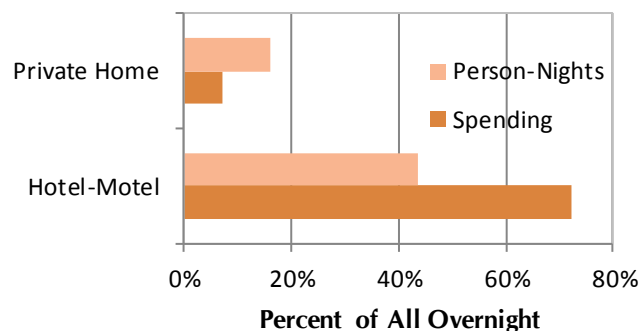
Travel Share of Total Employment (2015)*	19.0%
Overnight Visitor Day Share of Resident Population (2016p)**	21.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	3,393	7,751	\$962
Private Home	727	2,619	\$84
Other Overnight	1,999	6,796	\$252
All Overnight	6,119	17,166	\$1,298

Oregon Coast Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	1,036	1,275	1,500	1,874	1,942	3.6%	4.0%
Other	16	19	28	23	25	9.6%	3.0%
Visitor	1,021	1,256	1,472	1,852	1,917	3.6%	4.0%
Non-transportation	925	1,108	1,291	1,667	1,740	4.4%	4.0%
Transportation	96	148	182	185	178	-3.9%	3.9%
Earnings (\$Millions)							
Earnings	289	350	427	546	580	6.2%	4.4%
Employment (Thousands)							
Employment	16.9	18.3	19.7	21.6	22.3	3.4%	1.8%
Tax Revenue (\$Millions)							
Total	36.2	45.8	55.2	73.3	78.6	7.2%	5.0%
Local	12.2	15.6	19.5	27.3	28.3	3.7%	5.4%
State	24.0	30.2	35.7	46.1	50.4	9.3%	4.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Oregon Coast Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,525	1,472	1,561	1,669	1,782	1,852	1,917
Other Travel*	26	28	31	19	20	23	25
Total Direct Spending	1,551	1,500	1,592	1,689	1,802	1,874	1,942
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	340	335	351	372	403	446	469
Food Service	387	393	413	455	499	533	567
Food Stores	152	146	157	168	179	187	189
Local Tran. & Gas	215	179	211	214	216	181	174
Arts, Ent. & Rec.	217	208	212	228	243	253	262
Retail Sales	210	208	214	228	240	248	253
Visitor Air Tran.	4	3	3	4	3	4	4
Destination Spending	1,525	1,472	1,561	1,669	1,782	1,852	1,917
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	304.1	294.7	313.9	337.8	360.8	391.5	416.5
Arts, Ent. & Rec.	71.3	64.4	65.8	65.6	67.6	71.1	74.6
Retail**	49.6	47.7	49.9	53.6	57.6	61.1	64.0
Ground Tran.	5.7	5.4	5.8	6.3	7.0	7.5	8.3
Visitor Air Tran.	1.6	1.7	2.1	2.7	2.8	3.3	3.8
Other Travel*	11.9	13.4	14.9	9.7	10.5	11.5	12.6
Total Direct Earnings	444.2	427.4	452.5	475.7	506.3	545.9	579.9
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	13.7	12.8	12.9	13.4	13.7	14.3	14.9
Arts, Ent. & Rec.	4.4	4.1	4.0	4.0	4.0	4.0	4.1
Retail**	2.4	2.3	2.3	2.4	2.5	2.6	2.7
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Travel*	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Total Direct Employment	21.1	19.7	19.7	20.3	20.8	21.6	22.3
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	18.3	19.5	20.1	22.1	24.3	27.3	28.3
State Tax Receipts	37.2	35.7	39.5	41.4	43.5	46.1	50.4
Total Local & State	55.6	55.2	59.6	63.5	67.7	73.3	78.6

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Oregon Coast Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	1,030	990	1,042	1,112	1,192	1,247	1,298
Hotel, Motel*	724	696	729	787	863	915	962
Private Home	78	76	83	84	85	84	84
Other Overnight	227	218	230	241	244	248	252
Campground	168	159	168	179	181	184	188
Vacation Home	60	59	63	63	64	64	64
Day Travel	496	482	520	557	590	605	619
Spending at Destination	1,525	1,472	1,561	1,669	1,782	1,852	1,917

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$303	\$693	\$124	\$283	2.4	2.3
Private Home	\$83	\$299	\$32	\$116	2.6	3.6
Other Overnight	\$124	\$421	\$37	\$126	3.3	3.4
All Overnight	\$209	\$572	\$76	\$212	2.8	2.7

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	7,080	7,455	7,751	2,896	3,049	3,170
Private Home	2,588	2,595	2,619	1,003	1,006	1,015
Other Overnight	6,584	6,703	6,796	1,976	2,011	2,038
All Overnight	16,252	16,753	17,166	5,875	6,067	6,223

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	3,326	3,513	3,393	1,360	1,437	1,387
Private Home	718	720	727	278	279	281
Other Overnight	1,938	1,973	1,999	582	592	600
All Overnight	5,982	6,206	6,119	2,220	2,308	2,269

*Includes all lodging where a lodging tax is collected, except campgrounds.

GREATER PORTLAND TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$122,540
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$6.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$258,632
Additional employment if each resident household encouraged one additional overnight visitor	2,110

Visitor Shares

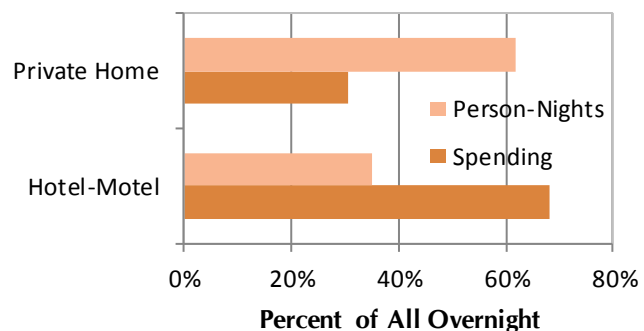
Travel Share of Total Employment (2015)*	2.9%
Overnight Visitor Day Share of Resident Population (2016p)**	4.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	3,835	9,207	\$2,219
Private Home	4,281	15,622	\$917
Other Overnight	198	782	\$30
All Overnight	8,315	25,611	\$3,167

Greater Portland Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	2,698	3,023	3,649	4,683	4,893	4.5%	3.8%
Other	834	845	1,025	1,182	1,226	3.8%	2.4%
Visitor	1,865	2,178	2,624	3,501	3,667	4.7%	4.3%
Non-transportation	1,178	1,391	1,637	2,295	2,422	5.5%	4.6%
Transportation	687	786	987	1,206	1,245	3.2%	3.8%
Earnings (\$Millions)							
Earnings	677	695	811	1,137	1,256	10.5%	3.9%
Employment (Thousands)							
Employment	26.0	25.7	26.8	32.9	34.4	4.3%	1.8%
Tax Revenue (\$Millions)							
Total	101.9	119.3	139.8	222.3	243.4	9.5%	5.6%
Local	45.1	56.1	67.2	121.6	131.5	8.2%	6.9%
State	56.8	63.2	72.5	100.7	111.8	11.1%	4.3%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Greater Portland Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	2,620	2,624	2,997	3,118	3,274	3,501	3,667
Other Travel*	1,001	1,025	1,079	1,087	1,142	1,182	1,226
Total Direct Spending	3,621	3,649	4,076	4,204	4,416	4,683	4,893
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	515	472	607	641	705	811	875
Food Service	530	567	647	679	706	761	807
Food Stores	109	110	125	129	134	142	143
Local Tran. & Gas	472	428	513	523	529	499	531
Arts, Ent. & Rec.	177	179	196	201	205	216	224
Retail Sales	296	309	339	347	350	365	372
Visitor Air Tran.	520	560	571	598	645	706	713
Destination Spending	2,620	2,624	2,997	3,118	3,274	3,501	3,667
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	384	377	451	478	510	561	606
Arts, Ent. & Rec.	58	55	65	64	67	71	75
Retail**	55	56	62	64	66	71	75
Ground Tran.	36	34	38	39	42	46	52
Visitor Air Tran.	87	93	101	108	119	134	154
Other Travel*	193	197	214	215	234	254	295
Total Direct Earnings	813	811	931	967	1,038	1,137	1,256
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	16.5	15.8	18.0	18.6	19.4	20.2	21.0
Arts, Ent. & Rec.	2.6	2.4	2.6	2.7	2.8	2.9	3.0
Retail**	2.1	2.1	2.3	2.3	2.3	2.4	2.4
Ground Tran.	1.3	1.2	1.3	1.3	1.3	1.4	1.5
Visitor Air Tran.	1.8	1.5	1.5	1.6	1.7	1.9	2.0
Other Travel*	4.3	3.7	3.7	3.8	4.0	4.2	4.4
Total Direct Employment	28.7	26.8	29.4	30.3	31.5	32.9	34.4
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	71.8	67.2	82.2	94.9	104.4	121.6	131.5
State Tax Receipts	73.9	72.5	86.9	89.7	93.5	100.7	111.8
Total Local & State	145.7	139.8	169.0	184.6	197.9	222.3	243.4

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Greater Portland Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	2,234	2,228	2,549	2,655	2,802	3,012	3,167
Hotel, Motel*	1,474	1,439	1,708	1,793	1,908	2,074	2,219
Private Home	732	764	813	833	865	909	917
Other Overnight	27	26	28	29	29	29	30
Campground	20	18	19	20	21	21	21
Vacation Home	8	8	9	9	9	9	9
Day Travel	386	396	448	462	472	489	500
Spending at Destination	2,620	2,624	2,997	3,118	3,274	3,501	3,667

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$507	\$1,248	\$241	\$579	2.1	2.5
Private Home	\$115	\$432	\$59	\$214	2.0	3.7
Other Overnight	\$116	\$463	\$38	\$151	3.0	4.0
All Overnight	\$251	\$798	\$124	\$381	2.0	3.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	8,524	8,903	9,207	4,007	4,203	4,376
Private Home	15,012	15,394	15,622	7,571	7,795	7,958
Other Overnight	759	772	782	251	255	258
All Overnight	24,294	25,069	25,611	11,829	12,253	12,593

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	3,551	3,709	3,835	1,632	1,710	1,778
Private Home	4,114	4,219	4,281	2,029	2,086	2,126
Other Overnight	192	195	198	63	64	65
All Overnight	7,857	8,123	8,315	3,724	3,860	3,969

*Includes all lodging where a lodging tax is collected, except campgrounds.

SOUTHERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$80,020
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$37,283
Additional employment if each resident household encouraged one additional overnight visitor	470

Visitor Shares

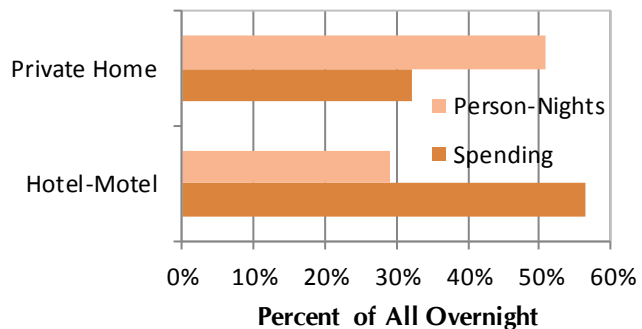
Travel Share of Total Employment (2015)*	4.8%
Overnight Visitor Day Share of Resident Population (2016p)**	6.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,571	3,488	\$419
Private Home	1,635	5,836	\$224
Other Overnight	615	2,335	\$80
All Overnight	3,821	11,660	\$723

Southern Oregon Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	627	796	864	979	1,002	2.3%	3.0%
Other	50	73	89	88	85	-3.7%	3.3%
Visitor	576	723	775	891	917	2.9%	2.9%
Non-transportation	489	585	614	734	762	3.9%	2.8%
Transportation	88	137	160	158	155	-1.5%	3.6%
Earnings (\$Millions)							
Earnings	163	197	212	269	284	5.8%	3.5%
Employment (Thousands)							
Employment	10.0	10.6	10.0	11.4	11.7	2.3%	1.0%
Tax Revenue (\$Millions)							
Total	21.9	28.4	30.9	39.1	42.2	7.7%	4.2%
Local	5.2	7.9	9.4	12.4	13.4	8.5%	6.1%
State	16.6	20.5	21.5	26.8	28.7	7.4%	3.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Southern Oregon Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	785	775	834	851	868	891	917
Other Travel*	90	89	91	90	90	88	85
Total Direct Spending	875	864	924	941	958	979	1,002
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	139	137	145	148	157	172	184
Food Service	186	194	209	219	226	240	252
Food Stores	75	74	81	83	86	90	90
Local Tran. & Gas	146	123	149	145	139	118	114
Arts, Ent. & Rec.	107	105	109	112	113	117	120
Retail Sales	102	105	109	112	112	115	116
Visitor Air Tran.	30	37	32	33	35	39	42
Destination Spending	785	775	834	851	868	891	917
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	140.8	138.9	150.2	156.6	168.7	181.8	195.1
Arts, Ent. & Rec.	37.2	34.4	35.3	36.7	38.2	39.8	41.2
Retail**	25.5	25.2	26.8	27.6	28.5	30.1	31.3
Ground Tran.	4.0	3.8	4.2	4.3	4.4	4.9	5.3
Visitor Air Tran.	2.3	2.2	2.4	2.6	2.8	3.0	3.4
Other Travel*	8.5	7.6	8.2	8.5	9.1	9.1	8.0
Total Direct Earnings	218.3	212.2	227.2	236.2	251.8	268.8	284.3
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	6.9	6.5	6.8	7.0	7.2	7.5	7.8
Arts, Ent. & Rec.	2.3	2.0	2.1	2.1	2.2	2.2	2.2
Retail**	1.2	1.1	1.2	1.2	1.2	1.2	1.2
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Visitor Air Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.3	0.2	0.2	0.2	0.3	0.3	0.2
Total Direct Employment	10.9	10.0	10.4	10.7	11.0	11.4	11.7
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.1	9.4	9.8	10.3	11.2	12.4	13.4
State Tax Receipts	22.2	21.5	24.7	25.2	25.7	26.8	28.7
Total Local & State	31.3	30.9	34.4	35.5	36.9	39.1	42.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Southern Oregon Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	619	610	653	666	680	700	723
Hotel, Motel*	350	340	366	374	384	400	419
Private Home	195	200	214	216	218	221	224
Other Overnight	74	70	73	77	78	78	80
Campground	57	53	56	60	60	61	62
Vacation Home	16	16	17	17	18	18	18
Day Travel	166	165	180	185	188	191	195
Spending at Destination	785	775	834	851	868	891	917

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$288	\$644	\$120	\$267	2.4	2.2
Private Home	\$96	\$349	\$38	\$137	2.5	3.6
Other Overnight	\$115	\$438	\$34	\$130	3.4	3.8
All Overnight	\$162	\$490	\$62	\$189	2.6	3.0

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	3,276	3,396	3,488	1,363	1,415	1,456
Private Home	5,679	5,781	5,836	2,247	2,295	2,325
Other Overnight	2,257	2,299	2,335	669	681	692
All Overnight	11,212	11,476	11,660	4,278	4,391	4,472

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,475	1,529	1,571	610	633	651
Private Home	1,591	1,620	1,635	621	634	641
Other Overnight	594	606	615	176	179	182
All Overnight	3,661	3,755	3,821	1,407	1,446	1,474

*Includes all lodging where a lodging tax is collected, except campgrounds.

CENTRAL OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$86,660
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$20,046
Additional employment if each resident household encouraged one additional overnight visitor	230

Visitor Shares

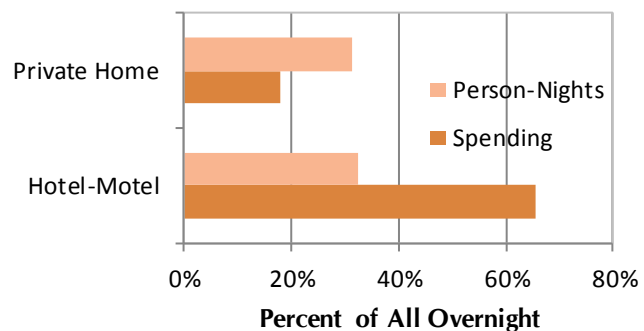
Travel Share of Total Employment (2015)*	7.0%
Overnight Visitor Day Share of Resident Population (2016p)**	10.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,417	3,077	\$453
Private Home	816	2,834	\$115
Other Overnight	806	3,038	\$96
All Overnight	3,039	8,948	\$664

Central Oregon Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	371	464	617	792	851	7.4%	5.3%
Other	19	35	59	60	61	2.1%	7.4%
Visitor	351	429	557	733	790	7.9%	5.2%
Non-transportation	312	361	461	631	687	8.9%	5.1%
Transportation	40	68	96	102	103	1.3%	6.1%
Earnings (\$Millions)							
Earnings	96	111	146	217	232	6.8%	5.7%
Employment (Thousands)							
Employment	5.7	5.8	7.0	9.0	9.2	3.1%	3.0%
Tax Revenue (\$Millions)							
Total	15.7	18.8	22.0	32.7	36.7	12.1%	5.5%
Local	6.7	7.7	7.9	12.5	14.1	13.2%	4.7%
State	9.0	11.1	14.1	20.3	22.6	11.5%	6.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Central Oregon Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	573	557	621	666	690	733	790
Other Travel*	49	59	52	54	57	60	61
Total Direct Spending	622	617	673	720	747	792	851
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	138	131	150	166	180	203	228
Food Service	139	142	160	173	181	196	215
Food Stores	52	50	55	58	61	64	66
Local Tran. & Gas	84	70	88	88	85	73	72
Arts, Ent. & Rec.	70	68	73	77	79	83	89
Retail Sales	71	71	77	80	81	84	89
Visitor Air Tran.	19	27	19	23	24	29	32
Destination Spending	573	557	621	666	690	733	790
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	107.1	102.1	115.2	124.8	136.7	157.3	168.0
Arts, Ent. & Rec.	24.1	21.9	23.5	25.8	28.9	30.7	32.4
Retail**	16.8	16.1	17.7	18.7	19.4	20.8	22.4
Ground Tran.	2.2	2.1	2.4	2.6	2.7	3.0	3.4
Visitor Air Tran.	0.6	0.6	0.6	0.7	0.8	0.9	1.0
Other Travel*	3.5	3.5	3.7	3.7	4.0	4.4	4.6
Total Direct Earnings	154.3	146.3	163.1	176.3	192.5	217.1	231.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,950	4,710	4,990	5,270	5,550	6,060	6,240
Arts, Ent. & Rec.	1,530	1,400	1,540	1,630	1,750	1,820	1,890
Retail**	760	720	770	810	820	850	870
Ground Tran.	70	70	80	80	80	90	90
Visitor Air Tran.	20	20	20	20	20	20	30
Other Travel*	110	100	100	100	110	110	120
Total Direct Employment	7,450	7,030	7,500	7,910	8,340	8,960	9,240
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.4	7.9	9.0	10.2	11.0	12.5	14.1
State Tax Receipts	14.9	14.1	16.7	17.7	18.6	20.3	22.6
Total Local & State	23.2	22.0	25.7	27.9	29.6	32.7	36.7

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Central Oregon Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	476	463	515	554	575	614	664
Hotel, Motel*	297	286	328	358	378	411	453
Private Home	91	93	98	103	103	108	115
Other Overnight	89	83	89	93	94	95	96
Campground	47	42	45	48	48	48	50
Vacation Home	42	41	44	45	46	46	46
Day Travel	97	95	107	113	115	119	126
Spending at Destination	573	557	621	666	690	733	790

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$354	\$774	\$147	\$319	2.4	2.2
Private Home	\$100	\$356	\$41	\$141	2.5	3.6
Other Overnight	\$103	\$389	\$32	\$119	3.3	3.8
All Overnight	\$198	\$574	\$74	\$219	2.7	2.9

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,683	2,875	3,077	1,113	1,194	1,279
Private Home	2,631	2,736	2,834	1,059	1,107	1,151
Other Overnight	2,954	3,005	3,038	907	923	932
All Overnight	8,268	8,616	8,948	3,079	3,223	3,362

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,236	1,325	1,417	510	547	585
Private Home	758	788	816	299	312	324
Other Overnight	784	797	806	240	244	247
All Overnight	2,778	2,910	3,039	1,050	1,104	1,156

*Includes all lodging where a lodging tax is collected, except campgrounds.

EASTERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$60,160
Employee Earnings generated by \$100 Visitor Spending	\$34
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$9,857
Additional employment if each resident household encouraged one additional overnight visitor	160

Visitor Shares

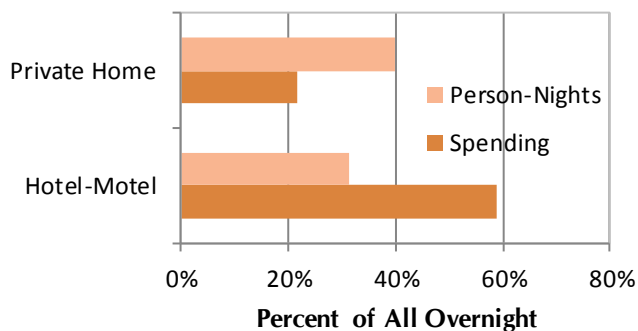
Travel Share of Total Employment (2015)*	5.6%
Overnight Visitor Day Share of Resident Population (2016p)**	7.2%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	799	1,583	\$154
Private Home	620	1,906	\$52
Other Overnight	401	1,435	\$49
All Overnight	1,820	4,924	\$254

Eastern Oregon Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	263	307	316	351	352	0.1%	1.8%
Other	9	12	14	12	11	-6.9%	1.2%
Visitor	254	295	302	339	340	0.4%	1.9%
Non-transportation	225	254	257	298	302	1.4%	1.9%
Transportation	29	41	45	41	38	-6.8%	1.8%
Earnings (\$Millions)							
Earnings	73	83	87	112	116	3.5%	3.0%
Employment (Thousands)							
Employment	5.4	5.4	5.0	5.6	5.7	1.1%	0.3%
Tax Revenue (\$Millions)							
Total	9.2	10.8	11.7	14.3	15.1	5.8%	3.1%
Local	2.1	2.6	3.2	3.9	4.1	6.7%	4.2%
State	7.1	8.2	8.5	10.4	11.0	5.5%	2.8%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Eastern Oregon Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	307	302	319	324	332	339	340
Other Travel*	17	14	16	16	15	12	11
Total Direct Spending	324	316	335	340	347	351	352
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	64	64	64	67	70	77	80
Food Service	72	75	79	81	85	90	92
Food Stores	33	33	35	36	38	39	39
Local Tran. & Gas	53	45	54	51	49	41	38
Arts, Ent. & Rec.	48	48	49	49	50	52	52
Retail Sales	36	37	38	38	39	40	39
Destination Spending	307	302	319	324	332	339	340
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	60.1	59.7	67.6	69.0	72.8	79.4	82.1
Arts, Ent. & Rec.	15.6	14.4	15.5	15.9	16.8	17.6	18.4
Retail**	10.3	10.3	10.8	11.0	11.4	12.1	12.2
Ground Tran.	1.4	1.4	1.5	1.5	1.6	1.7	1.8
Other Travel*	0.8	1.1	0.7	0.7	0.9	1.1	0.9
Total Direct Earnings	88.5	86.9	96.1	98.0	103.8	112.0	116.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,270	3,110	3,290	3,310	3,370	3,500	3,560
Arts, Ent. & Rec.	1,410	1,340	1,430	1,480	1,500	1,510	1,510
Retail**	520	500	500	500	510	530	530
Ground Tran.	50	50	50	50	50	50	50
Visitor Air Tran.	10	0	0	0	10	10	10
Other Travel*	50	50	40	40	50	50	50
Total Direct Employment	5,310	5,050	5,310	5,380	5,490	5,640	5,700
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.1	3.2	3.3	3.4	3.6	3.9	4.1
State Tax Receipts	8.7	8.5	9.8	9.9	10.0	10.4	11.0
Total Local & State	11.8	11.7	13.1	13.3	13.6	14.3	15.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Eastern Oregon Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	231	226	237	241	246	252	254
Hotel, Motel*	141	135	140	140	145	151	154
Private Home	48	49	52	53	54	53	52
Other Overnight	43	42	45	47	48	48	49
Campground	32	32	34	37	37	37	38
Vacation Home	10	10	11	11	11	11	11
Day Travel	76	76	82	84	85	87	86
Spending at Destination	307	302	319	324	332	339	340

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$238	\$472	\$97	\$193	2.5	2.0
Private Home	\$69	\$213	\$27	\$83	2.6	3.1
Other Overnight	\$115	\$410	\$34	\$122	3.4	3.6
All Overnight	\$140	\$370	\$52	\$140	2.7	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,518	1,584	1,583	619	646	645
Private Home	1,909	1,917	1,906	745	748	744
Other Overnight	1,389	1,414	1,435	413	420	426
All Overnight	4,816	4,915	4,924	1,776	1,814	1,815

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	766	800	799	312	326	326
Private Home	621	623	620	242	243	242
Other Overnight	389	396	401	116	118	120
All Overnight	1,776	1,819	1,820	671	687	687

*Includes all lodging where a lodging tax is collected, except campgrounds.

MT. HOOD/GORGE TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$81,070
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$8,432
Additional employment if each resident household encouraged one additional overnight visitor	100

Visitor Shares

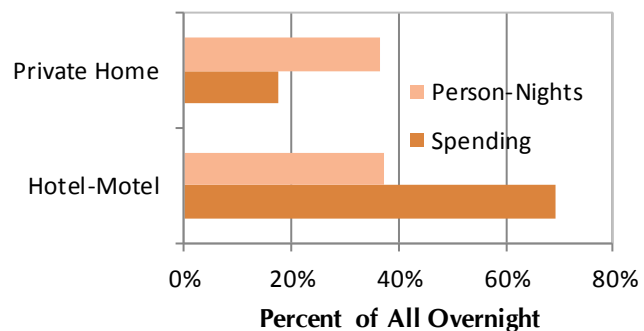
Travel Share of Total Employment (2015)*	7.8%
Overnight Visitor Day Share of Resident Population (2016p)**	9.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	648	1,407	\$184
Private Home	349	1,203	\$38
Other Overnight	226	859	\$29
All Overnight	1,223	3,469	\$252

Mt. Hood/Gorge Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	228	255	291	370	400	8.1%	3.6%
Other	13	12	15	16	17	5.9%	1.6%
Visitor	215	243	276	354	383	8.2%	3.7%
Non-transportation	195	215	241	319	348	9.3%	3.7%
Transportation	20	28	35	35	35	-1.5%	3.5%
Earnings (\$Millions)							
Earnings	61	66	77	106	117	10.5%	4.2%
Employment (Thousands)							
Employment	3.7	3.7	3.8	4.6	4.8	6.0%	1.7%
Tax Revenue (\$Millions)							
Total	7.7	9.0	10.6	14.9	17.5	17.1%	5.2%
Local	2.2	2.7	3.4	5.1	6.3	22.7%	6.9%
State	5.5	6.3	7.2	9.8	11.2	14.1%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental, other local ground transportation and one-way airfares.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes, auto rental taxes, and airport passenger facility charges paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Mt. Hood/The Gorge Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	281	276	309	310	333	354	383
Other Travel*	14	15	17	17	17	16	17
Total Direct Spending	295	291	326	327	350	370	400
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	53	52	60	63	70	80	94
Food Service	76	79	87	88	96	105	115
Food Stores	25	25	27	28	30	32	32
Local Tran. & Gas	41	35	43	41	41	35	35
Arts, Ent. & Rec.	38	38	40	39	42	45	48
Retail Sales	48	48	52	51	54	57	59
Destination Spending	281	276	309	310	333	354	383
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	51.7	50.6	57.0	59.7	65.7	72.5	80.7
Arts, Ent. & Rec.	13.1	12.1	12.8	13.6	14.5	15.6	17.0
Retail**	9.5	9.3	10.1	10.2	11.0	11.9	12.7
Ground Tran.	1.1	1.1	1.2	1.2	1.4	1.5	1.7
Other Travel*	3.2	4.0	4.2	4.3	4.6	4.8	5.3
Total Direct Earnings	78.7	77.1	85.4	89.0	97.1	106.3	117.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,650	2,470	2,680	2,760	2,910	3,080	3,270
Arts, Ent. & Rec.	830	740	740	790	800	870	920
Retail**	420	410	440	430	450	470	490
Ground Tran.	40	40	40	40	40	40	50
Other Travel*	90	110	110	110	110	110	120
Total Direct Employment	4,040	3,770	4,010	4,130	4,320	4,570	4,840
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.3	3.4	3.9	4.1	4.6	5.1	6.3
State Tax Receipts	7.3	7.2	8.4	8.6	9.1	9.8	11.2
Total Local & State	10.6	10.6	12.3	12.7	13.8	14.9	17.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Mt. Hood/Gorge Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	182	177	198	199	214	229	252
Hotel, Motel*	122	118	134	135	148	162	184
Private Home	32	33	36	36	37	38	38
Other Overnight	27	25	27	28	29	29	29
Campground	20	18	19	21	21	21	22
Vacation Home	7	7	8	8	8	8	8
Day Travel	100	99	111	112	119	125	131
Spending at Destination	281	276	309	310	333	354	383

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$299	\$666	\$131	\$284	2.3	2.2
Private Home	\$77	\$273	\$32	\$110	2.4	3.6
Other Overnight	\$115	\$438	\$34	\$131	3.3	3.8
All Overnight	\$184	\$520	\$73	\$206	2.5	2.8

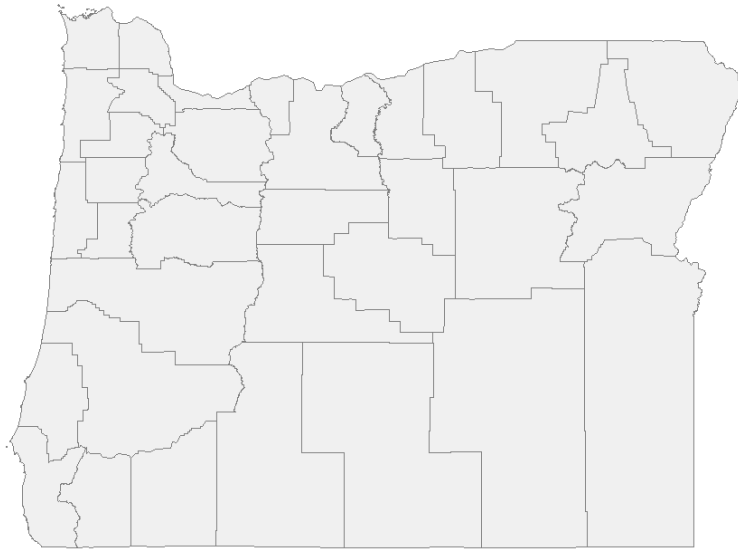
Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,195	1,293	1,407	518	562	614
Private Home	1,162	1,184	1,203	478	489	500
Other Overnight	832	847	859	249	253	257
All Overnight	3,189	3,324	3,469	1,245	1,305	1,371

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	551	596	648	234	253	276
Private Home	337	344	349	135	138	140
Other Overnight	219	223	226	65	66	67
All Overnight	1,106	1,162	1,223	434	457	484

*Includes all lodging where a lodging tax is collected, except campgrounds.

IV. COUNTY TRAVEL IMPACTS AND VISITOR VOLUME



2016p County Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment	Tax Revenue (\$000)		
	All Travel	Destination			Local	State	Total
Baker	45.0	43.1	13.7	700	480	1,290	1,770
Benton	117.2	104.8	33.7	1,730	1,720	3,910	5,630
Clackamas	597.3	513.2	167.1	6,260	5,910	18,220	24,130
Clatsop	551.9	546.1	164.8	6,000	10,730	14,260	24,990
Columbia	37.3	31.5	11.3	620	0	1,480	1,480
Coos	265.3	252.8	76.6	3,280	1,420	7,580	8,990
Crook	44.2	41.6	13.0	580	280	1,240	1,520
Curry	130.4	127.8	49.1	2,010	630	3,580	4,220
Deschutes	713.4	613.3	186.6	6,930	13,180	18,690	31,870
Douglas	233.2	220.7	68.1	3,130	1,380	6,730	8,110
East Douglas	173.5	161.8	50.2	2,320	1,150	5,240	6,390
West Douglas	59.7	58.9	17.9	820	230	1,490	1,710
Gilliam	4.4	4.1	1.0	50	0	120	120
Grant	10.7	9.9	2.8	180	80	320	400
Harney	17.7	16.9	6.3	310	280	520	800
Hood River	100.7	97.8	27.7	1,120	2,080	2,930	5,010
Jackson	547.9	426.2	142.8	5,440	9,090	14,360	23,450
Jefferson	50.5	47.8	16.6	1,020	640	1,680	2,320
Josephine	125.7	114.4	41.7	1,780	1,280	4,220	5,500
Klamath	141.0	132.9	46.4	1,910	1,780	4,530	6,300
Lake	13.8	12.9	3.2	220	120	400	520
Lane	930.6	672.4	262.7	10,620	12,970	24,110	37,080
East Lane	794.4	555.5	217.4	8,720	12,130	20,910	33,040
West Lane	136.2	117.0	45.3	1,900	840	3,200	4,040
Lincoln	571.5	561.8	152.6	6,040	12,910	14,750	27,650
Linn	139.2	125.0	34.8	1,780	1,170	4,670	5,850
Malheur	42.1	38.6	12.4	590	830	1,330	2,160
Marion	394.9	349.4	104.1	4,620	4,210	13,170	17,380
Morrow	14.9	13.6	3.8	180	10	470	480
Multnomah	3,836.5	1,981.8	937.4	22,980	116,960	76,710	193,670
East Multnomah	86.9	82.0	24.9	1,070	1,730	2,300	4,040
West Multnomah	3,749.6	1,899.8	912.5	21,910	115,220	74,410	189,630
Polk	170.6	161.2	48.5	2,120	0	4,100	4,100
Sherman	5.0	4.8	1.4	60	20	140	160
Tillamook	227.4	224.4	72.3	2,190	1,540	5,500	7,040
Umatilla	146.3	136.8	49.6	2,420	1,520	4,810	6,340
Union	33.3	30.3	11.8	600	550	1,070	1,620
Wallowa	29.3	28.5	12.7	590	350	850	1,210
Wasco	116.0	113.0	40.3	1,820	1,160	3,150	4,300
North Wasco	73.1	70.3	24.8	1,120	1,160	2,160	3,320
South Wasco	42.9	42.8	15.5	700	0	990	990
Washington	727.9	603.8	226.4	7,930	11,700	24,290	35,980
Wheeler	2.8	2.7	0.6	30	0	80	80
Yamhill	119.8	106.7	33.8	1,650	720	4,070	4,790

Note: The sum of destination spending for the counties will be less than statewide destination spending because of the treatment of transportation expenditures (airfares and a portion of ground transportation expenditures are not included in county destination spending).

2016p County Overnight Visitor Volume

	Nights (000)		Trips (000)	
	Persons	Parties	Persons	Parties
Baker	651	231	241	87
Benton	1,427	557	646	254
Clackamas	7,392	3,439	2,653	1,202
Clatsop	3,914	1,483	1,740	676
Columbia	665	296	221	98
Coos	2,592	970	1,061	405
Crook	687	247	294	109
Curry	1,599	541	660	234
Deschutes	6,846	2,632	2,696	1,045
Douglas	2,485	899	939	347
Gilliam/Sherman	152	53	64	23
Grant	222	77	89	32
Harney	268	97	118	44
Hood River	970	368	411	159
Jackson	5,422	2,162	2,124	841
Jefferson	907	305	351	121
Josephine	1,885	709	710	271
Klamath	2,100	776	810	305
Lake	262	92	109	39
Lane	8,173	3,195	3,111	1,212
Lincoln	4,981	1,844	2,122	808
Linn	1,972	744	829	317
Malheur	638	243	290	112
Marion	5,387	2,048	1,987	763
Morrow	265	99	118	45
Multnomah	12,553	6,152	5,154	2,439
Polk	1,101	423	463	180
Sherman (see Gilliam)				
Tillamook	2,549	872	1,087	386
Umatilla	1,651	633	766	298
Union	560	205	237	89
Wallowa	444	154	191	69
Wasco	1,149	420	529	199
Washington	8,096	4,014	2,924	1,410
Wheeler	72	24	27	9
Yamhill	1,683	658	764	301

Note: The sum of trips for the counties will be greater than the state trip estimate because some travelers visit multiple destinations on a single trip within Oregon.

BAKER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$61,990
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$926
Additional employment if each resident household encouraged one additional overnight visitor	15

Visitor Shares

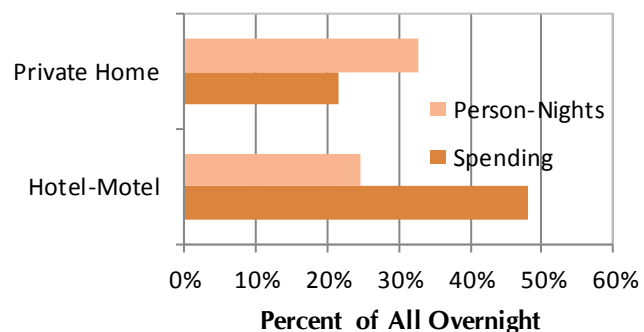
Travel Share of Total Employment (2015)*	8.6%
Overnight Visitor Day Share of Resident Population (2016p)**	11.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	88	166	\$15.9
Private Home	68	206	\$6.4
Other Overnight	85	278	\$9.5
All Overnight	241	651	\$31.8

Baker County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	35.0	42.2	41.7	44.3	45.0	1.6%	1.6%
Other	1.3	1.9	2.2	2.0	1.8	-6.8%	2.1%
Visitor	33.7	40.3	39.5	42.3	43.1	2.0%	1.6%
Non-transportation	30.6	35.6	34.5	38.1	39.1	2.8%	1.6%
Transportation	3.1	4.7	5.0	4.2	4.0	-5.6%	1.6%
Earnings (\$Millions)							
Earnings	9.1	10.9	10.9	13.0	13.7	5.4%	2.6%
Employment							
Employment	760	760	670	710	700	-1.3%	-0.5%
Tax Revenue (\$Millions)							
Total	1.2	1.4	1.5	1.7	1.8	6.8%	2.7%
Local	0.3	0.3	0.4	0.4	0.5	9.5%	4.1%
State	0.9	1.1	1.1	1.2	1.3	5.8%	2.2%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Baker County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	38.9	39.5	40.6	40.2	41.2	42.3	43.1
Other Travel*	2.8	2.2	2.7	2.6	2.5	2.0	1.8
Total Direct Spending	41.7	41.7	43.3	42.8	43.7	44.3	45.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	7.3	7.5	7.3	7.4	7.6	8.3	8.9
Food Service	10.2	10.8	11.1	11.2	11.7	12.4	12.8
Food Stores	4.6	4.7	5.0	5.1	5.3	5.5	5.5
Local Tran. & Gas	5.7	5.0	5.7	5.2	5.1	4.2	4.0
Arts, Ent. & Rec.	5.3	5.3	5.3	5.3	5.4	5.6	5.7
Retail Sales	5.8	6.0	6.1	6.0	6.1	6.3	6.2
Destination Spending	38.9	39.5	40.6	40.2	41.2	42.3	43.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	7.4	7.5	7.8	8.0	8.3	8.8	9.3
Arts, Ent. & Rec.	1.7	1.6	1.9	2.1	2.1	2.2	2.3
Retail**	1.5	1.5	1.6	1.6	1.6	1.7	1.8
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	10.9	10.9	11.6	11.9	12.3	13.0	13.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	430	400	390	400	400	400	390
Arts, Ent. & Rec.	180	180	220	220	220	220	210
Retail**	80	80	80	80	80	80	90
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	700	670	700	710	720	710	700
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.4	0.4	0.4	0.4	0.4	0.4	0.5
State Tax Receipts	1.1	1.1	1.2	1.2	1.2	1.2	1.3
Total Local & State	1.5	1.5	1.6	1.6	1.6	1.7	1.8

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Baker County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	29.0	29.3	29.8	29.5	30.2	31.1	31.8
Hotel, Motel*	15.2	15.0	14.8	14.1	14.5	15.2	15.9
Private Home	5.8	6.0	6.3	6.3	6.5	6.6	6.4
Other Overnight	8.0	8.3	8.7	9.1	9.2	9.3	9.5
Campground	5.1	5.4	5.7	6.1	6.2	6.3	6.4
Vacation Home	2.9	2.8	2.9	3.0	3.0	3.1	3.1
Day Travel	9.9	10.2	10.7	10.7	11.0	11.2	11.4
Spending at Destination	38.9	39.5	40.6	40.2	41.2	42.3	43.1

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$233	\$441	\$95	\$180	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$113	\$373	\$34	\$112	3.3	3.3
All Overnight	\$138	\$363	\$49	\$132	2.8	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	155	162	166	64	66	68
Private Home	206	206	206	79	79	79
Other Overnight	270	275	278	81	83	84
All Overnight	631	643	651	224	228	231

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	82	86	88	34	35	36
Private Home	68	68	68	26	26	26
Other Overnight	82	84	85	25	25	26
All Overnight	232	237	241	84	86	87

*Includes all lodging where a lodging tax is collected except campgrounds.

BENTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$62,420
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.40

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,265
Additional employment if each resident household encouraged one additional overnight visitor	68

Visitor Shares

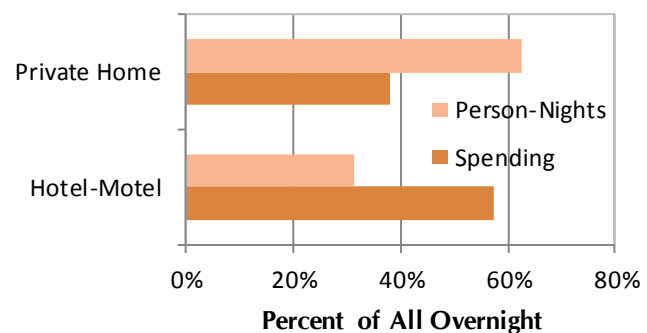
Travel Share of Total Employment (2015)*	3.4%
Overnight Visitor Day Share of Resident Population (2016p)**	4.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	271	451	\$45.2
Private Home	346	889	\$28.2
Other Overnight	29	87	\$3.5
All Overnight	646	1,427	\$76.8

Benton County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	71.2	88.5	99.1	117.2	117.2	0.0%	3.2%
Other	9.1	12.1	13.8	13.0	12.3	-5.3%	2.0%
Visitor	62.2	76.5	85.4	104.1	104.8	0.6%	3.3%
Non-transportation	56.2	67.2	74.3	93.2	94.7	1.6%	3.3%
Transportation	5.9	9.3	11.1	10.9	10.1	-7.3%	3.4%
Earnings (\$Millions)							
Earnings	18.7	22.3	25.1	31.8	33.7	5.9%	3.8%
Employment							
Employment	1,320	1,490	1,460	1,710	1,730	1.4%	1.7%
Tax Revenue (\$Millions)							
Total	3.0	3.6	4.0	5.3	5.6	5.7%	4.1%
Local	0.8	1.0	1.2	1.6	1.7	4.6%	5.3%
State	2.2	2.6	2.9	3.7	3.9	6.2%	3.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Benton County
Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	83.1	85.4	97.2	100.0	100.1	104.1	104.8
Other Travel*	16.8	13.8	17.1	15.8	15.4	13.0	12.3
Total Direct Spending	99.8	99.1	114.3	115.8	115.5	117.2	117.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	14.6	14.5	16.7	18.0	18.7	20.8	21.9
Food Service	22.5	24.6	27.9	29.1	29.5	31.6	32.3
Food Stores	8.7	9.0	10.1	10.3	10.5	11.0	10.8
Local Tran. & Gas	12.3	11.1	14.0	13.7	12.8	10.9	10.1
Arts, Ent. & Rec.	11.5	11.9	12.9	13.1	13.0	13.6	13.7
Retail Sales	13.5	14.4	15.6	15.8	15.6	16.2	16.0
Destination Spending	83.1	85.4	97.2	100.0	100.1	104.1	104.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	15.5	15.8	18.0	18.4	20.3	20.9	22.4
Arts, Ent. & Rec.	4.6	4.4	4.9	4.5	4.9	5.2	5.5
Retail**	3.0	3.1	3.4	3.5	3.6	3.8	3.9
Ground Tran.	0.4	0.4	0.5	0.5	0.5	0.6	0.6
Other Travel*	1.6	1.3	1.6	1.2	1.3	1.4	1.4
Total Direct Earnings	25.0	25.1	28.4	28.1	30.6	31.8	33.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	850	800	870	880	940	960	990
Arts, Ent. & Rec.	450	440	480	420	430	500	510
Retail**	160	160	170	170	170	170	170
Ground Tran.	10	10	20	20	20	20	20
Other Travel*	60	50	60	50	50	50	50
Total Direct Employment	1,530	1,460	1,590	1,540	1,610	1,710	1,730
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.2	1.2	1.3	1.4	1.5	1.6	1.7
State Tax Receipts	2.9	2.9	3.5	3.5	3.6	3.7	3.9
Total Local & State	4.0	4.0	4.8	4.9	5.0	5.3	5.6

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Benton County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	60.9	62.0	70.7	72.9	73.1	76.1	76.8
Hotel, Motel*	33.5	33.4	39.6	41.8	42.0	44.4	45.2
Private Home	24.3	25.7	28.0	27.8	27.8	28.4	28.2
Other Overnight	3.0	2.9	3.1	3.3	3.3	3.4	3.5
Campground	2.5	2.4	2.5	2.7	2.7	2.7	2.8
Vacation Home	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Day Travel	22.2	23.3	26.5	27.1	27.0	28.0	28.0
Spending at Destination	83.1	85.4	97.2	100.0	100.1	104.1	104.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$246	\$409	\$100	\$167	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$136	\$406	\$40	\$120	3.4	3.0
All Overnight	\$138	\$302	\$54	\$119	2.6	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	434	457	451	177	186	184
Private Home	865	892	889	338	349	347
Other Overnight	84	86	87	25	25	26
All Overnight	1,383	1,435	1,427	540	560	557

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	261	275	271	106	112	111
Private Home	337	347	346	132	136	135
Other Overnight	28	28	29	8	8	9
All Overnight	625	650	646	246	256	254

*Includes all lodging where a lodging tax is collected except campgrounds.

CLACKAMAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$87,520
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$23,090
Additional employment if each resident household encouraged one additional overnight visitor	264

Visitor Shares

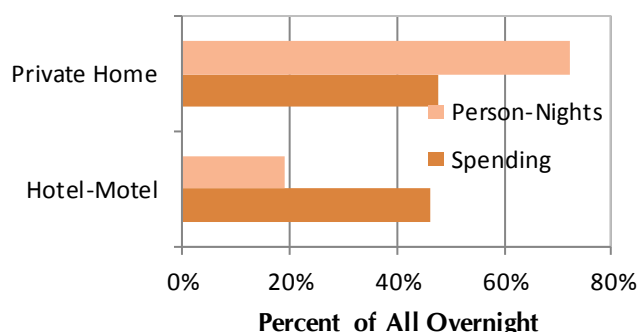
Travel Share of Total Employment (2015)*	2.8%
Overnight Visitor Day Share of Resident Population (2016p)**	5.0%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	754	1,496	\$202.7
Private Home	1,711	5,275	\$170.4
Other Overnight	188	621	\$21.2
All Overnight	2,653	7,392	\$394.3

Clackamas County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	337.0	394.4	463.5	566.1	597.3	5.5%	3.6%
Other	40.3	46.4	74.1	78.6	84.1	7.1%	4.7%
Visitor	296.7	347.9	389.5	487.5	513.2	5.3%	3.5%
Non-transportation	268.1	307.0	340.2	436.3	462.3	6.0%	3.5%
Transportation	28.6	40.9	49.3	51.3	50.9	-0.6%	3.7%
Earnings (\$Millions)							
Earnings	87.3	98.1	116.9	154.9	167.1	7.8%	4.1%
Employment							
Employment	4,800	5,010	5,220	6,050	6,260	3.5%	1.7%
Tax Revenue (\$Millions)							
Total	11.3	13.5	15.9	22.1	24.1	9.0%	4.8%
Local	2.1	2.9	3.2	5.4	5.9	9.0%	6.6%
State	9.2	10.6	12.7	16.7	18.2	9.0%	4.4%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Clackamas County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	405.7	389.5	440.0	444.3	461.4	487.5	513.2
Other Travel*	63.5	74.1	89.3	89.0	89.2	78.6	84.1
Total Direct Spending	469.1	463.5	529.3	533.3	550.6	566.1	597.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	66.8	58.5	72.0	73.7	79.5	90.9	101.8
Food Service	118.0	120.1	133.8	137.3	144.3	155.6	166.0
Food Stores	32.4	31.2	34.5	35.1	36.8	39.0	39.3
Local Tran. & Gas	56.2	49.3	59.5	57.4	56.8	51.3	50.9
Arts, Ent. & Rec.	47.6	45.8	49.0	49.3	50.8	53.5	55.7
Retail Sales	84.7	84.6	91.2	91.5	93.2	97.2	99.4
Destination Spending	405.7	389.5	440.0	444.3	461.4	487.5	513.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	77.0	72.5	82.4	84.0	89.0	98.0	103.7
Arts, Ent. & Rec.	16.5	15.0	16.0	17.6	18.7	19.9	21.3
Retail**	14.6	14.1	15.3	15.5	16.3	17.5	18.4
Ground Tran.	4.3	4.1	4.6	4.7	5.0	5.4	6.0
Other Travel*	7.1	11.2	12.3	12.8	13.7	14.3	17.7
Total Direct Earnings	119.5	116.9	130.6	134.6	142.7	154.9	167.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,460	3,150	3,430	3,450	3,560	3,760	3,880
Arts, Ent. & Rec.	1,120	1,020	1,010	1,070	1,100	1,150	1,210
Retail**	600	560	600	600	600	610	620
Ground Tran.	140	140	150	150	150	160	160
Other Travel*	250	350	350	370	390	390	400
Total Direct Employment	5,580	5,220	5,530	5,630	5,800	6,050	6,260
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.8	3.2	3.9	4.3	4.6	5.4	5.9
State Tax Receipts	12.3	12.7	15.1	15.4	15.8	16.7	18.2
Total Local & State	16.1	15.9	19.0	19.6	20.4	22.1	24.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Clackamas County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	310.6	295.3	335.1	338.1	351.9	372.9	394.3
Hotel, Motel*	147.1	133.1	158.4	160.1	169.6	184.6	202.7
Private Home	142.9	144.0	157.5	157.9	161.9	167.5	170.4
Other Overnight	20.6	18.2	19.3	20.1	20.5	20.8	21.2
Campground	13.9	11.4	12.0	12.8	12.9	13.2	13.5
Vacation Home	6.7	6.8	7.3	7.4	7.5	7.6	7.6
Day Travel	95.1	94.2	104.9	106.2	109.5	114.7	118.9
Spending at Destination	405.7	389.5	440.0	444.3	461.4	487.5	513.2

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$287	\$588	\$136	\$269	2.1	2.1
Private Home	\$67	\$213	\$32	\$100	2.1	3.2
Other Overnight	\$110	\$367	\$34	\$113	3.2	3.3
All Overnight	\$115	\$328	\$53	\$149	2.1	2.9

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,340	1,413	1,496	626	663	707
Private Home	5,069	5,183	5,275	2,416	2,481	2,540
Other Overnight	603	613	621	186	190	192
All Overnight	7,012	7,209	7,392	3,229	3,333	3,439

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	675	712	754	306	324	345
Private Home	1,644	1,681	1,711	763	782	799
Other Overnight	182	185	188	56	57	58
All Overnight	2,501	2,578	2,653	1,125	1,163	1,202

*Includes all lodging where a lodging tax is collected except campgrounds.

CLATSOP COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$91,500
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,304
Additional employment if each resident household encouraged one additional overnight visitor	36

Visitor Shares

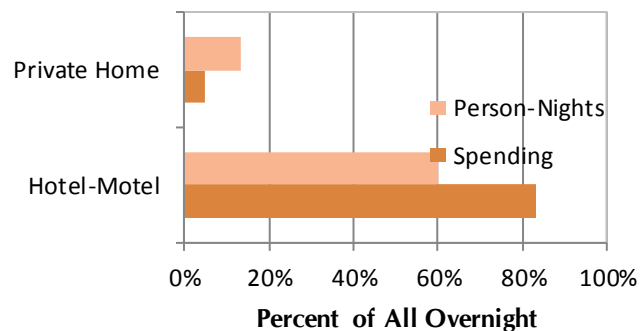
Travel Share of Total Employment (2015)*	24.5%
Overnight Visitor Day Share of Resident Population (2016p)**	27.8%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,270	2,401	\$295.2
Private Home	163	495	\$15.4
Other Overnight	308	1,018	\$39.6
All Overnight	1,740	3,914	\$350.2

Clatsop County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	283.0	346.4	405.2	539.6	551.9	2.3%	4.3%
Other	3.6	13.4	18.2	5.8	5.7	-1.6%	2.9%
Visitor	279.4	333.1	387.0	533.8	546.1	2.3%	4.3%
Non-transportation	257.7	300.7	345.6	487.1	502.0	3.1%	4.3%
Transportation	21.7	32.4	41.4	46.7	44.2	-5.3%	4.5%
Earnings (\$Millions)							
Earnings	80.9	98.9	118.6	157.0	164.8	5.0%	4.5%
Employment							
Employment	4,460	4,780	5,010	5,810	6,000	3.3%	1.9%
Tax Revenue (\$Millions)							
Total	10.8	13.7	16.5	23.7	25.0	5.5%	5.4%
Local	4.4	5.4	6.8	10.5	10.7	2.2%	5.7%
State	6.5	8.2	9.7	13.2	14.3	8.2%	5.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Clatsop County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	397.1	387.0	419.2	460.4	509.7	533.8	546.1
Other Travel*	15.5	18.2	20.1	7.1	7.0	5.8	5.7
Total Direct Spending	412.7	405.2	439.3	467.5	516.6	539.6	551.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	94.6	93.2	100.9	109.6	122.6	136.1	141.3
Food Service	110.4	112.7	121.2	137.0	155.1	166.4	173.9
Food Stores	32.8	31.8	34.7	37.9	41.7	43.8	43.8
Local Tran. & Gas	49.2	41.4	49.6	52.2	55.0	46.7	44.2
Arts, Ent. & Rec.	51.6	49.8	51.8	56.9	62.7	65.5	67.1
Retail Sales	58.5	58.1	61.0	66.8	72.6	75.2	75.8
Destination Spending	397.1	387.0	419.2	460.4	509.7	533.8	546.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	85.3	83.0	90.4	100.5	105.7	118.1	123.8
Arts, Ent. & Rec.	18.4	16.7	17.3	17.9	18.8	19.8	21.0
Retail**	12.0	11.6	12.4	13.6	15.2	16.1	16.8
Ground Tran.	1.5	1.5	1.6	1.8	2.1	2.2	2.4
Other Travel*	4.1	5.8	6.2	0.7	0.7	0.7	0.8
Total Direct Earnings	121.5	118.6	127.8	134.4	142.4	157.0	164.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,740	3,520	3,600	3,810	3,910	4,200	4,380
Arts, Ent. & Rec.	960	830	800	810	840	860	850
Retail**	560	540	550	580	630	660	680
Ground Tran.	50	50	50	60	60	60	70
Other Travel*	70	70	90	30	30	30	30
Total Direct Employment	5,390	5,010	5,090	5,280	5,470	5,810	6,000
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.8	6.8	7.5	8.3	9.3	10.5	10.7
State Tax Receipts	10.0	9.7	10.9	11.5	12.3	13.2	14.3
Total Local & State	16.7	16.5	18.3	19.8	21.6	23.7	25.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Clatsop County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	254.1	246.7	265.9	291.5	324.2	341.6	350.2
Hotel, Motel*	205.3	198.9	214.7	238.7	270.5	287.4	295.2
Private Home	14.1	13.6	15.1	15.2	15.5	15.3	15.4
Other Overnight	34.7	34.2	36.1	37.6	38.2	38.9	39.6
Campground	21.6	21.3	22.4	23.9	24.2	24.7	25.4
Vacation Home	13.1	12.9	13.7	13.7	14.0	14.1	14.2
Day Travel	143.0	140.3	153.3	168.9	185.5	192.2	195.9
Spending at Destination	397.1	387.0	419.2	460.4	509.7	533.8	546.1

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$300	\$568	\$123	\$233	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$127	\$423	\$39	\$129	3.3	3.3
All Overnight	\$236	\$518	\$89	\$201	2.6	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,252	2,371	2,401	921	970	982
Private Home	490	489	495	188	188	190
Other Overnight	989	1,006	1,018	302	307	311
All Overnight	3,730	3,866	3,914	1,411	1,465	1,483

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,190	1,253	1,270	487	513	519
Private Home	161	161	163	62	62	62
Other Overnight	299	304	308	91	93	94
All Overnight	1,650	1,718	1,740	640	667	676

*Includes all lodging where a lodging tax is collected except campgrounds.

COLUMBIA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$52,040
Employee Earnings generated by \$100 Visitor Spending	\$35
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,843
Additional employment if each resident household encouraged one additional overnight visitor	35

Visitor Shares

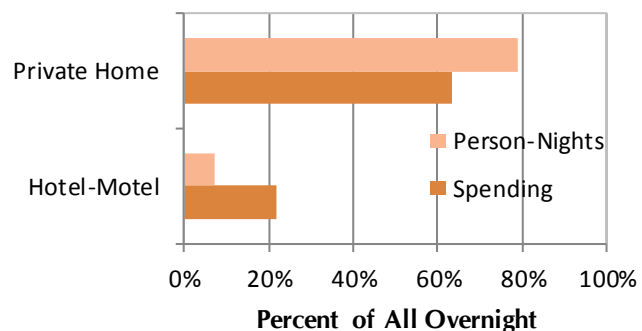
Travel Share of Total Employment (2015)*	3.7%
Overnight Visitor Day Share of Resident Population (2016p)**	3.6%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	25	50	\$5.0
Private Home	168	521	\$12.6
Other Overnight	29	94	\$3.1
All Overnight	221	665	\$20.7

Columbia County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	23.7	29.9	33.7	37.4	37.3	-0.2%	2.9%
Other	3.4	5.7	6.7	6.2	5.8	-5.1%	3.4%
Visitor	20.3	24.2	27.0	31.2	31.5	0.8%	2.8%
Non-transportation	18.5	21.5	23.8	28.2	28.6	1.5%	2.8%
Transportation	1.8	2.7	3.2	3.1	2.9	-5.8%	2.9%
Earnings (\$Millions)							
Earnings	5.4	6.4	8.2	10.8	11.3	5.3%	4.7%
Employment							
Employment	430	480	530	610	620	2.0%	2.3%
Tax Revenue (\$Millions)							
Total	0.8	1.0	1.1	1.4	1.5	5.5%	3.7%
Local	0.0	0.0	0.0	0.0	0.0	#DIV/0!	#DIV/0!
State	0.8	1.0	1.1	1.4	1.5	5.5%	3.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Columbia County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	27.9	27.0	29.3	28.4	30.9	31.2	31.5
Other Travel*	8.5	6.7	8.3	8.0	7.7	6.2	5.8
Total Direct Spending	36.4	33.7	37.6	36.4	38.6	37.4	37.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.8	2.5	2.6	2.2	2.7	3.1	3.2
Food Service	7.9	8.2	8.8	8.8	9.7	10.0	10.3
Food Stores	4.8	4.7	5.2	5.3	5.7	5.8	5.8
Local Tran. & Gas	3.7	3.2	3.8	3.6	3.7	3.1	2.9
Arts, Ent. & Rec.	3.8	3.7	3.8	3.7	4.0	4.1	4.1
Retail Sales	4.7	4.7	5.0	4.9	5.2	5.2	5.2
Destination Spending	27.9	27.0	29.3	28.4	30.9	31.2	31.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	4.5	5.2	6.2	6.1	6.8	7.4	8.0
Arts, Ent. & Rec.	1.4	1.3	1.3	1.3	1.3	1.4	1.2
Retail**	1.3	1.2	1.3	1.3	1.5	1.5	1.5
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.2	0.2	0.3	0.3	0.3	0.3	0.3
Total Direct Earnings	7.6	8.2	9.3	9.2	10.0	10.8	11.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	280	310	340	340	360	380	380
Arts, Ent. & Rec.	150	140	140	140	140	150	150
Retail**	60	60	60	60	70	70	70
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	20	20	20	20	20	20
Total Direct Employment	520	530	570	560	590	610	620
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	1.1	1.1	1.3	1.3	1.4	1.4	1.5
Total Local & State	1.1	1.1	1.3	1.3	1.4	1.4	1.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Columbia County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	18.6	17.8	19.3	18.4	20.2	20.5	20.7
Hotel, Motel*	5.0	4.4	4.5	3.5	4.4	4.8	5.0
Private Home	11.1	10.9	11.9	12.0	12.8	12.6	12.6
Other Overnight	2.6	2.5	2.8	3.0	3.0	3.0	3.1
Campground	2.1	2.0	2.4	2.5	2.5	2.6	2.7
Vacation Home	0.4	0.4	0.4	0.4	0.5	0.5	0.5
Day Travel	9.2	9.1	10.0	10.0	10.7	10.8	10.8
Spending at Destination	27.9	27.0	29.3	28.4	30.9	31.2	31.5

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$235	\$480	\$99	\$202	2.4	2.0
Private Home	\$51	\$159	\$24	\$75	2.1	3.1
Other Overnight	\$108	\$355	\$33	\$108	3.3	3.3
All Overnight	\$70	\$210	\$31	\$93	2.3	3.0

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	48	50	50	20	21	21
Private Home	520	514	521	245	242	246
Other Overnight	90	92	94	28	28	29
All Overnight	658	656	665	293	291	296

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	23	24	25	10	10	10
Private Home	168	166	168	79	78	79
Other Overnight	28	28	29	8	9	9
All Overnight	219	218	221	97	97	98

*Includes all lodging where a lodging tax is collected except campgrounds.

COOS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$79,710
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,351
Additional employment if each resident household encouraged one additional overnight visitor	55

Visitor Shares

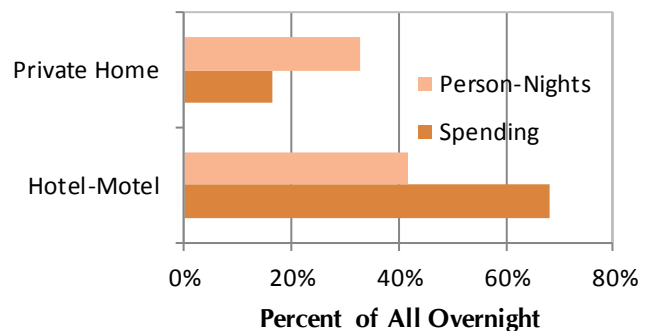
Travel Share of Total Employment (2015)*	10.2%
Overnight Visitor Day Share of Resident Population (2016p)**	11.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	586	1,109	\$117.3
Private Home	268	816	\$25.8
Other Overnight	206	667	\$25.1
All Overnight	1,061	2,592	\$168.3

Coos County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	151.2	196.9	210.8	260.8	265.3	1.7%	3.6%
Other	10.8	15.7	14.8	13.4	12.4	-7.4%	0.9%
Visitor	140.4	181.2	195.9	247.4	252.8	2.2%	3.7%
Non-transportation	128.1	161.3	172.4	223.0	229.8	3.1%	3.7%
Transportation	12.3	19.9	23.5	24.4	23.0	-5.7%	4.0%
Earnings (\$Millions)							
Earnings	40.7	50.8	56.3	72.2	76.6	6.1%	4.0%
Employment							
Employment	2,740	2,970	2,940	3,150	3,280	4.1%	1.1%
Tax Revenue (\$Millions)							
Total	5.0	6.4	6.5	8.4	9.0	6.9%	3.8%
Local	1.0	1.3	1.1	1.4	1.4	3.7%	2.1%
State	4.0	5.0	5.4	7.0	7.6	7.6%	4.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Coos County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	213.0	195.9	215.0	228.3	238.6	247.4	252.8
Other Travel*	19.3	14.8	15.6	15.4	14.3	13.4	12.4
Total Direct Spending	232.3	210.8	230.6	243.7	252.9	260.8	265.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	44.7	40.7	45.3	47.6	50.1	55.5	58.8
Food Service	55.6	53.9	58.7	64.1	68.5	73.1	76.0
Food Stores	21.3	19.9	21.7	23.0	24.2	25.2	25.1
Local Tran. & Gas	29.6	23.5	28.6	29.1	28.9	24.4	23.0
Arts, Ent. & Rec.	35.9	33.1	34.8	37.0	38.5	40.0	40.7
Retail Sales	26.0	24.8	26.1	27.6	28.4	29.2	29.2
Destination Spending	213.0	195.9	215.0	228.3	238.6	247.4	252.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	39.5	36.1	38.8	40.3	42.6	46.6	49.6
Arts, Ent. & Rec.	11.0	9.5	10.5	11.2	11.5	12.0	12.5
Retail**	6.5	6.0	6.4	6.8	7.2	7.6	7.9
Ground Tran.	0.9	0.8	0.9	1.0	1.1	1.2	1.2
Other Travel*	3.5	3.8	3.8	4.0	4.3	4.8	5.4
Total Direct Earnings	61.3	56.3	60.4	63.4	66.7	72.2	76.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,010	1,700	1,750	1,740	1,770	1,860	1,950
Arts, Ent. & Rec.	840	830	870	850	830	840	860
Retail**	310	280	290	300	310	320	330
Ground Tran.	30	30	30	30	30	30	30
Other Travel*	110	100	90	90	90	100	110
Total Direct Employment	3,300	2,940	3,020	3,010	3,030	3,150	3,280
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.3	1.1	1.1	1.2	1.2	1.4	1.4
State Tax Receipts	5.9	5.4	6.2	6.5	6.7	7.0	7.6
Total Local & State	7.3	6.5	7.3	7.6	7.9	8.4	9.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Coos County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	141.9	129.3	141.9	150.3	157.4	164.0	168.3
Hotel, Motel*	94.5	83.9	93.7	100.6	107.1	113.3	117.3
Private Home	24.6	24.2	25.6	25.9	26.1	26.1	25.8
Other Overnight	22.8	21.2	22.5	23.8	24.1	24.5	25.1
Campground	19.4	17.9	19.0	20.3	20.6	20.9	21.5
Vacation Home	3.4	3.3	3.5	3.5	3.5	3.6	3.6
Day Travel	71.1	66.6	73.1	78.0	81.2	83.5	84.6
Spending at Destination	213.0	195.9	215.0	228.3	238.6	247.4	252.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$258	\$488	\$106	\$200	2.4	1.9
Private Home	\$81	\$248	\$32	\$96	2.6	3.1
Other Overnight	\$128	\$415	\$38	\$122	3.4	3.2
All Overnight	\$174	\$416	\$65	\$159	2.7	2.4

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,040	1,095	1,109	427	450	456
Private Home	814	815	816	318	319	319
Other Overnight	643	656	667	189	192	196
All Overnight	2,497	2,565	2,592	933	961	970

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	550	579	586	225	237	241
Private Home	268	268	268	104	104	104
Other Overnight	199	203	206	58	59	60
All Overnight	1,016	1,050	1,061	387	401	405

*Includes all lodging where a lodging tax is collected except campgrounds.

CROOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$72,440
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,023
Additional employment if each resident household encouraged one additional overnight visitor	14

Visitor Shares

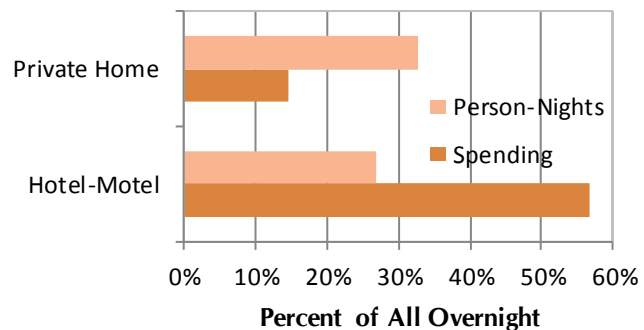
Travel Share of Total Employment (2015)*	6.0%
Overnight Visitor Day Share of Resident Population (2016p)**	8.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Trips (Thousands)	Nights (Thousands)	Spending (Millions)
Hotel, Motel*	116	194	\$19.5
Private Home	89	228	\$4.6
Other Overnight	89	265	\$8.6
All Overnight	294	687	\$32.7

Crook County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	19.4	23.2	29.5	42.0	44.2	5.4%	5.3%
Other	1.5	2.6	2.9	2.7	2.6	-3.4%	3.4%
Visitor	17.9	20.5	26.7	39.3	41.6	6.0%	5.4%
Non-transportation	16.6	18.6	24.1	36.4	38.8	6.6%	5.5%
Transportation	1.3	1.9	2.5	2.8	2.8	-1.6%	4.8%
Earnings (\$Millions)							
Earnings	5.1	6.0	8.1	12.1	13.0	7.5%	6.0%
Employment							
Employment	390	450	460	560	580	3.0%	2.5%
Tax Revenue (\$Millions)							
Total	0.8	0.8	0.9	1.4	1.5	11.1%	3.9%
Local	0.3	0.1	0.2	0.3	0.3	10.7%	0.0%
State	0.5	0.6	0.8	1.1	1.2	11.2%	5.3%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Crook County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	27.1	26.7	32.7	37.0	37.1	39.3	41.6
Other Travel*	3.9	2.9	3.5	3.4	3.3	2.7	2.6
Total Direct Spending	31.0	29.5	36.1	40.4	40.3	42.0	44.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	5.0	5.4	7.3	9.0	9.2	10.4	11.4
Food Service	6.8	7.0	8.5	9.6	9.7	10.4	11.2
Food Stores	4.6	4.2	4.7	5.0	5.1	5.4	5.5
Local Tran. & Gas	3.0	2.5	3.3	3.5	3.3	2.8	2.8
Arts, Ent. & Rec.	4.1	4.0	4.9	5.5	5.4	5.8	6.1
Retail Sales	3.6	3.6	4.0	4.3	4.3	4.4	4.6
Destination Spending	27.1	26.7	32.7	37.0	37.1	39.3	41.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.1	5.4	5.9	6.5	7.1	8.4	9.1
Arts, Ent. & Rec.	1.7	1.6	2.0	1.9	2.0	2.2	2.3
Retail**	1.0	1.0	1.1	1.2	1.2	1.3	1.3
Ground Tran.	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	9.1	8.1	9.2	9.8	10.6	12.1	13.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	270	230	230	240	250	290	300
Arts, Ent. & Rec.	190	180	200	190	190	210	210
Retail**	50	50	50	50	50	60	60
Ground Tran.	0	0	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	530	460	490	490	510	560	580
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.2	0.2	0.2	0.3	0.3
State Tax Receipts	0.9	0.8	0.9	1.0	1.0	1.1	1.2
Total Local & State	1.0	0.9	1.2	1.2	1.3	1.4	1.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Crook County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	20.3	20.2	25.1	28.7	28.9	30.8	32.7
Hotel, Motel*	7.7	9.1	13.1	16.3	16.4	18.0	19.5
Private Home	4.3	3.9	4.3	4.3	4.2	4.3	4.6
Other Overnight	8.3	7.2	7.7	8.1	8.3	8.4	8.6
Campground	6.9	5.8	6.3	6.7	6.8	6.9	7.1
Vacation Home	1.4	1.4	1.4	1.4	1.5	1.5	1.5
Day Travel	6.7	6.5	7.6	8.2	8.2	8.5	8.9
Spending at Destination	27.1	26.7	32.7	37.0	37.1	39.3	41.6

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$248	\$412	\$101	\$168	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$109	\$324	\$32	\$96	3.4	3.0
All Overnight	\$133	\$301	\$48	\$111	2.8	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	172	184	194	70	75	79
Private Home	209	220	228	82	86	89
Other Overnight	257	261	265	76	77	79
All Overnight	637	666	687	228	239	247

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	103	111	116	42	45	47
Private Home	81	86	89	32	33	35
Other Overnight	86	88	89	26	26	27
All Overnight	271	284	294	100	105	109

*Includes all lodging where a lodging tax is collected except campgrounds.

CURRY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$63,830
Employee Earnings generated by \$100 Visitor Spending	\$38
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.30

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,457
Additional employment if each resident household encouraged one additional overnight visitor	23

Visitor Shares

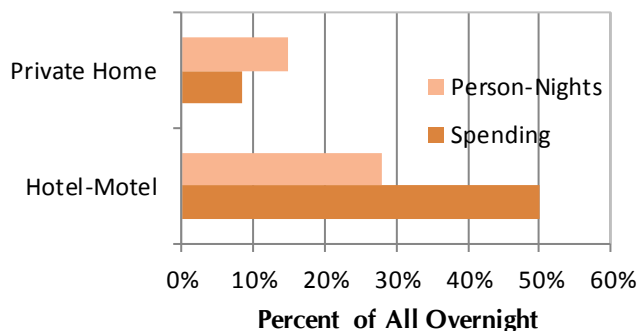
Travel Share of Total Employment (2015)*	18.7%
Overnight Visitor Day Share of Resident Population (2016p)**	19.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	277	461	\$46.9
Private Home	89	228	\$7.2
Other Overnight	295	910	\$36.8
All Overnight	660	1,599	\$91.0

Curry County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	86.1	105.1	111.1	127.3	130.4	2.4%	2.6%
Other	1.7	2.7	3.1	2.8	2.6	-6.0%	2.9%
Visitor	84.4	102.4	108.0	124.5	127.8	2.6%	2.6%
Non-transportation	77.5	91.9	96.1	113.4	117.2	3.4%	2.6%
Transportation	6.9	10.5	12.0	11.1	10.5	-5.3%	2.7%
Earnings (\$Millions)							
Earnings	27.7	33.3	35.7	46.4	49.1	5.8%	3.6%
Employment							
Employment	1,740	1,870	1,740	1,910	2,010	5.0%	0.9%
Tax Revenue (\$Millions)							
Total	2.5	3.1	3.2	3.9	4.2	7.1%	3.5%
Local	0.4	0.5	0.5	0.6	0.6	4.2%	2.9%
State	2.1	2.6	2.7	3.3	3.6	7.6%	3.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Curry County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	112.5	108.0	113.9	118.3	120.4	124.5	127.8
Other Travel*	3.7	3.1	3.8	3.6	3.5	2.8	2.6
Total Direct Spending	116.1	111.1	117.7	122.0	123.8	127.3	130.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	22.9	22.3	23.1	23.7	24.0	26.3	27.8
Food Service	28.8	29.1	30.5	32.5	33.7	35.9	37.6
Food Stores	15.5	14.7	15.8	16.6	17.2	17.9	18.0
Local Tran. & Gas	14.5	12.0	14.0	13.8	13.3	11.1	10.5
Arts, Ent. & Rec.	15.3	14.6	14.8	15.4	15.7	16.3	16.7
Retail Sales	15.5	15.3	15.7	16.3	16.5	16.9	17.1
Destination Spending	112.5	108.0	113.9	118.3	120.4	124.5	127.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	27.0	26.0	28.8	30.6	32.8	36.7	39.2
Arts, Ent. & Rec.	5.7	5.1	4.3	4.5	4.0	4.1	4.1
Retail**	4.3	4.1	4.3	4.5	4.7	5.0	5.1
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.5	0.5
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	37.6	35.7	37.9	40.2	42.0	46.4	49.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,200	1,130	1,190	1,220	1,220	1,320	1,400
Arts, Ent. & Rec.	450	400	340	370	340	360	380
Retail**	210	190	190	190	210	220	220
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,880	1,740	1,740	1,800	1,790	1,910	2,010
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.6	0.5	0.5	0.5	0.5	0.6	0.6
State Tax Receipts	2.8	2.7	3.0	3.1	3.1	3.3	3.6
Total Local & State	3.4	3.2	3.5	3.6	3.7	3.9	4.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Curry County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	80.9	77.4	81.1	84.0	85.4	88.5	91.0
Hotel, Motel*	41.7	39.7	41.2	42.0	42.8	45.2	46.9
Private Home	6.3	6.5	7.1	7.2	7.3	7.3	7.2
Other Overnight	32.9	31.2	32.8	34.8	35.3	36.0	36.8
Campground	29.5	27.9	29.4	31.3	31.7	32.4	33.2
Vacation Home	3.4	3.3	3.5	3.5	3.6	3.6	3.6
Day Travel	31.6	30.7	32.8	34.3	35.0	36.0	36.8
Spending at Destination	112.5	108.0	113.9	118.3	120.4	124.5	127.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$250	\$415	\$102	\$169	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$139	\$429	\$40	\$125	3.4	3.1
All Overnight	\$168	\$390	\$57	\$138	3.0	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	430	452	461	175	184	188
Private Home	223	226	228	87	88	89
Other Overnight	878	895	910	255	260	264
All Overnight	1,530	1,573	1,599	517	533	541

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	258	272	277	105	111	113
Private Home	87	88	89	34	34	35
Other Overnight	284	290	295	83	84	86
All Overnight	629	650	660	222	230	234

*Includes all lodging where a lodging tax is collected except campgrounds.

DESCHUTES COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$90,660
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.20

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,125
Additional employment if each resident household encouraged one additional overnight visitor	156

Visitor Shares

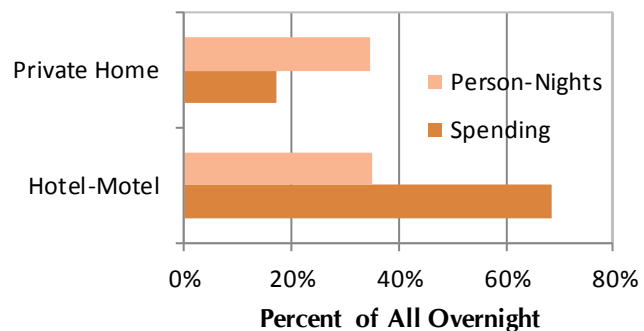
Travel Share of Total Employment (2015)*	6.2%
Overnight Visitor Day Share of Resident Population (2016p)**	10.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,336	2,527	\$368.6
Private Home	776	2,359	\$83.8
Other Overnight	585	1,960	\$64.6
All Overnight	2,696	6,846	\$517.0

Deschutes County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	295.9	374.7	510.8	660.8	713.4	7.9%	5.7%
Other	29.9	58.0	93.7	96.9	100.1	3.3%	7.9%
Visitor	266.1	316.7	417.2	563.9	613.3	8.7%	5.4%
Non-transportation	245.0	284.8	370.9	514.8	564.2	9.6%	5.4%
Transportation	21.1	31.9	46.3	49.1	49.1	-0.1%	5.4%
Earnings (\$Millions)							
Earnings	75.3	87.6	117.5	174.6	186.6	6.9%	5.8%
Employment							
Employment	4,230	4,210	5,310	6,700	6,930	3.4%	3.1%
Tax Revenue (\$Millions)							
Total	13.3	16.1	18.9	28.3	31.9	12.7%	5.6%
Local	6.2	7.2	7.4	11.6	13.2	13.4%	4.8%
State	7.1	8.9	11.5	16.7	18.7	12.1%	6.3%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Deschutes County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	435.3	417.2	476.4	509.1	531.0	563.9	613.3
Other Travel*	77.5	93.7	80.7	87.1	90.2	96.9	100.1
Total Direct Spending	512.8	510.8	557.0	596.2	621.3	660.8	713.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	111.6	104.7	121.3	134.4	146.3	165.8	187.4
Food Service	116.0	117.8	133.5	144.4	151.6	164.5	181.3
Food Stores	38.8	37.1	41.8	44.0	45.9	48.3	50.3
Local Tran. & Gas	55.2	46.3	58.5	58.8	57.2	49.1	49.1
Arts, Ent. & Rec.	54.8	52.7	57.2	60.4	61.9	65.3	70.2
Retail Sales	59.0	58.6	64.0	67.1	68.0	70.9	75.0
Destination Spending	435.3	417.2	476.4	509.1	531.0	563.9	613.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	85.9	81.9	93.9	100.7	110.7	127.9	136.5
Arts, Ent. & Rec.	18.9	17.0	17.3	18.7	21.0	22.4	23.7
Retail**	13.0	12.4	13.8	14.5	15.2	16.2	17.6
Ground Tran.	1.8	1.7	2.0	2.1	2.2	2.4	2.8
Other Travel*	4.4	4.4	4.6	4.8	5.1	5.7	6.1
Total Direct Earnings	123.9	117.5	131.5	140.9	154.3	174.6	186.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,890	3,720	3,970	4,160	4,410	4,810	4,960
Arts, Ent. & Rec.	950	860	870	900	1,010	1,030	1,080
Retail**	570	540	580	600	620	640	650
Ground Tran.	60	60	60	70	70	70	80
Other Travel*	150	140	140	140	150	160	170
Total Direct Employment	5,620	5,310	5,630	5,870	6,250	6,700	6,930
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.7	7.4	8.3	9.4	10.2	11.6	13.2
State Tax Receipts	12.2	11.5	13.7	14.5	15.3	16.7	18.7
Total Local & State	19.9	18.9	22.0	23.9	25.5	28.3	31.9

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Deschutes County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	363.5	347.0	396.4	424.5	444.4	473.8	517.0
Hotel, Motel*	238.7	226.1	263.5	287.0	305.0	332.2	368.6
Private Home	67.1	66.0	73.6	75.8	76.5	78.0	83.8
Other Overnight	57.8	54.9	59.3	61.8	62.9	63.6	64.6
Campground	25.3	22.6	24.3	25.9	26.2	26.7	27.4
Vacation Home	32.5	32.3	34.9	35.9	36.6	36.9	37.2
Day Travel	71.7	70.2	80.0	84.5	86.7	90.2	96.3
Spending at Destination	435.3	417.2	476.4	509.1	531.0	563.9	613.3

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$350	\$666	\$146	\$276	2.4	1.9
Private Home	\$87	\$271	\$36	\$108	2.4	3.1
Other Overnight	\$106	\$355	\$33	\$110	3.2	3.4
All Overnight	\$196	\$495	\$76	\$192	2.6	2.5

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,187	2,344	2,527	911	977	1,055
Private Home	2,192	2,272	2,359	888	926	966
Other Overnight	1,910	1,942	1,960	597	607	612
All Overnight	6,290	6,558	6,846	2,396	2,510	2,632

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,156	1,239	1,336	478	513	554
Private Home	721	747	776	285	297	309
Other Overnight	570	579	585	178	181	182
All Overnight	2,447	2,566	2,696	941	991	1,045

*Includes all lodging where a lodging tax is collected except campgrounds.

DOUGLAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$71,310
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,050
Additional employment if each resident household encouraged one additional overnight visitor	85

Visitor Shares

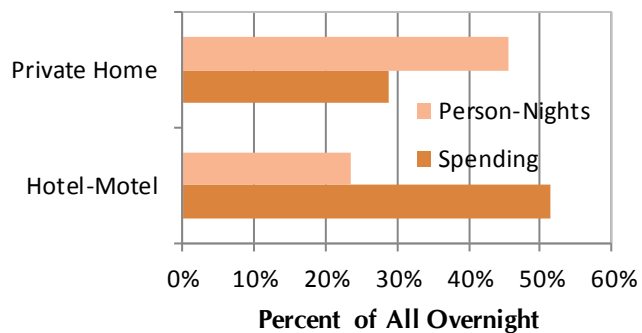
Travel Share of Total Employment (2015)*	6.1%
Overnight Visitor Day Share of Resident Population (2016p)**	6.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	326	600	\$67.6
Private Home	369	1,107	\$34.5
Other Overnight	244	777	\$24.9
All Overnight	939	2,485	\$126.9

Douglas County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	152.0	201.4	204.4	232.4	233.2	0.3%	2.7%
Other	8.7	13.2	15.6	14.3	12.5	-12.7%	2.3%
Visitor	143.4	188.2	188.8	218.1	220.7	1.2%	2.7%
Non-transportation	131.7	169.0	168.2	198.8	202.6	1.9%	2.7%
Transportation	11.7	19.2	20.6	19.3	18.0	-6.5%	2.8%
Earnings (\$Millions)							
Earnings	40.0	52.4	53.7	64.9	68.1	4.8%	3.4%
Employment							
Employment	2,740	3,150	2,810	3,070	3,130	2.1%	0.8%
Tax Revenue (\$Millions)							
Total	4.8	6.3	6.3	7.7	8.1	5.8%	3.4%
Local	0.7	1.1	1.0	1.3	1.4	7.4%	4.3%
State	4.1	5.2	5.3	6.4	6.7	5.5%	3.2%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

East Douglas County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	113.0	151.4	150.7	172.0	173.5	0.9%	2.7%
Other	8.0	12.3	14.5	13.2	11.7	-11.9%	2.4%
Visitor	105.0	139.2	136.3	158.7	161.8	1.9%	2.7%
Non-transportation	96.1	124.5	120.9	144.2	148.0	2.7%	2.7%
Transportation	8.8	14.7	15.4	14.5	13.7	-5.4%	2.8%
Earnings (\$Millions)							
Earnings	29.4	39.0	38.9	47.6	50.2	5.5%	3.4%
Employment							
Employment	2,030	2,350	2,040	2,250	2,320	2.8%	0.8%
Tax Revenue (\$Millions)							
Total	3.8	5.0	4.9	6.0	6.4	6.3%	3.3%
Local	0.6	0.9	0.8	1.1	1.2	7.9%	4.3%
State	3.2	4.1	4.0	4.9	5.2	5.9%	3.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

West Douglas County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	39.1	50.0	53.7	60.4	59.7	-1.2%	2.7%
Other	0.7	1.0	1.1	1.1	0.8	-23.3%	1.3%
Visitor	38.4	49.1	52.5	59.4	58.9	-0.8%	2.7%
Non-transportation	35.6	44.5	47.3	54.6	54.6	0.0%	2.7%
Transportation	2.8	4.5	5.2	4.8	4.3	-9.7%	2.7%
Earnings (\$Millions)							
Earnings	10.5	13.4	14.8	17.3	17.9	2.9%	3.4%
Employment							
Employment	710	800	770	810	820	0.4%	0.9%
Tax Revenue (\$Millions)							
Total	1.0	1.3	1.4	1.6	1.7	4.1%	3.4%
Local	0.1	0.2	0.2	0.2	0.2	4.9%	4.0%
State	0.9	1.1	1.2	1.4	1.5	3.9%	3.4%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Douglas County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	197.8	188.8	200.8	205.8	212.6	218.1	220.7
Other Travel*	18.6	15.6	19.0	18.4	17.7	14.3	12.5
Total Direct Spending	216.4	204.4	219.8	224.2	230.3	232.4	233.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	31.8	29.2	29.8	30.5	32.4	35.6	37.8
Food Service	51.3	51.7	55.0	57.5	60.5	63.8	65.7
Food Stores	22.5	21.9	23.7	24.6	25.6	26.6	26.3
Local Tran. & Gas	25.2	20.6	24.5	23.8	23.1	19.3	18.0
Arts, Ent. & Rec.	37.1	35.6	37.0	37.9	38.9	40.0	40.4
Retail Sales	29.8	29.8	30.8	31.5	32.0	32.7	32.4
Destination Spending	197.8	188.8	200.8	205.8	212.6	218.1	220.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	35.1	33.1	34.3	35.6	37.0	39.1	41.8
Arts, Ent. & Rec.	13.4	12.1	12.7	13.7	15.1	15.7	16.3
Retail**	7.1	6.8	7.2	7.5	7.8	8.2	8.4
Ground Tran.	0.8	0.7	0.8	0.8	0.9	0.9	1.0
Other Travel*	0.8	0.9	1.0	1.0	1.0	1.0	0.7
Total Direct Earnings	57.2	53.7	55.9	58.6	61.8	64.9	68.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,910	1,740	1,740	1,780	1,800	1,840	1,900
Arts, Ent. & Rec.	780	680	690	760	780	790	810
Retail**	340	320	330	340	340	360	360
Ground Tran.	30	20	30	30	30	30	30
Other Travel*	50	50	50	50	50	50	40
Total Direct Employment	3,100	2,810	2,830	2,940	2,990	3,070	3,130
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.0	1.1	1.1	1.2	1.3	1.4
State Tax Receipts	5.6	5.3	5.9	6.1	6.2	6.4	6.7
Total Local & State	6.7	6.3	7.0	7.2	7.4	7.7	8.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Douglas County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	116.1	108.7	114.6	116.9	121.1	124.6	126.9
Hotel, Motel*	63.0	55.8	58.0	58.9	62.2	65.3	67.6
Private Home	31.1	31.5	34.1	34.3	34.8	35.0	34.5
Other Overnight	22.0	21.5	22.5	23.7	24.0	24.3	24.9
Campground	18.3	17.6	18.4	19.6	19.9	20.1	20.6
Vacation Home	3.7	3.9	4.1	4.1	4.2	4.2	4.2
Day Travel	81.7	80.0	86.2	88.8	91.5	93.4	93.7
Spending at Destination	197.8	188.8	200.8	205.8	212.6	218.1	220.7

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$275	\$507	\$113	\$207	2.4	1.8
Private Home	\$81	\$243	\$31	\$93	2.6	3.0
Other Overnight	\$109	\$348	\$32	\$102	3.4	3.2
All Overnight	\$141	\$366	\$51	\$135	2.8	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	573	596	600	234	244	245
Private Home	1,096	1,103	1,107	421	424	426
Other Overnight	750	764	777	220	224	228
All Overnight	2,419	2,463	2,485	875	892	899

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	312	324	326	127	132	133
Private Home	366	368	369	141	141	142
Other Overnight	235	240	244	69	70	71
All Overnight	913	932	939	337	344	347

*Includes all lodging where a lodging tax is collected except campgrounds.

GILLIAM & SHERMAN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$87,540
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$170
Additional employment if each resident household encouraged one additional overnight visitor	2

Visitor Shares

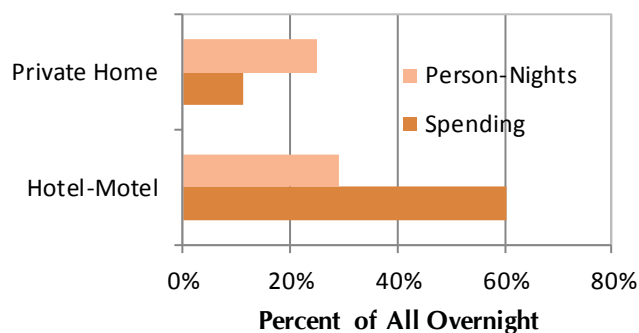
Travel Share of Total Employment (2015)*	3.9%
Overnight Visitor Day Share of Resident Population (2016p)**	11.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	28	46	\$4.0
Private Home	14	36	\$0.7
Other Overnight	23	70	\$2.1
All Overnight	64	152	\$6.8

Gilliam & Sherman County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	7.8	8.6	9.1	9.2	9.4	2.1%	1.2%
Other	0.3	0.4	0.5	0.4	0.4	-6.7%	2.0%
Visitor	7.5	8.2	8.6	8.8	9.0	2.5%	1.2%
Non-transportation	6.9	7.5	7.8	8.1	8.3	3.2%	1.2%
Transportation	0.5	0.7	0.8	0.7	0.6	-5.4%	1.0%
Earnings (\$Millions)							
Earnings	1.9	2.0	2.2	2.3	2.4	3.8%	1.6%
Employment							
Employment	140	140	110	100	100	0.6%	-2.1%
Tax Revenue (\$Millions)							
Total	0.19	0.21	0.24	0.26	0.28	7.7%	2.4%
Local			0.01	0.02	0.02	9.7%	
State	0.19	0.21	0.23	0.24	0.26	7.5%	2.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Gilliam & Sherman Counties Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.7	8.6	9.0	8.2	8.4	8.8	9.0
Other Travel*	0.6	0.5	0.6	0.6	0.6	0.4	0.4
Total Direct Spending	9.2	9.1	9.6	8.8	9.0	9.2	9.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.1	2.2	2.1	1.9	2.0	2.2	2.3
Food Service	2.1	2.2	2.3	2.1	2.2	2.3	2.4
Food Stores	1.1	1.1	1.2	1.1	1.2	1.2	1.2
Local Tran. & Gas	0.9	0.8	0.9	0.8	0.8	0.7	0.6
Arts, Ent. & Rec.	1.4	1.4	1.4	1.2	1.3	1.3	1.3
Retail Sales	1.0	1.0	1.1	1.0	1.0	1.0	1.0
Destination Spending	8.7	8.6	9.0	8.2	8.4	8.8	9.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.4	1.5	1.5	1.4	1.4	1.5	1.6
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.3	0.3	0.3	0.3	0.3	0.4	0.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.2	2.2	2.3	2.2	2.2	2.3	2.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	70	70	70	60	70	70	70
Arts, Ent. & Rec.	20	20	20	20	20	20	20
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	120	110	110	100	100	100	100
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts			0.01	0.01	0.01	0.02	0.02
State Tax Receipts	0.23	0.23	0.25	0.24	0.24	0.24	0.26
Total Local & State	0.23	0.24	0.27	0.25	0.25	0.26	0.28

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Gilliam & Sherman County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2011p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	6.6	6.6	6.8	6.1	6.3	6.6	6.8
Hotel, Motel*	4.0	4.1	4.1	3.4	3.5	3.7	4.0
Private Home	0.6	0.7	0.7	0.7	0.8	0.8	0.7
Other Overnight	2.0	1.8	1.9	2.0	2.0	2.1	2.1
Campground	1.8	1.7	1.8	1.9	1.9	1.9	2.0
Vacation Home	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Day Travel	2.1	2.1	2.2	2.1	2.1	2.2	2.2
Spending at Destination	8.7	8.6	9.0	8.2	8.4	8.8	9.0

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$211	\$351	\$86	\$143	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$103	\$320	\$30	\$93	3.5	3.1
All Overnight	\$128	\$291	\$45	\$105	2.9	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	43	45	46	18	18	19
Private Home	36	36	36	14	14	14
Other Overnight	68	69	70	20	20	20
All Overnight	147	150	152	51	52	53

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	26	27	28	11	11	11
Private Home	14	14	14	6	5	5
Other Overnight	22	22	23	6	6	7
All Overnight	62	63	64	22	23	23

*Includes all lodging where a lodging tax is collected except campgrounds.

GRANT COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$57,130
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.00

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$280
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

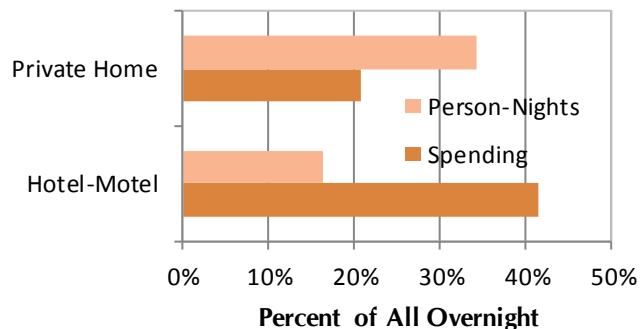
Travel Share of Total Employment (2015)*	4.6%
Overnight Visitor Day Share of Resident Population (2016p)**	8.5%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	23	38	\$3.4
Private Home	28	72	\$1.4
Other Overnight	38	112	\$2.9
All Overnight	89	222	\$7.7

Grant County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	8.0	9.0	9.8	10.6	10.7	0.9%	1.8%
Other	0.6	0.9	1.0	0.9	0.8	-7.8%	1.8%
Visitor	7.4	8.1	8.8	9.7	9.9	1.7%	1.8%
Non-transportation	6.8	7.3	7.9	8.9	9.1	2.4%	1.8%
Transportation	0.6	0.8	0.9	0.8	0.8	-6.0%	1.7%
Earnings (\$Millions)							
Earnings	2.1	2.2	2.4	2.7	2.8	2.6%	1.9%
Employment							
Employment	200	200	180	170	180	2.5%	-0.7%
Tax Revenue (\$Millions)							
Total	0.3	0.3	0.4	0.4	0.4	6.1%	2.3%
Local	0.0	0.1	0.1	0.1	0.1	9.4%	3.1%
State	0.2	0.2	0.3	0.3	0.3	5.3%	2.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Grant County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.0	8.8	8.5	8.9	9.5	9.7	9.9
Other Travel*	1.2	1.0	1.2	1.2	1.1	0.9	0.8
Total Direct Spending	9.1	9.8	9.7	10.1	10.6	10.6	10.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1.5	1.7	1.5	1.7	1.8	2.0	2.1
Food Service	2.0	2.3	2.2	2.4	2.6	2.7	2.8
Food Stores	1.3	1.4	1.4	1.5	1.6	1.6	1.6
Local Tran. & Gas	1.0	0.9	1.0	1.0	1.0	0.8	0.8
Arts, Ent. & Rec.	1.2	1.3	1.2	1.2	1.3	1.4	1.4
Retail Sales	1.0	1.2	1.1	1.2	1.2	1.2	1.2
Destination Spending	8.0	8.8	8.5	8.9	9.5	9.7	9.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.5	1.6	1.5	1.6	1.7	1.8	1.9
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Ground Tran.	0.0	0.0	0.0	0.0	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.2	2.4	2.3	2.4	2.5	2.7	2.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	100	110	100	100	100	110	110
Arts, Ent. & Rec.	50	50	40	50	50	40	40
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	170	180	160	170	170	170	180
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Total Local & State	0.3	0.4	0.4	0.3	0.4	0.4	0.4

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Grant County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	6.2	6.9	6.5	6.9	7.4	7.6	7.7
Hotel, Motel*	2.4	2.9	2.4	2.7	3.0	3.2	3.4
Private Home	1.2	1.4	1.5	1.5	1.5	1.5	1.4
Other Overnight	2.5	2.5	2.6	2.7	2.8	2.8	2.9
Campground	1.7	1.8	1.8	2.0	2.0	2.0	2.1
Vacation Home	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Day Travel	1.8	1.9	2.0	2.0	2.1	2.2	2.2
Spending at Destination	8.0	8.8	8.5	8.9	9.5	9.7	9.9

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$220	\$365	\$90	\$149	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$86	\$249	\$26	\$75	3.3	2.9
All Overnight	\$100	\$243	\$35	\$87	2.9	2.4

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	36	37	38	15	15	16
Private Home	73	73	72	29	28	28
Other Overnight	108	110	112	32	33	33
All Overnight	217	220	222	76	77	77

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	22	22	23	9	9	9
Private Home	29	28	28	11	11	11
Other Overnight	37	38	38	11	11	12
All Overnight	87	88	89	31	32	32

*Includes all lodging where a lodging tax is collected except campgrounds.

HARNEY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$55,050
Employee Earnings generated by \$100 Visitor Spending	\$37
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$345
Additional employment if each resident household encouraged one additional overnight visitor	6

Visitor Shares

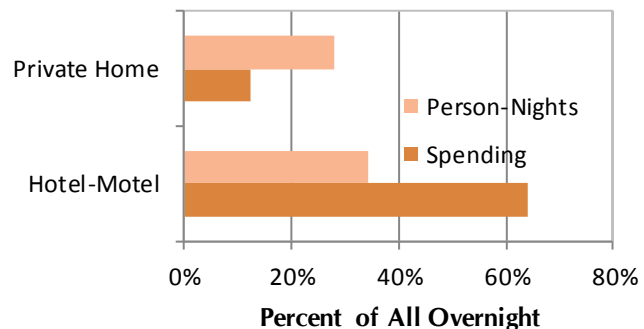
Travel Share of Total Employment (2015)*	7.8%
Overnight Visitor Day Share of Resident Population (2016p)**	10.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	57	95	\$8.6
Private Home	28	73	\$1.5
Other Overnight	33	100	\$2.9
All Overnight	118	268	\$13.0

Harney County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	14.9	15.9	14.6	17.2	17.7	3.1%	1.1%
Other	0.6	0.8	1.0	0.9	0.8	-6.1%	2.1%
Visitor	14.3	15.1	13.6	16.3	16.9	3.6%	1.1%
Non-transportation	13.3	13.8	12.4	15.1	15.7	4.2%	1.1%
Transportation	1.0	1.3	1.2	1.2	1.1	-4.1%	0.9%
Earnings (\$Millions)							
Earnings	4.7	4.9	4.5	5.8	6.3	7.4%	1.9%
Employment							
Employment	380	330	280	310	310	-0.8%	-1.3%
Tax Revenue (\$Millions)							
Total	0.5	0.6	0.6	0.7	0.8	9.1%	3.0%
Local	0.1	0.2	0.2	0.3	0.3	7.6%	5.1%
State	0.4	0.4	0.4	0.5	0.5	9.8%	2.2%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Harney County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	14.5	13.6	15.5	15.1	15.6	16.3	16.9
Other Travel*	1.2	1.0	1.2	1.2	1.1	0.9	0.8
Total Direct Spending	15.7	14.6	16.7	16.3	16.8	17.2	17.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	3.8	3.4	3.9	3.9	4.0	4.4	4.7
Food Service	3.5	3.4	3.9	3.8	4.0	4.3	4.5
Food Stores	1.6	1.7	1.9	1.9	1.9	2.0	2.0
Local Tran. & Gas	1.5	1.2	1.5	1.4	1.4	1.2	1.1
Arts, Ent. & Rec.	2.7	2.5	2.8	2.7	2.7	2.8	2.9
Retail Sales	1.4	1.4	1.5	1.5	1.5	1.5	1.6
Destination Spending	14.5	13.6	15.5	15.1	15.6	16.3	16.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	3.5	3.2	3.5	3.6	3.9	4.3	4.7
Arts, Ent. & Rec.	0.9	0.7	0.8	0.8	0.8	0.9	0.9
Retail**	0.4	0.4	0.4	0.4	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	4.9	4.5	4.9	4.9	5.3	5.8	6.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	200	180	170	180	180	200	200
Arts, Ent. & Rec.	100	90	90	90	90	90	90
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	330	280	290	290	300	310	310
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.3	0.2	0.2	0.3	0.3
State Tax Receipts	0.4	0.4	0.4	0.4	0.4	0.5	0.5
Total Local & State	0.6	0.6	0.7	0.7	0.7	0.7	0.8

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Harney County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	11.2	10.3	11.8	11.5	11.9	12.5	13.0
Hotel, Motel*	7.8	6.5	7.7	7.3	7.6	8.1	8.6
Private Home	1.2	1.4	1.5	1.4	1.5	1.5	1.5
Other Overnight	2.2	2.5	2.6	2.8	2.8	2.8	2.9
Campground	1.9	2.2	2.3	2.5	2.5	2.5	2.6
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	3.3	3.3	3.7	3.6	3.7	3.8	3.9
Spending at Destination	14.5	13.6	15.5	15.1	15.6	16.3	16.9

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$222	\$369	\$90	\$151	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$100	\$304	\$29	\$89	3.4	3.0
All Overnight	\$134	\$295	\$48	\$110	2.8	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	89	93	95	36	38	39
Private Home	72	73	73	28	28	29
Other Overnight	96	98	100	28	29	29
All Overnight	257	264	268	93	95	97

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	53	56	57	22	23	23
Private Home	28	28	28	11	11	11
Other Overnight	32	32	33	9	9	10
All Overnight	113	116	118	42	43	44

*Includes all lodging where a lodging tax is collected except campgrounds.

HOOD RIVER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$88,280
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,498
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

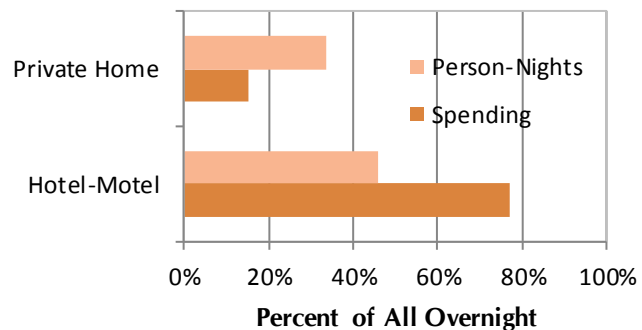
Travel Share of Total Employment (2015)*	6.4%
Overnight Visitor Day Share of Resident Population (2016p)**	11.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	254	480	\$58.3
Private Home	100	303	\$9.4
Other Overnight	58	187	\$4.7
All Overnight	411	970	\$72.5

Hood River County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	54.7	61.7	73.1	92.5	100.7	8.9%	3.9%
Other	2.2	3.3	3.3	3.1	2.9	-6.1%	1.7%
Visitor	52.5	58.5	69.8	89.4	97.8	9.4%	4.0%
Non-transportation	47.7	51.8	61.1	80.8	89.2	10.4%	4.0%
Transportation	4.8	6.7	8.6	8.6	8.6	-0.1%	3.7%
Earnings (\$Millions)							
Earnings	14.0	15.4	18.4	24.9	27.7	11.3%	4.4%
Employment							
Employment	880	890	920	1,050	1,120	6.8%	1.5%
Tax Revenue (\$Millions)							
Total	2.2	2.5	3.1	4.2	5.0	18.0%	5.4%
Local	0.8	0.8	1.2	1.7	2.1	22.0%	6.5%
State	1.4	1.6	1.9	2.5	2.9	15.3%	4.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Hood River County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	65.0	69.8	77.4	79.3	83.7	89.4	97.8
Other Travel*	4.2	3.3	4.0	3.9	3.7	3.1	2.9
Total Direct Spending	69.2	73.1	81.4	83.1	87.4	92.5	100.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	15.3	16.7	18.6	20.6	22.4	25.8	30.2
Food Service	17.6	19.9	21.8	22.3	23.8	26.0	28.5
Food Stores	5.5	5.7	6.3	6.4	6.8	7.2	7.4
Local Tran. & Gas	9.3	8.6	10.6	10.0	9.9	8.6	8.6
Arts, Ent. & Rec.	8.2	8.7	9.3	9.3	9.7	10.3	11.0
Retail Sales	9.2	10.1	10.8	10.7	11.1	11.6	12.2
Destination Spending	65.0	69.8	77.4	79.3	83.7	89.4	97.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	12.1	13.0	14.5	15.7	17.4	18.8	21.2
Arts, Ent. & Rec.	2.8	2.9	2.8	2.8	2.7	2.9	3.1
Retail**	1.9	2.0	2.2	2.2	2.3	2.5	2.7
Ground Tran.	0.3	0.3	0.3	0.3	0.4	0.4	0.5
Other Travel*	0.3	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	17.4	18.4	20.0	21.2	23.0	24.9	27.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	670	670	700	740	780	800	850
Arts, Ent. & Rec.	150	140	130	130	120	120	140
Retail**	90	90	100	100	100	110	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	930	920	950	990	1,030	1,050	1,120
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.0	1.2	1.3	1.4	1.5	1.7	2.1
State Tax Receipts	1.8	1.9	2.2	2.3	2.4	2.5	2.9
Total Local & State	2.8	3.1	3.5	3.7	3.9	4.2	5.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Hood River County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	46.9	50.3	55.8	57.4	60.9	65.5	72.5
Hotel, Motel*	34.8	37.8	42.3	43.9	47.0	51.5	58.3
Private Home	7.9	8.5	9.1	9.0	9.3	9.4	9.4
Other Overnight	4.2	4.1	4.3	4.5	4.6	4.6	4.7
Campground	3.2	3.0	3.2	3.4	3.5	3.5	3.6
Vacation Home	1.0	1.0	1.1	1.1	1.1	1.1	1.1
Day Travel	18.1	19.4	21.6	21.8	22.8	23.9	25.3
Spending at Destination	65.0	69.8	77.4	79.3	83.7	89.4	97.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$297	\$562	\$122	\$230	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$86	\$278	\$25	\$82	3.4	3.2
All Overnight	\$197	\$456	\$75	\$176	2.6	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	407	440	480	166	180	196
Private Home	294	300	303	113	115	116
Other Overnight	180	184	187	53	54	55
All Overnight	881	924	970	332	349	368

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	215	233	254	88	95	104
Private Home	97	99	100	37	38	38
Other Overnight	56	57	58	16	17	17
All Overnight	367	388	411	141	150	159

*Includes all lodging where a lodging tax is collected except campgrounds.

JACKSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$81,820
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,715
Additional employment if each resident household encouraged one additional overnight visitor	180

Visitor Shares

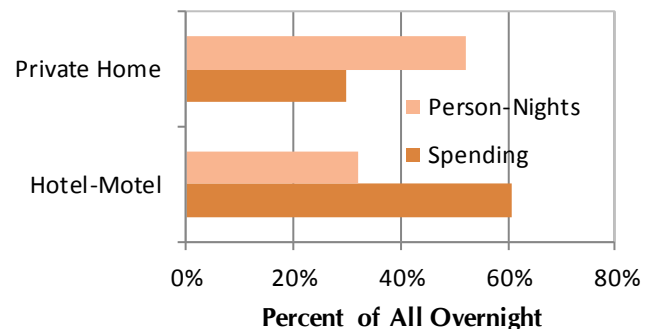
Travel Share of Total Employment (2015)*	4.5%
Overnight Visitor Day Share of Resident Population (2016p)**	6.9%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	946	1,790	\$221.8
Private Home	919	2,794	\$100.3
Other Overnight	259	838	\$31.0
All Overnight	2,124	5,422	\$353.1

Jackson County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	307.9	399.8	453.0	528.1	547.9	3.8%	3.7%
Other	57.2	90.9	115.6	121.5	121.7	0.1%	4.8%
Visitor	250.7	308.9	337.4	406.5	426.2	4.9%	3.4%
Non-transportation	226.2	271.3	292.5	360.1	380.3	5.6%	3.3%
Transportation	24.5	37.6	45.0	46.4	45.9	-0.9%	4.0%
Earnings (\$Millions)							
Earnings	76.5	92.2	102.5	133.2	142.8	7.2%	4.0%
Employment							
Employment	4,300	4,640	4,500	5,290	5,440	2.8%	1.5%
Tax Revenue (\$Millions)							
Total	10.8	14.4	16.2	21.5	23.5	9.2%	4.9%
Local	3.2	4.8	6.0	8.3	9.1	9.5%	6.7%
State	7.6	9.5	10.3	13.2	14.4	9.0%	4.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Jackson County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	334.0	337.4	367.0	381.6	391.0	406.5	426.2
Other Travel*	106.6	115.6	112.1	112.4	118.2	121.5	121.7
Total Direct Spending	440.6	453.0	479.1	494.0	509.2	528.1	547.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	67.3	69.2	74.2	77.5	82.4	90.5	98.1
Food Service	89.9	95.8	103.7	110.4	114.7	122.0	130.3
Food Stores	33.5	33.0	36.1	37.6	38.9	40.7	41.2
Local Tran. & Gas	50.7	45.0	53.9	53.6	51.2	46.4	45.9
Arts, Ent. & Rec.	44.3	44.4	46.4	48.2	49.0	50.8	53.0
Retail Sales	48.2	50.0	52.7	54.4	54.7	56.2	57.7
Destination Spending	334.0	337.4	367.0	381.6	391.0	406.5	426.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	66.5	67.4	72.6	76.7	83.7	90.2	98.5
Arts, Ent. & Rec.	14.8	13.9	14.2	14.9	15.4	16.1	16.9
Retail**	11.0	10.9	11.7	12.2	12.6	13.3	14.0
Ground Tran.	2.2	2.1	2.3	2.4	2.4	2.8	3.0
Other Travel*	8.7	8.1	8.9	9.4	10.2	10.8	10.4
Total Direct Earnings	103.1	102.5	109.7	115.5	124.2	133.2	142.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,200	3,060	3,210	3,370	3,560	3,730	3,910
Arts, Ent. & Rec.	830	700	660	700	700	710	710
Retail**	450	440	460	470	480	500	500
Ground Tran.	80	70	80	80	70	90	90
Other Travel*	300	230	240	250	260	270	230
Total Direct Employment	4,860	4,500	4,640	4,870	5,070	5,290	5,440
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.6	6.0	6.4	6.7	7.4	8.3	9.1
State Tax Receipts	10.4	10.3	11.8	12.2	12.6	13.2	14.4
Total Local & State	16.1	16.2	18.2	19.0	20.0	21.5	23.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Jackson County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	276.5	278.8	302.4	314.3	322.5	336.1	353.1
Hotel, Motel*	163.2	166.0	180.3	189.4	196.2	207.8	221.8
Private Home	83.9	86.2	94.3	95.5	96.4	98.0	100.3
Other Overnight	29.4	26.5	27.8	29.4	29.8	30.3	31.0
Campground	25.6	22.7	23.7	25.3	25.6	26.1	26.8
Vacation Home	3.8	3.8	4.1	4.1	4.2	4.2	4.3
Day Travel	57.5	58.7	64.6	67.3	68.5	70.4	73.1
Spending at Destination	334.0	337.4	367.0	381.6	391.0	406.5	426.2

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$291	\$559	\$124	\$234	2.4	1.9
Private Home	\$87	\$272	\$36	\$109	2.4	3.1
Other Overnight	\$126	\$409	\$37	\$120	3.4	3.2
All Overnight	\$163	\$420	\$65	\$166	2.5	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,653	1,713	1,790	699	727	761
Private Home	2,698	2,750	2,794	1,101	1,131	1,156
Other Overnight	808	824	838	237	241	245
All Overnight	5,159	5,287	5,422	2,037	2,099	2,162

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	874	906	946	365	379	397
Private Home	887	904	919	353	361	368
Other Overnight	250	255	259	73	75	76
All Overnight	2,011	2,065	2,124	791	815	841

*Includes all lodging where a lodging tax is collected except campgrounds.

JEFFERSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$47,130
Employee Earnings generated by \$100 Visitor Spending	\$34
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$863
Additional employment if each resident household encouraged one additional overnight visitor	18

Visitor Shares

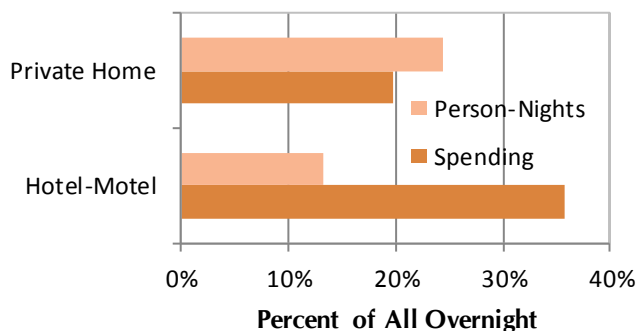
Travel Share of Total Employment (2015)*	10.7%
Overnight Visitor Day Share of Resident Population (2016p)**	10.8%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
2016p			
Hotel, Motel*	75	125	\$13.8
Private Home	90	232	\$7.4
Other Overnight	186	549	\$15.5
All Overnight	351	907	\$36.6

Jefferson County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	31.4	36.6	42.5	48.8	50.5	3.4%	3.0%
Other	1.5	2.4	3.0	2.8	2.7	-5.4%	3.6%
Visitor	29.9	34.2	39.5	46.0	47.8	4.0%	3.0%
Non-transportation	27.2	30.3	34.6	41.4	43.4	4.9%	3.0%
Transportation	2.7	3.9	4.9	4.6	4.4	-3.9%	3.2%
Earnings (\$Millions)							
Earnings	7.3	8.3	10.0	15.8	16.6	5.0%	5.3%
Employment							
Employment	600	600	690	990	1,020	3.3%	3.4%
Tax Revenue (\$Millions)							
Total	1.1	1.3	1.5	2.2	2.3	7.7%	4.8%
Local	0.3	0.3	0.4	0.6	0.6	9.6%	5.8%
State	0.8	1.0	1.1	1.6	1.7	7.0%	4.4%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Jefferson County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	40.5	39.5	43.0	46.0	44.2	46.0	47.8
Other Travel*	3.5	3.0	3.7	3.6	3.5	2.8	2.7
Total Direct Spending	44.0	42.5	46.7	49.6	47.7	48.8	50.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.6	6.3	7.1	8.2	7.8	8.6	9.3
Food Service	10.1	10.5	11.4	12.3	12.0	12.8	13.7
Food Stores	6.0	5.8	6.2	6.5	6.6	7.0	7.1
Local Tran. & Gas	5.8	4.9	6.0	6.1	5.4	4.6	4.4
Arts, Ent. & Rec.	6.5	6.3	6.6	6.9	6.7	7.0	7.3
Retail Sales	5.5	5.6	5.8	6.0	5.8	6.0	6.1
Destination Spending	40.5	39.5	43.0	46.0	44.2	46.0	47.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.5	6.4	7.0	8.2	8.6	9.6	10.2
Arts, Ent. & Rec.	2.0	1.8	2.8	3.4	3.9	4.1	4.2
Retail**	1.6	1.5	1.6	1.7	1.7	1.8	1.9
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	10.3	10.0	11.7	13.6	14.5	15.8	16.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	350	360	370	420	430	460	470
Arts, Ent. & Rec.	250	250	350	400	420	430	450
Retail**	80	80	80	90	80	80	90
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	700	690	810	930	950	990	1,020
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.4	0.4	0.5	0.6	0.5	0.6	0.6
State Tax Receipts	1.1	1.1	1.3	1.5	1.5	1.6	1.7
Total Local & State	1.6	1.5	1.8	2.0	2.0	2.2	2.3

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Jefferson County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	31.0	30.1	32.9	35.3	33.8	35.2	36.6
Hotel, Motel*	10.4	10.0	11.8	13.6	12.1	13.0	13.8
Private Home	6.1	6.4	6.8	6.9	6.7	7.0	7.4
Other Overnight	14.5	13.7	14.3	14.8	15.1	15.2	15.5
Campground	9.2	8.7	9.1	9.7	9.7	9.9	10.1
Vacation Home	5.3	5.0	5.2	5.2	5.3	5.3	5.4
Day Travel	9.5	9.4	10.2	10.7	10.4	10.8	11.2
Spending at Destination	40.5	39.5	43.0	46.0	44.2	46.0	47.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$271	\$450	\$110	\$184	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$95	\$279	\$28	\$83	3.4	2.9
All Overnight	\$120	\$302	\$40	\$104	3.0	2.5

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	113	121	125	46	49	51
Private Home	216	230	232	85	90	91
Other Overnight	532	542	549	158	161	163
All Overnight	861	892	907	289	300	305

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	68	73	75	28	30	31
Private Home	84	89	90	33	35	35
Other Overnight	180	183	186	54	55	56
All Overnight	332	345	351	114	119	121

*Includes all lodging where a lodging tax is collected except campgrounds.

JOSEPHINE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$65,960
Employee Earnings generated by \$100 Visitor Spending	\$35
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,564
Additional employment if each resident household encouraged one additional overnight visitor	69

Visitor Shares

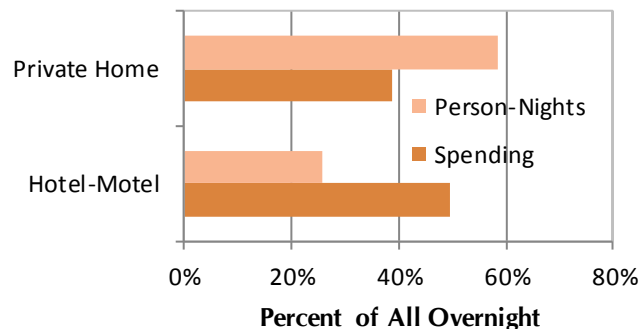
Travel Share of Total Employment (2015)*	4.7%
Overnight Visitor Day Share of Resident Population (2016p)**	6.0%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	256	485	\$45.6
Private Home	360	1,096	\$34.1
Other Overnight	94	304	\$10.4
All Overnight	710	1,885	\$90.1

Josephine County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	91.2	107.1	111.8	124.7	125.7	0.8%	2.0%
Other	8.9	11.3	12.6	11.9	11.3	-4.6%	1.5%
Visitor	82.3	95.8	99.2	112.8	114.4	1.4%	2.1%
Non-transportation	74.1	83.9	85.9	100.6	102.9	2.3%	2.1%
Transportation	8.2	11.9	13.3	12.2	11.4	-6.4%	2.1%
Earnings (\$Millions)							
Earnings	26.4	29.4	30.7	38.8	41.7	7.3%	2.9%
Employment							
Employment	1,710	1,650	1,570	1,740	1,780	2.5%	0.3%
Tax Revenue (\$Millions)							
Total	3.2	4.1	4.2	5.1	5.5	7.2%	3.3%
Local	0.6	1.0	1.0	1.2	1.3	7.2%	5.3%
State	2.7	3.1	3.2	3.9	4.2	7.2%	2.9%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Josephine County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	101.2	99.2	105.8	110.7	109.7	112.8	114.4
Other Travel*	15.9	12.6	15.2	14.7	14.2	11.9	11.3
Total Direct Spending	117.1	111.8	121.0	125.4	123.8	124.7	125.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	17.9	17.4	17.8	19.1	19.4	21.3	22.5
Food Service	26.7	27.7	29.5	31.4	31.6	33.5	34.6
Food Stores	11.7	11.4	12.4	12.9	13.1	13.7	13.6
Local Tran. & Gas	15.6	13.3	15.7	15.6	14.5	12.2	11.4
Arts, Ent. & Rec.	13.8	13.6	14.0	14.6	14.4	14.9	15.1
Retail Sales	15.6	15.9	16.5	17.1	16.7	17.2	17.1
Destination Spending	101.2	99.2	105.8	110.7	109.7	112.8	114.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	21.0	20.6	21.7	22.7	24.8	27.5	29.8
Arts, Ent. & Rec.	5.1	4.7	4.6	4.6	4.8	5.0	5.3
Retail**	4.0	4.0	4.2	4.4	4.4	4.7	4.8
Ground Tran.	0.5	0.5	0.5	0.6	0.6	0.6	0.7
Other Travel*	1.3	1.0	1.0	0.9	1.0	1.1	1.2
Total Direct Earnings	31.9	30.7	32.0	33.2	35.6	38.8	41.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,040	980	990	1,030	1,060	1,140	1,170
Arts, Ent. & Rec.	420	360	360	340	350	350	360
Retail**	180	180	180	190	180	190	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	40	40	40	40	50	50
Total Direct Employment	1,720	1,570	1,590	1,620	1,650	1,740	1,780
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.0	1.0	1.0	1.1	1.1	1.2	1.3
State Tax Receipts	3.3	3.2	3.6	3.7	3.7	3.9	4.2
Total Local & State	4.3	4.2	4.6	4.8	4.9	5.1	5.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Josephine County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	80.4	78.4	83.3	87.1	86.3	88.8	90.1
Hotel, Motel*	40.4	38.8	40.6	43.4	42.7	44.4	45.6
Private Home	30.0	30.7	33.3	33.9	33.5	34.2	34.1
Other Overnight	10.0	8.9	9.4	9.9	10.0	10.2	10.4
Campground	8.1	7.0	7.4	7.9	8.0	8.1	8.3
Vacation Home	1.9	1.9	2.0	2.0	2.0	2.0	2.1
Day Travel	20.8	20.8	22.6	23.6	23.4	24.1	24.3
Spending at Destination	101.2	99.2	105.8	110.7	109.7	112.8	114.4

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$230	\$435	\$94	\$178	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$116	\$376	\$34	\$111	3.4	3.3
All Overnight	\$127	\$333	\$48	\$127	2.7	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	467	485	485	191	198	198
Private Home	1,059	1,091	1,096	406	419	421
Other Overnight	294	299	304	87	88	90
All Overnight	1,820	1,875	1,885	684	705	709

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	247	256	256	101	105	105
Private Home	348	359	360	134	138	138
Other Overnight	91	92	94	27	27	28
All Overnight	686	707	710	261	270	271

*Includes all lodging where a lodging tax is collected except campgrounds.

KLAMATH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$70,660
Employee Earnings generated by \$100 Visitor Spending	\$34
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,605
Additional employment if each resident household encouraged one additional overnight visitor	51

Visitor Shares

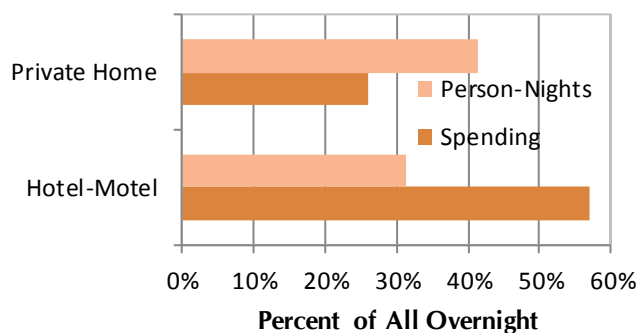
Travel Share of Total Employment (2015)*	6.3%
Overnight Visitor Day Share of Resident Population (2016p)**	8.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	354	670	\$62.4
Private Home	279	849	\$26.5
Other Overnight	177	581	\$18.1
All Overnight	810	2,100	\$107.0

Klamath County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	105.0	126.4	135.3	140.5	141.0	0.3%	1.9%
Other	11.4	15.3	14.1	8.6	8.1	-6.3%	-2.1%
Visitor	93.7	111.1	121.2	131.9	132.9	0.8%	2.2%
Non-transportation	84.0	96.5	104.2	117.0	118.9	1.7%	2.2%
Transportation	9.7	14.6	17.1	14.9	13.9	-6.6%	2.3%
Earnings (\$Millions)							
Earnings	29.0	33.7	37.1	46.0	46.4	0.9%	3.0%
Employment							
Employment	1,750	1,750	1,680	1,910	1,910	0.1%	0.5%
Tax Revenue (\$Millions)							
Total	3.7	4.6	5.1	6.0	6.3	4.7%	3.4%
Local	0.8	1.2	1.5	1.7	1.8	5.2%	4.9%
State	2.9	3.4	3.6	4.3	4.5	4.5%	2.9%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Klamath County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	123.4	121.2	130.4	125.1	128.8	131.9	132.9
Other Travel*	18.6	14.1	15.2	14.9	11.6	8.6	8.1
Total Direct Spending	142.0	135.3	145.6	140.0	140.4	140.5	141.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	26.3	25.9	27.4	25.7	27.2	29.8	31.0
Food Service	30.3	31.4	33.7	33.0	34.5	36.4	37.5
Food Stores	12.4	12.5	13.5	13.5	14.1	14.7	14.4
Local Tran. & Gas	20.0	17.1	20.4	18.5	17.9	14.9	13.9
Arts, Ent. & Rec.	17.6	17.4	18.0	17.5	17.9	18.4	18.6
Retail Sales	16.7	16.9	17.5	17.0	17.3	17.6	17.4
Destination Spending	123.4	121.2	130.4	125.1	128.8	131.9	132.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	26.2	25.7	29.6	29.8	31.9	34.3	34.8
Arts, Ent. & Rec.	6.2	5.8	6.0	5.8	5.7	5.9	5.6
Retail**	4.0	4.0	4.2	4.1	4.3	4.5	4.6
Ground Tran.	0.6	0.6	0.7	0.6	0.7	0.7	0.8
Other Travel*	1.1	1.0	1.1	1.1	1.1	0.6	0.6
Total Direct Earnings	38.2	37.1	41.6	41.4	43.6	46.0	46.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,120	1,040	1,180	1,150	1,170	1,220	1,210
Arts, Ent. & Rec.	440	410	450	440	450	450	450
Retail**	180	180	190	180	180	190	200
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	40	40	40	40	40	30	30
Total Direct Employment	1,810	1,680	1,880	1,820	1,860	1,910	1,910
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.5	1.5	1.4	1.5	1.6	1.7	1.8
State Tax Receipts	3.8	3.6	4.3	4.1	4.2	4.3	4.5
Total Local & State	5.3	5.1	5.7	5.6	5.8	6.0	6.3

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Klamath County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	99.9	97.8	105.0	100.3	103.4	106.0	107.0
Hotel, Motel*	59.7	57.1	61.9	57.0	58.9	61.2	62.4
Private Home	25.1	24.9	26.5	26.0	26.9	27.0	26.5
Other Overnight	15.1	15.9	16.7	17.3	17.6	17.8	18.1
Campground	8.8	9.8	10.3	10.9	11.1	11.2	11.5
Vacation Home	6.2	6.1	6.4	6.4	6.5	6.6	6.6
Day Travel	23.5	23.4	25.4	24.8	25.5	25.9	25.9
Spending at Destination	123.4	121.2	130.4	125.1	128.8	131.9	132.9

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$228	\$431	\$93	\$176	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$103	\$340	\$31	\$102	3.3	3.3
All Overnight	\$138	\$350	\$51	\$132	2.7	2.5

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	644	667	670	264	273	274
Private Home	839	849	849	323	326	326
Other Overnight	564	574	581	170	173	175
All Overnight	2,047	2,090	2,100	756	772	776

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	340	353	354	139	144	145
Private Home	276	279	279	106	107	107
Other Overnight	172	175	177	52	53	53
All Overnight	788	807	810	297	304	305

*Includes all lodging where a lodging tax is collected except campgrounds.

LAKE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$59,660
Employee Earnings generated by \$100 Visitor Spending	\$24
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.00

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$301
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

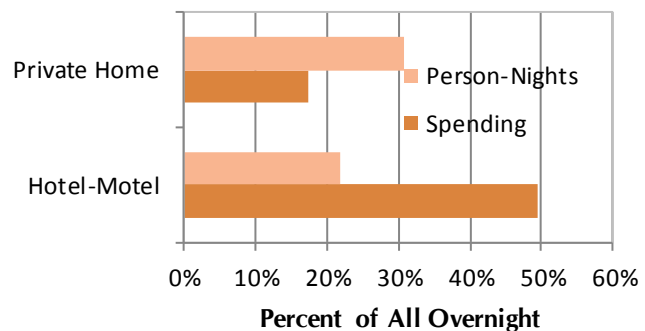
Travel Share of Total Employment (2015)*	5.8%
Overnight Visitor Day Share of Resident Population (2016p)**	9.2%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	35	58	\$5.0
Private Home	30	78	\$1.6
Other Overnight	43	126	\$3.2
All Overnight	109	262	\$9.7

Lake County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	9.8	11.0	13.4	13.7	13.8	0.5%	2.1%
Other	0.6	0.9	1.1	1.0	0.9	-6.7%	2.8%
Visitor	9.3	10.2	12.3	12.7	12.9	1.0%	2.1%
Non-transportation	8.5	9.2	11.0	11.7	11.9	1.7%	2.1%
Transportation	0.7	1.0	1.2	1.1	1.0	-6.1%	2.0%
Earnings (\$Millions)							
Earnings	2.2	2.4	2.9	3.1	3.2	2.6%	2.4%
Employment							
Employment	210	210	250	210	220	2.3%	0.3%
Tax Revenue (\$Millions)							
Total	0.3	0.4	0.5	0.5	0.5	5.6%	3.2%
Local	0.1	0.1	0.1	0.1	0.1	5.5%	5.6%
State	0.3	0.3	0.3	0.4	0.4	5.6%	2.6%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Lake County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	10.9	12.3	12.1	11.9	12.4	12.7	12.9
Other Travel*	1.2	1.1	1.3	1.3	1.2	1.0	0.9
Total Direct Spending	12.1	13.4	13.4	13.2	13.6	13.7	13.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.2	2.7	2.5	2.4	2.6	2.8	2.9
Food Service	2.7	3.2	3.2	3.2	3.4	3.5	3.6
Food Stores	1.6	1.7	1.7	1.7	1.8	1.9	1.9
Local Tran. & Gas	1.3	1.2	1.4	1.3	1.2	1.1	1.0
Arts, Ent. & Rec.	1.7	1.9	1.8	1.7	1.8	1.8	1.9
Retail Sales	1.4	1.6	1.5	1.5	1.6	1.6	1.6
Destination Spending	10.9	12.3	12.1	11.9	12.4	12.7	12.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.6	1.8	1.6	1.6	1.8	1.9	1.9
Arts, Ent. & Rec.	0.6	0.6	0.6	0.5	0.6	0.6	0.6
Retail**	0.4	0.5	0.5	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Total Direct Earnings	2.7	2.9	2.7	2.7	3.0	3.1	3.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	150	160	140	140	140	130	140
Arts, Ent. & Rec.	50	50	60	50	50	50	50
Retail**	20	30	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	230	250	220	220	220	210	220
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Total Local & State	0.4	0.5	0.4	0.5	0.5	0.5	0.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lake County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	8.3	9.4	9.1	9.0	9.3	9.6	9.7
Hotel, Motel*	4.0	5.1	4.7	4.4	4.6	4.9	5.0
Private Home	1.3	1.5	1.5	1.5	1.6	1.6	1.6
Other Overnight	3.0	2.8	2.9	3.0	3.1	3.1	3.2
Campground	2.0	1.9	1.9	2.0	2.1	2.1	2.1
Vacation Home	1.0	0.9	1.0	1.0	1.0	1.0	1.0
Day Travel	2.6	2.9	3.0	3.0	3.1	3.1	3.1
Spending at Destination	10.9	12.3	12.1	11.9	12.4	12.7	12.9

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$213	\$354	\$87	\$144	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$84	\$240	\$25	\$73	3.3	2.9
All Overnight	\$106	\$248	\$37	\$90	2.8	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	56	58	58	23	24	24
Private Home	78	78	78	31	31	31
Other Overnight	122	124	126	37	37	38
All Overnight	256	260	262	90	92	92

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	34	35	35	14	14	14
Private Home	30	30	30	12	12	12
Other Overnight	42	43	43	13	13	13
All Overnight	106	108	109	38	39	39

*Includes all lodging where a lodging tax is collected except campgrounds.

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$72,190
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$25,560
Additional employment if each resident household encouraged one additional overnight visitor	354

Visitor Shares

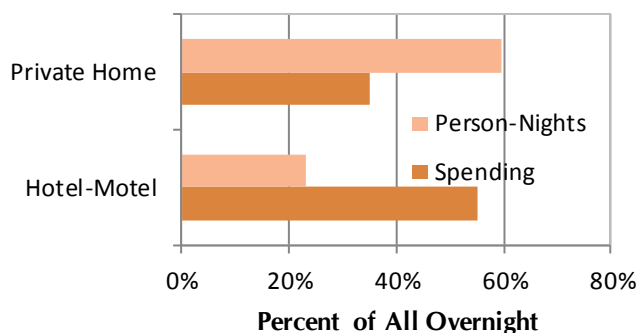
Travel Share of Total Employment (2015)*	5.1%
Overnight Visitor Day Share of Resident Population (2016p)**	6.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,099	2,042	\$295.9
Private Home	1,574	4,766	\$165.3
Other Overnight	438	1,365	\$46.5
All Overnight	3,111	8,173	\$507.7

Lane County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	494.4	601.7	732.9	870.4	930.6	6.9%	4.0%
Other	97.9	129.7	221.2	237.9	258.2	8.5%	6.2%
Visitor	396.5	472.0	511.7	632.5	672.4	6.3%	3.4%
Non-transportation	357.5	415.6	448.8	565.6	605.2	7.0%	3.3%
Transportation	39.0	56.4	62.9	66.9	67.3	0.6%	3.5%
Earnings (\$Millions)							
Earnings	119.9	142.0	167.9	239.1	262.7	9.9%	5.0%
Employment							
Employment	7,440	8,010	8,460	10,190	10,620	4.2%	2.2%
Tax Revenue (\$Millions)							
Total	17.4	21.5	23.9	33.7	37.1	10.2%	4.8%
Local	5.4	7.2	7.8	11.9	13.0	9.4%	5.6%
State	12.0	14.4	16.1	21.8	24.1	10.6%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

East Lane County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	419.2	513.3	632.7	743.2	794.4	6.9%	4.1%
Other	94.5	126.6	212.0	220.9	239.0	8.2%	6.0%
Visitor	324.7	386.7	420.8	522.3	555.5	6.3%	3.4%
Non-transportation	290.1	336.8	365.0	462.4	495.1	7.1%	3.4%
Transportation	34.6	50.0	55.8	60.0	60.4	0.7%	3.5%
Earnings (\$Millions)							
Earnings	99.1	118.0	138.5	197.7	217.4	10.0%	5.0%
Employment							
Employment	6,100	6,600	6,940	8,370	8,720	4.1%	2.3%
Tax Revenue (\$Millions)							
Total	15.6	19.4	21.2	29.9	33.0	10.4%	4.8%
Local	5.2	6.9	7.2	11.0	12.1	9.9%	5.5%
State	10.4	12.5	13.9	18.9	20.9	10.7%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

West Lane County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	75.2	88.3	100.2	127.2	136.2	7.1%	3.8%
Other	3.4	3.1	9.3	17.0	19.2	13.0%	11.4%
Visitor	71.8	85.2	90.9	110.1	117.0	6.2%	3.1%
Non-transportation	67.4	78.8	83.8	103.2	110.1	6.7%	3.1%
Transportation	4.4	6.5	7.1	6.9	6.9	-0.8%	2.8%
Earnings (\$Millions)							
Earnings	20.8	24.1	29.4	41.4	45.3	9.3%	5.0%
Employment							
Employment	1,330	1,410	1,530	1,810	1,900	4.7%	2.3%
Tax Revenue (\$Millions)							
Total	1.8	2.2	2.7	3.7	4.0	8.6%	5.0%
Local	0.3	0.3	0.6	0.8	0.8	2.7%	7.6%
State	1.6	1.9	2.1	2.9	3.2	10.2%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Lane County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	536.8	511.7	572.1	584.3	609.3	632.5	672.4
Other Travel*	180.2	221.2	214.8	226.8	234.4	237.9	258.2
Total Direct Spending	717.0	732.9	786.9	811.1	843.7	870.4	930.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	98.3	88.1	100.6	103.5	112.2	124.8	139.9
Food Service	145.4	147.2	164.0	170.5	179.4	190.7	206.0
Food Stores	56.3	54.8	60.6	62.2	65.2	67.9	69.2
Local Tran. & Gas	75.3	62.9	77.4	75.7	75.9	66.9	67.3
Arts, Ent. & Rec.	77.1	74.2	78.8	80.5	83.1	86.1	90.9
Retail Sales	84.4	84.5	90.7	91.8	93.6	96.0	99.1
Destination Spending	536.8	511.7	572.1	584.3	609.3	632.5	672.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	106.1	99.7	113.6	117.8	127.3	138.4	149.5
Arts, Ent. & Rec.	26.0	23.6	24.8	28.4	30.1	31.5	34.2
Retail**	17.9	17.4	18.8	19.3	20.2	21.3	22.6
Ground Tran.	3.6	3.4	3.4	3.4	3.8	4.1	4.4
Other Travel*	24.3	24.0	32.5	36.3	38.9	43.8	52.0
Total Direct Earnings	178.0	167.9	193.2	205.2	220.3	239.1	262.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,050	4,590	4,990	5,130	5,310	5,550	5,770
Arts, Ent. & Rec.	2,430	2,220	2,240	2,370	2,420	2,410	2,540
Retail**	810	760	810	830	840	870	880
Ground Tran.	130	120	120	110	120	120	130
Other Travel*	860	770	950	1,060	1,100	1,240	1,300
Total Direct Employment	9,290	8,460	9,100	9,500	9,790	10,190	10,620
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.5	7.8	8.8	9.6	10.5	11.9	13.0
State Tax Receipts	17.0	16.1	19.2	19.9	20.6	21.8	24.1
Total Local & State	25.5	23.9	28.0	29.5	31.1	33.7	37.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lane County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	405.1	381.7	428.7	435.9	456.1	475.3	507.7
Hotel, Motel*	222.0	198.9	230.0	235.5	251.3	268.2	295.9
Private Home	141.5	142.7	156.8	156.3	160.0	161.5	165.3
Other Overnight	41.6	40.1	41.9	44.1	44.8	45.5	46.5
Campground	33.6	31.6	32.8	34.9	35.4	36.0	37.0
Vacation Home	7.9	8.6	9.1	9.2	9.4	9.5	9.5
Day Travel	131.7	129.9	143.4	148.3	153.3	157.2	164.7
Spending at Destination	536.8	511.7	572.1	584.3	609.3	632.5	672.4

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$341	\$643	\$145	\$269	2.4	1.9
Private Home	\$86	\$266	\$35	\$105	2.5	3.1
Other Overnight	\$115	\$357	\$34	\$106	3.4	3.1
All Overnight	\$159	\$419	\$62	\$163	2.6	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,802	1,898	2,042	765	805	867
Private Home	4,583	4,658	4,766	1,840	1,872	1,923
Other Overnight	1,320	1,345	1,365	392	399	405
All Overnight	7,706	7,901	8,173	2,998	3,076	3,195

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	969	1,021	1,099	406	427	460
Private Home	1,514	1,538	1,574	596	606	622
Other Overnight	424	432	438	126	128	130
All Overnight	2,907	2,990	3,111	1,128	1,162	1,212

*Includes all lodging where a lodging tax is collected except campgrounds.

LINCOLN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$93,760
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.90

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,521
Additional employment if each resident household encouraged one additional overnight visitor	48

Visitor Shares

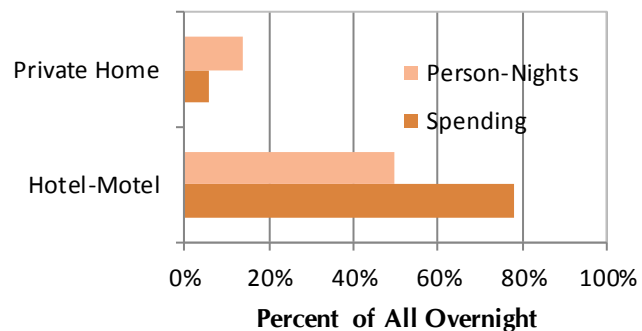
Travel Share of Total Employment (2015)*	22.7%
Overnight Visitor Day Share of Resident Population (2016p)**	28.5%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,398	2,644	\$359.3
Private Home	206	625	\$22.2
Other Overnight	518	1,712	\$67.9
All Overnight	2,122	4,981	\$449.4

Lincoln County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	293.7	349.9	433.0	529.6	571.5	7.9%	4.2%
Other	12.0	9.4	9.8	10.0	9.7	-3.2%	-1.3%
Visitor	281.6	340.5	423.2	519.6	561.8	8.1%	4.4%
Non-transportation	259.6	306.8	377.9	474.2	515.3	8.7%	4.4%
Transportation	22.1	33.7	45.4	45.3	46.4	2.4%	4.8%
Earnings (\$Millions)							
Earnings	77.7	90.2	116.5	141.9	152.6	7.5%	4.3%
Employment							
Employment	4,300	4,690	5,540	5,820	6,040	3.7%	2.1%
Tax Revenue (\$Millions)							
Total	12.2	15.4	19.8	25.3	27.7	9.1%	5.2%
Local	5.5	7.0	9.3	12.3	12.9	5.0%	5.4%
State	6.7	8.4	10.5	13.1	14.7	13.0%	5.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Lincoln County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	432.5	423.2	432.6	459.6	496.2	519.6	561.8
Other Travel*	12.5	9.8	11.3	11.0	10.9	10.0	9.7
Total Direct Spending	445.0	433.0	443.9	470.7	507.1	529.6	571.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	120.4	120.5	121.7	127.3	138.6	153.6	162.6
Food Service	102.7	105.1	105.9	116.3	129.0	138.5	156.9
Food Stores	39.6	38.2	40.4	43.0	46.1	48.3	50.4
Local Tran. & Gas	53.7	45.4	51.3	52.3	53.6	45.3	46.4
Arts, Ent. & Rec.	59.2	57.2	56.6	60.5	64.9	67.7	74.2
Retail Sales	57.0	56.8	56.7	60.3	64.0	66.1	71.1
Destination Spending	432.5	423.2	432.6	459.6	496.2	519.6	561.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	86.0	84.2	88.2	93.5	99.6	106.2	114.3
Arts, Ent. & Rec.	18.0	16.4	17.5	14.9	14.9	15.7	16.3
Retail**	13.0	12.6	12.8	13.8	14.9	15.8	17.4
Ground Tran.	1.6	1.6	1.6	1.7	2.0	2.1	2.5
Other Travel*	2.2	1.7	1.7	1.7	1.9	2.1	2.1
Total Direct Earnings	120.9	116.5	121.9	125.6	133.2	141.9	152.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,090	3,920	3,850	3,960	4,090	4,130	4,280
Arts, Ent. & Rec.	950	930	990	930	940	900	910
Retail**	640	600	600	630	670	690	730
Ground Tran.	60	50	50	60	60	60	70
Other Travel*	50	40	40	40	40	40	50
Total Direct Employment	5,770	5,540	5,520	5,630	5,800	5,820	6,040
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.1	9.3	9.2	10.1	11.0	12.3	12.9
State Tax Receipts	10.9	10.5	11.4	11.8	12.4	13.1	14.7
Total Local & State	19.0	19.8	20.6	21.8	23.4	25.3	27.7

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lincoln County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	344.1	337.4	342.6	363.7	394.0	415.1	449.4
Hotel, Motel*	264.1	259.6	260.1	277.9	306.7	326.8	359.3
Private Home	19.7	19.2	20.9	21.4	21.8	21.7	22.2
Other Overnight	60.2	58.5	61.6	64.4	65.5	66.6	67.9
Campground	38.6	37.2	38.9	41.6	42.2	43.2	44.3
Vacation Home	21.7	21.4	22.7	22.8	23.2	23.4	23.6
Day Travel	88.4	85.9	90.0	96.0	102.2	104.5	112.3
Spending at Destination	432.5	423.2	432.6	459.6	496.2	519.6	561.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$332	\$628	\$136	\$257	2.4	1.9
Private Home	\$92	\$281	\$35	\$108	2.6	3.0
Other Overnight	\$130	\$431	\$40	\$131	3.3	3.3
All Overnight	\$244	\$556	\$90	\$212	2.7	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	2,239	2,358	2,644	916	964	1,082
Private Home	605	607	625	232	233	240
Other Overnight	1,662	1,691	1,712	507	516	522
All Overnight	4,506	4,656	4,981	1,656	1,714	1,844

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,184	1,246	1,398	484	510	572
Private Home	199	200	206	76	77	79
Other Overnight	503	512	518	153	156	158
All Overnight	1,886	1,958	2,122	714	742	808

*Includes all lodging where a lodging tax is collected except campgrounds.

LINN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$72,030
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,964
Additional employment if each resident household encouraged one additional overnight visitor	69

Visitor Shares

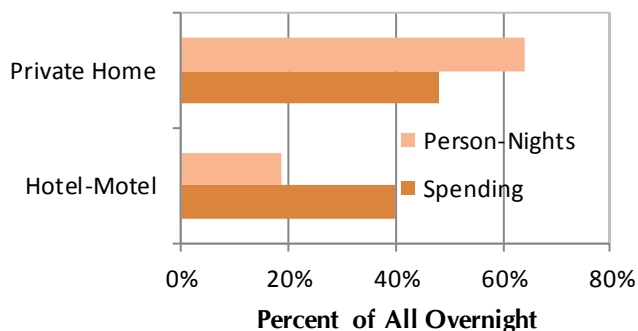
Travel Share of Total Employment (2015)*	2.9%
Overnight Visitor Day Share of Resident Population (2016p)**	4.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	237	393	\$37.0
Private Home	483	1,243	\$39.4
Other Overnight	109	336	\$10.1
All Overnight	829	1,972	\$86.5

Linn County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	82.9	103.9	112.9	135.9	139.2	2.4%	3.3%
Other	9.9	14.3	16.9	15.8	14.1	-10.4%	2.2%
Visitor	73.0	89.6	96.1	120.1	125.0	4.1%	3.4%
Non-transportation	66.3	79.0	84.0	107.8	113.1	5.0%	3.4%
Transportation	6.7	10.5	12.1	12.3	11.9	-3.6%	3.7%
Earnings (\$Millions)							
Earnings	18.9	22.7	24.8	32.6	34.8	6.9%	3.9%
Employment							
Employment	1,430	1,570	1,490	1,710	1,780	4.0%	1.4%
Tax Revenue (\$Millions)							
Total	3.0	3.7	4.0	5.4	5.8	8.5%	4.3%
Local	0.4	0.6	0.6	1.0	1.2	12.7%	7.2%
State	2.6	3.1	3.3	4.3	4.7	7.5%	3.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Linn County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	101.6	96.1	110.7	114.3	117.2	120.1	125.0
Other Travel*	20.9	16.9	20.7	20.0	19.3	15.8	14.1
Total Direct Spending	122.5	112.9	131.4	134.3	136.5	135.9	139.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	12.6	10.8	12.8	14.0	15.3	16.9	19.2
Food Service	27.9	28.0	32.2	33.8	35.1	37.1	39.2
Food Stores	13.1	12.6	14.4	14.8	15.3	15.9	15.9
Local Tran. & Gas	14.7	12.1	15.5	15.2	14.7	12.3	11.9
Arts, Ent. & Rec.	15.2	14.6	16.0	16.4	16.7	17.2	17.8
Retail Sales	18.1	17.9	19.8	20.2	20.2	20.7	21.0
Destination Spending	101.6	96.1	110.7	114.3	117.2	120.1	125.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	15.8	14.8	16.8	17.5	18.3	20.4	22.4
Arts, Ent. & Rec.	5.3	4.8	4.9	5.1	5.4	5.6	5.9
Retail**	4.0	3.9	4.4	4.5	4.6	4.9	5.1
Ground Tran.	0.5	0.5	0.5	0.6	0.6	0.6	0.7
Other Travel*	1.0	0.9	0.9	0.9	0.9	1.0	0.7
Total Direct Earnings	26.7	24.8	27.5	28.5	29.9	32.6	34.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	990	870	950	990	1,010	1,060	1,120
Arts, Ent. & Rec.	390	360	350	350	350	360	370
Retail**	190	190	210	210	210	220	220
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	50	50	50	50	50	40
Total Direct Employment	1,650	1,490	1,580	1,610	1,640	1,710	1,780
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.8	0.6	0.8	0.9	0.9	1.0	1.2
State Tax Receipts	3.6	3.3	4.0	4.1	4.2	4.3	4.7
Total Local & State	4.3	4.0	4.9	5.0	5.1	5.4	5.8

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Linn County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	70.4	65.7	75.7	78.3	80.5	82.6	86.5
Hotel, Motel*	27.0	22.9	28.0	30.2	32.1	33.8	37.0
Private Home	34.2	34.1	38.6	38.5	38.7	38.9	39.4
Other Overnight	9.2	8.6	9.1	9.6	9.7	9.8	10.1
Campground	7.8	7.3	7.7	8.1	8.2	8.3	8.5
Vacation Home	1.4	1.4	1.5	1.5	1.5	1.5	1.5
Day Travel	31.2	30.4	35.1	36.1	36.7	37.5	38.6
Spending at Destination	101.6	96.1	110.7	114.3	117.2	120.1	125.0

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$231	\$384	\$94	\$156	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$103	\$315	\$30	\$92	3.4	3.1
All Overnight	\$116	\$273	\$44	\$104	2.7	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	354	373	393	144	152	160
Private Home	1,201	1,218	1,243	469	476	486
Other Overnight	324	330	336	94	96	98
All Overnight	1,879	1,921	1,972	708	724	744

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	213	224	237	87	91	96
Private Home	467	474	483	183	185	189
Other Overnight	105	107	109	31	31	32
All Overnight	785	805	829	300	308	317

*Includes all lodging where a lodging tax is collected except campgrounds.

MALHEUR COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$65,970
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,094
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

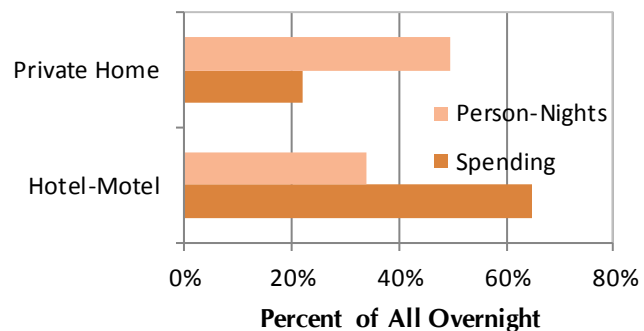
Travel Share of Total Employment (2015)*	3.5%
Overnight Visitor Day Share of Resident Population (2016p)**	5.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	136	227	\$21.2
Private Home	119	306	\$6.1
Other Overnight	34	106	\$4.0
All Overnight	290	638	\$31.3

Malheur County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	32.5	37.6	37.6	40.9	42.1	3.0%	1.6%
Other	2.5	3.7	4.3	3.8	3.5	-7.0%	2.2%
Visitor	30.0	33.9	33.3	37.1	38.6	4.0%	1.6%
Non-transportation	27.8	30.9	30.2	34.3	35.9	4.7%	1.6%
Transportation	2.2	3.0	3.1	2.8	2.7	-4.8%	1.3%
Earnings (\$Millions)							
Earnings	8.8	9.8	9.8	11.8	12.4	4.9%	2.2%
Employment							
Employment	610	610	550	580	590	1.4%	-0.2%
Tax Revenue (\$Millions)							
Total	1.3	1.5	1.7	2.0	2.2	9.5%	3.4%
Local	0.4	0.5	0.6	0.7	0.8	11.9%	5.5%
State	0.9	1.0	1.0	1.2	1.3	8.0%	2.4%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Malheur County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	31.2	33.3	35.9	35.0	35.5	37.1	38.6
Other Travel*	5.3	4.3	5.2	5.0	4.7	3.8	3.5
Total Direct Spending	36.5	37.6	41.1	40.0	40.2	40.9	42.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	7.9	8.5	9.1	9.1	9.2	10.2	11.3
Food Service	7.8	8.6	9.3	9.1	9.4	10.0	10.4
Food Stores	3.6	3.9	4.2	4.2	4.3	4.5	4.5
Local Tran. & Gas	3.3	3.1	3.7	3.4	3.3	2.8	2.7
Arts, Ent. & Rec.	5.0	5.2	5.4	5.2	5.2	5.5	5.6
Retail Sales	3.6	3.9	4.1	4.0	4.0	4.1	4.1
Destination Spending	31.2	33.3	35.9	35.0	35.5	37.1	38.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.4	6.8	7.5	7.6	7.8	8.3	8.6
Arts, Ent. & Rec.	1.7	1.6	1.9	1.9	1.9	2.0	2.2
Retail**	0.9	1.0	1.0	1.0	1.1	1.1	1.1
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	9.4	9.8	10.9	10.9	11.1	11.8	12.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	360	370	380	380	380	400	410
Arts, Ent. & Rec.	120	120	150	140	130	120	120
Retail**	50	50	50	50	50	50	50
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	530	550	590	580	570	580	590
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.6	0.6	0.7	0.7	0.7	0.7	0.8
State Tax Receipts	1.0	1.0	1.2	1.2	1.2	1.2	1.3
Total Local & State	1.6	1.7	1.9	1.9	1.9	2.0	2.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Malheur County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	25.1	26.8	28.8	28.1	28.5	29.9	31.3
Hotel, Motel*	16.6	17.5	19.0	18.3	18.4	19.7	21.2
Private Home	5.6	5.9	6.2	6.0	6.2	6.3	6.1
Other Overnight	2.9	3.4	3.6	3.8	3.8	3.9	4.0
Campground	2.6	3.1	3.3	3.5	3.5	3.6	3.7
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	6.1	6.5	7.1	6.9	7.0	7.2	7.3
Spending at Destination	31.2	33.3	35.9	35.0	35.5	37.1	38.6

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$229	\$381	\$93	\$155	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$130	\$398	\$38	\$116	3.4	3.1
All Overnight	\$129	\$279	\$49	\$108	2.6	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	211	220	227	86	90	92
Private Home	302	306	306	118	120	120
Other Overnight	102	104	106	30	30	31
All Overnight	615	630	638	234	240	243

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	127	133	136	52	54	56
Private Home	118	119	119	46	47	46
Other Overnight	33	34	34	10	10	10
All Overnight	278	285	290	107	110	112

*Includes all lodging where a lodging tax is collected except campgrounds.

MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$78,510
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$15,920
Additional employment if each resident household encouraged one additional overnight visitor	203

Visitor Shares

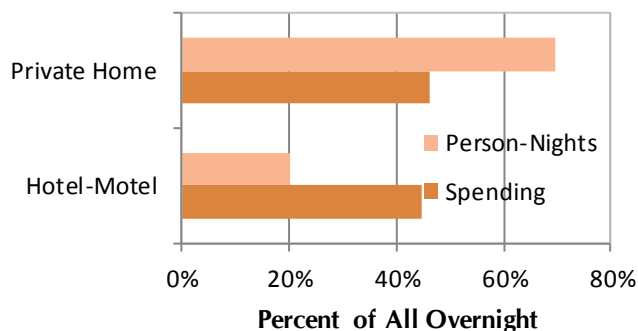
Travel Share of Total Employment (2015)*	2.5%
Overnight Visitor Day Share of Resident Population (2016p)**	4.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	601	1,137	\$124.6
Private Home	1,217	3,701	\$115.2
Other Overnight	169	549	\$22.8
All Overnight	1,987	5,387	\$262.6

Marion County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	238.0	293.6	324.3	384.0	394.9	2.9%	3.2%
Other	32.1	42.1	48.6	47.5	45.5	-4.2%	2.2%
Visitor	205.9	251.5	275.7	336.5	349.4	3.8%	3.4%
Non-transportation	187.1	222.7	241.8	303.1	317.4	4.7%	3.4%
Transportation	18.8	28.7	33.8	33.4	32.1	-4.0%	3.4%
Earnings (\$Millions)							
Earnings	57.8	67.6	75.6	98.4	104.1	5.8%	3.7%
Employment							
Employment	3,630	3,850	3,890	4,500	4,620	2.6%	1.5%
Tax Revenue (\$Millions)							
Total	9.2	11.0	12.0	16.1	17.4	7.9%	4.1%
Local	1.8	2.2	2.5	3.8	4.2	10.2%	5.6%
State	7.4	8.8	9.5	12.3	13.2	7.2%	3.6%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Marion County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	279.1	275.7	305.7	318.6	326.6	336.5	349.4
Other Travel*	59.8	48.6	59.3	57.9	56.5	47.5	45.5
Total Direct Spending	338.9	324.3	365.0	376.5	383.1	384.0	394.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	42.3	40.1	43.1	47.4	51.5	57.2	63.5
Food Service	75.8	79.4	88.0	93.1	96.5	102.4	108.1
Food Stores	34.1	33.8	37.9	39.1	40.4	42.1	42.2
Local Tran. & Gas	39.1	33.8	41.7	41.1	39.6	33.4	32.1
Arts, Ent. & Rec.	40.5	40.1	42.9	44.3	44.9	46.4	47.8
Retail Sales	47.2	48.4	52.2	53.6	53.7	55.0	55.7
Destination Spending	279.1	275.7	305.7	318.6	326.6	336.5	349.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	48.2	47.2	51.9	54.9	57.9	64.7	69.5
Arts, Ent. & Rec.	13.9	13.0	13.1	14.0	14.1	14.7	14.7
Retail**	10.4	10.3	11.3	11.7	12.0	12.7	13.2
Ground Tran.	1.3	1.3	1.5	1.5	1.6	1.7	1.9
Other Travel*	4.0	3.7	3.8	3.9	4.2	4.6	4.8
Total Direct Earnings	77.8	75.6	81.6	86.1	89.9	98.4	104.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,480	2,320	2,500	2,620	2,700	2,830	2,910
Arts, Ent. & Rec.	990	910	850	930	950	930	970
Retail**	470	460	480	490	500	520	520
Ground Tran.	50	40	50	50	50	50	50
Other Travel*	170	150	150	150	160	160	170
Total Direct Employment	4,150	3,890	4,030	4,240	4,360	4,500	4,620
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.8	2.5	2.9	3.1	3.4	3.8	4.2
State Tax Receipts	9.9	9.5	11.2	11.6	11.7	12.3	13.2
Total Local & State	12.7	12.0	14.1	14.7	15.1	16.1	17.4

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Marion County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	210.0	205.9	227.1	237.2	244.0	251.8	262.6
Hotel, Motel*	91.6	87.1	95.6	103.4	109.2	115.8	124.6
Private Home	98.3	99.4	111.1	112.3	112.9	113.7	115.2
Other Overnight	20.2	19.4	20.4	21.5	21.9	22.3	22.8
Campground	16.6	15.8	16.5	17.7	17.9	18.3	18.8
Vacation Home	3.5	3.6	3.8	3.9	3.9	4.0	4.0
Day Travel	69.1	69.8	78.6	81.4	82.6	84.6	86.8
Spending at Destination	279.1	275.7	305.7	318.6	326.6	336.5	349.4

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$268	\$506	\$110	\$207	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$140	\$457	\$42	\$135	3.4	3.3
All Overnight	\$128	\$344	\$49	\$132	2.6	2.7

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,038	1,093	1,137	425	447	465
Private Home	3,567	3,642	3,701	1,369	1,398	1,420
Other Overnight	530	540	549	157	160	162
All Overnight	5,136	5,275	5,387	1,951	2,005	2,048

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	549	578	601	225	236	246
Private Home	1,173	1,197	1,217	450	460	467
Other Overnight	163	166	169	48	49	50
All Overnight	1,885	1,942	1,987	723	745	763

*Includes all lodging where a lodging tax is collected except campgrounds.

MORROW COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$78,330
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$362
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

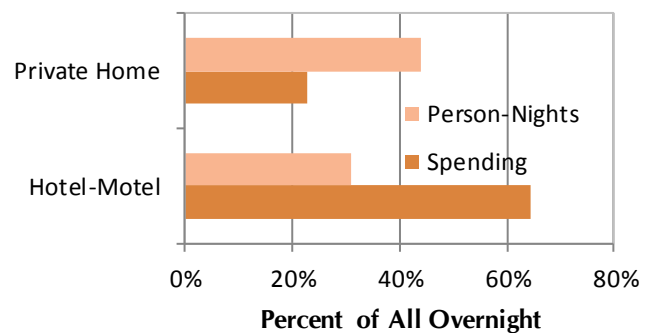
Travel Share of Total Employment (2015)*	2.3%
Overnight Visitor Day Share of Resident Population (2016p)**	6.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	51	85	\$7.3
Private Home	44	113	\$2.3
Other Overnight	23	66	\$1.3
All Overnight	118	265	\$10.8

Morrow County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	10.0	11.2	12.0	14.7	14.9	1.6%	2.6%
Other	0.9	1.4	1.5	1.4	1.3	-6.4%	2.6%
Visitor	9.1	9.8	10.4	13.3	13.6	2.4%	2.6%
Non-transportation	8.4	8.8	9.3	12.2	12.6	3.1%	2.6%
Transportation	0.7	1.0	1.1	1.1	1.1	-5.1%	2.3%
Earnings (\$Millions)							
Earnings	2.5	2.6	2.8	3.7	3.8	2.7%	2.6%
Employment							
Employment	190	190	150	170	180	1.4%	-0.3%
Tax Revenue (\$Millions)							
Total	0.3	0.3	0.3	0.4	0.5	6.9%	3.0%
Local	0.0	0.0	0.0	0.0	0.0	10.0%	19.4%
State	0.3	0.3	0.3	0.4	0.5	6.8%	3.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Morrow County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	11.5	10.4	11.5	12.9	12.7	13.3	13.6
Other Travel*	2.0	1.5	1.9	1.8	1.7	1.4	1.3
Total Direct Spending	13.5	12.0	13.4	14.7	14.5	14.7	14.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.7	2.4	2.7	3.2	3.2	3.5	3.8
Food Service	2.9	2.8	3.1	3.4	3.4	3.7	3.8
Food Stores	1.3	1.3	1.4	1.5	1.5	1.6	1.5
Local Tran. & Gas	1.4	1.1	1.3	1.4	1.3	1.1	1.1
Arts, Ent. & Rec.	1.8	1.6	1.7	1.9	1.8	1.9	2.0
Retail Sales	1.4	1.3	1.4	1.5	1.5	1.5	1.5
Destination Spending	11.5	10.4	11.5	12.9	12.7	13.3	13.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.9	1.6	1.8	2.1	2.1	2.3	2.4
Arts, Ent. & Rec.	0.7	0.6	0.6	0.6	0.6	0.7	0.7
Retail**	0.5	0.4	0.5	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	3.2	2.8	3.1	3.4	3.4	3.7	3.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	140	100	100	120	120	110	120
Arts, Ent. & Rec.	30	30	30	30	40	30	30
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	200	150	160	170	180	170	180
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.4	0.3	0.4	0.4	0.4	0.4	0.5
Total Local & State	0.4	0.3	0.4	0.4	0.4	0.4	0.5

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Morrow County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	9.1	8.2	9.0	10.2	10.0	10.5	10.8
Hotel, Motel*	5.7	5.0	5.6	6.6	6.5	6.9	7.3
Private Home	2.2	2.1	2.2	2.3	2.3	2.3	2.3
Other Overnight	1.2	1.1	1.2	1.2	1.3	1.3	1.3
Campground	0.7	0.6	0.6	0.7	0.7	0.7	0.7
Vacation Home	0.5	0.5	0.6	0.6	0.6	0.6	0.6
Day Travel	2.4	2.3	2.5	2.7	2.7	2.8	2.8
Spending at Destination	11.5	10.4	11.5	12.9	12.7	13.3	13.6

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$210	\$349	\$86	\$142	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$63	\$181	\$19	\$55	3.3	2.9
All Overnight	\$109	\$240	\$41	\$92	2.7	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	80	83	85	33	34	35
Private Home	110	113	113	43	44	44
Other Overnight	64	66	66	20	20	20
All Overnight	254	262	265	95	98	99

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	48	50	51	20	20	21
Private Home	43	44	44	17	17	17
Other Overnight	22	23	23	7	7	7
All Overnight	113	117	118	43	45	45

*Includes all lodging where a lodging tax is collected except campgrounds.

MULTNOMAH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$115,620
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$9.80

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$112,430
Additional employment if each resident household encouraged one additional overnight visitor	972

Visitor Shares

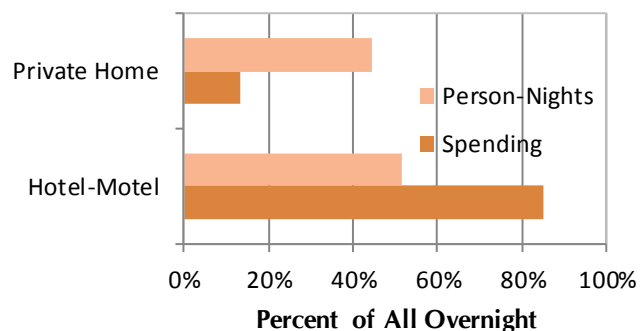
Travel Share of Total Employment (2015)*	3.5%
Overnight Visitor Day Share of Resident Population (2016p)**	4.3%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	3,242	6,592	\$1,527.2
Private Home	1,771	5,489	\$183.7
Other Overnight	141	472	\$18.5
All Overnight	5,154	12,553	\$1,729.3

Multnomah County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	2,106	2,310	2,819	3,677	3,836	4.3%	3.8%
Other	1,219	1,232	1,521	1,821	1,855	1.8%	2.7%
Visitor	888	1,078	1,297	1,856	1,982	6.8%	5.1%
Non-transportation	738	892	1,069	1,559	1,647	5.6%	5.1%
Transportation	149	187	228	296	335	13.0%	5.2%
Earnings (\$Millions)							
Earnings	521	516	601	848	937	10.6%	3.7%
Employment							
Employment	18,000	17,380	17,980	22,030	22,980	4.3%	1.5%
Tax Revenue (\$Millions)							
Total	79	93	108	176	194	9.8%	5.8%
Local	40	50	59	108	117	8.5%	7.0%
State	39	42	49	69	77	12.0%	4.3%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

East Multnomah County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	48.7	53.6	57.6	79.5	86.9	9.2%	3.7%
Other	5.8	4.8	4.2	4.7	4.9	5.6%	-1.1%
Visitor	42.8	48.8	53.5	74.9	82.0	9.5%	4.1%
Non-transportation	39.3	43.7	47.5	68.2	75.3	10.3%	4.2%
Transportation	3.6	5.1	6.0	6.6	6.7	0.5%	3.9%
Earnings (\$Millions)							
Earnings	13.2	14.0	15.2	22.3	24.9	11.5%	4.1%
Employment							
Employment	810	800	770	1,000	1,070	7.6%	1.8%
Tax Revenue (\$Millions)							
Total	1.8	2.0	2.3	3.4	4.0	18.2%	5.2%
Local	0.6	0.8	0.9	1.4	1.7	23.0%	6.5%
State	1.1	1.3	1.4	2.0	2.3	14.8%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

West Multnomah County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	2,058	2,257	2,761	3,597	3,750	4.2%	3.8%
Other	1,213	1,227	1,517	1,817	1,850	1.8%	2.7%
Visitor	845	1,030	1,244	1,781	1,900	6.7%	5.2%
Non-transportation	699	848	1,022	1,491	1,572	5.4%	5.2%
Transportation	146	182	222	290	328	13.3%	5.2%
Earnings (\$Millions)							
Earnings	508	502	585	825	913	10.6%	3.7%
Employment							
Employment	17,190	16,570	17,210	21,030	21,910	4.2%	1.5%
Tax Revenue (\$Millions)							
Total	77	91	106	173	190	9.7%	5.8%
Local	39	50	59	106	115	8.3%	7.0%
State	38	41	47	67	74	11.9%	4.3%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Multnomah County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,302	1,297	1,537	1,608	1,710	1,856	1,982
Other Travel*	1,462	1,521	1,581	1,624	1,722	1,821	1,855
Total Direct Spending	2,764	2,819	3,118	3,232	3,432	3,677	3,836
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	398	371	477	504	562	647	693
Food Service	328	355	410	430	450	486	517
Food Stores	57	59	67	69	73	78	78
Local Tran. & Gas	245	228	266	280	293	296	335
Arts, Ent. & Rec.	105	107	119	122	126	133	138
Retail Sales	169	178	198	203	206	216	220
Destination Spending	1,302	1,297	1,537	1,608	1,710	1,856	1,982
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	252	249	297	317	340	370	399
Arts, Ent. & Rec.	34	32	40	38	40	43	44
Retail**	29	30	33	34	36	39	41
Ground Tran.	26	24	27	28	30	34	37
Other Travel*	258	266	290	301	329	363	417
Total Direct Earnings	598	601	688	718	774	848	937
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	10.8	10.5	11.8	12.3	12.7	13.1	13.5
Arts, Ent. & Rec.	1.0	1.0	1.1	1.1	1.1	1.2	1.2
Retail**	1.1	1.1	1.2	1.2	1.2	1.3	1.3
Ground Tran.	1.0	0.9	0.9	0.9	1.0	1.0	1.1
Other Travel*	5.5	4.7	4.7	4.8	5.1	5.4	5.8
Total Direct Employment	19.4	18.0	19.7	20.4	21.1	22.0	23.0
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	63	59	73	84	93	108	117
State Tax Receipts	50	49	58	60	63	69	77
Total Local & State	113	108	130	144	156	176	194

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Multnomah County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	1,119	1,108	1,318	1,382	1,476	1,611	1,729
Hotel, Motel*	956	935	1,131	1,193	1,284	1,410	1,527
Private Home	148	157	171	172	175	183	184
Other Overnight	16	16	17	17	18	18	18
Campground	12	12	12	13	13	14	14
Vacation Home	4	4	4	4	4	5	5
Day Travel	183	190	219	226	233	245	252
Spending at Destination	1,302	1,297	1,537	1,608	1,710	1,856	1,982

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$487	\$1,017	\$232	\$471	2.1	2.1
Private Home	\$64	\$206	\$33	\$104	1.9	3.2
Other Overnight	\$122	\$409	\$39	\$131	3.1	3.4
All Overnight	\$281	\$709	\$138	\$336	2.0	2.5

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	6,107	6,388	6,592	2,871	3,015	3,133
Private Home	5,317	5,435	5,489	2,739	2,816	2,867
Other Overnight	457	465	472	148	150	152
All Overnight	11,881	12,288	12,553	5,757	5,981	6,152

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	3,002	3,141	3,242	1,378	1,447	1,501
Private Home	1,715	1,753	1,771	857	879	893
Other Overnight	137	140	141	44	45	45
All Overnight	4,855	5,034	5,154	2,279	2,370	2,439

*Includes all lodging where a lodging tax is collected except campgrounds.

POLK COUNTY TRAVEL IMPACTS

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$77,160
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.50

Visitor Shares

Travel Share of Total Employment (2015)*	7.1%
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Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	39.5	38.4	40.7	41.5	41.9	44.2	44.9
Hotel, Motel*	21.4	20.7	21.7	22.2	22.4	24.4	24.8
Private Home	14.3	14.1	15.2	15.3	15.4	15.7	15.9
Other Overnight	3.8	3.6	3.7	4.0	4.0	4.1	4.2
Campground	3.5	3.3	3.5	3.7	3.7	3.8	3.9
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	105.8	103.9	108.2	110.3	110.8	115.2	116.3
Spending at Destination	145.2	142.3	148.9	151.7	152.7	159.4	161.2

Polk County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	104.7	154.9	152.6	169.2	170.6	0.8%	3.1%
Other	4.9	8.5	10.3	9.9	9.4	-4.5%	4.1%
Visitor	99.7	146.4	142.3	159.4	161.2	1.1%	3.0%
Non-transportation	95.8	139.2	134.4	152.0	154.3	1.5%	3.0%
Transportation	4.0	7.2	7.9	7.3	6.9	-6.2%	3.5%
Earnings (\$Millions)							
Earnings	31.8	45.9	48.3	45.6	48.5	6.2%	2.7%
Employment							
Employment	1,690	2,260	1,970	2,060	2,120	2.9%	1.4%
Tax Revenue (\$Millions)							
Total	2.6	3.5	3.7	3.9	4.1	5.5%	3.0%
State	2.6	3.5	3.7	3.9	4.1	5.5%	3.0%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

**Polk County
Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	145.2	142.3	148.9	151.7	152.7	159.4	161.2
Other Travel*	13.2	10.3	12.9	12.5	12.2	9.9	9.4
Total Direct Spending	158.5	152.6	161.8	164.3	164.9	169.2	170.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.6	13.1	13.6	14.1	14.4	16.0	16.8
Food Service	25.7	26.6	28.3	29.3	29.9	32.0	32.8
Food Stores	11.3	11.1	11.9	12.2	12.5	13.2	13.0
Local Tran. & Gas	9.2	7.9	9.3	9.0	8.6	7.3	6.9
Arts, Ent. & Rec.	81.9	80.1	82.1	83.5	83.7	87.2	87.9
Retail Sales	3.5	3.5	3.6	3.7	3.6	3.8	3.7
Destination Spending	145.2	142.3	148.9	151.7	152.7	159.4	161.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	16.0	16.0	16.3	16.3	16.7	19.3	21.4
Arts, Ent. & Rec.	31.1	29.4	23.8	22.4	21.8	23.0	23.6
Retail**	2.2	2.1	2.2	2.3	2.3	2.5	2.5
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.5	0.5
Other Travel*	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Total Direct Earnings	50.1	48.3	43.2	41.8	41.7	45.6	48.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	970	940	900	910	920	990	1,010
Arts, Ent. & Rec.	990	880	840	820	820	910	950
Retail**	110	110	110	110	110	120	120
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	30	20	20	30	30	30	30
Total Direct Employment	2,120	1,970	1,900	1,890	1,890	2,060	2,120
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	3.9	3.7	3.7	3.7	3.7	3.9	4.1
Total Local & State	3.9	3.7	3.7	3.7	3.7	3.9	4.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

TILLAMOOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$102,800
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,375
Additional employment if each resident household encouraged one additional overnight visitor	13

Visitor Shares

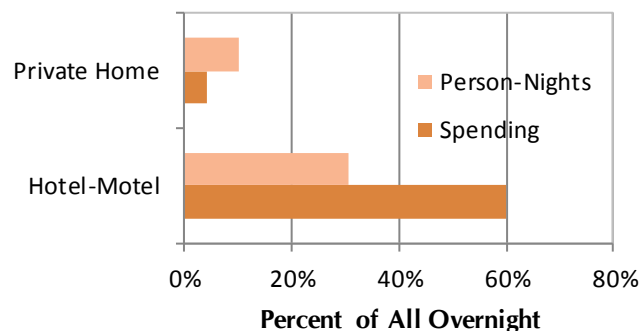
Travel Share of Total Employment (2015)*	16.5%
Overnight Visitor Day Share of Resident Population (2016p)**	26.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	452	751	\$81.2
Private Home	99	255	\$5.1
Other Overnight	536	1,543	\$47.0
All Overnight	1,087	2,549	\$133.3

Tillamook County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	108.2	138.2	186.2	229.4	227.4	-0.9%	4.8%
Other	1.9	3.0	3.5	3.2	3.0	-5.4%	2.9%
Visitor	106.3	135.2	182.8	226.2	224.4	-0.8%	4.8%
Non-transportation	99.2	124.2	167.6	211.0	210.6	-0.2%	4.8%
Transportation	7.1	11.0	15.2	15.2	13.8	-8.9%	4.3%
Earnings (\$Millions)							
Earnings	30.0	38.1	55.0	68.4	72.3	5.7%	5.7%
Employment							
Employment	1,500	1,680	2,100	2,180	2,190	0.5%	2.4%
Tax Revenue (\$Millions)							
Total	2.8	3.8	5.1	6.6	7.0	6.6%	5.9%
Local	0.5	0.8	1.0	1.5	1.5	4.1%	7.6%
State	2.3	3.0	4.1	5.1	5.5	7.3%	5.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Tillamook County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	183.2	182.8	195.1	208.7	217.1	226.2	224.4
Other Travel*	4.3	3.5	4.3	4.1	3.9	3.2	3.0
Total Direct Spending	187.5	186.2	199.4	212.8	221.0	229.4	227.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	34.3	35.3	37.5	40.2	42.1	46.3	49.0
Food Service	48.9	50.9	54.5	59.4	62.9	66.9	66.6
Food Stores	24.1	23.2	25.1	26.7	28.0	29.2	28.4
Local Tran. & Gas	17.5	15.2	18.0	18.2	17.8	15.2	13.8
Arts, Ent. & Rec.	30.5	30.0	30.8	33.2	34.6	36.1	35.0
Retail Sales	27.8	28.0	29.3	31.0	31.7	32.5	31.5
Destination Spending	183.2	182.8	195.1	208.7	217.1	226.2	224.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	38.3	38.3	40.0	43.2	48.1	49.3	52.7
Arts, Ent. & Rec.	9.7	9.0	8.7	8.2	8.9	9.3	9.8
Retail**	7.1	6.9	7.3	7.8	8.2	8.6	8.7
Ground Tran.	0.7	0.7	0.8	0.8	0.9	1.0	1.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Total Direct Earnings	56.0	55.0	57.0	60.2	66.2	68.4	72.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,280	1,270	1,190	1,260	1,340	1,370	1,400
Arts, Ent. & Rec.	550	460	400	380	380	370	370
Retail**	370	340	350	380	400	400	390
Ground Tran.	20	20	20	30	30	30	30
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	2,240	2,100	1,960	2,060	2,150	2,180	2,190
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.0	1.0	1.1	1.2	1.3	1.5	1.5
State Tax Receipts	4.2	4.1	4.5	4.7	5.0	5.1	5.5
Total Local & State	5.2	5.1	5.6	5.9	6.3	6.6	7.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Tillamook County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	107.1	107.0	113.0	121.3	126.6	133.3	133.3
Hotel, Motel*	59.9	62.2	65.2	71.5	76.0	82.0	81.2
Private Home	4.7	4.7	5.2	5.2	5.3	5.2	5.1
Other Overnight	42.5	40.1	42.6	44.6	45.4	46.0	47.0
Campground	30.1	27.9	29.6	31.6	32.0	32.6	33.5
Vacation Home	12.4	12.2	13.0	13.0	13.3	13.4	13.5
Day Travel	76.1	75.7	82.1	87.4	90.4	92.9	91.1
Spending at Destination	183.2	182.8	195.1	208.7	217.1	226.2	224.4

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$265	\$441	\$108	\$180	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$101	\$288	\$30	\$88	3.3	2.9
All Overnight	\$153	\$345	\$52	\$123	2.9	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	777	818	751	317	334	306
Private Home	257	259	255	100	101	100
Other Overnight	1,498	1,525	1,543	453	461	466
All Overnight	2,532	2,602	2,549	870	896	872

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	467	492	452	190	201	184
Private Home	100	101	99	39	39	39
Other Overnight	522	530	536	159	161	163
All Overnight	1,089	1,123	1,087	388	401	386

*Includes all lodging where a lodging tax is collected except campgrounds.

UMATILLA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$57,910
Employee Earnings generated by \$100 Visitor Spending	\$35
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,394
Additional employment if each resident household encouraged one additional overnight visitor	59

Visitor Shares

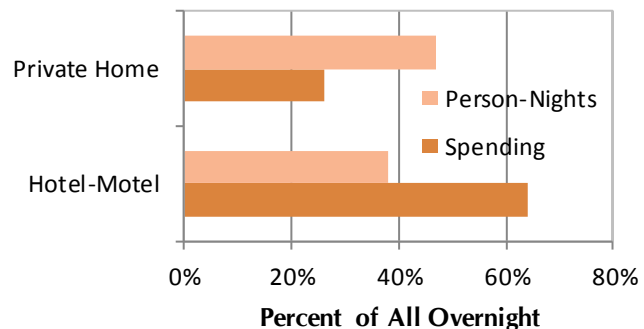
Travel Share of Total Employment (2015)*	6.2%
Overnight Visitor Day Share of Resident Population (2016p)**	5.9%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	382	636	\$62.4
Private Home	294	757	\$24.0
Other Overnight	89	259	\$9.5
All Overnight	766	1,651	\$95.9

Umatilla County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	104.4	127.9	133.7	149.9	146.3	-2.4%	2.3%
Other	8.8	10.7	11.8	10.1	9.5	-5.7%	0.5%
Visitor	95.5	117.2	121.9	139.8	136.8	-2.1%	2.4%
Non-transportation	86.6	103.5	106.5	125.6	124.0	-1.3%	2.4%
Transportation	8.9	13.7	15.4	14.2	12.8	-9.4%	2.5%
Earnings (\$Millions)							
Earnings	27.9	33.7	36.0	49.0	49.6	1.3%	3.9%
Employment							
Employment	1,990	2,090	2,030	2,390	2,420	1.0%	1.3%
Tax Revenue (\$Millions)							
Total	3.7	4.5	4.9	6.2	6.3	3.0%	3.7%
Local	0.8	1.0	1.2	1.5	1.5	2.6%	4.6%
State	2.9	3.5	3.7	4.7	4.8	3.2%	3.4%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Umatilla County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	122.9	121.9	126.9	133.8	135.4	139.8	136.8
Other Travel*	14.5	11.8	13.4	13.0	13.3	10.1	9.5
Total Direct Spending	137.4	133.7	140.3	146.8	148.6	149.9	146.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	25.7	25.5	25.2	27.9	28.6	31.4	31.5
Food Service	30.2	31.6	33.0	35.2	36.2	38.5	38.5
Food Stores	11.6	11.5	12.3	13.0	13.4	14.0	13.4
Local Tran. & Gas	17.9	15.4	17.8	17.6	16.8	14.2	12.8
Arts, Ent. & Rec.	22.3	22.2	22.6	23.7	23.9	24.7	24.2
Retail Sales	15.1	15.6	15.9	16.5	16.5	17.0	16.3
Destination Spending	122.9	121.9	126.9	133.8	135.4	139.8	136.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	24.6	24.4	29.9	30.6	32.2	35.1	35.4
Arts, Ent. & Rec.	6.8	6.3	6.9	6.6	7.2	7.5	7.8
Retail**	3.7	3.7	3.9	4.0	4.2	4.4	4.4
Ground Tran.	0.6	0.6	0.6	0.6	0.7	0.7	0.7
Other Travel*	0.9	1.0	0.6	0.6	1.1	1.2	1.3
Total Direct Earnings	36.7	36.0	41.9	42.4	45.3	49.0	49.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,280	1,230	1,370	1,390	1,410	1,470	1,500
Arts, Ent. & Rec.	610	570	600	600	640	660	660
Retail**	180	170	170	170	180	180	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	50	30	30	50	50	50
Total Direct Employment	2,140	2,030	2,190	2,220	2,300	2,390	2,420
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.2	1.2	1.4	1.4	1.5	1.5
State Tax Receipts	3.7	3.7	4.3	4.4	4.5	4.7	4.8
Total Local & State	4.9	4.9	5.5	5.7	5.9	6.2	6.3

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Umatilla County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	87.0	85.8	88.5	93.5	94.6	97.8	95.9
Hotel, Motel*	56.9	55.3	56.0	59.8	60.6	63.4	62.4
Private Home	21.5	22.4	23.8	24.7	24.8	25.1	24.0
Other Overnight	8.6	8.1	8.7	9.0	9.2	9.3	9.5
Campground	5.6	5.2	5.5	5.9	5.9	6.1	6.2
Vacation Home	3.0	3.0	3.2	3.2	3.2	3.2	3.3
Day Travel	35.9	36.1	38.4	40.3	40.8	41.9	40.9
Spending at Destination	122.9	121.9	126.9	133.8	135.4	139.8	136.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$241	\$401	\$98	\$163	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$122	\$351	\$37	\$106	3.3	2.9
All Overnight	\$152	\$322	\$58	\$125	2.6	2.1

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	629	657	636	257	268	259
Private Home	764	769	757	299	301	296
Other Overnight	251	255	259	76	77	78
All Overnight	1,644	1,682	1,651	631	645	633

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	378	395	382	154	161	156
Private Home	297	299	294	116	117	115
Other Overnight	87	88	89	26	27	27
All Overnight	762	782	766	297	305	298

*Includes all lodging where a lodging tax is collected except campgrounds.

UNION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$51,180
Employee Earnings generated by \$100 Visitor Spending	\$38
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.40

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,080
Additional employment if each resident household encouraged one additional overnight visitor	21

Visitor Shares

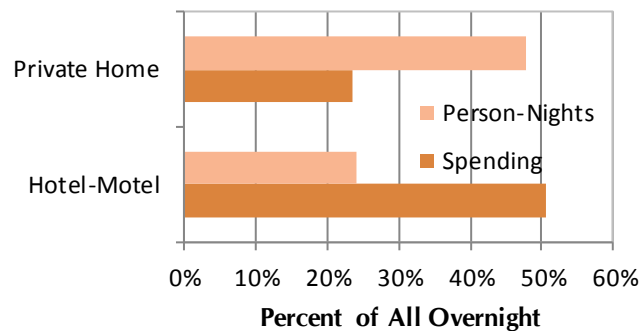
Travel Share of Total Employment (2015)*	4.0%
Overnight Visitor Day Share of Resident Population (2016p)**	5.9%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	83	138	\$12.6
Private Home	101	260	\$5.2
Other Overnight	52	162	\$6.2
All Overnight	237	560	\$24.0

Union County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	29.2	30.8	29.3	33.2	33.3	0.3%	0.9%
Other	1.9	3.0	3.5	3.2	3.0	-6.0%	3.0%
Visitor	27.3	27.8	25.8	30.0	30.3	1.0%	0.7%
Non-transportation	25.3	25.3	23.3	27.7	28.1	1.6%	0.7%
Transportation	1.9	2.5	2.5	2.3	2.2	-6.1%	0.8%
Earnings (\$Millions)							
Earnings	9.4	9.4	9.3	11.3	11.8	5.0%	1.6%
Employment							
Employment	650	580	540	580	600	3.4%	-0.5%
Tax Revenue (\$Millions)							
Total	1.2	1.2	1.2	1.5	1.6	6.7%	2.3%
Local	0.4	0.3	0.3	0.5	0.6	6.2%	2.6%
State	0.8	0.8	0.8	1.0	1.1	6.9%	2.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Union County **Travel Impacts, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	27.8	25.8	27.5	27.2	29.1	30.0	30.3
Other Travel*	4.3	3.5	4.4	4.2	4.0	3.2	3.0
Total Direct Spending	32.1	29.3	31.8	31.4	33.1	33.2	33.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.3	5.7	5.8	5.9	6.5	7.1	7.4
Food Service	6.8	6.7	7.2	7.2	7.8	8.2	8.4
Food Stores	4.0	3.8	4.1	4.2	4.4	4.6	4.5
Local Tran. & Gas	3.0	2.5	2.9	2.7	2.7	2.3	2.2
Arts, Ent. & Rec.	4.3	3.9	4.0	3.9	4.2	4.3	4.4
Retail Sales	3.3	3.2	3.4	3.3	3.5	3.5	3.5
Destination Spending	27.8	25.8	27.5	27.2	29.1	30.0	30.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.9	6.8	6.9	7.0	7.5	8.1	8.4
Arts, Ent. & Rec.	1.6	1.3	1.3	1.6	1.7	1.7	1.9
Retail**	1.0	0.9	1.0	1.0	1.1	1.1	1.1
Ground Tran.	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Total Direct Earnings	9.7	9.3	9.5	9.9	10.5	11.3	11.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	350	340	330	320	330	340	360
Arts, Ent. & Rec.	160	140	160	180	180	170	180
Retail**	50	50	50	50	50	50	50
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	570	540	550	560	570	580	600
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.4	0.3	0.4	0.4	0.5	0.5	0.6
State Tax Receipts	0.9	0.8	0.9	0.9	1.0	1.0	1.1
Total Local & State	1.3	1.2	1.4	1.4	1.5	1.5	1.6

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Union County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	22.2	20.4	21.6	21.4	22.9	23.7	24.0
Hotel, Motel*	11.9	10.6	10.8	10.4	11.6	12.4	12.6
Private Home	4.6	4.7	5.2	5.1	5.4	5.3	5.2
Other Overnight	5.7	5.2	5.5	5.9	6.0	6.1	6.2
Campground	5.2	4.8	5.1	5.4	5.5	5.6	5.8
Vacation Home	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Day Travel	5.6	5.4	5.9	5.8	6.2	6.3	6.3
Spending at Destination	27.8	25.8	27.5	27.2	29.1	30.0	30.3

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$223	\$371	\$91	\$151	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$132	\$407	\$39	\$119	3.4	3.1
All Overnight	\$117	\$271	\$43	\$102	2.7	2.3

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	133	139	138	54	57	56
Private Home	262	260	260	102	101	102
Other Overnight	156	159	162	45	46	47
All Overnight	551	558	560	202	204	205

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	80	84	83	33	34	34
Private Home	102	101	101	40	39	40
Other Overnight	51	52	52	15	15	15
All Overnight	233	236	237	87	89	89

*Includes all lodging where a lodging tax is collected except campgrounds.

WALLOWA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$48,500
Employee Earnings generated by \$100 Visitor Spending	\$44
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$362
Additional employment if each resident household encouraged one additional overnight visitor	7

Visitor Shares

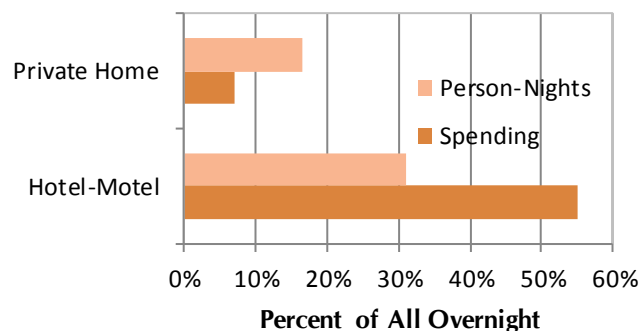
Travel Share of Total Employment (2015)*	12.6%
Overnight Visitor Day Share of Resident Population (2016p)**	17.5%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	85	142	\$12.7
Private Home	27	70	\$1.4
Other Overnight	78	232	\$8.1
All Overnight	191	444	\$22.2

Wallowa County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	19.0	21.7	25.7	28.4	29.3	3.2%	2.9%
Other	0.6	0.8	1.0	0.8	0.8	-5.8%	2.3%
Visitor	18.5	20.9	24.7	27.6	28.5	3.5%	2.9%
Non-transportation	17.2	19.1	22.6	25.6	26.7	4.1%	3.0%
Transportation	1.3	1.8	2.1	1.9	1.9	-4.1%	2.6%
Earnings (\$Millions)							
Earnings	6.1	6.9	8.4	11.9	12.7	6.7%	5.0%
Employment							
Employment	480	440	490	580	590	2.3%	1.4%
Tax Revenue (\$Millions)							
Total	0.6	0.7	0.9	1.1	1.2	9.3%	4.3%
Local	0.2	0.2	0.3	0.3	0.4	9.4%	3.7%
State	0.4	0.5	0.6	0.8	0.9	9.3%	4.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Wallowa County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	24.8	24.7	25.5	25.0	26.5	27.6	28.5
Other Travel*	1.2	1.0	1.1	1.1	1.1	0.8	0.8
Total Direct Spending	25.9	25.7	26.7	26.1	27.6	28.4	29.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.2	6.1	6.1	6.1	6.6	7.2	7.7
Food Service	5.9	6.2	6.4	6.4	6.8	7.2	7.6
Food Stores	3.3	3.4	3.6	3.6	3.8	4.0	4.0
Local Tran. & Gas	2.5	2.1	2.5	2.3	2.3	1.9	1.9
Arts, Ent. & Rec.	4.0	3.9	3.9	3.8	4.0	4.1	4.3
Retail Sales	2.9	2.9	3.0	2.9	3.0	3.1	3.1
Destination Spending	24.8	24.7	25.5	25.0	26.5	27.6	28.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.0	5.9	6.7	6.7	7.5	8.7	9.5
Arts, Ent. & Rec.	1.4	1.2	1.1	1.5	1.6	1.7	1.7
Retail**	1.1	1.1	1.2	1.2	1.2	1.3	1.3
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.1	0.1	0.1
Total Direct Earnings	8.6	8.4	9.1	9.4	10.6	11.9	12.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	320	300	340	330	360	380	390
Arts, Ent. & Rec.	130	140	120	150	150	140	150
Retail**	50	50	50	50	50	50	50
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	510	490	520	530	560	580	590
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.3	0.3	0.3	0.3	0.3	0.4
State Tax Receipts	0.6	0.6	0.7	0.7	0.7	0.8	0.9
Total Local & State	0.9	0.9	0.9	1.0	1.0	1.1	1.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wallowa County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	19.3	19.2	19.7	19.3	20.5	21.4	22.2
Hotel, Motel*	11.4	11.0	11.0	10.3	11.3	12.0	12.7
Private Home	1.3	1.3	1.4	1.3	1.4	1.4	1.4
Other Overnight	6.6	6.9	7.3	7.7	7.8	7.9	8.1
Campground	5.4	5.6	6.0	6.4	6.5	6.6	6.8
Vacation Home	1.3	1.3	1.3	1.3	1.3	1.3	1.3
Day Travel	5.5	5.5	5.8	5.7	6.0	6.2	6.3
Spending at Destination	24.8	24.7	25.5	25.0	26.5	27.6	28.5

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$219	\$364	\$89	\$149	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$118	\$348	\$35	\$104	3.4	3.0
All Overnight	\$144	\$323	\$50	\$116	2.9	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	133	139	142	54	57	58
Private Home	69	69	70	27	27	27
Other Overnight	225	229	232	67	68	69
All Overnight	427	437	444	148	151	154

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	80	83	85	33	34	35
Private Home	27	27	27	11	10	11
Other Overnight	76	77	78	23	23	23
All Overnight	183	187	191	66	67	69

*Includes all lodging where a lodging tax is collected except campgrounds.

WASCO COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$62,250
Employee Earnings generated by \$100 Visitor Spending	\$40
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,440
Additional employment if each resident household encouraged one additional overnight visitor	23

Visitor Shares

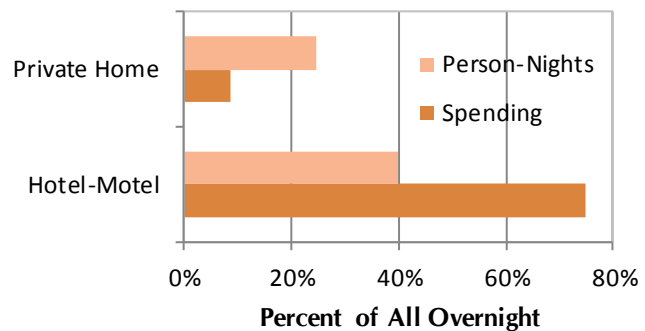
Travel Share of Total Employment (2015)*	12.4%
Overnight Visitor Day Share of Resident Population (2016p)**	12.1%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	293	488	\$60.6
Private Home	103	266	\$5.3
Other Overnight	132	395	\$11.0
All Overnight	529	1,149	\$77.0

Wasco County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	66.6	77.5	90.0	108.5	116.0	6.9%	3.5%
Other	1.9	2.8	3.5	3.2	3.0	-6.0%	3.0%
Visitor	64.7	74.6	86.5	105.3	113.0	7.3%	3.5%
Non-transportation	60.8	69.1	79.8	98.8	106.6	7.9%	3.6%
Transportation	3.9	5.5	6.8	6.6	6.4	-2.0%	3.2%
Earnings (\$Millions)							
Earnings	19.8	22.7	26.8	36.7	40.3	9.7%	4.5%
Employment							
Employment	1,290	1,330	1,400	1,770	1,820	3.1%	2.2%
Tax Revenue (\$Millions)							
Total	1.9	2.3	2.7	3.7	4.3	15.9%	5.3%
Local	0.3	0.5	0.7	0.9	1.2	23.1%	7.8%
State	1.5	1.8	2.0	2.8	3.1	13.4%	4.6%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

North Wasco County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	42.3	47.7	56.2	68.0	73.1	7.6%	3.7%
Other	1.8	2.7	3.3	3.0	2.8	-6.0%	3.2%
Visitor	40.6	45.0	52.9	64.9	70.3	8.2%	3.7%
Non-transportation	38.0	41.5	48.6	60.7	66.1	8.9%	3.8%
Transportation	2.6	3.6	4.3	4.2	4.2	-1.2%	3.2%
Earnings (\$Millions)							
Earnings	11.9	13.1	16.0	22.2	24.8	11.6%	5.0%
Employment							
Employment	780	770	840	1,070	1,120	5.0%	2.5%
Tax Revenue (\$Millions)							
Total	1.4	1.7	2.0	2.8	3.3	18.4%	6.1%
Local	0.3	0.5	0.7	0.9	1.2	23.1%	8.3%
State	1.0	1.2	1.4	1.9	2.2	16.0%	5.1%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

South Wasco County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	24.2	29.8	33.8	40.6	42.9	5.8%	3.9%
Other	0.1	0.2	0.2	0.2	0.2	-6.0%	3.2%
Visitor	24.1	29.6	33.6	40.4	42.8	5.9%	3.9%
Non-transportation	22.9	27.7	31.2	38.1	40.5	6.5%	3.9%
Transportation	1.3	1.9	2.4	2.3	2.2	-3.5%	3.8%
Earnings (\$Millions)							
Earnings	7.9	9.6	10.8	14.5	15.5	6.9%	4.6%
Employment							
Employment	510	560	560	700	700	0.2%	2.1%
Tax Revenue (\$Millions)							
Total	0.5	0.6	0.7	0.9	1.0	8.1%	4.6%
Local	0.0	0.0	0.0	0.0	0.0	#DIV/0!	#DIV/0!
State	0.5	0.6	0.7	0.9	1.0	8.1%	4.6%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Wasco County
Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	85.5	86.5	86.8	86.2	98.4	105.3	113.0
Other Travel*	4.1	3.5	4.3	4.2	4.0	3.2	3.0
Total Direct Spending	89.6	90.0	91.1	90.3	102.4	108.5	116.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	24.8	24.8	24.1	24.6	29.0	33.0	37.4
Food Service	20.5	21.9	22.1	22.0	25.4	27.5	29.5
Food Stores	8.5	8.4	8.9	9.0	9.9	10.5	10.6
Local Tran. & Gas	7.6	6.8	7.6	7.1	7.5	6.6	6.4
Arts, Ent. & Rec.	13.4	13.4	12.9	12.6	14.4	15.2	16.1
Retail Sales	10.8	11.2	11.2	10.9	12.1	12.6	13.0
Destination Spending	85.5	86.5	86.8	86.2	98.4	105.3	113.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	19.3	19.4	19.9	21.6	24.2	26.9	29.6
Arts, Ent. & Rec.	4.6	4.4	4.2	5.2	5.7	6.2	6.8
Retail**	2.5	2.5	2.5	2.5	2.8	3.0	3.2
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.5	0.5
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Total Direct Earnings	26.9	26.8	27.1	29.9	33.4	36.7	40.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	960	920	950	1,020	1,060	1,150	1,190
Arts, Ent. & Rec.	400	360	350	400	400	480	490
Retail**	100	100	110	100	110	120	120
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,480	1,400	1,430	1,540	1,590	1,770	1,820
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.5	0.7	0.7	0.7	0.9	0.9	1.2
State Tax Receipts	2.1	2.0	2.2	2.3	2.6	2.8	3.1
Total Local & State	2.6	2.7	2.8	3.0	3.4	3.7	4.3

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wasco County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	57.4	57.7	56.7	56.5	65.2	70.8	77.0
Hotel, Motel*	43.1	43.7	41.6	40.9	49.2	54.7	60.6
Private Home	4.5	4.6	5.0	5.0	5.3	5.3	5.3
Other Overnight	9.8	9.4	10.0	10.5	10.7	10.8	11.0
Campground	8.0	7.6	8.1	8.6	8.7	8.8	9.0
Vacation Home	1.8	1.8	1.9	2.0	2.0	2.0	2.0
Day Travel	28.1	28.8	30.1	29.7	33.2	34.5	36.0
Spending at Destination	85.5	86.5	86.8	86.2	98.4	105.3	113.0

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$305	\$507	\$124	\$207	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$95	\$282	\$28	\$84	3.4	3.0
All Overnight	\$184	\$387	\$67	\$146	2.7	2.1

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	429	462	488	175	188	199
Private Home	261	262	266	102	102	104
Other Overnight	382	389	395	113	115	117
All Overnight	1,072	1,113	1,149	390	406	420

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	258	278	293	105	113	120
Private Home	101	102	103	40	40	40
Other Overnight	128	130	132	38	39	39
All Overnight	487	510	529	183	192	199

*Includes all lodging where a lodging tax is collected except campgrounds.

WASHINGTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$82,120
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$6.00

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$34,578
Additional employment if each resident household encouraged one additional overnight visitor	421

Visitor Shares

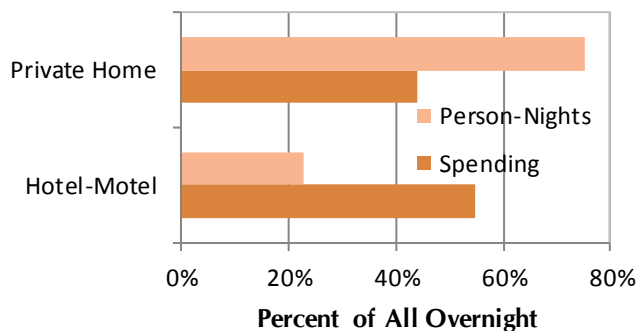
Travel Share of Total Employment (2015)*	2.1%
Overnight Visitor Day Share of Resident Population (2016p)**	3.8%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	931	1,899	\$263.3
Private Home	1,946	6,036	\$188.7
Other Overnight	47	162	\$5.3
All Overnight	2,924	8,096	\$457.3

Washington County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	409.5	488.8	560.1	690.0	727.9	5.5%	3.9%
Other	73.9	104.4	118.0	116.0	124.1	7.0%	3.5%
Visitor	335.6	384.5	442.1	574.1	603.8	5.2%	4.0%
Non-transportation	299.0	333.9	380.1	506.7	536.7	5.9%	4.0%
Transportation	36.7	50.6	62.0	67.4	67.1	-0.5%	4.1%
Earnings (\$Millions)							
Earnings	109.6	124.8	142.7	203.2	226.4	11.4%	5.0%
Employment							
Employment	5,460	5,560	5,780	7,520	7,930	5.5%	2.5%
Tax Revenue (\$Millions)							
Total	16.4	18.6	22.1	32.9	36.0	9.4%	5.4%
Local	4.3	4.1	6.1	10.9	11.7	7.7%	6.9%
State	12.1	14.4	16.0	22.0	24.3	10.3%	4.7%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Washington County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	448.1	442.1	512.0	536.4	540.2	574.1	603.8
Other Travel*	139.0	118.0	141.3	129.8	130.1	116.0	124.1
Total Direct Spending	587.1	560.1	653.3	666.2	670.2	690.0	727.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	81.3	70.7	93.4	100.1	103.2	118.7	133.3
Food Service	135.5	142.4	161.1	171.2	174.4	188.3	199.6
Food Stores	35.1	35.5	39.7	41.5	42.5	45.3	45.6
Local Tran. & Gas	67.2	62.0	75.3	75.8	73.1	67.4	67.1
Arts, Ent. & Rec.	50.0	50.0	54.1	56.3	56.3	59.4	61.5
Retail Sales	79.0	81.6	88.4	91.6	90.7	94.9	96.7
Destination Spending	448.1	442.1	512.0	536.4	540.2	574.1	603.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	88.5	85.1	105.9	112.2	120.0	135.1	150.2
Arts, Ent. & Rec.	16.5	15.5	17.2	17.5	18.5	19.7	21.2
Retail**	14.3	14.4	15.8	16.5	16.8	18.1	19.0
Ground Tran.	6.4	6.2	7.2	7.5	7.8	8.4	9.3
Other Travel*	22.9	21.5	23.2	19.2	20.7	21.9	26.7
Total Direct Earnings	148.6	142.7	169.2	172.9	183.8	203.2	226.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,840	3,590	4,250	4,440	4,690	5,070	5,400
Arts, Ent. & Rec.	900	870	940	940	980	1,020	1,080
Retail**	550	540	570	590	590	620	620
Ground Tran.	220	210	230	240	240	240	260
Other Travel*	650	580	570	530	560	560	580
Total Direct Employment	6,150	5,780	6,560	6,750	7,060	7,520	7,930
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.8	6.1	7.5	8.8	9.1	10.9	11.7
State Tax Receipts	16.8	16.0	19.8	20.2	20.6	22.0	24.3
Total Local & State	23.6	22.1	27.3	29.1	29.7	32.9	36.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Washington County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	335.1	326.5	382.1	400.8	404.1	431.6	457.3
Hotel, Motel*	177.5	162.6	205.8	218.9	221.4	241.2	263.3
Private Home	153.0	159.4	171.4	176.8	177.6	185.1	188.7
Other Overnight	4.6	4.6	4.9	5.1	5.2	5.2	5.3
Campground	2.5	2.3	2.5	2.6	2.7	2.7	2.8
Vacation Home	2.2	2.2	2.4	2.5	2.5	2.5	2.6
Day Travel	112.9	115.6	129.9	135.6	136.1	142.5	146.5
Spending at Destination	448.1	442.1	512.0	536.4	540.2	574.1	603.8

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$291	\$610	\$139	\$283	2.1	2.1
Private Home	\$62	\$196	\$31	\$97	2.0	3.2
Other Overnight	\$94	\$327	\$33	\$114	2.8	3.5
All Overnight	\$114	\$324	\$56	\$156	2.0	2.8

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,746	1,823	1,899	821	861	903
Private Home	5,738	5,936	6,036	2,878	2,987	3,054
Other Overnight	158	160	162	55	56	57
All Overnight	7,642	7,919	8,096	3,755	3,904	4,014

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	855	893	931	393	412	432
Private Home	1,850	1,914	1,946	909	942	962
Other Overnight	46	46	47	16	16	16
All Overnight	2,751	2,854	2,924	1,318	1,371	1,410

*Includes all lodging where a lodging tax is collected except campgrounds.

WHEELER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$82,180
Employee Earnings generated by \$100 Visitor Spending	\$23
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.00

Visitor Volume (2016p)

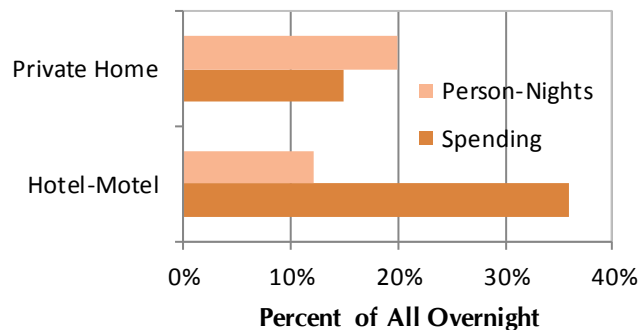
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$44
Additional employment if each resident household encouraged one additional overnight visitor	1

Visitor Shares

Travel Share of Total Employment (2015)*	4.5%
Overnight Visitor Day Share of Resident Population (2016p)**	14.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

Overnight Visitor Spending and Volume



Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	5	9	\$0.8
Private Home	5	13	\$0.3
Other Overnight	17	50	\$1.0
All Overnight	27	72	\$2.0

Wheeler County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	2.2	2.4	2.8	2.8	2.8	1.1%	1.7%
Other	0.1	0.2	0.2	0.2	0.2	-7.7%	1.7%
Visitor	2.1	2.2	2.6	2.6	2.7	1.7%	1.7%
Non-transportation	1.9	2.0	2.3	2.4	2.4	2.5%	1.7%
Transportation	0.2	0.3	0.3	0.3	0.2	-6.0%	1.7%
Earnings (\$Millions)							
Earnings	0.5	0.5	0.6	0.6	0.6	3.6%	1.6%
Employment							
Employment	40	40	40	30	30	0.7%	-1.5%
Tax Revenue (\$Millions)							
Total	0.1	0.1	0.1	0.1	0.1	5.3%	1.9%
State	0.1	0.1	0.1	0.1	0.1	5.3%	1.9%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Wheeler County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	2.7	2.6	2.6	2.5	2.6	2.6	2.7
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Spending	2.9	2.8	2.8	2.7	2.8	2.8	2.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	0.5	0.5	0.5	0.4	0.5	0.5	0.5
Food Service	0.6	0.7	0.7	0.7	0.7	0.7	0.8
Food Stores	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Local Tran. & Gas	0.4	0.3	0.3	0.3	0.3	0.3	0.2
Arts, Ent. & Rec.	0.4	0.4	0.4	0.3	0.4	0.4	0.4
Retail Sales	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Destination Spending	2.7	2.6	2.6	2.5	2.6	2.6	2.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Arts, Ent. & Rec.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Retail**	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	0.7	0.6	0.6	0.6	0.6	0.6	0.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	30	30	30	20	30	20	20
Arts, Ent. & Rec.	10	10	0	0	0	0	0
Retail**	10	10	10	10	10	10	10
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	40	40	40	40	40	30	30
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Local & State	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wheeler County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	2.0	2.0	1.9	1.9	1.9	2.0	2.0
Hotel, Motel*	0.9	0.9	0.8	0.7	0.7	0.7	0.8
Private Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Other Overnight	0.9	0.8	0.9	0.9	0.9	0.9	1.0
Campground	0.6	0.6	0.6	0.7	0.7	0.7	0.7
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	0.6	0.6	0.7	0.7	0.7	0.7	0.7
Spending at Destination	2.7	2.6	2.6	2.5	2.6	2.6	2.7

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$209	\$348	\$85	\$142	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$65	\$192	\$19	\$57	3.4	3.0
All Overnight	\$84	\$216	\$28	\$73	3.0	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	8	9	9	3	4	4
Private Home	14	14	13	5	5	5
Other Overnight	48	49	50	14	14	15
All Overnight	70	71	72	23	23	24

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	5	5	5	2	2	2
Private Home	5	5	5	2	2	2
Other Overnight	16	16	17	5	5	5
All Overnight	26	27	27	9	9	9

*Includes all lodging where a lodging tax is collected except campgrounds.

YAMHILL COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$66,410
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,489
Additional employment if each resident household encouraged one additional overnight visitor	53

Visitor Shares

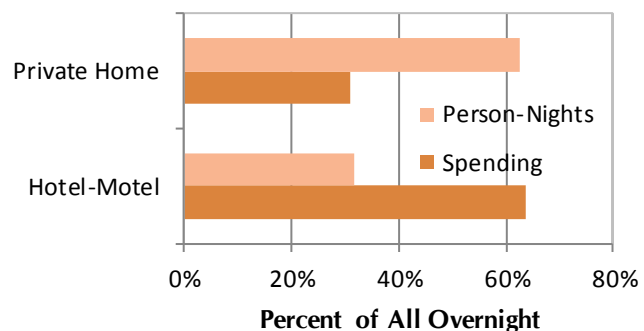
Travel Share of Total Employment (2015)*	3.2%
Overnight Visitor Day Share of Resident Population (2016p)**	4.4%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	324	539	\$47.9
Private Home	408	1,050	\$21.0
Other Overnight	32	95	\$3.5
All Overnight	764	1,683	\$72.5

Yamhill County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg. 15-16p	00-16p
Spending (\$Millions)							
Total	56.7	68.4	94.2	118.0	119.8	1.5%	5.1%
Other	8.0	11.6	14.2	13.8	13.1	-5.0%	3.4%
Visitor	48.8	56.8	80.0	104.2	106.7	2.4%	5.4%
Non-transportation	44.8	51.1	71.9	95.9	98.7	3.0%	5.4%
Transportation	3.9	5.6	8.1	8.4	8.0	-4.6%	4.8%
Earnings (\$Millions)							
Earnings	13.2	14.9	21.6	31.6	33.8	7.0%	6.5%
Employment							
Employment	1,020	1,030	1,250	1,590	1,650	3.7%	3.3%
Tax Revenue (\$Millions)							
Total	1.9	2.2	2.9	4.4	4.8	9.1%	6.3%
Local	0.1	0.1	0.2	0.6	0.7	14.5%	15.9%
State	1.8	2.1	2.7	3.8	4.1	8.2%	5.5%

Other spending includes air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Non-transportation visitor spending** includes accommodations, food services, retail, food stores, and arts, entertainment & recreation. **Visitor transportation spending** includes private auto, auto rental and other local ground transportation.

Earnings include wages & salaries, earned benefits and proprietor income.

Employment includes all full- and part-time employment of payroll employees and proprietors.

Local tax revenue includes lodging taxes and auto rental taxes paid by visitors.

State tax revenue includes the lodging and motor fuel tax payments of visitors, and the income tax payments attributable to travel industry businesses and employees.

Yamhill County Travel Impacts, 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	69.9	80.0	95.4	98.3	98.6	104.2	106.7
Other Travel*	17.8	14.2	17.7	17.5	17.0	13.8	13.1
Total Direct Spending	87.7	94.2	113.2	115.8	115.6	118.0	119.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	11.2	14.5	18.4	19.4	20.1	23.1	24.5
Food Service	19.4	22.9	27.1	28.3	28.6	30.7	31.8
Food Stores	9.4	9.9	11.4	11.6	11.8	12.5	12.4
Local Tran. & Gas	8.2	8.1	10.5	10.2	9.6	8.4	8.0
Arts, Ent. & Rec.	10.7	12.3	14.3	14.8	14.7	15.4	15.7
Retail Sales	11.0	12.2	13.8	14.0	13.7	14.2	14.3
Destination Spending	69.9	80.0	95.4	98.3	98.6	104.2	106.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	11.7	13.6	16.2	18.1	18.8	21.1	23.0
Arts, Ent. & Rec.	3.7	4.1	5.1	5.1	5.1	5.4	5.5
Retail**	2.6	2.7	3.1	3.2	3.2	3.4	3.5
Ground Tran.	0.4	0.5	0.6	0.6	0.6	0.7	0.7
Other Travel*	0.8	0.7	0.8	1.0	1.0	1.0	1.0
Total Direct Earnings	19.2	21.6	25.7	27.9	28.8	31.6	33.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	680	730	820	900	910	950	990
Arts, Ent. & Rec.	330	340	430	450	450	430	460
Retail**	120	120	130	140	140	140	140
Ground Tran.	10	20	20	20	20	20	20
Other Travel*	50	40	40	50	50	50	50
Total Direct Employment	1,190	1,250	1,450	1,550	1,560	1,590	1,650
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.2	0.4	0.5	0.6	0.6	0.7
State Tax Receipts	2.6	2.7	3.4	3.6	3.6	3.8	4.1
Total Local & State	2.7	2.9	3.9	4.1	4.1	4.4	4.8

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Yamhill County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	44.9	52.7	63.4	65.6	66.0	70.5	72.5
Hotel, Motel*	23.2	31.0	39.6	41.8	42.2	46.1	47.9
Private Home	18.6	18.7	20.7	20.5	20.5	20.9	21.0
Other Overnight	3.1	3.0	3.1	3.3	3.3	3.5	3.5
Campground	2.7	2.5	2.6	2.8	2.8	3.0	3.0
Vacation Home	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Day Travel	25.0	27.3	32.0	32.7	32.6	33.7	34.2
Spending at Destination	69.9	80.0	95.4	98.3	98.6	104.2	106.7

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$218	\$363	\$89	\$148	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$126	\$374	\$37	\$111	3.4	3.0
All Overnight	\$110	\$241	\$43	\$95	2.6	2.2

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	509	535	539	207	218	220
Private Home	1,014	1,036	1,050	396	405	410
Other Overnight	91	93	95	27	28	28
All Overnight	1,614	1,665	1,683	631	651	658

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	306	322	324	125	131	132
Private Home	394	403	408	154	158	160
Other Overnight	31	31	32	9	9	9
All Overnight	731	756	764	288	298	301

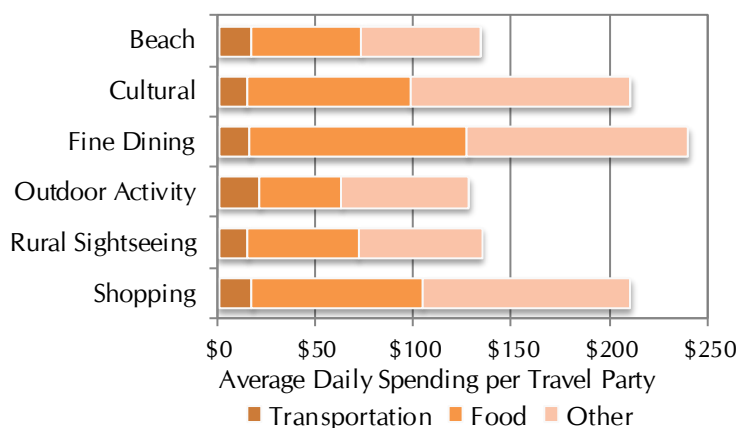
*Includes all lodging where a lodging tax is collected except campgrounds.

V. OREGON DAY TRAVEL, 2016P

Visitor volume and average daily spending estimates for day travel to specific destinations within Oregon are not provided in this report because of data limitations. Day travel often involves expenditures in multiple locations. For example, a day trip from Portland to Eugene may entail expenditures on food and motor fuel in different intermediate locations on the trip. In addition, the magnitude and type of expenditures are very much related to the purpose of day travel and the activities engaged on the trip. Finally, it is difficult to provide meaningful estimates of day travel visitor volume relating to specific destinations because of the fact that day trips involve travel to and through multiple locations (e.g., counties).

The following charts and tables provide information on day travel to destinations in Oregon broken out by trip activity and trip purpose. Trip activities are shown below. In general, the greater levels of average daily spending for cultural, dining and shopping activities reflect day trips to urban areas. Many important day trip activities, such as visits to wineries and gaming, are not shown because of insufficient data.

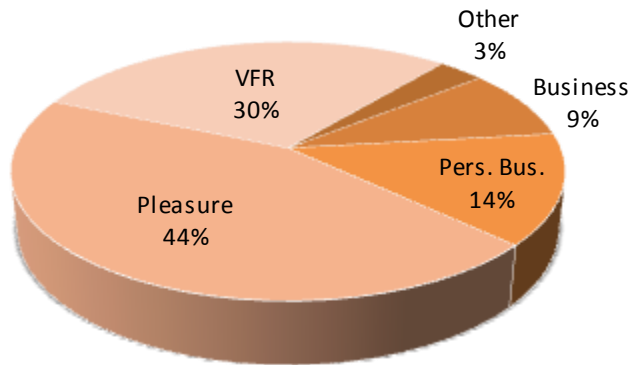
Day Trip Activity, 2016p



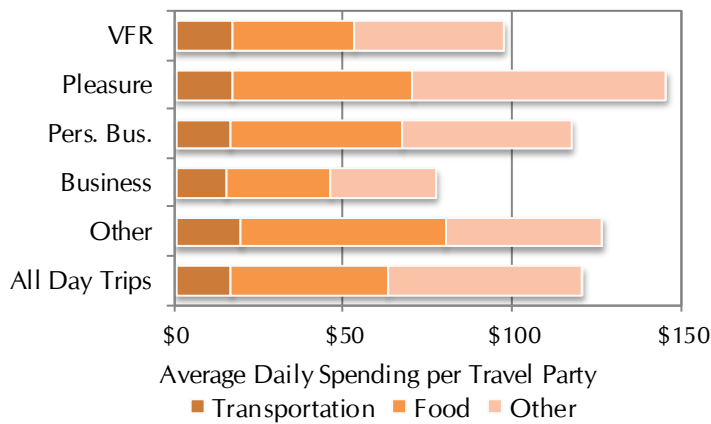
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
Beach	\$144.9	\$13.2	\$69.3	\$62.5	2.8
Cultural	\$229.6	\$11.1	\$103.9	\$114.6	2.8
Fine Dining	\$265.0	\$12.6	\$137.9	\$114.6	2.6
Outdoor Activity	\$134.5	\$16.4	\$51.9	\$66.2	2.8
Rural Sightseeing	\$145.8	\$11.6	\$70.1	\$64.2	2.7
Shopping	\$229.3	\$13.4	\$107.8	\$108.1	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

Purpose of Day Trip, 2016p



Many day travelers, such as those visiting friends and relatives, do not report an activity on their trip. For this reason, spending by trip purpose is lower than the average spending shown for activities.



(Because travelers may engage in more than one activity, or none at all, the activity distribution is not shown.)

Sources: TNS TravelsAmerica and Dean Runyan Associates.

	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
VFR	\$95.9	\$14.4	\$37.5	\$44.0	2.4
Pleasure	\$144.4	\$14.5	\$55.2	\$74.7	2.7
Personal Business	\$116.5	\$13.9	\$52.7	\$49.9	2.2
Business	\$76.0	\$13.0	\$32.0	\$31.0	1.6
Other	\$125.4	\$16.7	\$62.5	\$46.2	2.0
Total	\$119.5	\$14.3	\$47.8	\$57.4	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

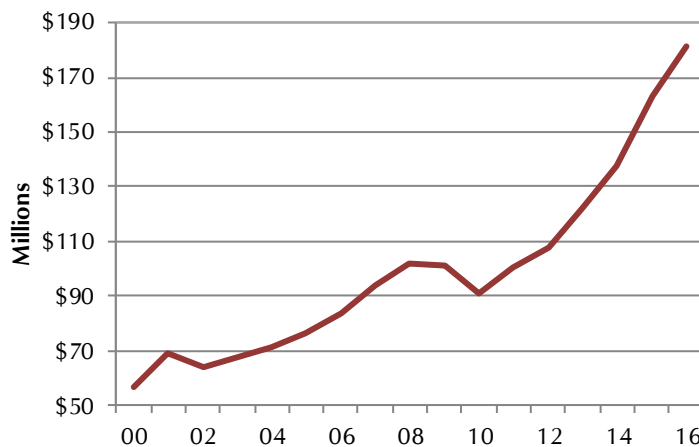
VI. LOCAL TRANSIENT LODGING TAX RECEIPTS

Transient lodging taxes are one of the most direct means for jurisdictions to collect revenues from visitors. They are also a useful indicator of travel activity in the state, since almost all of these sales are made by travelers. Transient lodging tax receipts therefore provide a basis for evaluating both travel trends and the distribution of travel activity in the state.

During 2016, ninety-one cities and sixteen counties in Oregon levied a locally administered transient lodging tax. This tax, ranging from 2 percent to 13.5 percent, is collected on the sale (i.e., rental) of a room at a lodging establishment such as a hotel, motel, bed & breakfast or at a campground site or RV park.

Local lodging tax receipts increased by 11.0 percent from the 2015 to 2016 fiscal years. (The large increase in revenues in the past two fiscal years is in part attributable to the establishment of the Tourism Improvement District in the City of Portland, which levies an additional 2 percent tax on lodging establishments with 50 or more rooms. TID collections began in October 1, 2012)

Oregon Local Lodging Tax Receipts



Room tax collections for most taxing jurisdictions within Oregon are reported for the last eleven fiscal years in the following table. It should be noted that transient lodging tax data is subject to revision. The revisions can be a result of late payments, back taxes, interest or fees.¹

¹ See <http://www.oregon.gov/DOR/programs/gov-research/Pages/research-lodging.aspx> for information on the 1 percent state lodging tax collected by the Oregon Department of Revenue.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
BAKER COUNTY												
County-wide	*	318	385	411	394	386	413	391	395	404	455	534
BENTON COUNTY												
Corvallis	9.0%	1,021	1,095	1,126	1,076	1,080	1,062	1,239	1,364	1,425	1,604	1,746
CLACKAMAS COUNTY												
Sandy	3.0%	17	18	15	21	21	20	24	26	26	38	37
Lake Oswego	6.0%	532	615	733	678	716	796	806	949	1,011	1,146	1,273
Oregon City	6.0%	42	52	57	54	52	52	55	63	77	99	180
Wilsonville	5.0%	207	268	275	219	193	214	209	242	273	258	470
County-wide	6.0%	2,454	2,777	3,071	2,661	2,432	2,683	2,894	3,198	3,421	3,786	4,415
CLATSOP COUNTY												
Astoria	9.0%	932	1,029	1,195	976	1,024	952	971	1,111	1,253	1,423	1,667
Cannon Beach	8.0%	1,867	1,997	2,110	2,049	2,074	2,336	2,465	2,631	2,761	3,045	3,536
Gearhart	7.0%	112	119	120	130	135	129	118	163	167	189	199
Seaside	8.0%	2,356	2,596	2,979	2,960	2,982	2,854	2,922	3,550	3,550	4,120	4,476
Warrenton	12.0%	274	316	328	308	458	463	446	483	620	626	720
Unincorporated	9.5%	122	135	116	153	164	168	188	216	214	334	408
COLUMBIA COUNTY												
COOS COUNTY												
Bandon	6.0%	383	434	426	386	391	384	376	438	462		
Coos Bay	7.0%	496	554	561	461	464	469	485	507	520	583	652
Coquille Indian Tribe	8.0%	0	0	0	0	108	274	281	296	295	343	337
Lakeside	7.5%	37	39	40	37	23	35	35	37	40	46	56
North Bend	7.0%	233	245	246	307	84	89	96	96	102	102	158
CROOK COUNTY												
Prineville	8.5%	163	197	194	164	149	176	180	207	191	253	316
CURRY COUNTY												
Brookings	6.0%	160	171	178	160	141	140	142	168	165	166	199
Gold Beach	6.0%	272	292	314	306	309	300	297	311	324	355	410
Port Orford	7.0%	44	45	47	42	46	49	51	54	59	64	69

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

The Coquille Indian Tribe in Coos County began collecting its own tax on January 1, 2010. Prior to that date, receipts were included with North Bend.

*All jurisdictions in Baker County have a 5.0% rate from November through April, and a 7.0% rate from May through October.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
DESCHUTES COUNTY												
Bend	10.4%	3,107	3,303	3,427	2,938	2,960	3,280	3,524	3,888	4,660	6,367	7,694
Redmond	9.0%	463	493	509	436	458	504	503	533	587	691	835
Sisters	8.0%	213	224	267	280	275	288	308	331	355	407	449
Unincorporated	8.0%	3,231	3,304	3,511	3,270	2,960	3,139	3,258	3,691	4,266	5,107	5,938
DOUGLAS COUNTY												
Reedsport	5.0%-7.0%*	164	173	175	151	168	160	170	182	181	221	213
Roseburg	8.0%	835	881	892	826	775	785	806	801	904	1,011	1,120
Sutherlin	8.0%	60	73	68	55	64	79	84	82	91	149	182
Winston	5.0%	10	9	9	7	6	7	6	7	7	16	19
GILLIAM COUNTY												
GRANT COUNTY												
County-wide	8.0%	93	98	85	84	92	96	80	89	108	127	
HARNEY COUNTY												
Burns	9.0%	64	79	99	71	67	93	104	85	85	91	126
Hines	8.0%	117	129	150	143	130	135	141	144	153	166	192
HOOD RIVER COUNTY												
Cascade Locks	7.0%	110	117	129	119	129	135	127	144	153	177	299
Hood River	8.0%	538	578	630	694	738	787	828	971	1,202	1,361	1,587
Unincorporated	8.0%	219	224	236	176	180	224	234	237	109	114	145
JACKSON COUNTY												
Ashland	9.0%	1,558	1,551	1,537	1,854	1,923	1,897	1,978	2,081	2,081	2,339	2,055
Central Point	9.0%	0	293	343	299	298	304	362	452	373	391	482
Jacksonville	9.0%	57	64	70	79	81	87	96	103	104	117	147
Medford	9.0%	2,148	2,410	2,553	2,283	2,273	2,373	2,502	2,646	2,929	3,315	3,824
Phoenix	6.0%	39	27	36	24	13	11	13	21	33	35	33
Rogue River	6.0%	50	48	47	40	44	44	47	57	66	74	72
Shady Cove	6.0%	66	65	81	68	43	45	42	43	43	50	61
Talent	6.0%	7	5	2	4	4	5	5	6	5	6	
JEFFERSON COUNTY												
Madras	9.0%	149	172	202	196	183	194	195	222	251	278	283
Metolius	6.0%	2	2	2	1	1	1	1	1	2	1	
Unincorporated	6.0%	182	228	227	203	205	188	255	273	293	282	298

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

*Tax rate is 7.0% in Reedsport and 5.0% in areas surrounding Reedsport that impose a tax. Sutherlin rate increase from 5% to 8% on August 14, 2014.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
JOSEPHINE COUNTY												
Grants Pass	9.0%	1,003	1,047	1,024	970	941	939	951	1,062	1,111	1,204	1,420
KLAMATH COUNTY												
County-wide	8.0%	1,095	1,330	1,477	1,421	1,376	1,409	1,400	1,565	1,707	1,896	2,047
LAKE COUNTY												
County-wide	6.0%	96	111	107	94	98	125	94	107	115	122	137
LANE COUNTY												
Coburg	8.0%	45	48	50	47	38	39	38	36	39	45	48
Cottage Grove	9.0%	182	213	224	227	205	186	207	215	236	254	272
Creswell	8.0%	68	82	81	80	83	128	118	141	130	156	177
Dunes City	8.0%	25	24	24	20	21	26	33	31	30	40	41
Eugene	9.5%	3,114	3,470	3,686	3,611	3,175	3,458	3,404	3,751	3,999	4,480	5,157
Florence	9.0%	276	297	299	498	538	565	540	557	629	714	786
Junction City	8.0%	22	26	24	20	18	20	18	21	23	30	31
Lowell	8.0%									0.6	0.9	1.1
McKenzie	8.0%	173	173	241	387	205	220	212	228	248	270	297
Oakridge	8.0%	43	51	83	69	50	54	57	69	75	85	71
Springfield	9.5%	1,483	1,597	1,655	1,630	1,435	1,641	1,904	2,056	2,260	2,574	2,900
Veneta	8.0%	0.1	0.6	0.4	0.5	0.4	0.2	0.3	0.5	0.5	0.5	0.6
Westfir	8.0%	7.4	9.6	9.2	1.2	0.7	0.6	0.4	0.5	0.0	0.2	5.3
Unincorporated	8.0%	512	546	571	475	416	470	462	510	540	608	669
LINCOLN COUNTY												
Depoe Bay	8.0%	441	403	401	378	457	453	473	505	519	545	609
Lincoln City	9.5%	3,083	3,438	3,704	4,417	4,352	4,260	4,234	4,514	4,983	5,887	6,337
Newport	9.5%	2,113	2,272	2,357	2,228	2,256	2,291	2,323	2,426	2,751	3,173	3,537
Waldport	7.0%	23	23	23	23	23	23	30	34	41	52	61
Yachats	7.0%	442	503	520	496	477	429	451	481	512	605	
Unincorporated	9.0%	1,078	1,119	1,389	1,599	1,556	1,673	1,696	1,801	1,776	1,856	2,134
LINN COUNTY												
Albany	9.0%	611	701	741	675	595	656	716	755	804	941	1,057
Lebanon	9.0%	22	30	36	36	34	35	39	39	45	70	204
Sweet Home	6.0%	18	18	19	21	21	23	25	27	29	36	23

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
MALHEUR COUNTY												
Ontario	9.0%	520	607	618	578	583	634	659	672	712	734	867
MARION COUNTY												
Keizer	6.0%	66	76	80	69	61	63	57	49	54	68	118
Salem	9.0%	2,052	2,395	2,506	2,416	2,138	2,215	2,239	2,445	2,731	3,125	3,613
Silverton	9.0%	0	0	0	0	0	166	191	199	214	255	276
Stayton	7.0%	0	0	0	0	0	0	0	0	0	4	
Sublimity	7.0%	32	40	38	23	23	22	21	23	22	21	
Woodburn	9.0%	218	224	239	271	215	256	274	276	353	335	435
MORROW COUNTY												
Heppner	5.0%	5	4	4	5	4	4	6	4	4	4	5
MULTNOMAH COUNTY												
Fairview	6.0%	39	39	43	38	37	38	39	45	49	59	52
Gresham	6.0%	469	556	616	563	455	460	495	605	664	809	977
Portland	8.0%*	15,964	17,527	19,647	23,572	16,512	19,143	21,359	28,747	35,063	41,804	50,543
Troutdale	6.95%	356	341	375	414	403	429	428	452	481	578	718
Wood Village	6.0%	84	98	105	100	85	89	97	105	110	126	153
County-Wide	5.5%	14,794	16,726	18,491	16,115	15,441	18,208	20,052	21,464	24,268	29,692	34,300
POLK COUNTY												
SHERMAN COUNTY												
Condon	6.0%					13	14	14				
TILLAMOOK COUNTY												
Garibaldi	9.0%	65	93	81	57	58	80	90	121	113	138	165
Manzanita	9.0%	289	313	355	378	384	374	388	466	599	679	721
Rockaway Beach	9.0%	230	226	257	255	224	257	254	309	373	623	675
Tillamook	10.0%	223	316	344	292	276	313	278	291	321	363	360
Wheeler	9.0%	19	20	22	23	17	25	23	27	24	28	29
County-wide/Unincorp.	1.0-10.0%*									469	2,431	2,806

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

*The rate for Portland includes the 6.0% basic rate for all establishments and the 2.0% Tourism Improvement District rate for establishments with 50 or more rooms.

Tillamook county-wide tax began on January 1, 2014. The rate is 10% in unincorporated areas and ranges from 1% to 3% in other jurisdictions.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
UMATILLA COUNTY												
Hermiston	8.0%	300	313	320	339	359	364	412	374	437	494	513
Milton-Freewater	7.0%	0	0	0	15	20	9	24	14	18	16	18
Pendleton	8.0%	649	768	791	777	778	805	799	836	862	913	963
Umatilla	3.5%	17	16	17	18	18	30	44	26	32	42	45
UNION COUNTY												
LaGrande	5.0%	241	232	271	239	220	245	271	268	300	304	340
County-wide	3.0%	147	143	167	146	125	147	150	165	181	163	182
WALLOWA COUNTY												
Enterprise	3.0%	37	39	36	39	37	34	34	0			39
County-wide	5.0%	209	232	244	253	248	240	251	252	244	284	328
WASCO COUNTY												
The Dalles	8.0%	490	562	524	688	652	671	672	648	726	933	1,018
WASHINGTON COUNTY												
County-wide	9.0%	4,537	6,480	7,014	6,332	5,673	6,869	7,604	8,269	9,053	10,069	12,262

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

*The rate for Hermiston is 8.0% for 6 or fewer days and 2.5% for occupancy of 7 to 30 days.

APPENDICES

APPENDIX A	2016 TRAVEL IMPACT AND VISITOR VOLUME ESTIMATES
APPENDIX B	KEY TERMS AND DEFINITIONS
APPENDIX C	RELATIONSHIP BETWEEN SPENDING AND VOLUME
APPENDIX D	REGIONAL TRAVEL IMPACT MODEL
APPENDIX E	TRAVEL INDUSTRY ACCOUNTS
APPENDIX F	OREGON EARNINGS AND EMPLOYMENT BY INDUSTRY SECTOR
APPENDIX G	INDUSTRY GROUPS

2016 TRAVEL IMPACT AND VISITOR VOLUME ESTIMATES

This appendix provides a brief overview of the methodology, terminology and limitations of the travel impact and visitor volume estimates.

DIRECT IMPACTS

The estimates of the direct impacts associated with traveler spending in Oregon were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the Oregon travel industry were gathered from various local, state and federal sources.

Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are also broken out by type of traveler accommodation and by the type of business in which the expenditures occur.

OVERNIGHT VISITOR VOLUME AND AVERAGE SPENDING ESTIMATES

This report also provides county, regional and statewide estimates of visitor volume and average spending (which includes both domestic and international visitation) for overnight visitors. These estimates are derived from the RTIM spending estimates and other source data (see Appendix D). It should be noted that in the case of trips, the sum of county and regions are greater than the statewide estimate. This is because travelers may visit more than one destination on the same trip. Similar the length of stay on a given trip will less at a particular destination than for the state as whole due to pass-through time spent in route to the destination.

In addition, the treatment of transportation expenditures (ground and air) depends upon the level of geography (county, region or state). County level estimates of destination spending do not include airfares and only a portion of ground transportation expenditures. Regional level estimates of destination spending include airfares (one-way) and a larger share of ground transportation. State level estimates include all one-way airfares and all expenditures for ground transportation.

PRELIMINARY ESTIMATES

Preliminary estimates for 2015 were prepared at the state and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2015 becomes available.

SECONDARY (INDIRECT AND INDUCED) IMPACTS

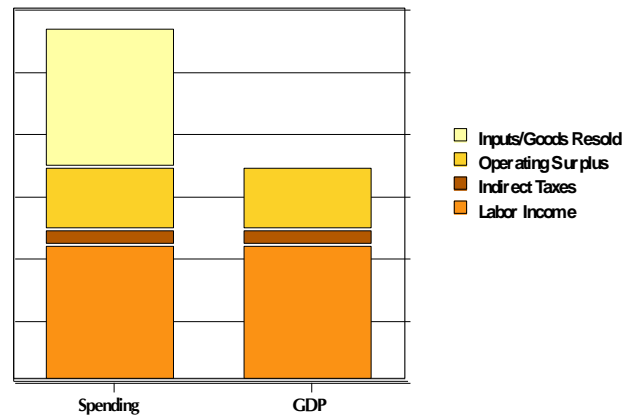
Direct impacts are reported for all counties within Oregon. Secondary employment and earnings impacts over and above direct impacts are reported at the state level only for the year 2015. These indirect and induced impacts are generated from the direct impacts produced by the RTIM, discussed above, and an input-output model of the Oregon economy prepared by the IMPLAN Group, LLC. Indirect impacts represent the purchases of goods and services from other firms by businesses that directly receive expenditures from travelers. Hotels, for example, purchase maintenance services from independent contractors. Induced impacts represent the purchase of goods and services by employees whose earnings are in part derived from travel expenditures. The sum of the direct, indirect and induced impacts equals the total impact of all spending by visitors in the state. The “multiplier” refers to the ratio of the total impacts to the direct impacts for employment or earnings. A description of the methodology used to estimate secondary impacts can be found in the Appendix.

GROSS DOMESTIC PRODUCT

An estimate of the Gross Domestic Product (GDP) of the Oregon travel industry based on the RTIM direct travel impacts is also provided in this report. The GDP of an industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always less than output or sales because GDP measures only the “value added” of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. GDP is a useful concept because it permits comparisons of the economic contributions of different industries.

The relationship between spending and gross domestic product is illustrated in the figure below. Examples of inputs are the food or accounting services that restaurants purchase from suppliers. “Goods resold” are the commodities that retail establishments purchase from manufacturers or wholesale trade businesses and resell with a markup. These inputs or goods are not counted as the GDP of the restaurant or retail industry because their value was created in other industries (agriculture, accounting, manufacturing).

Relationship Between Spending and Gross Domestic Product



It is for this reason that “travel spending” – as measured from surveys of visitors – is not the best measure of the travel industry’s real economic contribution. This is because some visitor spending is actually counted as the GDP of other industries (e.g., agriculture, accounting, manufacturing). Furthermore, these other industries may or may not be located within the geographic area of interest. If the farm were located within the region of interest, then the GDP of the local farm would be included as an indirect or secondary effect. If not (e.g., a manufacturing firm in another state or country), then that portion of GDP is not counted.

The preceding graph also shows the three main components of GDP. For most industries, labor income (essentially equivalent to earnings in this report) is the primary component of GDP. This is true of the travel industry. A second component is the tax payments that businesses make to government, such as sales, excise and property taxes. In the case of excise taxes, businesses are essentially a collection agency for the government. The final component, operating surplus, represents the income and payments (e.g., dividends, interest) to other stakeholders of the firm.

The concept of GDP also illustrates that with small geographic units of analysis (e.g., counties), earnings, employment, and tax revenues are the best measures of the economic value of the travel industry to the local economy. Small area measures of GDP are less reliable and much of the operating surplus may leak out of the local economy anyway. Indirect effects are also generally less in smaller economies.

COMPARISON WITH OTHER EXPORT-ORIENTED INDUSTRIES

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, extractive industries, and manufacturing are the best examples of goods producing export-oriented industries. Many professional services (e.g., engineering, architecture, law) are also traded in export markets. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do the exports of other industries.

Exports are not necessarily more important than locally traded goods and services. However, diverse export-oriented industries in any economy are a source of strength – in part because they generate income that contributes to the development of other local services and amenities. Such industries characterize the “comparative advantage” of the local economy within larger regional, national and global markets.

For the purposes of this report, we have defined five major export-oriented industries in Oregon.

- **Microelectronics.** This industry includes establishments that manufacture computers, communications equipment and similar products and components that utilize integrated circuits. This is the largest manufacturing subsector (NAICS 334).
- **Agriculture & food processing.** This industry group encompasses parts of two major industry categories: agriculture, and food manufacturing or processing.
- **Logging and wood products.** This industry group is comprised of logging and the manufacture of wood products, including paper.
- **Travel.** A portion of the transportation, retail, leisure, and hospitality industries as estimated in this report.
- **Software.** This industry comprises establishments primarily engaged in computer software publishing or reproduction.

Comparisons with these industries are more meaningful for the travel industry than comparisons with non-export oriented industries (e.g., health care, retail trade, government) where industry growth is largely a function of population and demographic factors. See Appendix C for a list of Oregon industries.

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates in this report are expressed in *current* dollars unless otherwise noted.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

KEY TERMS AND DEFINITIONS

ECONOMIC IMPACTS

Commodity: A classification of a product or service, such as lodging or food service. An establishment or industry may produce more than one commodity.

Direct Impacts: Employment, earnings and tax receipts *directly* generated by travel spending, as distinguished from secondary and total impacts.

Earnings: Earnings include wage and salary disbursements, other earned income or benefits, and proprietor income. Only the earnings attributable to travel expenditures are included.

Employment: Industry employment (jobs) associated with travel-generated earnings. Includes both full-time and part-time positions, and salaried or self-employed individuals. Employment is reported as an average for a time period, typically annual. (Unless otherwise noted, the employment estimates refer to establishment or industry employment at place of work, not the employment status or residence of the individual.)

Federal Taxes: Federal taxes include the motor fuel excise tax, airline ticket taxes, and personal income and payroll taxes.

Hotel, Motel: Includes all lodging where a lodging tax is collected except campgrounds.

Industry: A classification of business or government establishments based on their primary technological process. (See NAICS Appendix table.)

Local Taxes: Lodging, sales and auto rental taxes imposed by cities, counties and other regional tax jurisdictions in Oregon. Passenger Facility Charges attributable to visitors (a fee imposed on airline tickets) are included in counties with airports. Property taxes are not included.

Other spending: See Travel spending.

Private Home: Unpaid overnight accommodations of friends and relatives.

Receipts: Travel expenditures less the sales and excise taxes paid by the consumer.

State Taxes: Lodging, motor fuel, and business and personal income taxes imposed by the state of Oregon.

Total Impacts: The sum of Direct and Secondary impacts.

Travel spending: The sum of visitor and other spending related to travel. Other spending includes spending by residents on ground and air transportation for the purpose of travel to other destinations and spending on travel arrangement services.

Vacation Home: A housing unit for occasional use where a lodging tax is not collected.

Visitor spending: All spending on goods & services by visitors at the destination. Also referred to as destination spending.

VISITOR VOLUME

Length of Stay: The number of nights that a visitor or travel party is away from home on a trip.

Night: Applies to overnight visitors only. The number of nights on a trip is the length of stay. The count of days and nights is generally equivalent for overnight visitors. (See trips.)

Party-trips: The number of trips to the destination by travel parties. Party-trips are equal to the number of Visitor-trips divided by the average party size.

Party-nights: The number of nights or days that travel parties stayed at the destination. Party-nights are equal to the number of visitor-nights divided by the average party size or the number of party-trips multiplied by the average length of stay.

Party Size: The number of individuals (adults and children, including non-household members) that are traveling together and are sharing the costs of travel.

Room Demand: A count of the number of hotel/motel rooms that are sold on a nightly basis over a given period of time. Also referred to as *room nights sold*.

Travel party: A *travel party* includes all *visitors* (adults and children) traveling together. The *party size* represents the average number of visitors or persons in the travel party.

Trip: A trip may include more than one day or night at a destination. For overnight visitor categories, the total number of trips will be less than the number of nights. The *length of stay* for the trip represents the number of nights (or days) at the destination.

Visitor: An individual traveler that stays overnight away from home in paid or unpaid accommodations, or a day visitor that travels at least fifty miles one-way from home on non-routine trip.

Visitor Air Arrival: A passenger who travels by air and initiated the trip at another location. Visitor air arrivals do not include passengers who are returning home from a trip to another destination or passengers that are making a connection to another flight.

Visitor-trips: The number of trips to the destination by visitors or persons. This is also equivalent to as the total number of *visits*.

Visitor-nights: The number of nights or days that visitors (persons) stayed at the destination. Visitor-nights are equal to the number of visitor-trips multiplied by the average length of stay.

RELATIONSHIP BETWEEN SPENDING AND VOLUME

The Spending, Average Expenditures and Volume tables are computationally related as shown with the sample data below.

- **Spending equals Average Expenditures multiplied by Volume** for comparable party/person and night/trip categories
- **Travel parties and persons** are related by division or multiplication with **Party Size**
- **Trips and nights** are related by division or multiplication with **Length of Stay**

Visitor Spending by Type of Accommodation (\$Million), YEAR

		YEAR
All Overnight	$656,000 \times \$86 = \$56,100,000$ (calculated from person-trips)	56.1
Hotel, Motel	$160,000 \times \$200 = \$32,000,000$ (calculated from party-nights)	32.0
Private Home	$1,030,000 \times \$20 = \$20,600,000$ (calculated from person-nights)	20.6
Other Overnight	$10,000 \times \$350 = \$3,500,000$ (calculated from party-trips)	3.5
Campground		3.0
Vacation Home		0.5
Day Travel		30.0
Spending at Destination		86.1

Average Expenditures for Overnight Visitors, YEAR

	Travel Party		Visitor (Person)		Party	Length of
	Nights	Trip	Nights	Trip	Size	Stay (nights)
Hotel, Motel	\$200	\$340	\$83	\$142	2.4	1.7
Private Home	\$50	\$130	\$20	\$52	2.5	2.6
Other Overnight	\$117	\$350	\$34	\$103	3.4	3.0
All Overnight	\$494	\$214	\$197	\$86	2.5	2.3

Overnight Visitor Volume, YEAR

	Visitor-Nights (000)		Party-Nights (000)	
	YEAR		YEAR	
Hotel, Motel	$160 \times \underline{2.4} =$	384		160
Private Home		1,030		412
Other Overnight		102		30
All Overnight		1,516		602

	Visitor-Trips (000)		Party-Trips (000)	
	YEAR		YEAR	
Hotel, Motel		226		94
Private Home	$1,030 / \underline{2.6} =$	396		158
Other Overnight		34		10
All Overnight		656		263

REGIONAL TRAVEL IMPACT MODEL

PRIMARY DATA SOURCES

Room Demand,
Visitor Surveys,
Population,
Inventory/Use
of Campsites &
Second Homes,
Visitor air
arrivals



Visitor Volume
(Travel Party Days by
Type of
Accommodation)



ECONOMIC IMPACTS OF TRAVEL

Accommodation
Sales,
Visitor Surveys,
Airtfares



Visitor Spending
(Type of
Accommodation and
Type of Commodity)



Point of Sale Taxes
(Sales and Excise Taxes
associated with Visitor
Spending)



*Note: Receipts equals
Spending less
POS Taxes*

Business Receipts
(not reported)



Earnings
(By Industry)



Employment
(By Industry)

Ratio of
Earnings to
Receipts for
relevant
Industry



Business Taxes
(Taxes on business
income or receipts)



Personal Taxes
(Local, state and
federal income and
payroll taxes)

Average
Annual
Earnings per
job for
relevant
industry



*Note: Most estimates of taxes
are based on implicit tax rates
applied to visitor spending,
business receipts, and
employee earnings. Lodging
tax receipts reflect actual tax
collections.*

TRAVEL INDUSTRY ACCOUNTS: A COMPARISON OF THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS

An economic account is a method for displaying inter-related information about a set of economic activities. A travel industry account is a method to report different types of related information about the purchase of goods and services by visitors. The Bureau of Economic Analysis (BEA), which now provides annual and quarterly estimates of travel and tourism at the national level, describes a Travel and Tourism Satellite Account (TTSA) as “present(ing) a rearrangement of information from the National Income and Product Accounts, from the industry accounts, and from other sources so that travel and tourism activities can be analyzed more completely than is possible in the structure of the traditional national economic accounts.”¹

Similarly, the RTIM has been developed by Dean Runyan Associates to estimate travel spending, earnings, employment, and tax receipts at the state, county, and regional levels. These initial findings can, in turn, be used as input data for deriving estimates of other economic measures, such as value-added and indirect effects.

This appendix provides an overview of the Regional Travel Impact Model (RTIM) and travel and tourism satellite accounts (TTSA). Although there is no single or absolute form of a TTSA, the one developed by the Bureau of Economic Analysis (BEA) will be the basis of the analysis here. The definitions, framework, and estimating methods used for the U.S. BEA TTSA follow, as closely as is practicable, the guidelines for similar travel satellite accounts that were developed by the World Tourism Organization (WTO) and the Organization for Economic Co-operation and Development (OECD).

The primary focus is on the direct impacts of visitor spending. Visitors are defined as persons that stay overnight away from home, or travel more than fifty miles one-way on a non-routine trip. Only the expenditures related to specific trips are counted as visitor spending. Other travel related expenditures such as the consumption of durable goods (e.g., recreational vehicles or sporting equipment) or the purchase of vacation homes are not considered.

While such a definition of the travel industry (i.e., the trip related expenditures of visitors) is conservative, it is also in keeping with the notion of the travel industry as being an export-oriented industry for specific local communities. That is, visitors are important to regions because they inject money into the local economy. This focus on the export-oriented nature of the travel industry for local communities becomes blurred if the industry is defined so as to include non-trip related expenditures.

¹ Peter D. Kuhbach, Mark A. Planting, and Erich H. Strassner, “U.S. Travel and Tourism Satellite Accounts for 1998-2003,” *Survey of Current Business* 84 (September 2004): 43-59.

PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

There are three primary types of information that are measured and/or estimated in a travel industry account. The first is a measure of the **travel industry** in terms of both the characteristics of the business firms that sell travel goods and services and the characteristics of consumers that purchase travel industry goods and services. The second is a measure of the **demand segments** that consume travel industry goods and services. For example, the distinction between business and leisure travel is a measure of demand segments. The third is a measure of the **components of economic output** associated with the travel industry. The employee earnings generated by visitor spending is one such component. Travel-generated tax receipts are another. These three categories of information represent different aspects of the accounting ledger – they represent different ways of viewing or analyzing the travel industry.

The bulk of this paper will discuss these three types of information in terms of their conceptual foundations, the data requirements, and some of the more salient issues that users of this information should be aware of. There will also be some discussion of **indirect and induced effects** in that these effects can be reasonably estimated from the direct travel industry accounts. These secondary (versus direct) effects describe the relationship of the travel industry to other sectors of the larger economy.

The intent of this discussion will be to provide a general overview of the process of constructing travel industry accounts and the underlying similarity between the RTIM and a TTSA. More technical issues are generally placed in footnotes.

TRAVEL INDUSTRY

Defining the travel industry is probably the most critical and data intensive effort involved in developing a travel industry account. It is an exercise in matching supply (sellers of goods and services) with demand (the travelers that purchase those particular goods and services). It is complicated by the fact that no single industrial classification scheme provides a valid measure of the travel industry.² There are only three significant industrial classifications (Accommodations [NAICS 721], Scheduled Passenger Air Transportation [NAICS 481111] and Travel Arrangement and Reservation Services [NAICS 5615]) that *primarily* sell travel industry goods and services.³ Firms in other industries (retail, recreation, transportation) provide goods and services to both travelers and other types of consumers.

Because of this, most satellite accounts, as well as the RTIM, incorporate at least some information about the expenditures of visitors in order to define the supply of

² The North American Industrial Classification System (NAICS) is the current standard in the United States.

³ Even these industries are not purely travel. For example, the accommodations industry provides services to local residents (food service and meeting rooms). Passenger airlines also ship cargo on the same planes that carry passengers. Fortunately, it is usually possible to make adjustments for these non-travel components through the use of additional data.

visitor industry firms. For example, if there is an estimate of visitor-days and an estimate of how much the average visitor spends on food services per day, then an estimate of visitor spending on food services can be calculated. In most cases, this will be only a fraction of all food service sales in that residents are a larger market for most restaurants.⁴

The industry sectors that are usually matched to visitor spending in this way are: accommodations (NAICS 721), food service (722), arts, entertainment and recreation (71), and retail trade (44-45). A portion of transportation business is also part of the travel industry for obvious reasons.

In the case of the transportation sector, the definition and measurement of the travel industry component is more complicated because most transportation spending by visitors involves travel to and from the destination, rather than travel at or within the destination market. This is not an issue if the geographic scope of the travel industry market includes the origin and destination of travel. National travel industry accounts thus include all domestic passenger air transportation in the travel industry. The issue is more complicated at the state or regional level, however. Suppose, for example, that the focus of a travel industry account is the state of Arizona. How should the purchase of a round trip airline ticket by a Chicago resident traveling to Phoenix be treated in that only some of the economic impact of this spending will occur in Arizona? A reasonable approach would be to allocate only a portion of this spending (and related payroll, taxes, etc.) to Arizona and ignore the remainder for the purpose of creating a travel industry account for Arizona. However, if this procedure were followed for every state, the sum of the state accounts would be less than the national travel account. The state accounts would be additive if outbound air travel from each state were included. However, this is methodologically inconsistent with the construction of a national account, which does not include outbound travel as a component of domestic tourism demand. The approach used in the RTIM is to make a distinction between the *visitor industry*, that includes only visitor demand, and the *travel industry*, which includes visitor demand and that portion of outbound travel that can be attributed to the resident economy. For example, the passenger air transportation employment in Arizona can be divided between three groups of travelers: inbound, outbound, and pass-through. Only that employment attributable to inbound travel is part of the Arizona *visitor industry*. Employment attributable to outbound and pass-through travelers is included with the larger *travel industry*.⁵

⁴ The proportion can vary enormously among regions and localities, however. In many popular visitor destinations, the primary market for food service will be visitors. It should also be noted that even with reliable visitor survey data, there is still the issue of how to translate spending on food service *commodities* to the supply of food service by *industry*. As indicated in the footnote above, food service is also supplied by the accommodation industry.

⁵ The same issue arises with travel agencies and reservation services (NAICS 5615). Most of these services are probably related to outbound travel and are treated as such in the RTIM.

The following two tables display the specific industries that are included in the travel industry for the BEA's national TTSA and the RTIM. Although not identical, the industries are equivalent with only a few exceptions.⁶

**Bureau of Economic Analysis Tourism Industries
Distribution of Travel-Generated Compensation
in United States, 2007**

Accommodation & Food Services	38.1%
Traveler accommodations	21.5%
Food services and drinking places	16.6%
Transportation	23.3%
Air transportation	15.4%
Rail transportation	0.4%
Water transportation	1.2%
Interurban bus transportation	0.3%
Interurban charter bus transportation	0.2%
Urban transit systems & other tran.	1.7%
Taxi service	1.0%
Automotive equipment rental & leasing	2.0%
Automotive repair services	0.8%
Parking lots and garages	0.2%
Toll highways	0.1%
Recreation	11.2%
Scenic and sightseeing transportation	0.4%
Motion pictures and performing arts	1.1%
Spectator sports	2.3%
Participant sports	2.4%
Gambling	3.0%
All other recreation and entertainment	2.0%
Retail & Nondurable Goods Production	16.2%
Petroleum refineries	0.6%
Industries producing nondurable PCE commodities, excluding petroleum refineries	4.4%
Wholesale trade & tran. services	4.2%
Gasoline service stations	1.3%
Retail trade services, excluding gasoline service stations	5.8%
Travel Arrangement	7.3%
All other industries	2.2%
Total Tourism Compensation	100.0%

Source: Adapted from Eric S. Griffith and Steven L. Zemanek, "U.S. Travel and Tourism Satellite Accounts for 2005-2008," Survey of Current Business (June 2009): 37, table 6.

⁶ The major exception is that the BEA includes the production of consumer non-durables that are sold through retail outlets. This is not a major component and would be even less so at the level of the state.

RTIM Travel Impact Industries Matched to NAICS

Travel Impact Industry	NAICS Industry (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and Rural Bus Transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Arrangement Services	Travel Agencies (56151) Tour Operators (56152)

Source: Dean Runyan Associates

DEMAND SEGMENTS

The distinction between inbound and outbound travel has already been discussed in the previous section and in terms of the concepts of the *visitor industry* and the *travel industry*. Three other types of demand segments that are related exclusively to the *visitor industry* will be discussed here. The first two demand categories are reported by the BEA in their national TTSA. They are: **leisure versus business travel**, and **resident versus non-resident travel**. The third demand category is typically reported in the RTIM: **type of traveler accommodation**. These three demand categories will be discussed in turn.

The distinction between **leisure versus business travel** is useful for several reasons. Economists like to distinguish between personal consumption expenditures on the one hand and business expenditures on the other. Indeed, this distinction is central for the National Income and Product Accounts (NIPAs). Those in the travel industry are more likely to be interested in this distinction because leisure travelers represent a more “marketable” segment because their travel choices are less determined by economic and business factors. Furthermore, business and leisure travelers tend to have different spending profiles. The availability of this information in either a state or regional TTSA or RTIM is essentially dependent on the availability of survey data (as it is at the national level). It should be noted, however, that such estimates are considerably less reliable for smaller geographic areas because of the limitations of survey data. Even at the state level, year-to-year changes in the composition of this demand segment should be interpreted in conjunction with other data.

The distinction between **resident versus non-resident travel** is fundamental to a national TTSA because it mirrors the distinction between the domestic economy and international transactions. Non-resident travel in the United States is considered an export in the official international transaction accounts.⁷ The distinction is obviously also important because it is based on different political, legal, and currency regimes – factors that in themselves influence travel behavior. At the level of the state or region, the distinction between resident and nonresident travel is less important, although it is often reported.⁸ There are at least two reasons why this distinction is less useful at state and regional levels.

First, there is considerably less of an economic rationale for distinguishing resident and non-resident travel at the level of the state, or any other political jurisdiction within the United States, than there is at the national level. States do not maintain interstate trade balance sheets that chart the flow of goods and services across state boundaries. From an economic point of view, the administration of the tax system is the primary, if only, reason for this distinction. In the case of travel and tourism,

⁷ Conversely, the spending of U.S. visitors in other countries is treated as an import in the international transaction accounts.

⁸ The issues discussed with regard to the reliability of survey data for leisure versus business travel also applies to this category

the evaluation of the tax impacts of resident versus nonresident travel might also be important.⁹

Second, travel is behaviorally defined by length of distance from home (usually at least 50 miles one-way), trip purpose (non-routine), and/or the use of an overnight accommodation away from home. Rarely is domestic travel defined by virtue of crossing a geographic boundary.¹⁰ The operators of tourist attractions in local communities are generally less interested in the origin of visitors than in the revenue that they generate for their businesses. In terms of the economic impacts at the *local* level, the distinction between in-state residents, out-of-state residents and international visitors may not be relevant other than for the purpose of marketing. However, other geographic characteristics of the visitor (e.g., distance traveled, the specific area of origin) are generally more useful measures of the visitor market than whether the visitor is a resident or nonresident.

Finally, the distinction among different ***types of traveler accommodations*** is generally reported in the RTIM. Typically, these categories are:

- Visitors who stay in hotels, motels, B&Bs., and similar lodging facilities
- Visitors who stay at campsites
- Visitors who stay in the private homes of friends or relatives
- Visitors who stay in vacation or second homes
- Visitors who do not stay in overnight accommodations on their trip away from home (day visitors).

These distinctions can be useful because estimates of economic impacts are often used for different purposes. The total of all accommodation types, of course, is an estimate of the total magnitude of the visitor industry. Visitors who stay in commercial lodging such as hotels and motels are most likely to have the greatest economic impact on a person-day basis. These visitors are also more likely to be influenced by marketing efforts. In urban areas, a large proportion will represent business travel. In other words, the type of accommodation category can be used in conjunction with other types of data to analyze the market characteristics of visitors.

⁹ Nonresident visitors who pay taxes in their destination state represent an unambiguous gain for the state. This effect is less clear for resident travelers within the state.

¹⁰ In essence, state level travel impact estimates really represent an aggregation of smaller geographic units, such as counties or regions. Populous states with large landmasses (e.g., California or Texas) will have a higher proportion of resident travel than small states (e.g., Rhode Island or Delaware).

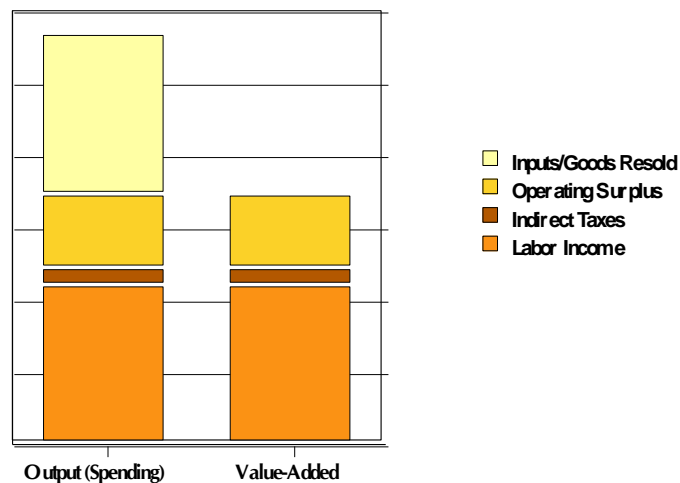
COMPONENTS OF INDUSTRY OUTPUT

Because both the RTIM and the TTSA are empirically linked to NAICS industry accounts, it is possible to provide estimates of different components of economic output. The major economic components most often estimated are:¹¹

- Travel spending (Gross Output)
- Value-added (Gross Product)
- Earnings (labor income)
- Indirect business taxes (sales, excise, property taxes & fees).

The relationship of these components is shown below. As indicated, the value-added of a particular industry (the bar on the right) is equal to gross output (travel spending) minus the intermediate inputs used by travel industry businesses to produce the good or service. Restaurants, for example, prepare and serve the food products that are purchased from suppliers. Airlines purchase or lease airplanes from other firms. These intermediate inputs are not counted as part of the value-added of the travel industry. They are counted as value-added in other industries (e.g., agriculture, aerospace manufacturing).

Components of Industry Output



The distinction between gross output and value-added is probably even more important at the state or regional level. This is because the intermediate inputs that are purchased from other industries are even more likely to be purchased from businesses located in different regions or states. For example, the economic impact

¹¹ There are some small differences between the BEA TTSA and the RTIM in what these components include. The BEA allocates proprietor income to Operating Surplus, the RTIM allocates it to Labor Income. The RTIM does not have an estimate of property taxes in indirect taxes. Overall, property taxes on businesses are a relatively small proportion of indirect taxes.

of air passenger travel in the state of Hawaii should not include the purchase of airplanes manufactured in other parts of the world. Travel industry value-added is a more meaningful measure of the true economic impact of visitor spending in Hawaii because a portion of the economic impact of visitor spending in the state will actually occur elsewhere.¹²

Value-added can also be viewed in terms of the distribution or payout of industry receipts, exclusive of those paid to other firms for intermediate inputs. Some of the receipts are distributed to labor as wages, benefits, and proprietor income. Some receipts are paid to government as indirect taxes. These taxes are called “indirect” because most of them are actually paid by consumers in the form of sales or excise taxes.¹³ The remainder leaves gross operating surplus. Out of gross operating surplus various payments are made in the form of dividends, interest, and other payments, or retained by the firm. The sum of these three broad categories of payments is equal to travel industry value-added. To summarize:

Value-added = Spending *less* intermediate goods & services, or

Value-added = Labor Income *plus* indirect business taxes *plus* gross operating surplus.

The RTIM is similar to the TTSA in that it also provides estimates of these components of economic output. Travel spending, earnings, and tax impacts are generally provided at the state or regional level. Value-added is generally reported at the state-level only (sometimes referred to as Travel Industry Gross State Product). At the level of the state, travel industry value-added or GSP is an important measure – more economically meaningful than travel spending.¹⁴ For smaller geographic areas, however, the rationale for reporting value-added is less clear. First, there are real data limitations and data costs in deriving these estimates. Second, ***the most important components of value added for the travel industry are earnings and tax receipts***. Because the travel industry is relatively labor intensive and because a large proportion of travel industry goods and services are subject to excise and sales taxes, these two components of value-added (labor income and indirect taxes) are relatively high for the travel industry. The local effects of gross operating surplus are generally less important and certainly much more difficult to assess than are earnings and tax impacts. The relevance of earnings and tax receipts is also in keeping the export-oriented emphasis of the travel industry: earnings and tax receipts are more likely to stay in the local economy than is operating surplus.

¹² It should also be noted the value of the intermediate inputs used by travel industry firms will not necessarily disappear if the travel industry stops buying them. Aerospace firms will shift their production to other users (e.g., military). Agriculture will seek new markets for their products.

¹³ Other taxes included here are property taxes, business franchise taxes, and other fees. Income taxes are not included, because they are paid out of operating surplus.

¹⁴ It is also possible to compare different industries with respect to their value-added. It is more difficult and less useful to compare industries on the basis of sales.

INDIRECT, INDUCED AND SECONDARY EFFECTS

To this point, the discussion of travel industry accounts has referred only to the direct output components. That is, the ripple effects of the re-spending of travel industry receipts throughout the larger economy have not been analyzed. The structure of both the TTSA and the RTIM permit such analysis.

- **Indirect** effects refer to the intermediate inputs used to produce the final product or service, providing that those inputs are themselves produced within the designated geographic area.
- **Induced** effects refer to the purchase of goods and services by *employees* that are attributable to direct and indirect impacts. These induced impacts are derived from economic data that describe the purchasing patterns of households. For example, employees of all the designated export-oriented industries will spend their income on food, household durables, health care, and so on.
- The sum of indirect and induced impacts is sometimes referred to as the **secondary** effect. These secondary impacts may be as great or greater than the direct impact alone.
- The ratio of the total effects (direct plus either indirect, induced, or secondary) to the direct effects is the **multiplier**.

The BEA reports the **indirect** components of economic output. This is equivalent to domestic travel spending less the goods and services imported from abroad to meet domestic demand. For travel, these imports would include souvenirs manufactured in China and petroleum extracted in Saudi Arabia. The indirect output multiplier for 2002 was 1.76. The ratio of domestic travel spending to travel industry value-added was 1.88. The difference reflects the intermediate inputs for travel imported from abroad.

At the state level, these indirect output multipliers are typically lower because relatively more of the intermediate inputs are purchased from outside of the state. At the county or metropolitan level, the multipliers are generally even lower for the same reason. Furthermore, the estimates are usually less reliable because of the data limitations of the regional input-output model used to estimate the indirect effects.

The BEA does not report **induced** effects – the effect of household spending of the direct and indirect labor income. Typically, these induced effects will be larger than the indirect effects at the state or regional level, in part because they are based on both the direct and indirect components.¹⁵ As with indirect effects, the induced effects will also tend to be lower for smaller economic areas and the reliability of the estimates will be less.

¹⁵ The induced effects can be estimated with the Implan model maintained by the Minnesota Implan Group.

Secondary effects should be interpreted cautiously. These effects describe the relationship of economic transactions at a point in time. These relationships will not necessarily remain constant with a change in direct economic output. This is because all economic resources have alternative uses. Because of this, it is often difficult to determine the effect of an increase or decrease in visitor spending on the larger economic system over time.

THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS COMPARED

This appendix has provided an overview of Dean Runyan Associates RTIM and the Bureau of Economic Analysis' domestic TTSA. These travel industry accounts are similar in terms of how they define the travel industry and the measures of the industry that are reported. The differences stem largely from their different levels of analysis – the BEA provides estimates at the national level only, while the RTIM's are typically constructed on a state or regional level. Because of this geographic focus, the RTIM provides a distinction between the visitor industry and the travel industry. The RTIM also provides measures of all of the components of economic output and secondary effects at the state or large region level. At smaller units of analysis, however, the emphasis is on earnings and tax receipts generated by travel spending as these are the most reliable and meaningful measures of the economic impact of travel at the local level.

Oregon Earnings and Employment by Industry Sector, 2015

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	18,926	15.0%	299	12.5%
Agriculture, Forestry, Fishing and related	3,215	2.5%	90	3.8%
Mining	123	0.1%	6	0.2%
Manufacturing	15,588	12.3%	203	8.5%
<i>**Travel</i>	2,844	2.3%	106	4.4%
Primarily Non Export-Oriented	61,240	48.5%	1,150	48.2%
Construction	7,527	6.0%	117	4.9%
Utilities	624	0.5%	5	0.2%
Wholesale trade	6,465	5.1%	86	3.6%
Retail trade	8,320	6.6%	251	10.5%
Real estate and rental and leasing	2,239	1.8%	111	4.6%
Management of companies and enterprises	5,986	4.7%	44	1.9%
Administrative and waste services	4,725	3.7%	129	5.4%
Other services, except public administration	4,785	3.8%	126	5.3%
Government and government enterprises	20,569	16.3%	282	11.8%
Mixed	46,210	36.6%	939	39.3%
Transportation and warehousing	3,954	3.1%	70	2.9%
Information	3,410	2.7%	42	1.8%
Finance and insurance	5,591	4.4%	91	3.8%
Professional and technical services	9,739	7.7%	154	6.4%
Educational services	1,673	1.3%	61	2.5%
Health care and social assistance	15,866	12.6%	279	11.7%
Leisure and Hospitality	5,977	4.7%	243	10.2%
Oregon Total**	126,376	100.0%	2,388	100.0%

**Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).

Industry Groups

Accommodation & Food Services

- Food services and drinking places
- Hotels and motels, including casino hotels
- Other accommodations

Arts, Entertainment & Recreation

- Amusement parks, arcades, and gambling industries
- Bowling centers
- Fitness and recreational sports centers
- Independent artists, writers, and performers
- Museums, historical sites, zoos, and parks
- Other amusement and recreation industries
- Performing arts companies
- Promoters of performing arts and sports and agents for public figures
- Spectator sports companies

Construction

- Construction of new nonresidential commercial and health care structures
- Construction of new nonresidential manufacturing structures
- Construction of new residential permanent site single- and multi-family structures
- Construction of other new nonresidential structures
- Construction of other new residential structures
- Maintenance and repair construction of nonresidential structures
- Maintenance and repair construction of residential structures

Education and Health Services

- Child day care services
- Community food, housing, and other relief services, including rehabilitation services
- Home health care services
- Individual and family services
- Medical and diagnostic labs and outpatient and other ambulatory care services
- Nursing and residential care facilities
- Offices of physicians, dentists, and other health practitioners
- Other private educational services
- Private elementary and secondary schools
- Private hospitals
- Private junior colleges, colleges, universities, and professional schools

Financial Activities

- Commercial and industrial machinery and equipment rental and leasing
- Funds, trusts, and other financial vehicles
- General and consumer goods rental except video tapes and discs
- Imputed rental activity for owner-occupied dwellings
- Insurance agencies, brokerages, and related activities
- Insurance carriers
- Lessors of nonfinancial intangible assets
- Monetary authorities and depository credit intermediation activities
- Nondepository credit intermediation and related activities
- Real estate establishments
- Securities, commodity contracts, investments, and related activities
- Video tape and disc rental

Information

- Book publishers
- Cable and other subscription programming
- Data processing, hosting, ISP, web search portals and related services
- Directory, mailing list, and other publishers
- Internet publishing and broadcasting
- Motion picture and video industries
- Newspaper publishers
- Other information services
- Periodical publishers
- Radio and television broadcasting
- Software publishers
- Sound recording industries
- Telecommunications

Manufacturing & Utilities

(280 industries)

Natural Resources and Mining

- All other crop farming
- Animal production, except cattle and poultry and eggs
- Cattle ranching and farming
- Commercial Fishing
- Commercial hunting and trapping
- Commercial logging
- Cotton farming
- Dairy cattle and milk production
- Drilling oil and gas wells
- Extraction of oil and natural gas
- Forestry, forest products, and timber tract production
- Fruit farming
- Grain farming
- Greenhouse, nursery, and floriculture production
- Mining and quarrying other nonmetallic minerals
- Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals
- Mining and quarrying stone
- Mining coal
- Mining copper, nickel, lead, and zinc
- Mining gold, silver, and other metal ore
- Mining iron ore
- Oilseed farming
- Poultry and egg production
- Sugarcane and sugar beet farming
- Support activities for agriculture and forestry
- Support activities for oil and gas operations
- Support activities for other mining
- Tobacco farming
- Tree nut farming
- Vegetable and melon farming

Other Services

- Automotive repair and maintenance, except car washes
- Car washes
- Civic, social, professional, and similar organizations
- Commercial and industrial machinery and equipment repair and maintenance
- Death care services
- Dry-cleaning and laundry services
- Electronic and precision equipment repair and maintenance
- Grantmaking, giving, and social advocacy organizations
- Other personal services
- Personal and household goods repair and maintenance
- Personal care services
- Private household operations
- Religious organizations

Professional and Business Services

- Accounting, tax preparation, bookkeeping, and payroll services
- Advertising and related services
- All other miscellaneous professional, scientific, and technical services
- Architectural, engineering, and related services
- Business support services
- Computer systems design services
- Custom computer programming services
- Employment services
- Environmental and other technical consulting services
- Facilities support services
- Investigation and security services
- Legal services
- Management of companies and enterprises
- Management, scientific, and technical consulting services
- Office administrative services
- Other computer related services, including facilities management
- Other support services
- Photographic services
- Scientific research and development services
- Services to buildings and dwellings
- Specialized design services
- Travel arrangement and reservation services
- Veterinary services
- Waste management and remediation services

Public Administration

- Federal electric utilities
- Other Federal Government enterprises
- Other state and local government enterprises
- State and local government electric utilities
- State and local government passenger transit
- US Postal Service

Trade

- Retail Nonstores - Direct and electronic sales
- Retail Stores - Building material and garden supply
- Retail Stores - Clothing and clothing accessories
- Retail Stores - Electronics and appliances
- Retail Stores - Food and beverage
- Retail Stores - Furniture and home furnishings
- Retail Stores - Gasoline stations
- Retail Stores - General merchandise
- Retail Stores - Health and personal care
- Retail Stores - Miscellaneous
- Retail Stores - Motor vehicle and parts
- Retail Stores - Sporting goods, hobby, book and music
- Wholesale trade businesses

Transport

- Automotive equipment rental and leasing
- Couriers and messengers
- Scenic and sightseeing transportation and support activities for transportation
- Transit and ground passenger transportation
- Transport by air
- Transport by pipeline
- Transport by rail
- Transport by truck
- Transport by water
- Warehousing and storage