

# **Oregon Travel Impacts**

## *1991-2012p*

April 2013

*Prepared for the*

Oregon Tourism Commission  
Salem, Oregon

# **OREGON TRAVEL IMPACTS, 1991-2012P**

STATEWIDE PRELIMINARY ESTIMATES

DETAILED COUNTY ESTIMATES

OVERNIGHT VISITOR VOLUME

April 2013

*Prepared for*

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## EXECUTIVE SUMMARY

This report provides detailed statewide, regional and county travel impact estimates for Oregon from 1991 to 2012. The report also provides average spending and volume estimates for overnight visitors for most counties. The estimates for 2012 are preliminary. Secondary impacts and travel industry GDP are provided at the state level.

### TRAVEL SPENDING, EMPLOYMENT AND EARNINGS ALL UP OVER 2011

The Oregon travel industry continued to exhibit moderate growth in spending, visitation and employment during 2012. Travel-generated employment increased for the second consecutive year, though it has not recovered to its pre-recession level. In general, Oregon travel industry trends reflect those of the larger U.S. travel industry.

- **Spending.** Statewide travel spending, \$9.2 billion, increased by 3.2 percent in current dollars.
- **Travel Activity.** Overnight visitation increased by 1.5 percent for the year. Visitor air travel to Oregon destinations (2.85 million) was up by 7 percent and is now roughly at the peak attained in 2007. Room demand, as measured by Smith Travel Research, increased by 2.6 percent for the year.<sup>1</sup>
- **Employment.** Preliminary estimates indicate that travel industry employment grew by 1,500 jobs, an increase of 1.7 percent following an increase of 1,600 jobs from 2010 to 2011.
- **Secondary Impacts.** The re-spending of travel-related revenues by businesses and employees supported 41,000 additional jobs outside of the travel industry with \$1.4 billion in earnings in 2012. Most of these jobs were in various professional and business services.
- **GDP.** The Gross Domestic Product of the travel industry was \$3.4 billion in 2012. 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).

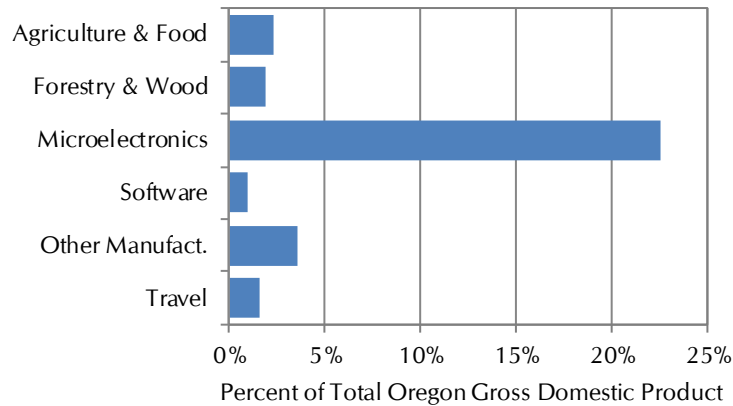
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<sup>1</sup> The Smith Travel Research reports were prepared for the Oregon Tourism Commission.

## THE OREGON TRAVEL INDUSTRY IS A LEADING EXPORT-ORIENTED INDUSTRY

Travel and tourism is one of the most important ***“export-oriented”*** industries in Oregon. Spending by visitors generates sales in lodging, food services, recreation, transportation and retail businesses – the “travel industry.” These sales support jobs for Oregon residents and contribute tax revenue to local and state governments. Travel is especially important in the non-metropolitan areas of the state, where manufacturing and traded services are less prevalent.

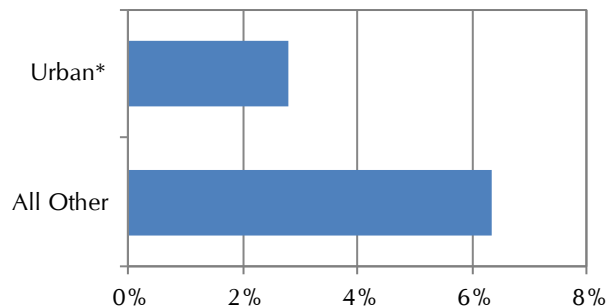
### ***GDP of Leading Oregon Export-Oriented Industries (2011)***



## 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, more rural counties have a bigger share of travel-generated employment.

### ***Travel-Generated Employment as a Percent of Total Employment (2011)***



\*The urban counties are Clackamas, Lane, Marion, Multnomah and Washington.

## **Oregon Travel Impacts, 1991-2012p**

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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 1991 to 2012. 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 2012 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 Scott West, Chief Strategy Officer, and Todd Davidson, Chief Executive Officer of Travel Oregon, for their support and assistance.

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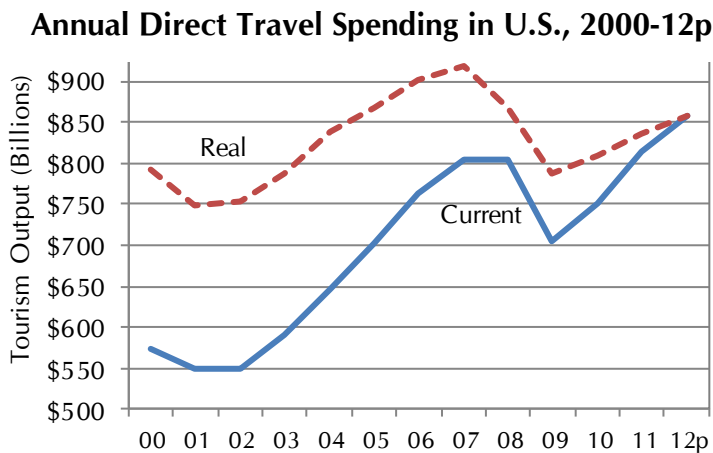
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## I. U.S. TRAVEL



Most of the 2012 estimates in this section are preliminary. The estimates for spending and employment were made by Dean Runyan Associates and are based on preliminary fourth quarter data from the Bureau of Economic Analysis (BEA) Tourism Satellite Accounts.<sup>1</sup> International arrival data was available through October of 2012.

The following two graphs are derived from the BEA data. Both graphs show direct tourism output for the United States – spending by domestic and international visitors.



Spending by domestic and international visitors was \$858 billion in 2012(preliminary) in current dollars. This represents a 5.4 percent increase over 2011. When adjusted for changes in prices (constant dollars), spending increased by 2.7 percent – compared to a 3.2 percent increase from 2010 to 2011. In real terms, tourism output has still not recovered from the steep decline in 2008 and 2009.



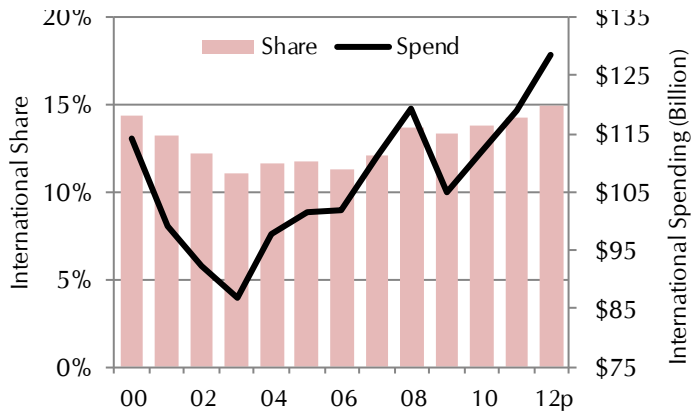
Real travel spending has increased in every quarter since the first quarter of 2009, with the exception of 2012-3Q. The average quarterly rate of increase during this period has been 0.7 percent. The average quarterly rate of decrease from 2008-Q1 to 2009-Q2 was 2.8 percent.

<sup>1</sup> See [www.bea.gov/industry/index.htm](http://www.bea.gov/industry/index.htm). Released March 20, 2013. Preliminary 2012 estimates and constant (2012) travel spending estimates by Dean Runyan Associates.

The following three graphs are concerned with international travel to the U.S. The first graph is derived from the Bureau of Economic Analysis Travel and Tourism Satellite Accounts and International Transactions.<sup>2</sup> The following two graphs are derived from the monthly (through October) international arrival data released by the Office of Travel and Tourism Industries.<sup>3</sup>

### International Direct Travel Spending in U.S. Amounts in Real Dollars (Billions)

International Share of U.S. Internal Travel\*



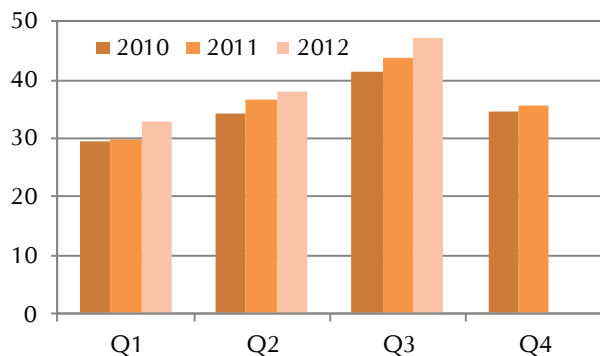
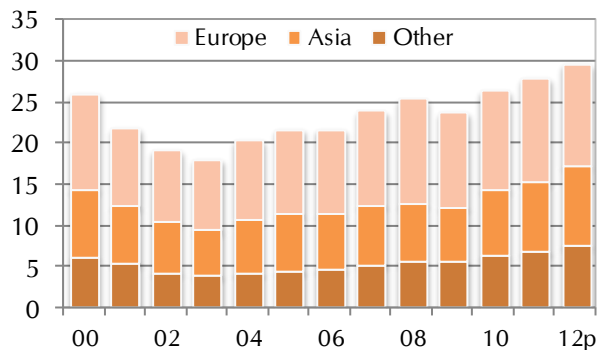
\*Airfares for international flights on U.S. air carriers are not included.

In real dollars, spending by international visitors in the U.S. increased by 7.9 percent from 2011 to 2012 (preliminary) – the third continual year of growth. The international share of U.S. travel spending in 2011 was 15 percent – compared to 11 percent in 2003.

Some of the recent increase in international visitor spending, has been due to favorable exchange rates with respect to the U.S. dollar. Overseas arrivals to the U.S. increased by 5.8% in 2011 and by a similar amount in 2012.

It should also be noted that the increased share of international spending in recent years is in part a function of the relatively modest sluggish growth of domestic travel spending.

### Overseas Arrivals (Millions)



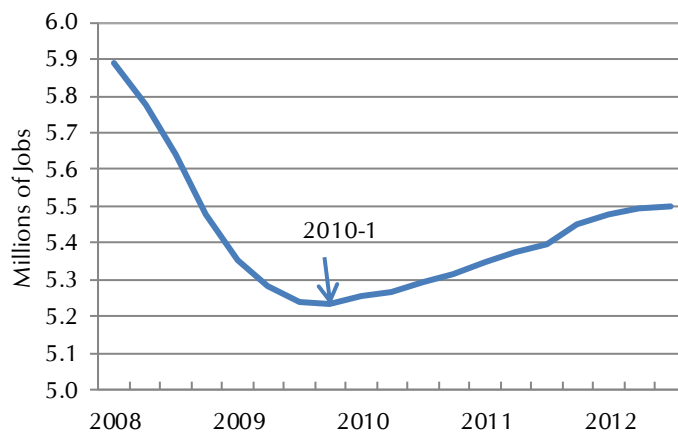
<sup>2</sup> See [www.bea.gov/international/index.htm](http://www.bea.gov/international/index.htm) for quarterly international estimates of travel and tourism exports (travel to the U.S. by international visitors). Preliminary 2011 estimates by Dean Runyan Associates

<sup>3</sup> See <http://tinnet.ita.doc.gov/research/monthly/index.html>. Preliminary 2012 estimates by Dean Runyan Associates.

The following two graphs show quarterly employment trends since 2008 for seasonally adjusted data.\* Travel-generated employment was at its lowest level in the first quarter of 2010 – one year after the low point for real travel spending (see graph, page 2). This is why employment is generally a lagging indicator of overall economic activity. One of the reasons for this is that employers often adjust the length of work before making employment decisions. The second graph indicates this – the average hourly work week was at its low-point in the first quarter of 2009 and began to increase one year before any growth in employment.

### U.S. Travel Industry Employment

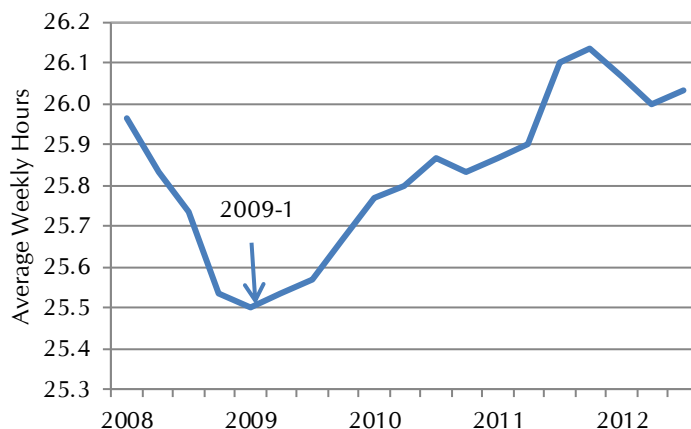
Seasonally Adjusted at Annual Rates  
2008-Q1 to 2012-Q4



Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts. Travel industry employment includes the travel-supported component of accommodations, food services, transportation, retail and recreation (including arts and entertainment).

### U.S. Leisure & Hospitality Average Weekly Hours

Seasonally Adjusted, 2009-Q1 to 2012-Q4



Source: Bureau of Labor Statistics Current Employment Survey. The Leisure and Hospitality sectors include all businesses in recreation (NAICS 71) and accommodation and food services (NAICS 72).

\*Seasonal adjustment permits quarter to quarter trend analysis.

Nationally, actual employment and hours worked in leisure and hospitality are greatest in the 3<sup>rd</sup> quarter.

## 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 showed increases from 2011 to 2012. There have now been three consecutive years of positive growth following the steep decline in visitation, spending and employment brought on by the 2007-2009 recession.
- Travel spending increased by 3.2 percent from 2011 to 2012 to \$9.2 billion. An estimated 25.4 million overnight visitors traveled to Oregon destinations in 2012 (preliminary). This represents a 1.5 percent increase over 2011. Visitor air arrivals to Oregon increased by 7 percent for the year (preliminary).
- Total travel generated employment was 91,100 in 2012p. This represents a 1.7 percent increase over 2011, the second consecutive year of employment growth following the steep decline from 2008 to 2010. Changes in employment typically lag changes in business income following deep recessions. Visitor-generated employment will probably continue to expand with continuing growth in visitation.
- The Gross Domestic Product of the travel industry was \$3.4 billion in 2012. 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 2012, these secondary impacts were equivalent to 41,000 jobs with earnings of \$1.4 billion.



## ANNUAL TRAVEL TRENDS

Total direct travel spending in Oregon was \$9.2 billion in 2012. The increase from 2011 to 2012 (3.2 percent) followed a 4.6 percent increase from 2010 to 2011.

However, in real terms the increase was greater because price increases for transportation were less (see graph, next page). Travel-generated employment increased for the second consecutive year. Moderate employment growth should continue as visitor activity continues to expand.<sup>1</sup>

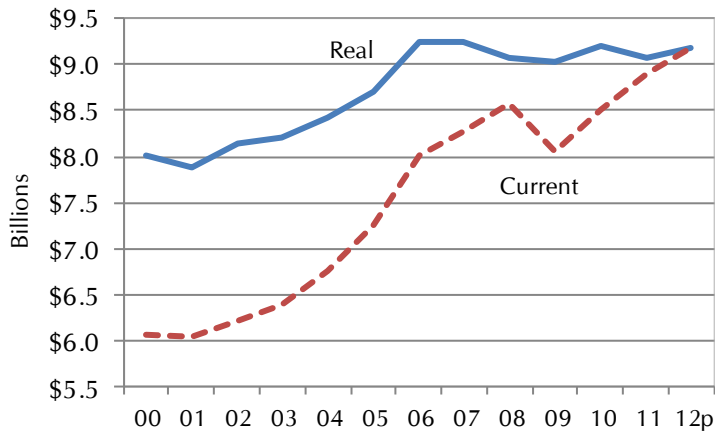
### Oregon Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Billion)	(\$Billion)	(Thousand)	Local	State	Federal
1991	3.7	1.0	70.5	31	93	200
1992	3.9	1.0	70.4	34	102	218
1993	4.2	1.1	71.8	42	109	231
1994	4.4	1.1	73.0	45	115	242
1995	4.6	1.2	74.8	50	120	256
1996	4.9	1.3	76.2	54	123	269
1997	5.2	1.3	76.7	57	127	284
1998	5.4	1.4	79.6	59	130	297
1999	5.7	1.5	80.6	63	136	312
2000	6.1	1.6	82.2	72	145	333
2001	6.1	1.6	83.8	73	146	332
2002	6.2	1.6	85.4	76	147	345
2003	6.4	1.6	84.5	77	150	348
2004	6.8	1.7	84.9	82	163	365
2005	7.2	1.8	85.8	90	171	385
2006	8.0	1.9	90.5	102	187	416
2007	8.3	2.0	93.5	110	195	441
2008	8.6	2.1	94.8	112	200	450
2009	8.1	2.0	88.9	110	187	438
2010	8.5	2.0	88.0	109	193	446
2011	8.9	2.1	89.6	120	230	422
2012p	9.2	2.2	91.1	127	236	442
<i>Annual Percentage Change</i>						
11-12p	3.2	6.4	1.7	5.4	2.9	4.6
91-12p	4.5	4.1	1.2	7.0	4.5	3.8

Note: Estimates for 2012p are preliminary. The percentage change for 1991-2012p refers to the average annual percentage change. These direct travel impacts do not include secondary (indirect and induced) impacts. One-way visitor airfares are included. Total earnings include wage and salary disbursements, other earned income and proprietor income. Employment includes full- and part-time payroll employees and self-employed.

<sup>1</sup> Preliminary estimates for employment are the most subject to revision because of data limitations.

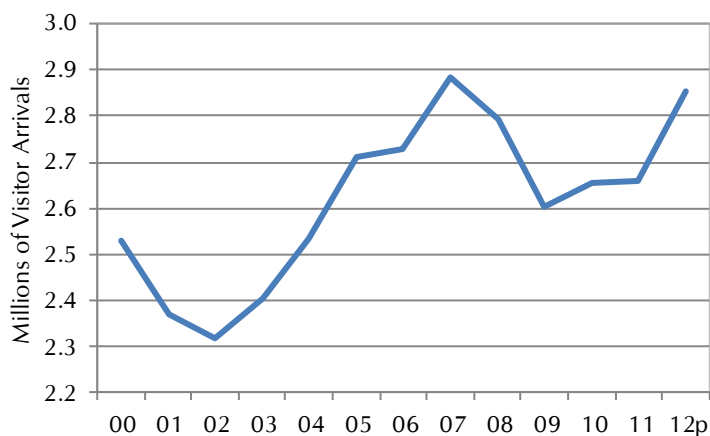
### Oregon Direct Travel Spending Real and Current Dollars



Travel spending increased by 3.2 percent from 2011 to 2012p, the third consecutive year of growth.

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

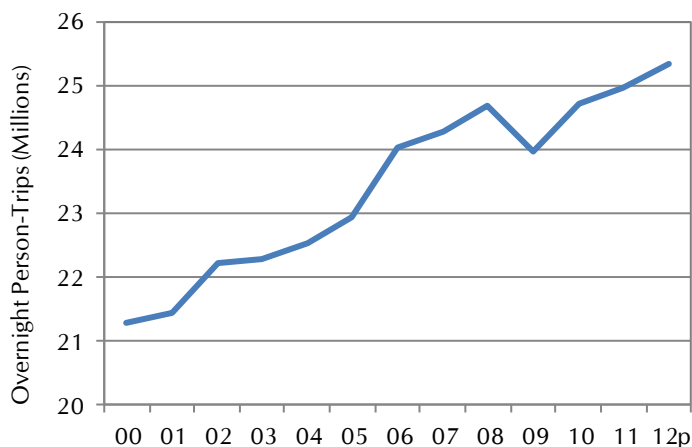
### Air Passenger Visitor Arrivals to Oregon U.S. Air Carriers



Visitor air arrivals to Oregon increased by 7 percent from 2011 to 2012(p). Visitor arrivals on domestic flights (2.85 million) have reached the level previously attained in 2007.

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

### Oregon Overnight Person-Trips



There were 25.4 million overnight person-trips to Oregon destinations in 2012, an increase of 1.5 percent from 2011, following a 1.0 percent increase the preceding year.

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 Oregon Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$353	\$883	\$152	\$375	2.3	2.5
Private Home	\$101	\$401	\$44	\$170	2.3	4.0
Other Overnight	\$123	\$458	\$37	\$138	3.3	3.7
All Overnight	\$189	\$620	\$77	\$251	2.5	3.3

Note: The average daily expenditures for visitors to the state of Oregon include an estimate of one-way airfares and all ground transportation spending in the state. The average daily spending estimates for counties and regions in the following sections of this report do not include all of these transportation expenditures.

### Oregon Overnight Visitor Volume, 2009-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	24,765	25,427	26,177	10,651	10,928	11,270
Private Home	40,053	40,212	40,489	17,334	17,388	17,531
Other Overnight	16,234	16,006	16,006	4,892	4,829	4,829
All Overnight	81,052	81,646	82,672	32,878	33,145	33,630

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	10,063	10,319	10,614	4,272	4,379	4,511
Private Home	10,314	10,360	10,436	4,385	4,402	4,436
Other Overnight	4,362	4,300	4,300	1,314	1,297	1,297
All Overnight	24,740	24,978	25,351	9,972	10,077	10,243

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.

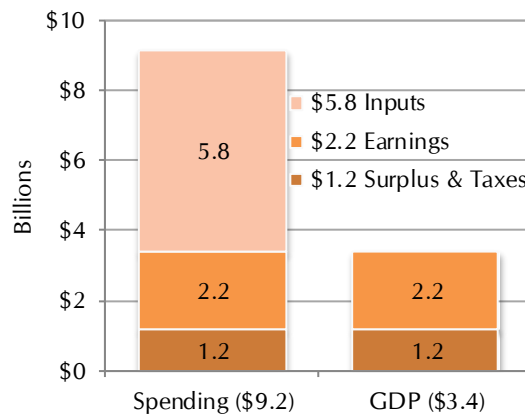
## OREGON TRAVEL INDUSTRY GROSS DOMESTIC PRODUCT

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 \$3.4 billion in 2012.

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.<sup>2</sup>

**Oregon Travel Industry Gross Domestic Product, 2012p**



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

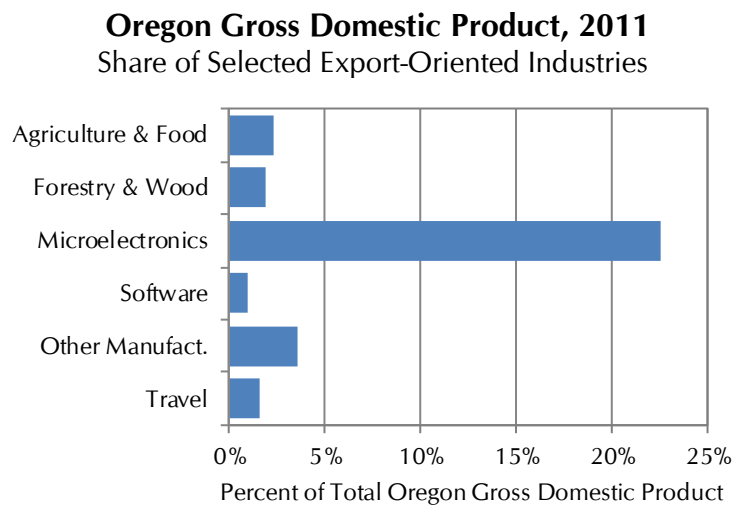
<sup>2</sup> Over 40 percent of these intermediate inputs are purchased from other Oregon businesses.

## GROSS DOMESTIC PRODUCT OF OREGON EXPORT-ORIENTED INDUSTRIES

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations.<sup>3</sup> 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 2011. 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.



Source: Dean Runyan Associations 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 2011. GDP estimates by Dean Runyan Associates.

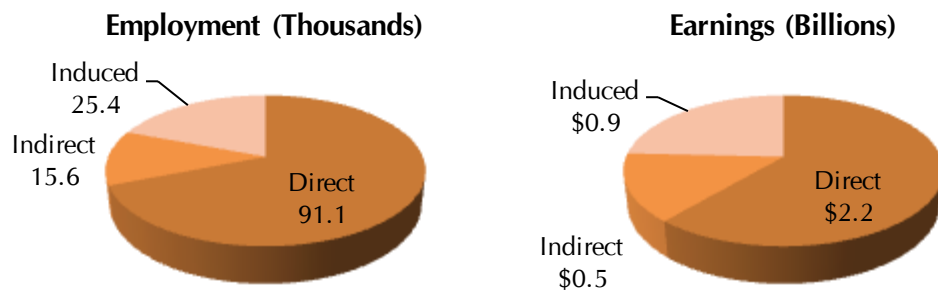
<sup>3</sup> See also Appendices A and E.

## 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, 2012p



Note: Indirect and induced impacts estimated by Dean Runyan Associates with Minnesota IMPLAN model. Percentages may not add to 100% due to rounding. Total direct and secondary employment was 132,100 jobs. The employment multiplier is 1.45 (132.1/91.1). Total direct and secondary earnings were \$3.6 billion. The earnings multiplier is 1.63 (\$3.62/\$2.22).

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:

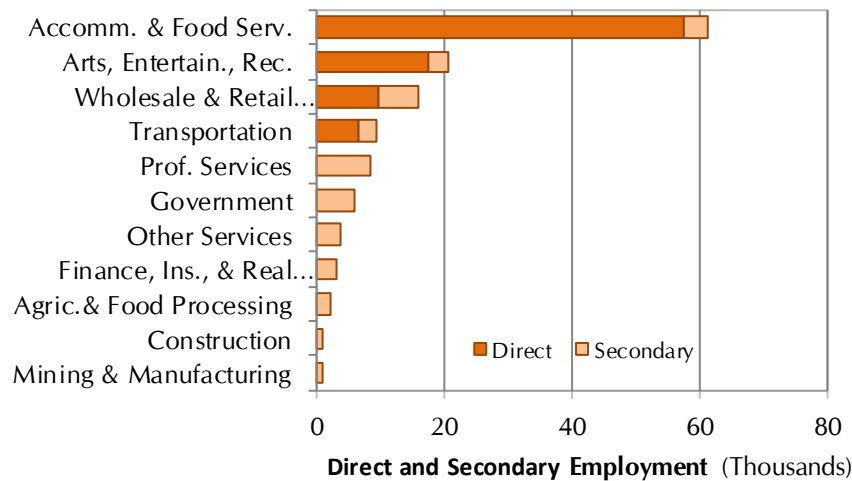
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Retail Trade**
- **Transportation**

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.

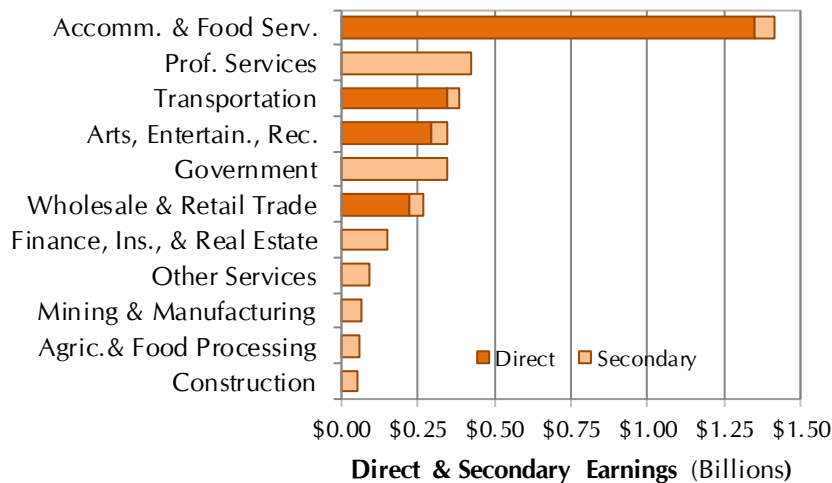
The indirect and induced impacts of travel spending are found in all eleven-industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

- **Professional Services** (8,300 jobs and \$427 million earnings). Legal, medical, educational and other professional services are utilized by travel businesses (indirect effect) and by employees of these firms (induced effect).
- **Other Services** (3,600 jobs and \$92 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops. Similarly, travel businesses utilize a number of service providers, such as laundry, maintenance and business services.
- **Government** (5,800 jobs and \$349 million earnings). Employees of travel-related businesses pay fees to attend public educational institutions and to operate motor vehicles.
- **Finance, Insurance and Real Estate** (3,200 jobs and \$151 million earnings). Employees and businesses use the services of financial institutions, insurers and real estate businesses.

### Direct and Secondary Employment Generated by Travel Spending in Oregon, 2012p



### Direct and Secondary Earnings Generated by Travel Spending in Oregon, 2012p



See notes at end of table on page 20.

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 & Secondary Travel-Generated Earnings in Oregon, 2012p

(\$ Million)

Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	1,348.8	22.3	45.3	67.6	1,416.4
Professional Services	0.0	155.7	271.4	427.1	427.1
Transportation	345.8	36.5	4.3	40.9	386.6
Arts, Entertainment & Recreation	295.1	40.9	13.1	54.0	349.1
Government	0	36.7	312.2	348.9	348.9
Retail Trade	225	4.3	36.1	40.4	265.8
Finance, Ins., & Real Estate	0	69.8	81.1	151.0	151.0
Other Services	0	52.5	39.8	92.3	92.3
Mining & Manufacturing	0	39.5	28.7	68.2	68.2
Agriculture & Food Processing	0	42.1	14.6	56.8	56.8
Construction	0	23.0	30.5	53.5	53.5
All Industries	2,215.1	523.5	877.2	1,400.7	3,615.9

### Direct & Secondary Travel-Generated Employment in Oregon, 2012p

(thousand jobs)

Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	57.5	1.2	2.5	3.7	61.2
Arts, Entertainment & Recreation	17.4	2.5	0.8	3.3	20.7
Wholesale & Retail Trade	9.6	1.3	5.0	6.3	15.9
Transportation	6.6	1.9	0.9	2.8	9.4
Professional Services	0	2.6	5.7	8.3	8.3
Government	0	0.4	5.4	5.8	5.8
Other Services	0	1.7	1.9	3.6	3.6
Finance, Ins., & Real Estate	0	1.6	1.7	3.2	3.2
Agriculture & Food Processing	0	1.5	0.5	2.1	2.1
Construction	0	0.4	0.6	1.0	1.0
Mining & Manufacturing	0	0.5	0.4	0.9	0.9
All Industries	91.1	15.6	25.4	41.0	132.1

Sources: Dean Runyan Associates and Minnesota Implan Group.

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 2002 through 2012p are shown on the following page.

## Oregon Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
Other Travel*	670	726	892	911	982	962	964
Total Direct Spending	6,213	6,751	8,022	8,572	8,503	8,894	9,177
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>							
Hotel, Motel	2,379	2,620	3,289	3,689	3,552	3,802	3,982
Private Home	1,199	1,305	1,499	1,635	1,675	1,738	1,777
Campground	341	367	379	422	402	414	419
Vacation Home	119	132	149	167	164	173	175
Day Travel	1,505	1,601	1,813	1,747	1,730	1,805	1,858
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	963	1,043	1,307	1,431	1,358	1,438	1,510
Food Service	1,289	1,381	1,590	1,697	1,767	1,829	1,928
Food Stores	456	493	525	574	566	594	613
Local Tran. & Gas	703	922	1,260	1,536	1,332	1,566	1,591
Arts, Ent. & Rec.	796	825	899	886	872	881	906
Retail Sales	910	896	968	935	952	973	1,001
Visitor Air Tran.	425	465	581	602	675	648	665
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	898	961	1,134	1,252	1,219	1,246	1,349
Arts, Ent. & Rec.	235	238	265	301	279	285	295
Retail**	177	193	208	217	214	216	225
Ground Tran.	40	43	48	52	49	51	54
Visitor Air Tran.	94	82	92	93	99	106	110
Other Travel*	181	164	178	180	166	179	182
Total Direct Earnings	1,625	1,682	1,925	2,095	2,025	2,083	2,215
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	51.0	51.3	55.8	58.6	55.2	56.3	57.5
Arts, Ent. & Rec.	16.6	16.3	17.1	18.4	16.9	17.2	17.4
Retail**	9.1	9.5	9.9	9.9	9.5	9.5	9.6
Ground Tran.	1.8	1.8	1.8	1.9	1.7	1.8	1.8
Visitor Air Tran.	2.2	1.9	1.9	2.0	1.7	1.7	1.7
Other Travel*	4.8	4.1	4.0	4.1	3.1	3.1	3.1
Total Direct Employment	85.4	84.9	90.5	94.8	88.0	89.6	91.1
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	76	82	102	112	109	120	127
State Tax Receipts	147	163	187	200	193	230	236
Federal Tax Receipts	345	365	416	450	446	422	442
Total Direct Tax Receipts	569	610	705	762	748	772	805

Details may not add to totals due to rounding.

\*Other Travel includes resident air travel and travel agencies. \*\*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

#### Portland Metro

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

## 2012p Regional Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment	Tax Revenue (\$Million)		
	All Travel	Destination			Local	State	Total
Willamette Valley	1,535	1,379	367	18.3	13	47	60
North Coast	628	622	180	7.0	8	16	24
Central Coast	597	590	164	7.7	10	16	25
South Coast	352	342	98	4.7	2	10	11
Oregon Coast	1,576	1,573	444	19.5	20	41	61
Portland	3,856	2,910	846	27.0	69	85	154
Southern	916	831	221	10.1	10	26	36
Central	650	602	165	7.5	8	18	26
Eastern	333	317	92	5.0	3	10	14
Mt. Hood/Gorge	309	299	82	3.9	4	9	12

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).

## 2012p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	18.2	7.1	6.0	2.3
North Coast	5.6	2.0	2.1	0.8
Central Coast	5.5	2.0	1.9	0.7
South Coast	3.8	1.4	1.3	0.5
Oregon Coast	15.0	5.4	5.2	1.9
Portland	23.0	11.2	7.4	3.5
Southern	11.0	4.2	3.6	1.4
Central	7.7	2.8	2.6	1.0
Eastern	4.8	1.8	1.8	0.7
Mt. Hood/Gorge	3.0	1.2	1.0	0.4

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 (2012p)

Amount of Visitor Spending that supports 1 Job	\$76,870
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$77,802
Additional employment if each resident household encouraged one additional overnight visitor	1,010

### Visitor Shares

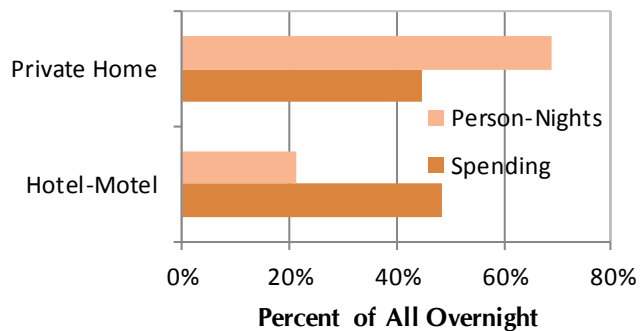
Travel Share of Total Employment (2011)*	3.1%
Overnight Visitor Day Share (2012p)**	4.5%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,834	3,892	\$482
Private Home	3,699	12,540	\$445
Other Overnight	474	1,776	\$67
All Overnight	6,007	18,208	\$993

## Willamette Valley Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	631	151	13,580	3.4	18.8	22.2
1992	672	159	13,440	3.8	20.7	24.4
1993	719	169	13,770	5.0	22.1	27.2
1994	743	176	13,930	5.6	23.2	28.8
1995	783	188	14,210	6.0	24.2	30.2
1996	829	200	14,520	6.4	24.6	31.0
1997	874	214	14,660	6.7	25.4	32.1
1998	910	230	15,680	6.8	26.3	33.1
1999	950	238	15,260	7.3	26.9	34.2
2000	1,006	247	15,700	7.9	28.3	36.2
2001	1,016	251	15,950	8.0	28.5	36.5
2002	1,061	267	16,560	8.4	29.1	37.5
2003	1,093	269	16,340	8.3	29.8	38.1
2004	1,165	280	16,660	9.0	32.1	41.1
2005	1,267	300	17,340	10.2	34.2	44.4
2006	1,355	317	17,770	11.3	36.2	47.5
2007	1,385	337	18,340	12.2	37.6	49.8
2008	1,453	349	18,590	12.5	38.8	51.3
2009	1,346	328	17,210	11.4	35.9	47.3
2010	1,447	332	17,160	11.4	37.2	48.6
2011	1,509	343	17,760	12.1	46.0	58.1
2012p	1,535	367	18,270	12.6	47.0	59.6
<b>Annual Percentage Change</b>						
11-12p	1.8	6.9	2.9	4.6	2.1	2.6
91-12p	4.3	4.3	1.4	6.5	4.5	4.8

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Willamette Valley Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	979	1,057	1,215	1,296	1,284	1,344	1,379
Other Travel*	82	108	140	156	163	165	156
Total Direct Spending	1,061	1,165	1,355	1,453	1,447	1,509	1,535
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	122	132	165	183	171	181	188
Food Service	241	257	289	306	319	330	346
Food Stores	101	108	113	127	127	133	137
Local Tran. & Gas	112	150	205	251	214	253	256
Arts, Ent. & Rec.	210	216	234	228	228	228	234
Retail Sales	173	169	178	173	177	181	185
Visitor Air Tran.	20	26	30	28	49	38	33
Destination Spending	979	1,057	1,215	1,296	1,284	1,344	1,379
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	149.3	159.1	184.0	204.0	198.1	206.0	221.3
Arts, Ent. & Rec.	65.2	66.0	72.7	81.8	76.9	79.7	85.6
Retail**	34.3	36.9	39.2	41.4	41.1	41.5	43.2
Ground Tran.	5.2	5.5	6.1	6.5	6.0	6.3	6.5
Visitor Air Tran.	1.2	1.5	2.2	1.6	1.3	1.3	1.4
Other Travel*	11.5	11.5	13.2	13.3	8.5	8.6	9.0
Total Direct Earnings	266.6	280.5	317.4	348.6	331.9	343.4	367.1
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	9.3	9.4	10.1	10.5	9.8	10.2	10.4
Arts, Ent. & Rec.	4.7	4.5	4.9	5.3	4.9	5.1	5.3
Retail**	1.8	1.9	1.9	2.0	1.9	1.9	1.9
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.0	0.1	0.1	0.1	0.0	0.0	0.0
Other Travel*	0.5	0.5	0.5	0.5	0.3	0.3	0.3
Total Direct Employment	16.6	16.7	17.8	18.6	17.2	17.8	18.3
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	8.4	9.0	11.3	12.5	11.4	12.1	12.6
State Tax Receipts	29.1	32.1	36.2	38.8	37.2	46.0	47.0
Total Local & State	37.5	41.1	47.5	51.3	48.6	58.1	59.6

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, and travel agencies. \*\*Retail includes gasoline.

## Willamette Valley Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	658	718	837	934	919	968	993
Hotel, Motel	298	331	410	458	433	465	482
Private Home	309	336	374	410	421	438	445
Other Overnight	51	51	53	67	64	66	67
Campground	43	42	42	54	51	52	53
Vacation Home	9	10	11	13	13	14	14
Day Travel	322	340	378	362	365	375	386
Spending at Destination	979	1,057	1,215	1,296	1,284	1,344	1,379

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$298	\$636	\$124	\$263	2.4	2.1
Private Home	\$90	\$307	\$35	\$120	2.5	3.4
Other Overnight	\$127	\$475	\$37	\$141	3.4	3.8
All Overnight	\$140	\$424	\$55	\$165	2.6	3.0

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	3,647	3,766	3,892	1,518	1,567	1,621
Private Home	12,404	12,444	12,540	4,894	4,908	4,952
Other Overnight	1,813	1,776	1,776	536	526	526
All Overnight	17,865	17,987	18,208	6,948	7,001	7,098

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,717	1,774	1,834	709	733	758
Private Home	3,658	3,670	3,699	1,430	1,434	1,446
Other Overnight	484	474	474	143	140	140
All Overnight	5,858	5,918	6,007	2,282	2,307	2,344



# NORTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$88,760
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,904
Additional employment if each resident household encouraged one additional overnight visitor	60

### Visitor Shares

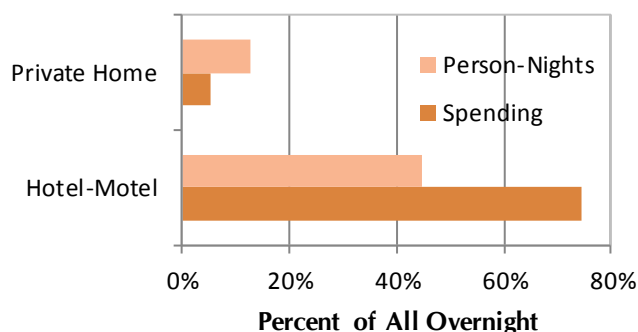
Travel Share of Total Employment (2011)*	19.1%
Overnight Visitor Day Share (2012p)**	24.6%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,174	2,520	\$288
Private Home	217	730	\$20
Other Overnight	673	2,399	\$79
All Overnight	2,065	5,649	\$387

## North Coast Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	263	74	5,250	2.6	6.2	8.8
1992	278	78	5,230	2.9	6.6	9.6
1993	297	84	5,420	3.2	7.2	10.4
1994	316	89	5,570	3.5	7.6	11.2
1995	327	93	5,550	3.7	7.8	11.5
1996	330	93	5,430	3.8	7.7	11.5
1997	340	97	5,370	4.0	7.9	11.8
1998	352	101	5,610	4.2	8.1	12.3
1999	367	106	5,780	4.5	8.3	12.9
2000	391	111	5,970	4.9	8.8	13.7
2001	411	117	6,240	5.1	9.1	14.3
2002	429	123	6,420	5.5	9.4	14.8
2003	440	125	6,440	5.5	9.6	15.1
2004	457	129	6,420	5.9	10.6	16.6
2005	476	134	6,420	6.2	11.0	17.3
2006	560	158	7,300	7.5	12.9	20.4
2007	559	164	7,270	7.5	13.2	20.7
2008	594	175	7,610	7.8	14.0	21.8
2009	569	173	7,380	7.6	13.6	21.2
2010	582	169	7,090	7.8	13.5	21.4
2011	598	168	7,020	8.1	15.2	23.3
2012p	628	180	7,030	8.5	15.9	24.4
<b>Annual Percentage Change</b>						
11-12p	5.0	7.7	0.0	4.2	4.8	4.6
91-12p	4.2	4.3	1.4	5.7	4.6	5.0

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## North Coast Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	426	453	555	588	578	593	622
Other Travel*	3	4	5	6	5	6	6
Total Direct Spending	429	457	560	594	582	598	628
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	83	89	120	130	129	129	136
Food Service	117	124	150	160	165	167	179
Food Stores	45	48	53	57	56	58	60
Local Tran. & Gas	30	40	58	72	61	71	74
Arts, Ent. & Rec.	69	71	83	82	80	80	84
Retail Sales	83	81	91	87	87	87	91
Destination Spending	426	453	555	588	578	593	622
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	84.2	89.5	112.4	124.3	122.0	120.1	130.4
Arts, Ent. & Rec.	20.5	20.7	24.5	28.2	25.8	26.1	27.6
Retail**	15.8	16.8	18.8	19.4	18.8	18.8	19.8
Ground Tran.	1.6	1.7	2.1	2.3	2.2	2.2	2.4
Other Travel*	0.6	0.5	0.5	0.5	0.3	0.3	0.4
Total Direct Earnings	122.7	129.2	158.4	174.7	169.2	167.5	180.4
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	4,320	4,290	4,930	5,050	4,820	4,740	4,770
Arts, Ent. & Rec.	1,140	1,140	1,310	1,510	1,300	1,310	1,270
Retail**	850	900	950	940	890	890	890
Ground Tran.	70	70	80	80	70	70	80
Other Travel*	30	20	20	20	10	10	10
Total Direct Employment	6,420	6,420	7,300	7,610	7,090	7,020	7,030
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	5.5	5.9	7.5	7.8	7.8	8.1	8.5
State Tax Receipts	9.4	10.6	12.9	14.0	13.5	15.2	15.9
Total Local & State	14.8	16.6	20.4	21.8	21.4	23.3	24.4

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, and travel agencies. \*\*Retail includes gasoline.

## North Coast Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	237	255	323	367	359	368	387
Hotel, Motel	157	170	233	270	264	271	288
Private Home	15	16	18	19	19	19	20
Other Overnight	65	69	73	78	76	78	79
Campground	44	47	49	52	51	52	52
Vacation Home	20	22	24	26	25	26	27
Day Travel	190	198	231	222	219	224	235
Spending at Destination	426	453	555	588	578	593	622

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$280	\$600	\$114	\$245	2.4	2.1
Private Home	\$71	\$240	\$28	\$93	2.6	3.4
Other Overnight	\$109	\$386	\$33	\$118	3.3	3.6
All Overnight	\$190	\$504	\$69	\$188	2.8	2.7

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	2,409	2,387	2,520	984	976	1,030
Private Home	709	711	730	274	275	282
Other Overnight	2,431	2,399	2,399	739	729	729
All Overnight	5,549	5,497	5,649	1,997	1,980	2,041

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,123	1,112	1,174	459	454	480
Private Home	211	211	217	81	82	84
Other Overnight	682	673	673	208	205	205
All Overnight	2,016	1,997	2,065	748	741	769

# CENTRAL COAST TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$77,170
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,857
Additional employment if each resident household encouraged one additional overnight visitor	90

### Visitor Shares

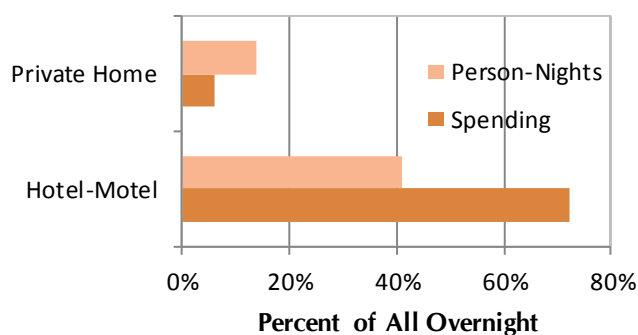
Travel Share of Total Employment (2011)*	22.0%
Overnight Visitor Day Share (2012p)**	23.9%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,036	2,266	\$305
Private Home	224	767	\$25
Other Overnight	660	2,482	\$92
All Overnight	1,920	5,515	\$423

## Central Coast Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	254	69	6,090	2.9	5.9	8.8
1992	270	74	6,050	3.5	6.5	9.9
1993	289	79	6,270	3.9	7.0	10.9
1994	299	82	6,260	4.1	7.3	11.3
1995	321	88	6,440	4.4	7.7	12.1
1996	345	92	6,570	5.0	8.0	13.0
1997	365	98	6,630	5.4	8.4	13.7
1998	369	100	6,330	5.5	8.5	14.0
1999	382	103	6,530	5.6	8.6	14.3
2000	399	105	6,290	5.9	9.0	14.9
2001	425	112	6,740	6.4	9.4	15.8
2002	439	117	6,810	6.8	9.6	16.4
2003	446	118	6,820	6.8	9.8	16.6
2004	466	122	6,930	7.1	10.9	18.1
2005	484	126	6,870	7.5	11.3	18.8
2006	558	147	7,700	9.0	13.1	22.1
2007	582	160	8,220	8.7	13.9	22.6
2008	593	163	8,160	8.7	14.2	22.8
2009	567	161	7,910	9.7	13.7	23.4
2010	576	156	7,710	10.0	13.6	23.6
2011	589	155	7,620	10.0	15.2	25.2
2012p	597	164	7,670	9.8	15.6	25.4
<b>Annual Percentage Change</b>						
11-12p	1.3	6.1	0.7	-1.5	2.4	0.9
91-12p	4.2	4.2	1.1	6.0	4.7	5.2

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Central Coast Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	435	461	552	585	571	582	590
Other Travel*	4	5	6	8	5	6	6
Total Direct Spending	439	466	558	593	576	589	597
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	96	102	133	144	143	142	142
Food Service	105	111	132	143	147	148	153
Food Stores	48	52	55	59	57	59	60
Local Tran. & Gas	31	41	60	74	62	72	72
Arts, Ent. & Rec.	73	76	85	84	81	80	81
Retail Sales	81	79	87	82	82	82	83
Destination Spending	435	461	552	585	571	582	590
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	77.9	82.1	102.8	114.2	111.0	111.7	118.4
Arts, Ent. & Rec.	20.2	20.6	23.2	26.5	24.1	22.2	24.5
Retail**	15.8	16.8	18.4	18.8	18.2	18.1	18.6
Ground Tran.	1.6	1.6	2.0	2.1	2.0	2.0	2.1
Other Travel*	1.3	1.1	1.1	1.3	0.7	0.7	0.8
Total Direct Earnings	116.8	122.3	147.4	163.0	156.1	154.7	164.2
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	4,430	4,450	5,110	5,490	5,210	5,240	5,190
Arts, Ent. & Rec.	1,390	1,490	1,560	1,640	1,550	1,440	1,540
Retail**	860	880	910	910	850	850	840
Ground Tran.	70	70	70	70	70	70	70
Other Travel*	60	40	40	50	20	20	20
Total Direct Employment	6,810	6,930	7,700	8,160	7,710	7,620	7,670
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	6.8	7.1	9.0	8.7	10.0	10.0	9.8
State Tax Receipts	9.6	10.9	13.1	14.2	13.6	15.2	15.6
Total Local & State	16.4	18.1	22.1	22.8	23.6	25.2	25.4

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, and travel agencies. \*\*Retail includes gasoline.

## Central Coast Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	284	303	375	420	409	417	423
Hotel, Motel	188	200	267	306	296	302	305
Private Home	20	21	23	24	24	25	25
Other Overnight	76	82	85	90	89	91	92
Campground	56	60	61	64	63	64	65
Vacation Home	20	22	24	26	26	27	27
Day Travel	151	158	177	165	162	165	167
Spending at Destination	435	461	552	585	571	582	590

### Average Expenditures for Overnight Visitors, 2012p

	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	\$123	\$463	\$37	\$139	3.3	3.8
All Overnight	\$215	\$596	\$77	\$220	2.8	2.8

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	2,290	2,258	2,266	936	923	926
Private Home	759	761	767	293	293	296
Other Overnight	2,530	2,482	2,482	763	749	749
All Overnight	5,579	5,502	5,515	1,992	1,966	1,971

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,048	1,033	1,036	429	423	424
Private Home	221	222	224	85	86	86
Other Overnight	673	660	660	203	199	199
All Overnight	1,943	1,916	1,920	717	707	709



# SOUTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$72,960
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,543
Additional employment if each resident household encouraged one additional overnight visitor	90

### Visitor Shares

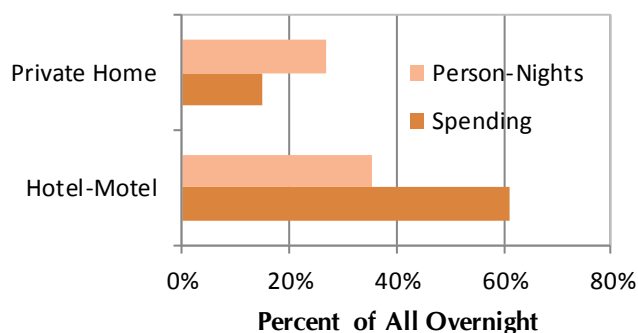
Travel Share of Total Employment (2011)*	11.6%
Overnight Visitor Day Share (2012p)**	12.1%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	635	1,356	\$143
Private Home	303	1,040	\$35
Other Overnight	392	1,450	\$56
All Overnight	1,330	3,847	\$235

## South Coast Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	173	50	4,640	0.9	4.5	5.4
1992	177	51	4,500	0.9	4.8	5.7
1993	179	51	4,370	1.0	4.9	5.9
1994	185	53	4,360	1.1	5.1	6.2
1995	192	56	4,440	1.1	5.2	6.4
1996	199	57	4,450	1.1	5.2	6.4
1997	198	57	4,230	1.1	5.1	6.2
1998	206	60	4,330	1.1	5.4	6.5
1999	224	65	4,450	1.3	5.7	7.0
2000	237	68	4,490	1.4	6.0	7.4
2001	252	73	4,770	1.5	6.3	7.8
2002	267	78	5,000	1.6	6.5	8.1
2003	282	81	5,080	1.6	6.9	8.5
2004	294	83	4,950	1.7	7.4	9.2
2005	302	84	4,840	1.8	7.6	9.4
2006	328	91	4,980	1.8	8.2	10.0
2007	338	97	5,130	1.9	8.5	10.5
2008	348	99	5,170	1.8	8.7	10.6
2009	305	92	4,690	1.6	7.9	9.5
2010	321	92	4,670	1.6	8.1	9.7
2011	337	94	4,750	1.5	9.6	11.1
2012p	352	98	4,730	1.5	9.8	11.4
<b>Annual Percentage Change</b>						
11-12p	4.3	5.1	-0.4	1.5	2.9	2.7
91-12p	3.4	3.3	0.1	2.5	3.8	3.6

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## South Coast Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	261	286	317	337	313	328	342
Other Travel*	6	8	10	11	8	9	9
Total Direct Spending	267	294	328	348	321	337	352
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	49	57	65	67	63	65	67
Food Service	67	72	79	84	83	86	91
Food Stores	31	33	33	37	35	36	38
Local Tran. & Gas	22	31	41	51	41	49	51
Arts, Ent. & Rec.	47	49	51	51	48	48	50
Retail Sales	42	41	43	42	40	41	42
Visitor Air Tran.	3	3	5	4	3	3	3
Destination Spending	261	286	317	337	313	328	342
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	50.4	55.3	61.1	66.4	62.1	63.1	67.9
Arts, Ent. & Rec.	13.5	13.7	14.5	16.7	14.7	15.1	14.4
Retail**	9.4	10.1	10.4	11.0	10.4	10.4	11.0
Ground Tran.	1.0	1.1	1.2	1.3	1.2	1.2	1.3
Visitor Air Tran.	1.5	1.4	1.6	1.6	1.7	1.9	2.1
Other Travel*	2.0	1.8	1.9	1.9	1.7	1.8	1.7
Total Direct Earnings	77.9	83.4	90.7	98.9	91.8	93.6	98.3
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,010	3,060	3,120	3,200	2,830	2,870	2,910
Arts, Ent. & Rec.	1,310	1,220	1,200	1,290	1,230	1,270	1,210
Retail**	520	520	520	530	490	490	490
Ground Tran.	40	40	40	40	40	40	40
Visitor Air Tran.	40	40	40	40	30	30	40
Other Travel*	70	60	60	60	50	50	40
Total Direct Employment	5,000	4,950	4,980	5,170	4,670	4,750	4,730
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	1.6	1.7	1.8	1.8	1.6	1.5	1.5
State Tax Receipts	6.5	7.4	8.2	8.7	8.1	9.6	9.8
Total Local & State	8.1	9.2	10.0	10.6	9.7	11.1	11.4

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, and travel agencies. \*\*Retail includes gasoline.

## South Coast Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	169	188	212	232	214	225	235
Hotel, Motel	93	108	128	142	127	135	143
Private Home	28	29	33	34	32	34	35
Other Overnight	49	51	51	57	54	56	56
Campground	43	45	45	50	48	49	49
Vacation Home	6	6	7	7	7	7	7
Day Travel	92	97	105	105	99	103	107
Spending at Destination	261	286	317	337	313	328	342

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$257	\$550	\$105	\$225	2.4	2.1
Private Home	\$87	\$301	\$34	\$117	2.6	3.5
Other Overnight	\$133	\$492	\$39	\$144	3.4	3.7
All Overnight	\$169	\$477	\$61	\$177	2.8	2.8

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,260	1,291	1,356	517	529	556
Private Home	1,001	1,013	1,040	391	396	406
Other Overnight	1,484	1,450	1,450	433	424	424
All Overnight	3,745	3,755	3,847	1,342	1,349	1,386

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	592	605	635	242	248	260
Private Home	290	294	303	113	114	118
Other Overnight	401	392	392	117	115	115
All Overnight	1,283	1,291	1,330	472	477	492

# OREGON COAST TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$81,150
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$19,127
Additional employment if each resident household encouraged one additional overnight visitor	240

### Visitor Shares

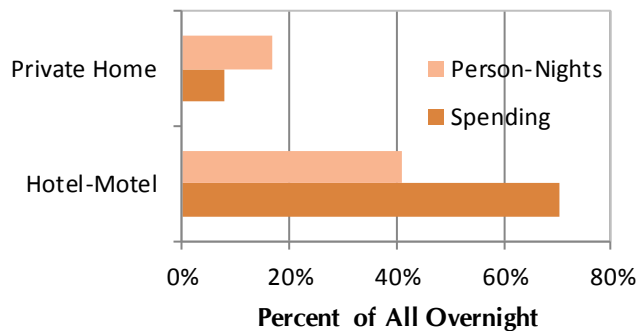
Travel Share of Total Employment (2011)*	17.3%
Overnight Visitor Day Share (2012p)**	19.3%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	2,695	6,142	\$746
Private Home	705	2,537	\$82
Other Overnight	1,817	6,332	\$230
All Overnight	5,217	15,011	\$1,058

## Oregon Coast Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	689	194	16,050	6.5	16.6	23.1
1992	725	204	15,850	7.3	17.9	25.2
1993	765	215	16,140	8.1	19.1	27.1
1994	799	225	16,260	8.7	20.0	28.7
1995	840	237	16,500	9.3	20.7	30.0
1996	874	244	16,520	9.9	21.0	30.9
1997	903	252	16,300	10.4	21.4	31.8
1998	927	262	16,340	10.8	21.9	32.7
1999	973	274	16,840	11.4	22.7	34.1
2000	1,028	286	16,820	12.2	23.8	36.0
2001	1,088	303	17,810	13.0	24.9	37.9
2002	1,136	318	18,290	13.8	25.5	39.3
2003	1,168	326	18,420	13.8	26.3	40.1
2004	1,216	336	18,380	14.8	29.0	43.8
2005	1,262	345	18,200	15.5	29.9	45.4
2006	1,446	398	20,050	18.3	34.2	52.6
2007	1,479	421	20,690	18.1	35.7	53.8
2008	1,535	438	21,010	18.2	36.9	55.2
2009	1,441	426	20,050	18.9	35.2	54.0
2010	1,480	418	19,540	19.5	35.2	54.7
2011	1,524	417	19,460	19.6	40.0	59.6
2012p	1,576	444	19,490	19.8	41.3	61.2
<b>Annual Percentage Change</b>						
11-12p	3.4	6.5	0.2	1.1	3.4	2.7
91-12p	4.0	4.0	0.9	5.5	4.4	4.7

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Oregon Coast Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	1,129	1,210	1,439	1,529	1,476	1,520	1,573
Other Travel*	6	6	7	7	4	4	4
Total Direct Spending	1,136	1,216	1,446	1,535	1,480	1,524	1,576
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	227	248	319	341	335	336	346
Food Service	288	306	361	388	394	400	422
Food Stores	124	133	142	153	147	153	158
Local Tran. & Gas	91	123	174	215	179	211	214
Arts, Ent. & Rec.	190	196	219	217	209	208	215
Retail Sales	206	201	221	210	209	210	216
Visitor Air Tran.	3	3	5	4	3	3	3
Destination Spending	1,129	1,210	1,439	1,529	1,476	1,520	1,573
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	212.6	226.9	276.3	304.9	295.1	295.0	316.7
Arts, Ent. & Rec.	54.3	55.0	62.3	71.4	64.6	63.3	66.4
Retail**	41.3	44.2	48.2	49.7	48.0	47.8	49.9
Ground Tran.	4.2	4.4	5.3	5.7	5.4	5.5	5.7
Visitor Air Tran.	1.5	1.4	1.6	1.6	1.7	1.9	2.1
Other Travel*	4.3	3.8	4.0	4.3	3.3	3.4	3.4
Total Direct Earnings	318.2	335.8	397.6	437.6	418.1	416.8	444.1
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	11.8	11.8	13.2	13.7	12.9	12.9	12.9
Arts, Ent. & Rec.	3.8	3.9	4.1	4.4	4.1	4.0	4.0
Retail**	2.3	2.3	2.4	2.4	2.3	2.3	2.3
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	0.0	0.0
Other Travel*	0.2	0.2	0.2	0.2	0.1	0.1	0.1
Total Direct Employment	18.3	18.4	20.0	21.0	19.5	19.5	19.5
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	13.8	14.8	18.3	18.2	19.5	19.6	19.8
State Tax Receipts	25.5	29.0	34.2	36.9	35.2	40.0	41.3
Total Local & State	39.3	43.8	52.6	55.2	54.7	59.6	61.2

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, and travel agencies. \*\*Retail includes gasoline.

## Oregon Coast Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	694	753	920	1,032	992	1,023	1,058
Hotel, Motel	441	483	635	726	695	717	746
Private Home	63	67	74	78	76	79	82
Other Overnight	191	204	211	227	222	227	230
Campground	144	153	157	168	163	166	168
Vacation Home	47	50	55	60	59	61	62
Day Travel	435	457	519	496	483	497	515
Spending at Destination	1,129	1,210	1,439	1,529	1,476	1,520	1,573

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$297	\$677	\$121	\$277	2.4	2.3
Private Home	\$83	\$300	\$32	\$116	2.6	3.6
Other Overnight	\$121	\$422	\$36	\$127	3.3	3.5
All Overnight	\$196	\$551	\$70	\$203	2.8	2.8

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	5,959	5,936	6,142	2,438	2,428	2,512
Private Home	2,469	2,485	2,537	958	964	984
Other Overnight	6,445	6,332	6,332	1,934	1,902	1,902
All Overnight	14,873	14,754	15,011	5,330	5,294	5,398

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	2,618	2,606	2,695	1,071	1,065	1,102
Private Home	684	690	705	265	267	273
Other Overnight	1,850	1,817	1,817	555	545	545
All Overnight	5,152	5,112	5,217	1,890	1,877	1,920



# PORTLAND METRO TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$120,730
Employee Earnings generated by \$100 Visitor Spending	\$23
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$201,332
Additional employment if each resident household encouraged one additional overnight visitor	1,670

### Visitor Shares

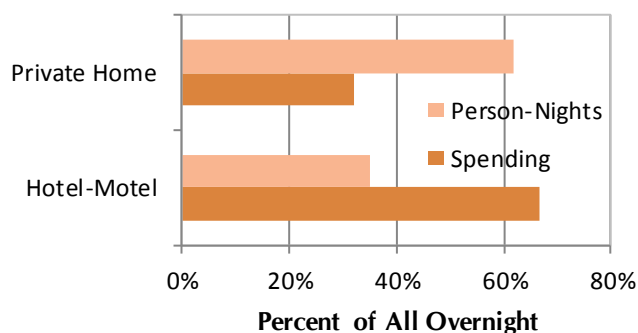
Travel Share of Total Employment (2011)*	2.6%
Overnight Visitor Day Share (2012p)**	4.1%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,359	8,063	\$1,654
Private Home	3,900	14,230	\$800
Other Overnight	187	740	\$28
All Overnight	7,445	23,032	\$2,482

## Portland Metro Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	1,378	354	19,270	12.4	32.2	44.6
1992	1,516	388	19,690	13.6	35.7	49.3
1993	1,633	413	20,300	17.7	38.1	55.8
1994	1,707	440	20,910	19.6	40.3	60.0
1995	1,822	474	22,120	22.4	43.0	65.3
1996	1,983	509	22,970	24.9	44.9	69.8
1997	2,153	538	23,570	26.8	46.8	73.6
1998	2,237	562	24,130	27.8	48.0	75.8
1999	2,371	601	24,570	29.3	50.7	80.0
2000	2,562	639	24,970	35.5	54.7	90.1
2001	2,461	635	25,040	34.9	54.5	89.4
2002	2,447	623	24,620	35.8	53.3	89.1
2003	2,499	614	24,060	36.4	53.3	89.7
2004	2,654	626	24,300	38.5	58.0	96.5
2005	2,900	660	24,860	43.2	61.2	104.4
2006	3,202	707	25,810	48.8	65.5	114.3
2007	3,350	757	26,900	55.0	69.6	124.6
2008	3,473	771	27,640	57.4	71.5	129.0
2009	3,266	727	25,660	57.1	66.2	123.2
2010	3,506	762	25,760	55.0	69.6	124.5
2011	3,711	799	26,430	64.0	82.7	146.6
2012p	3,856	846	26,950	68.8	85.2	154.1
<b>Annual Percentage Change</b>						
11-12p	3.9	5.9	2.0	7.6	3.1	5.1
91-12p	5.0	4.2	1.6	8.5	4.7	6.1

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Portland Metro Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	1,826	1,983	2,363	2,587	2,606	2,778	2,910
Other Travel*	622	671	839	886	900	933	947
Total Direct Spending	2,447	2,654	3,202	3,473	3,506	3,711	3,856
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	324	355	445	514	470	526	571
Food Service	387	422	485	530	566	598	633
Food Stores	81	90	97	109	110	118	121
Local Tran. & Gas	233	285	369	442	413	474	485
Arts, Ent. & Rec.	151	160	174	177	179	185	191
Retail Sales	274	274	297	296	308	320	329
Visitor Air Tran.	374	397	497	520	560	558	579
Destination Spending	1,826	1,983	2,363	2,587	2,606	2,778	2,910
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	263	287	336	383	376	387	424
Arts, Ent. & Rec.	43	45	49	58	55	59	58
Retail**	44	48	52	55	56	57	59
Ground Tran.	23	25	28	31	29	31	33
Visitor Air Tran.	89	77	85	87	93	100	103
Other Travel*	161	145	157	157	153	166	169
Total Direct Earnings	623	626	707	771	762	799	846
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	13.5	13.9	15.1	16.5	15.8	16.2	16.8
Arts, Ent. & Rec.	2.1	2.3	2.4	2.6	2.4	2.6	2.6
Retail**	1.8	1.9	2.1	2.1	2.1	2.1	2.1
Ground Tran.	1.0	1.1	1.1	1.1	1.0	1.1	1.1
Visitor Air Tran.	2.1	1.7	1.7	1.8	1.5	1.5	1.5
Other Travel*	4.1	3.5	3.4	3.5	2.9	2.9	2.9
Total Direct Employment	24.6	24.3	25.8	27.6	25.8	26.4	27.0
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	35.8	38.5	48.8	57.4	55.0	64.0	68.8
State Tax Receipts	53.3	58.0	65.5	71.5	69.6	82.7	85.2
Total Local & State	89.1	96.5	114.3	129.0	124.5	146.6	154.1

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, and travel agencies. \*\*Retail includes gasoline.

## Portland Metro Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	1,513	1,648	1,982	2,201	2,211	2,361	2,482
Hotel, Motel	960	1,051	1,283	1,442	1,421	1,549	1,654
Private Home	535	576	677	731	764	784	800
Other Overnight	18	20	23	27	26	28	28
Campground	12	14	16	20	18	19	19
Vacation Home	6	6	7	8	8	9	9
Day Travel	313	336	381	386	395	417	428
Spending at Destination	1,826	1,983	2,363	2,587	2,606	2,778	2,910

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$438	\$1,075	\$205	\$492	2.1	2.5
Private Home	\$112	\$417	\$56	\$205	2.0	3.7
Other Overnight	\$114	\$455	\$38	\$150	3.0	4.0
All Overnight	\$222	\$705	\$108	\$333	2.1	3.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	7,250	7,751	8,063	3,401	3,616	3,772
Private Home	14,402	14,361	14,230	7,200	7,185	7,156
Other Overnight	730	740	740	241	246	246
All Overnight	22,383	22,853	23,032	10,842	11,047	11,174

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	3,020	3,229	3,359	1,386	1,475	1,538
Private Home	3,947	3,936	3,900	1,935	1,930	1,919
Other Overnight	185	187	187	60	61	61
All Overnight	7,152	7,352	7,445	3,381	3,467	3,519

# SOUTHERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$83,980
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$34,462
Additional employment if each resident household encouraged one additional overnight visitor	410

### Visitor Shares

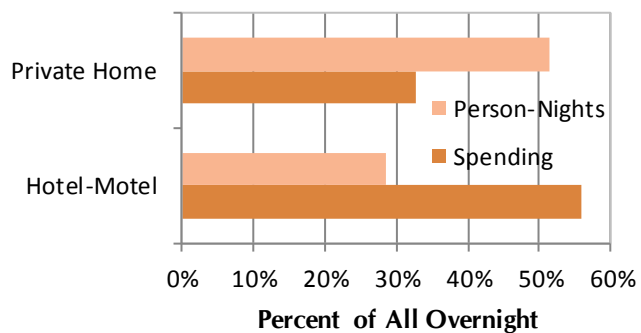
Travel Share of Total Employment (2011)*	4.4%
Overnight Visitor Day Share (2012p)**	6.4%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,408	3,126	\$366
Private Home	1,584	5,654	\$214
Other Overnight	578	2,196	\$75
All Overnight	3,571	10,975	\$654

## Southern Oregon Travel Trends, 1991-2012p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	427	112	9,450	2.8	11.9	14.7
1992	449	117	9,150	3.0	12.8	15.9
1993	458	119	9,020	4.1	13.3	17.5
1994	469	122	8,910	4.3	13.8	18.1
1995	491	127	8,920	4.5	14.2	18.6
1996	514	132	9,050	4.5	14.3	18.8
1997	535	137	9,010	4.6	14.6	19.2
1998	552	145	9,490	4.9	15.0	19.9
1999	589	154	9,770	5.2	15.7	20.9
2000	626	162	9,950	5.7	16.6	22.3
2001	627	163	10,090	6.3	16.6	22.9
2002	686	181	10,890	7.1	17.6	24.6
2003	720	186	10,830	7.2	18.3	25.5
2004	756	191	10,730	7.7	19.8	27.5
2005	797	196	10,590	8.0	20.5	28.5
2006	845	206	10,700	8.7	21.5	30.2
2007	856	214	10,850	9.2	21.9	31.2
2008	874	217	10,890	9.2	22.2	31.3
2009	845	209	10,230	8.9	20.8	29.7
2010	859	209	9,930	9.4	21.3	30.7
2011	893	212	10,000	9.5	25.8	35.4
2012p	916	221	10,070	9.8	26.3	36.1
<b>Annual Percentage Change</b>						
11-12p	2.6	4.2	0.7	2.7	1.6	1.9
91-12p	3.7	3.3	0.3	6.1	3.9	4.4

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Southern Oregon Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	643	695	766	789	776	807	831
Other Travel*	43	61	80	85	83	85	85
Total Direct Spending	686	756	845	874	859	893	916
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	116	124	140	139	137	138	141
Food Service	157	167	180	186	193	198	208
Food Stores	63	68	69	75	74	78	81
Local Tran. & Gas	74	96	126	150	128	151	153
Arts, Ent. & Rec.	105	108	111	107	104	105	109
Retail Sales	108	106	108	102	104	105	109
Visitor Air Tran.	20	26	31	30	37	32	32
Destination Spending	643	695	766	789	776	807	831
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	116.4	123.7	134.8	140.8	138.1	140.3	147.1
Arts, Ent. & Rec.	31.8	32.0	33.5	37.2	34.2	33.9	34.4
Retail**	22.4	24.2	24.9	25.5	25.1	25.3	26.5
Ground Tran.	3.8	3.9	4.1	4.3	4.0	4.1	4.3
Visitor Air Tran.	1.2	1.6	2.0	2.3	2.2	2.4	2.5
Other Travel*	5.0	5.9	6.7	7.1	5.3	5.7	5.9
Total Direct Earnings	180.6	191.4	206.1	217.2	208.9	211.7	220.6
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	6.9	6.8	6.8	6.9	6.4	6.5	6.6
Arts, Ent. & Rec.	2.4	2.3	2.2	2.3	2.0	2.0	2.0
Retail**	1.2	1.2	1.2	1.2	1.1	1.1	1.1
Ground Tran.	0.2	0.2	0.2	0.2	0.1	0.1	0.1
Visitor Air Tran.	0.0	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.2	0.3	0.2	0.3	0.2	0.2	0.2
Total Direct Employment	10.9	10.7	10.7	10.9	9.9	10.0	10.1
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	7.1	7.7	8.7	9.2	9.4	9.5	9.8
State Tax Receipts	17.6	19.8	21.5	22.2	21.3	25.8	26.3
Total Local & State	24.6	27.5	30.2	31.3	30.7	35.4	36.1

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, and travel agencies. \*\*Retail includes gasoline.

## Southern Oregon Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	483	528	586	623	613	637	654
Hotel, Motel	272	299	340	354	344	358	366
Private Home	152	163	180	195	197	205	214
Other Overnight	59	66	66	74	71	74	75
Campground	47	52	51	57	55	57	58
Vacation Home	12	13	15	16	16	17	17
Day Travel	160	167	179	166	163	170	177
Spending at Destination	643	695	766	789	776	807	831

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$281	\$628	\$117	\$260	2.4	2.2
Private Home	\$96	\$346	\$38	\$135	2.5	3.6
Other Overnight	\$115	\$436	\$34	\$129	3.4	3.8
All Overnight	\$156	\$477	\$60	\$183	2.6	3.1

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	3,091	3,101	3,126	1,287	1,289	1,300
Private Home	5,407	5,493	5,654	2,140	2,168	2,233
Other Overnight	2,230	2,196	2,196	661	651	651
All Overnight	10,728	10,790	10,975	4,088	4,108	4,185

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,393	1,397	1,408	576	578	582
Private Home	1,515	1,539	1,584	592	600	618
Other Overnight	587	578	578	174	171	171
All Overnight	3,495	3,515	3,571	1,342	1,349	1,372



# CENTRAL OREGON TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$81,610
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$15,755
Additional employment if each resident household encouraged one additional overnight visitor	190

### Visitor Shares

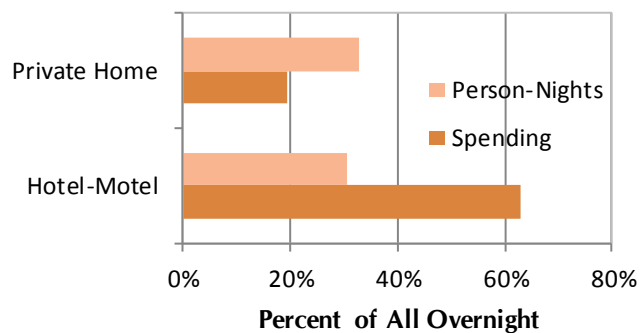
Travel Share of Total Employment (2011)*	6.5%
Overnight Visitor Day Share (2012p)**	10.2%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,079	2,338	\$315
Private Home	722	2,502	\$96
Other Overnight	749	2,819	\$89
All Overnight	2,550	7,659	\$500

## Central Oregon Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	220	57	4,410	3.6	5.4	9.0
1992	229	59	4,310	3.7	5.8	9.5
1993	237	61	4,340	3.9	6.2	10.0
1994	258	67	4,570	4.4	6.7	11.1
1995	268	69	4,530	4.4	6.9	11.3
1996	281	72	4,570	4.7	7.0	11.7
1997	298	76	4,630	5.0	7.3	12.3
1998	307	80	4,960	5.3	7.5	12.9
1999	333	86	5,230	5.8	8.0	13.9
2000	368	95	5,710	6.6	8.9	15.5
2001	368	95	5,740	6.5	8.9	15.4
2002	381	99	5,800	6.8	9.0	15.8
2003	400	100	5,740	6.7	9.3	16.1
2004	425	105	5,820	7.0	10.4	17.4
2005	462	111	5,810	7.4	11.1	18.5
2006	569	138	6,720	9.2	13.6	22.8
2007	593	147	7,180	8.5	14.3	22.8
2008	621	154	7,450	8.0	14.9	22.8
2009	589	145	6,960	7.1	13.7	20.9
2010	615	145	7,010	7.6	14.1	21.7
2011	626	151	7,240	8.0	16.8	24.9
2012p	650	165	7,450	8.4	17.6	26.0
<b>Annual Percentage Change</b>						
11-12p	3.9	9.3	3.0	4.7	4.7	4.7
91-12p	5.3	5.2	2.5	4.2	5.8	5.2

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Central Oregon Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	363	397	526	573	559	577	602
Other Travel*	18	28	42	48	56	49	48
Total Direct Spending	381	425	569	621	615	626	650
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	89	94	133	138	131	137	144
Food Service	88	95	126	139	142	146	155
Food Stores	37	40	46	52	50	52	54
Local Tran. & Gas	31	42	66	84	70	83	85
Arts, Ent. & Rec.	53	55	67	70	68	68	71
Retail Sales	58	58	70	71	71	72	74
Visitor Air Tran.	8	13	18	19	27	18	18
Destination Spending	363	397	526	573	559	577	602
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	67.1	71.4	96.5	107.0	102.2	108.0	120.3
Arts, Ent. & Rec.	15.5	15.9	20.1	24.1	22.0	21.7	22.4
Retail**	11.8	12.9	15.4	16.8	16.2	16.3	17.1
Ground Tran.	1.4	1.5	2.0	2.2	2.1	2.2	2.3
Visitor Air Tran.	0.5	0.5	0.6	0.6	0.6	0.6	0.6
Other Travel*	2.3	2.6	2.9	3.4	2.3	2.5	2.6
Total Direct Earnings	98.6	104.9	137.5	154.1	145.4	151.3	165.3
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,820	3,760	4,540	4,950	4,720	4,950	5,100
Arts, Ent. & Rec.	1,180	1,230	1,230	1,530	1,410	1,400	1,430
Retail**	610	650	750	760	720	730	750
Ground Tran.	60	60	70	70	70	70	70
Visitor Air Tran.	20	20	20	20	20	20	20
Other Travel*	100	90	100	110	80	80	80
Total Direct Employment	5,800	5,820	6,720	7,450	7,010	7,240	7,450
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	6.8	7.0	9.2	8.0	7.6	8.0	8.4
State Tax Receipts	9.0	10.4	13.6	14.9	14.1	16.8	17.6
Total Local & State	15.8	17.4	22.8	22.8	21.7	24.9	26.0

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, and travel agencies. \*\*Retail includes gasoline.

## Central Oregon Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	293	322	433	476	464	479	500
Hotel, Motel	169	183	270	297	286	298	315
Private Home	57	67	81	91	94	93	96
Other Overnight	67	72	82	89	84	87	89
Campground	39	41	45	47	43	44	45
Vacation Home	28	32	37	42	41	43	44
Day Travel	70	75	93	97	95	98	102
Spending at Destination	363	397	526	573	559	577	602

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$325	\$708	\$135	\$292	2.4	2.2
Private Home	\$96	\$338	\$38	\$133	2.5	3.5
Other Overnight	\$102	\$386	\$31	\$118	3.3	3.8
All Overnight	\$176	\$521	\$65	\$196	2.7	3.0

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	2,210	2,227	2,338	917	923	970
Private Home	2,432	2,443	2,502	976	978	1,003
Other Overnight	2,844	2,819	2,819	873	866	866
All Overnight	7,485	7,490	7,659	2,766	2,767	2,838

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,019	1,026	1,079	420	423	445
Private Home	701	705	722	277	277	285
Other Overnight	756	749	749	232	230	230
All Overnight	2,476	2,480	2,550	929	930	959

# EASTERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$63,720
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$9,562
Additional employment if each resident household encouraged one additional overnight visitor	150

### Visitor Shares

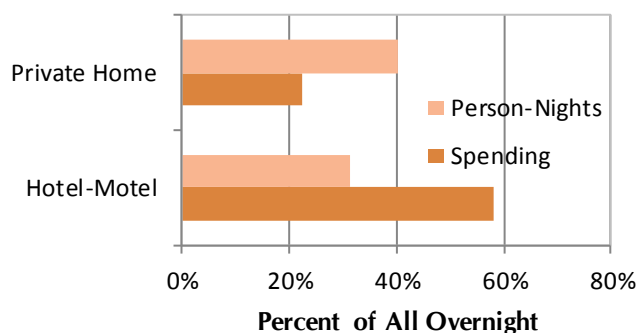
Travel Share of Total Employment (2011)*	4.9%
Overnight Visitor Day Share (2012p)**	6.8%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	753	1,493	\$138
Private Home	623	1,915	\$53
Other Overnight	377	1,345	\$46
All Overnight	1,753	4,753	\$236

## Eastern Oregon Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	170	47	4,740	1.0	4.8	5.8
1992	183	51	4,820	1.2	5.3	6.5
1993	196	55	5,020	1.3	5.8	7.0
1994	206	57	5,120	1.4	6.1	7.5
1995	215	60	5,170	1.7	6.2	7.9
1996	223	62	5,170	1.8	6.2	8.0
1997	229	64	5,090	1.8	6.3	8.1
1998	238	68	5,430	1.9	6.6	8.4
1999	249	71	5,390	2.0	6.7	8.7
2000	263	73	5,430	2.1	7.1	9.2
2001	264	74	5,490	2.2	7.1	9.2
2002	280	79	5,740	2.2	7.3	9.6
2003	284	79	5,620	2.2	7.5	9.7
2004	297	82	5,530	2.5	8.1	10.5
2005	308	83	5,390	2.6	8.3	10.8
2006	329	88	5,630	2.9	8.7	11.6
2007	327	91	5,540	3.2	8.9	12.1
2008	324	89	5,310	3.1	8.7	11.8
2009	300	87	5,140	3.0	8.3	11.3
2010	315	87	5,030	3.2	8.5	11.7
2011	336	86	5,020	3.3	10.2	13.5
2012p	333	92	5,000	3.3	10.3	13.6
<b>Annual Percentage Change</b>						
11-12p	-0.7	6.2	-0.4	1.4	0.8	0.9
91-12p	3.3	3.2	0.3	5.8	3.7	4.2

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Eastern Oregon Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	272	286	315	307	301	320	317
Other Travel*	9	11	14	17	14	16	17
Total Direct Spending	280	297	329	324	315	336	333
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	49	52	59	64	64	66	64
Food Service	67	70	76	72	75	78	79
Food Stores	31	33	34	33	33	35	35
Local Tran. & Gas	26	35	46	53	45	54	53
Arts, Ent. & Rec.	53	54	56	48	48	49	48
Retail Sales	43	41	42	36	37	38	38
Destination Spending	272	286	315	307	301	320	317
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	51.5	53.8	59.1	60.1	59.6	59.1	63.8
Arts, Ent. & Rec.	14.9	14.7	15.6	15.6	14.4	14.7	15.0
Retail**	10.1	10.7	10.9	10.3	10.3	10.4	10.6
Ground Tran.	1.3	1.4	1.5	1.4	1.4	1.5	1.4
Other Travel*	1.2	1.0	1.0	1.1	1.1	0.7	0.7
Total Direct Earnings	79.2	81.7	88.4	88.7	86.7	86.3	91.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,390	3,340	3,450	3,270	3,100	3,080	3,100
Arts, Ent. & Rec.	1,640	1,480	1,490	1,410	1,330	1,350	1,340
Retail**	570	590	570	520	500	500	490
Ground Tran.	60	60	60	50	50	50	50
Visitor Air Tran.	10	10	10	10	0	0	0
Other Travel*	70	50	50	50	50	30	30
Total Direct Employment	5,740	5,530	5,630	5,310	5,030	5,020	5,000
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	2.2	2.5	2.9	3.1	3.2	3.3	3.3
State Tax Receipts	7.3	8.1	8.7	8.7	8.5	10.2	10.3
Total Local & State	9.6	10.5	11.6	11.8	11.7	13.5	13.6

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, and travel agencies. \*\*Retail includes gasoline.

## Eastern Oregon Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	185	198	219	231	225	239	236
Hotel, Motel	106	113	131	141	134	143	138
Private Home	39	41	45	48	48	51	53
Other Overnight	40	43	43	43	43	45	46
Campground	32	34	34	32	33	34	35
Vacation Home	8	9	10	10	10	11	11
Day Travel	86	89	95	76	76	80	80
Spending at Destination	272	286	315	307	301	320	317

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$226	\$449	\$92	\$183	2.5	2.0
Private Home	\$71	\$218	\$28	\$85	2.6	3.1
Other Overnight	\$114	\$405	\$34	\$121	3.4	3.6
All Overnight	\$135	\$357	\$50	\$135	2.7	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,541	1,566	1,493	628	638	609
Private Home	1,840	1,887	1,915	718	736	747
Other Overnight	1,364	1,345	1,345	406	400	400
All Overnight	4,744	4,798	4,753	1,752	1,775	1,756

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	776	790	753	317	322	307
Private Home	598	614	623	233	240	243
Other Overnight	382	377	377	114	113	113
All Overnight	1,757	1,781	1,753	664	674	663



# MT. HOOD/GORGE TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$78,020
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,844
Additional employment if each resident household encouraged one additional overnight visitor	70

### Visitor Shares

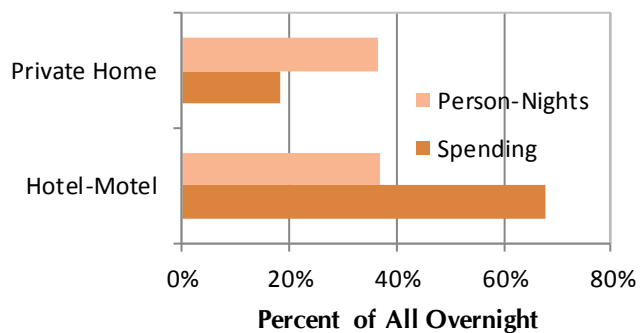
Travel Share of Total Employment (2011)*	6.6%
Overnight Visitor Day Share (2012p)**	10.0%

\*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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	517	1,123	\$131
Private Home	323	1,112	\$35
Other Overnight	210	798	\$27
All Overnight	1,049	3,033	\$193

## Mt. Hood/Gorge Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	139	37	3,110	1.0	3.6	4.6
1992	152	40	3,210	1.2	4.0	5.2
1993	162	43	3,320	1.4	4.3	5.7
1994	170	45	3,360	1.5	4.5	6.0
1995	177	47	3,390	1.5	4.6	6.1
1996	187	50	3,460	1.6	4.8	6.4
1997	198	53	3,520	1.7	5.0	6.7
1998	203	55	3,610	1.8	5.1	6.9
1999	211	57	3,600	1.9	5.2	7.1
2000	223	60	3,650	2.2	5.5	7.6
2001	228	61	3,690	2.3	5.5	7.8
2002	221	59	3,540	2.3	5.3	7.5
2003	228	60	3,560	2.3	5.4	7.7
2004	238	62	3,580	2.4	5.9	8.3
2005	252	65	3,660	2.7	6.2	9.0
2006	277	72	3,870	3.0	6.8	9.8
2007	286	77	4,040	3.3	7.2	10.4
2008	292	78	4,020	3.3	7.3	10.5
2009	264	73	3,730	3.2	6.7	9.8
2010	281	74	3,670	3.3	6.9	10.2
2011	296	76	3,750	3.6	8.1	11.8
2012p	309	82	3,890	3.8	8.5	12.3
<b>Annual Percentage Change</b>						
11-12p	4.6	7.9	3.7	4.4	4.4	4.4
91-12p	3.9	3.9	1.1	6.4	4.2	4.8

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Mt. Hood/The Gorge Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	214	229	266	280	273	286	299
Other Travel*	7	9	10	12	8	10	10
Total Direct Spending	221	238	277	292	281	296	309
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	36	38	46	53	51	54	57
Food Service	59	63	73	76	78	80	85
Food Stores	19	21	23	25	25	26	27
Local Tran. & Gas	18	24	33	40	34	40	41
Arts, Ent. & Rec.	34	36	39	38	37	37	39
Retail Sales	48	47	51	47	47	48	50
Destination Spending	214	229	266	280	273	286	299
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	37.5	39.8	46.8	51.6	49.9	51.3	55.9
Arts, Ent. & Rec.	10.1	10.3	11.6	13.1	12.0	12.3	13.0
Retail**	8.0	8.6	9.4	9.5	9.2	9.3	9.8
Ground Tran.	0.9	0.9	1.1	1.1	1.1	1.1	1.2
Other Travel*	2.5	2.8	2.9	2.9	1.7	1.7	1.8
Total Direct Earnings	59.0	62.5	71.7	78.2	73.9	75.7	81.7
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	2,340	2,330	2,550	2,650	2,440	2,500	2,610
Arts, Ent. & Rec.	680	700	750	830	740	750	770
Retail**	400	420	440	420	400	400	420
Ground Tran.	40	40	40	40	40	40	40
Other Travel*	90	90	90	80	50	50	50
Total Direct Employment	3,540	3,580	3,870	4,020	3,670	3,750	3,890
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	2.3	2.4	3.0	3.3	3.3	3.6	3.8
State Tax Receipts	5.3	5.9	6.8	7.3	6.9	8.1	8.5
Total Local & State	7.5	8.3	9.8	10.5	10.2	11.8	12.3

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, and travel agencies. \*\*Retail includes gasoline.

## Mt. Hood/Gorge Visitor Volume and Visitor Spending

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	123	133	158	181	174	184	193
Hotel, Motel	80	85	106	121	115	123	131
Private Home	25	27	30	32	33	34	35
Other Overnight	19	21	22	27	26	27	27
Campground	13	15	16	20	19	19	20
Vacation Home	5	6	6	7	7	7	7
Day Travel	91	96	108	99	98	102	106
Spending at Destination	214	229	266	280	273	286	299

### Average Expenditures for Overnight Visitors, 2012p

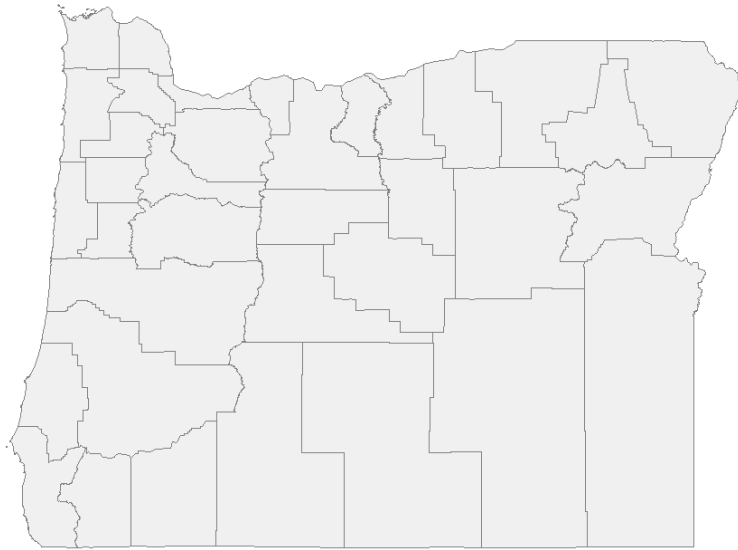
	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$269	\$597	\$116	\$253	2.3	2.2
Private Home	\$77	\$274	\$32	\$109	2.4	3.5
Other Overnight	\$113	\$431	\$34	\$129	3.3	3.8
All Overnight	\$163	\$470	\$64	\$184	2.6	2.9

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,068	1,080	1,123	461	466	486
Private Home	1,099	1,098	1,112	449	449	456
Other Overnight	808	798	798	242	238	238
All Overnight	2,975	2,976	3,033	1,152	1,153	1,180

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	493	498	517	209	211	219
Private Home	319	319	323	127	127	129
Other Overnight	213	210	210	63	63	63
All Overnight	1,024	1,026	1,049	399	400	410

## IV. COUNTY TRAVEL IMPACTS AND VISITOR VOLUME



## 2012p County Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment	Tax Revenue (\$000)		
	All Travel	Destination			Local	State	Total
Baker	42.6	39.9	11.6	660	390	1,270	1,660
Benton	112.9	97.5	27.1	1,530	1,290	3,770	5,060
Clackamas	470.9	419.9	120.0	5,230	3,980	14,080	18,060
Clatsop	430.3	423.9	121.1	4,970	7,340	11,130	18,470
Columbia	36.8	28.3	8.2	500	0	1,400	1,400
Coos	233.5	218.0	61.7	3,050	1,020	6,710	7,730
Crook	35.5	32.1	8.8	450	220	970	1,180
Curry	118.1	114.0	36.7	1,680	520	3,120	3,640
Deschutes	532.8	456.8	134.3	5,660	7,710	14,450	22,160
Douglas	221.1	201.7	53.6	2,720	1,050	6,320	7,370
East Douglas	167.0	148.9	39.7	2,020	890	5,020	5,900
West Douglas	54.1	52.8	13.8	700	170	1,310	1,470
Gilliam	4.5	4.1	0.8	50	0	120	120
Grant	10.0	8.7	2.4	170	80	320	400
Harney	16.8	15.4	4.6	270	250	460	710
Hood River	79.4	75.5	20.1	960	1,230	2,340	3,560
Jackson	477.1	369.3	108.5	4,570	6,510	12,600	19,110
Jefferson	48.7	44.6	11.1	760	490	1,460	1,940
Josephine	120.3	105.9	32.1	1,620	970	3,960	4,930
Klamath	138.2	123.1	37.7	1,660	1,350	4,290	5,630
Lake	13.6	12.1	2.6	200	100	390	490
Lane	708.3	555.2	165.9	8,240	8,060	18,860	26,920
East Lane	613.0	462.4	138.6	6,830	7,500	16,660	24,170
West Lane	95.3	92.8	27.4	1,410	560	2,190	2,750
Lincoln	447.2	439.3	123.1	5,570	9,100	12,080	21,180
Linn	128.7	108.2	26.2	1,480	800	4,320	5,120
Malheur	41.0	35.7	10.6	580	680	1,300	1,980
Marion	349.5	293.7	79.8	3,960	2,610	11,970	14,580
Morrow	13.0	11.2	2.8	160	10	410	420
Multnomah	2,989.3	1,485.4	630.2	18,090	59,430	56,670	116,100
East Multnomah	64.8	61.9	16.3	810	1,090	1,690	2,780
West Multnomah	2,924.6	1,423.5	613.9	17,280	58,340	54,990	113,320
Polk	161.8	149.1	54.9	2,330	0	4,500	4,500
Sherman	4.9	4.6	1.2	60	10	140	150
Tillamook	197.6	193.1	59.4	2,050	1,120	4,790	5,910
Umatilla	139.3	125.6	40.1	2,070	1,180	4,560	5,740
Union	31.8	27.3	9.0	530	420	990	1,410
Wallowa	26.5	25.3	8.0	430	280	650	940
Wasco	90.5	86.0	27.6	1,440	660	2,320	2,980
North Wasco	56.9	52.7	16.5	860	660	1,570	2,230
South Wasco	33.6	33.3	11.1	580	0	750	750
Washington	598.2	487.6	147.9	5,900	7,330	19,910	27,240
Wheeler	2.8	2.6	0.6	40	0	80	80
Yamhill	103.1	85.8	25.0	1,430	410	3,560	3,970

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).

## 2012p County Overnight Visitor Volume

	Nights (000)		Trips (000)	
	Persons	Parties	Persons	Parties
Baker	623	222	230	84
Benton	1,401	547	631	248
Clackamas	6,601	3,025	2,356	1,056
Clatsop	3,271	1,228	1,419	546
Columbia	629	280	208	92
Coos	2,359	881	952	363
Crook	590	210	247	91
Curry	1,488	504	612	216
Deschutes	5,738	2,175	2,209	846
Douglas	2,400	870	901	333
Gilliam/Sherman	153	54	66	24
Grant	214	74	84	30
Harney	266	96	117	44
Hood River	846	319	351	135
Jackson	4,966	1,956	1,927	757
Jefferson	883	298	342	118
Josephine	1,812	682	681	260
Klamath	2,004	742	772	291
Lake	262	93	108	39
Lane	7,395	2,861	2,770	1,071
Lincoln	4,147	1,517	1,716	647
Linn	1,815	684	752	287
Malheur	637	243	290	112
Marion	4,839	1,836	1,763	675
Morrow	238	89	105	40
Multnomah	11,386	5,495	4,641	2,172
Polk	<i>n.a.</i>	<i>n.a.</i>	<i>n.a.</i>	<i>n.a.</i>
Sherman (see Gilliam)				
Tillamook	2,378	813	1,010	358
Umatilla	1,594	611	736	286
Union	538	197	227	85
Wallowa	420	146	181	65
Wasco	1,000	363	450	169
Washington	7,166	3,510	2,582	1,234
Wheeler	70	23	27	9
Yamhill	1,491	582	666	262

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 (2012p)

Amount of Visitor Spending that supports 1 Job	\$60,840
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

### Visitor Volume (2012p)

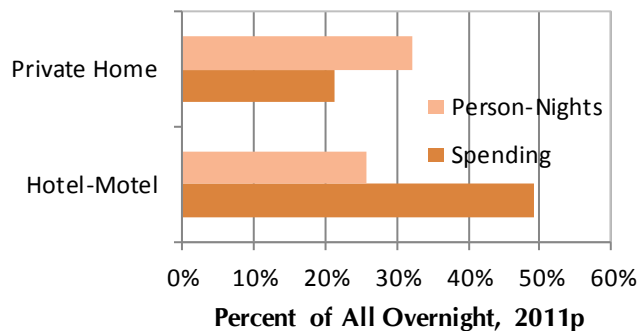
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$844
Additional employment if each resident household encouraged one additional overnight visitor	14

### Visitor Shares

Travel Share of Total Employment (2011)*	8.0%
Overnight Visitor Day Share (2012p)**	10.7%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	85	160	\$14.5
Private Home	66	200	\$6.2
Other Overnight	80	263	\$8.8
All Overnight	230	623	\$29.5



## Baker County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	23.6	6.1	680	147	631	778
1992	25.8	6.7	710	187	712	899
1993	28.0	7.3	750	220	785	1,005
1994	31.2	8.2	820	250	880	1,130
1995	32.3	8.5	810	270	890	1,160
1996	32.2	8.4	780	270	867	1,137
1997	34.5	9.1	800	265	917	1,182
1998	34.9	9.5	850	265	929	1,193
1999	35.0	9.4	820	264	918	1,182
2000	35.2	9.2	770	250	917	1,167
2001	34.8	9.1	740	244	900	1,144
2002	38.6	10.3	840	288	975	1,263
2003	39.1	10.3	850	289	987	1,276
2004	40.7	10.6	780	293	1,063	1,356
2005	42.2	10.9	760	310	1,091	1,402
2006	43.6	11.2	750	331	1,122	1,453
2007	43.5	11.5	760	415	1,144	1,559
2008	41.7	10.9	700	385	1,086	1,471
2009	39.7	10.9	690	401	1,053	1,453
2010	41.8	10.9	680	403	1,079	1,482
2011	42.2	11.0	680	394	1,263	1,657
2012p	42.6	11.6	660	392	1,271	1,663
Annual Percentage Change						
11-12p	0.9%	4.8%	-3.0%	-0.4%	0.6%	0.3%
91-12p	2.8%	3.1%	-0.1%	4.8%	3.4%	3.7%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Baker County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	37.3	39.1	41.4	38.9	39.6	39.5	39.9
Other Travel*	1.4	1.6	2.3	2.8	2.2	2.7	2.7
Total Direct Spending	38.6	40.7	43.6	41.7	41.8	42.2	42.6
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	5.9	6.3	6.9	7.3	7.5	7.3	7.2
Food Service	10.1	10.5	11.1	10.2	10.9	10.7	11.0
Food Stores	4.8	5.0	4.9	4.6	4.8	4.9	5.0
Local Tran. & Gas	3.1	4.1	5.3	5.7	5.0	5.6	5.5
Arts, Ent. & Rec.	6.1	6.2	6.2	5.3	5.4	5.2	5.3
Retail Sales	7.3	7.0	7.0	5.8	6.1	5.9	6.0
Destination Spending	37.3	39.1	41.4	38.9	39.6	39.5	39.9
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	6.7	7.0	7.5	7.4	7.6	7.7	8.2
Arts, Ent. & Rec.	1.7	1.7	1.7	1.7	1.6	1.6	1.6
Retail**	1.6	1.7	1.6	1.5	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	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	10.3	10.6	11.2	10.9	10.9	11.0	11.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	450	440	450	430	400	410	400
Arts, Ent. & Rec.	270	230	200	180	180	180	170
Retail**	100	100	90	80	80	80	80
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	840	780	750	700	680	680	660
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.3	0.3	0.3	0.4	0.4	0.4	0.4
State Tax Receipts	1.0	1.1	1.1	1.1	1.1	1.3	1.3
Total Local & State	1.3	1.4	1.5	1.5	1.5	1.7	1.7

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, and travel agencies. \*\*Retail includes gasoline.

## Baker County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	25.2	26.7	28.6	29.0	29.4	29.3	29.5
Hotel, Motel	11.6	12.5	14.5	15.2	15.0	14.6	14.5
Private Home	5.2	5.3	5.6	5.8	6.0	6.1	6.2
Other Overnight	8.3	8.9	8.5	8.0	8.4	8.7	8.8
Campground	5.9	6.3	5.8	5.1	5.6	5.7	5.8
Vacation Home	2.4	2.5	2.7	2.9	2.8	3.0	3.0
Day Travel	12.1	12.4	12.8	9.9	10.2	10.2	10.4
Spending at Destination	37.3	39.1	41.4	38.9	39.6	39.5	39.9

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$222	\$420	\$91	\$172	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$111	\$364	\$33	\$110	3.3	3.3
All Overnight	\$133	\$352	\$47	\$128	2.8	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	174	163	160	71	67	65
Private Home	202	197	200	77	76	77
Other Overnight	266	263	263	80	79	79
All Overnight	642	623	623	229	222	222

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	92	86	85	38	35	35
Private Home	66	65	66	25	25	25
Other Overnight	81	80	80	24	24	24
All Overnight	240	231	230	88	84	84

# BENTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$65,040
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.20

### Visitor Volume (2012p)

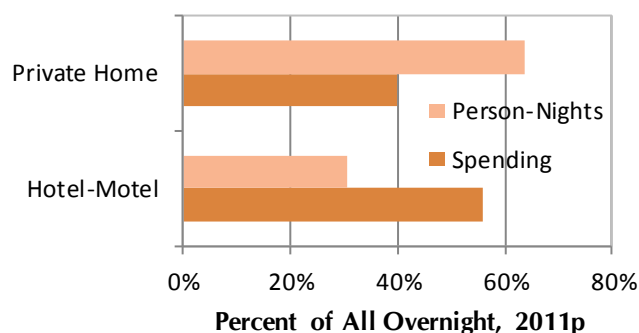
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,891
Additional employment if each resident household encouraged one additional overnight visitor	60

### Visitor Shares

Travel Share of Total Employment (2011)*	2.7%
Overnight Visitor Day Share (2012p)**	4.3%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	256	427	\$39.8
Private Home	347	893	\$28.4
Other Overnight	27	81	\$3.2
All Overnight	631	1,401	\$71.4

## Benton County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	46.8	12.1	1,210	404	1,527	1,931
1992	49.8	12.8	1,200	449	1,686	2,135
1993	51.8	13.4	1,210	476	1,787	2,262
1994	56.5	14.7	1,290	555	1,942	2,498
1995	60.0	15.7	1,320	628	2,026	2,654
1996	62.1	16.2	1,320	667	2,036	2,703
1997	62.6	16.4	1,270	676	2,024	2,700
1998	61.3	16.4	1,280	666	1,995	2,661
1999	63.8	16.9	1,210	694	2,026	2,720
2000	69.0	17.8	1,280	757	2,150	2,907
2001	69.0	17.9	1,290	756	2,133	2,889
2002	70.8	18.6	1,290	758	2,153	2,911
2003	73.7	19.0	1,300	777	2,224	3,001
2004	83.1	21.3	1,460	937	2,527	3,464
2005	87.5	21.9	1,480	991	2,618	3,610
2006	92.7	22.8	1,500	1,081	2,736	3,818
2007	93.8	23.7	1,510	1,102	2,798	3,900
2008	98.3	24.4	1,520	1,150	2,860	4,010
2009	87.0	23.1	1,410	998	2,651	3,649
2010	96.5	24.2	1,430	1,156	2,818	3,974
2011	105.5	25.3	1,500	1,081	3,607	4,688
2012p	112.9	27.1	1,530	1,295	3,768	5,063
Annual Percentage Change						
11-12p	7.0%	7.0%	2.3%	19.8%	4.5%	8.0%
91-12p	4.3%	3.9%	1.1%	5.7%	4.4%	4.7%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Benton County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	64.3	74.5	80.7	83.5	84.6	90.7	97.5
Other Travel*	6.5	8.6	12.0	14.7	11.9	14.8	15.4
Total Direct Spending	70.8	83.1	92.7	98.3	96.5	105.5	112.9
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	9.3	12.0	13.8	14.7	14.6	15.5	16.8
Food Service	17.9	20.6	22.1	22.7	24.3	25.7	28.0
Food Stores	7.1	7.9	8.1	8.7	8.8	9.5	10.1
Local Tran. & Gas	5.5	8.1	10.4	12.4	11.0	13.3	14.0
Arts, Ent. & Rec.	10.7	11.7	11.9	11.5	11.7	12.1	12.9
Retail Sales	13.8	14.2	14.4	13.5	14.1	14.7	15.7
Destination Spending	64.3	74.5	80.7	83.5	84.6	90.7	97.5
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	11.2	13.3	14.5	15.6	15.7	16.4	17.5
Arts, Ent. & Rec.	3.7	3.9	4.1	4.6	4.4	4.7	5.0
Retail**	2.6	2.9	3.0	3.0	3.1	3.2	3.4
Ground Tran.	0.3	0.4	0.4	0.4	0.4	0.4	0.5
Other Travel*	0.7	0.7	0.8	0.8	0.6	0.6	0.6
Total Direct Earnings	18.6	21.3	22.8	24.4	24.2	25.3	27.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	740	830	850	850	790	830	840
Arts, Ent. & Rec.	330	400	430	460	440	470	480
Retail**	160	170	170	160	160	160	160
Ground Tran.	10	20	10	10	10	10	20
Other Travel*	50	40	40	40	30	30	30
Total Direct Employment	1,290	1,460	1,500	1,520	1,430	1,500	1,530
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.8	0.9	1.1	1.2	1.2	1.1	1.3
State Tax Receipts	2.2	2.5	2.7	2.9	2.8	3.6	3.8
Total Local & State	2.9	3.5	3.8	4.0	4.0	4.7	5.1

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, and travel agencies. \*\*Retail includes gasoline.

## Benton County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	43.5	51.5	56.6	61.3	61.7	66.4	71.4
Hotel, Motel	21.1	27.6	31.4	34.0	33.8	36.7	39.8
Private Home	19.9	21.2	22.2	24.3	24.8	26.6	28.4
Other Overnight	2.5	2.7	3.0	3.0	3.0	3.1	3.2
Campground	2.1	2.2	2.5	2.5	2.4	2.5	2.5
Vacation Home	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Day Travel	20.8	23.0	24.2	22.2	22.9	24.4	26.1
Spending at Destination	64.3	74.5	80.7	83.5	84.6	90.7	97.5

### Average Expenditures for Overnight Visitors, 2012p

	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	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$131	\$392	\$39	\$116	3.4	3.0
All Overnight	\$131	\$287	\$51	\$113	2.6	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	383	398	427	156	162	174
Private Home	826	849	893	323	332	349
Other Overnight	83	81	81	24	24	24
All Overnight	1,292	1,328	1,401	503	518	547

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	230	239	256	94	97	105
Private Home	321	330	347	126	129	136
Other Overnight	27	27	27	8	8	8
All Overnight	579	596	631	228	235	248

# CLACKAMAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$82,590
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

### Visitor Volume (2012p)

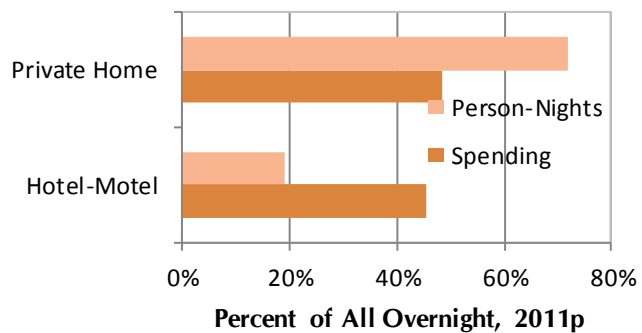
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,080
Additional employment if each resident household encouraged one additional overnight visitor	170

### Visitor Shares

Travel Share of Total Employment (2011)*	2.4%
Overnight Visitor Day Share (2012p)**	6.5%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	640	1,269	\$139.6
Private Home	1,540	4,749	\$149.2
Other Overnight	176	583	\$19.1
All Overnight	2,356	6,601	\$307.9



## Clackamas County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	202.9	51.3	4,040	672	6,111	6,783
1992	222.5	56.4	4,190	744	6,851	7,595
1993	240.9	61.5	4,420	959	7,427	8,386
1994	245.4	62.6	4,340	1,176	7,627	8,803
1995	259.1	66.3	4,420	1,283	7,872	9,156
1996	271.1	69.2	4,480	1,553	7,974	9,527
1997	289.4	74.6	4,580	1,746	8,293	10,040
1998	285.6	75.3	4,500	1,767	8,228	9,995
1999	303.1	79.3	4,570	1,850	8,539	10,389
2000	326.3	83.8	4,730	2,110	9,021	11,131
2001	328.9	84.4	4,740	2,032	9,022	11,054
2002	330.4	84.6	4,720	2,102	8,896	10,998
2003	337.5	86.4	4,650	2,039	9,134	11,172
2004	360.6	91.2	4,850	2,168	9,973	12,141
2005	389.1	96.9	4,970	2,869	10,547	13,416
2006	424.3	105.1	5,180	3,247	11,347	14,593
2007	441.3	113.5	5,400	3,649	11,907	15,556
2008	460.6	117.4	5,500	3,770	12,211	15,981
2009	408.1	108.7	5,100	3,103	11,140	14,243
2010	431.3	108.5	4,980	3,206	11,373	14,579
2011	455.8	112.4	5,140	3,665	13,793	17,458
2012p	470.9	120.0	5,230	3,977	14,079	18,056
Annual Percentage Change						
11-12p	3.3%	6.8%	1.6%	8.5%	2.1%	3.4%
91-12p	4.1%	4.1%	1.2%	8.8%	4.1%	4.8%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Clackamas County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	306.3	325.1	377.0	403.4	387.0	404.2	419.9
Other Travel*	24.2	35.5	47.3	57.2	44.3	51.6	51.0
Total Direct Spending	330.4	360.6	424.3	460.6	431.3	455.8	470.9
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	43.0	44.8	58.4	65.9	56.7	61.6	67.1
Food Service	88.9	95.2	109.7	117.5	119.6	122.6	128.6
Food Stores	23.7	26.3	28.2	32.3	31.4	32.7	33.3
Local Tran. & Gas	28.0	35.1	46.6	55.9	49.0	55.9	56.8
Arts, Ent. & Rec.	41.3	43.1	47.0	47.4	45.7	46.0	47.1
Retail Sales	81.4	80.5	87.1	84.4	84.7	85.4	87.0
Destination Spending	306.3	325.1	377.0	403.4	387.0	404.2	419.9
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	54.1	57.3	68.1	76.5	71.7	75.3	80.6
Arts, Ent. & Rec.	12.4	12.7	14.2	16.5	14.9	15.2	16.7
Retail**	11.9	12.8	13.9	14.6	14.1	14.1	14.6
Ground Tran.	3.3	3.5	4.0	4.2	4.1	4.2	4.3
Other Travel*	2.9	4.8	5.1	5.6	3.6	3.6	3.8
Total Direct Earnings	84.6	91.2	105.1	117.4	108.5	112.4	120.0
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	2,970	2,960	3,240	3,440	3,120	3,270	3,320
Arts, Ent. & Rec.	950	1,020	1,010	1,120	1,020	1,030	1,060
Retail**	520	530	580	600	560	560	560
Ground Tran.	140	140	150	140	140	140	140
Other Travel*	140	200	210	200	150	140	140
Total Direct Employment	4,720	4,850	5,180	5,500	4,980	5,140	5,230
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	2.1	2.2	3.2	3.8	3.2	3.7	4.0
State Tax Receipts	8.9	10.0	11.3	12.2	11.4	13.8	14.1
Total Local & State	11.0	12.1	14.6	16.0	14.6	17.5	18.1

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, and travel agencies. \*\*Retail includes gasoline.

## Clackamas County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	221.8	237.0	279.2	308.6	292.7	307.9	321.3
Hotel, Motel	97.5	101.9	130.2	145.1	128.6	139.6	151.6
Private Home	111.3	120.1	132.7	142.8	145.5	149.2	150.3
Other Overnight	13.0	15.1	16.3	20.6	18.5	19.1	19.4
Campground	7.7	9.5	10.2	13.9	11.8	12.2	12.3
Vacation Home	5.2	5.6	6.1	6.7	6.8	7.0	7.1
Day Travel	84.5	88.1	97.8	94.8	94.4	96.3	98.6
Spending at Destination	306.3	325.1	377.0	403.4	387.0	404.2	419.9

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$237	\$483	\$110	\$218	2.2	2.0
Private Home	\$66	\$209	\$31	\$97	2.1	3.2
Other Overnight	\$106	\$354	\$33	\$109	3.2	3.3
All Overnight	\$102	\$292	\$47	\$131	2.2	2.9

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,151	1,198	1,269	537	555	590
Private Home	4,873	4,805	4,749	2,305	2,273	2,255
Other Overnight	588	583	583	182	180	180
All Overnight	6,613	6,585	6,601	3,024	3,008	3,025

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	580	603	640	262	272	289
Private Home	1,581	1,559	1,540	730	720	713
Other Overnight	178	176	176	55	54	54
All Overnight	2,338	2,338	2,356	1,047	1,046	1,056

# CLATSOP COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$85,510
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

### Visitor Volume (2012p)

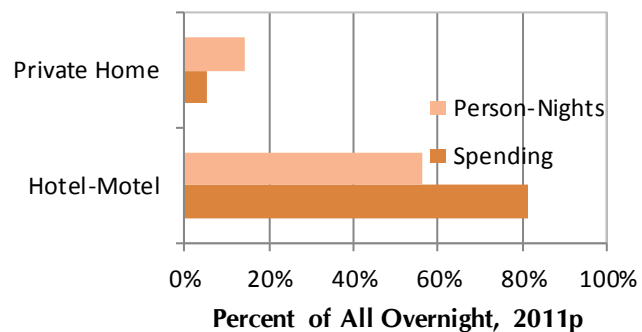
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$2,915
Additional employment if each resident household encouraged one additional overnight visitor	34

### Visitor Shares

Travel Share of Total Employment (2011)*	20.8%
Overnight Visitor Day Share (2012p)**	24.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	975	1,844	\$220.0
Private Home	155	472	\$14.7
Other Overnight	289	955	\$36.1
All Overnight	1,419	3,271	\$270.8

## Clatsop County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	187.7	53.3	3,830	2,370	4,461	6,830
1992	196.8	55.8	3,780	2,624	4,779	7,403
1993	210.3	59.8	3,920	2,866	5,149	8,015
1994	227.8	65.0	4,090	3,182	5,592	8,775
1995	235.8	67.3	4,080	3,339	5,712	9,051
1996	235.9	67.3	3,960	3,414	5,599	9,013
1997	242.5	69.4	3,910	3,557	5,672	9,230
1998	251.1	72.9	4,070	3,777	5,838	9,615
1999	263.8	76.4	4,260	4,076	6,060	10,136
2000	282.8	80.9	4,460	4,386	6,452	10,838
2001	292.3	83.6	4,600	4,538	6,600	11,139
2002	304.1	87.5	4,710	4,850	6,746	11,596
2003	310.4	89.0	4,720	4,875	6,915	11,790
2004	323.0	92.0	4,710	5,179	7,720	12,899
2005	337.8	95.3	4,730	5,428	8,017	13,445
2006	378.4	106.6	5,120	6,324	8,941	15,265
2007	379.1	110.3	5,140	6,507	9,164	15,671
2008	406.5	118.6	5,370	6,761	9,808	16,569
2009	389.5	117.6	5,240	6,601	9,550	16,151
2010	395.1	113.9	4,990	6,805	9,424	16,229
2011	409.2	112.0	4,900	7,060	10,604	17,664
2012p	430.3	121.1	4,970	7,337	11,133	18,470
Annual Percentage Change						
11-12p	5.2%	8.1%	1.5%	3.9%	5.0%	4.6%
91-12p	4.0%	4.0%	1.2%	5.5%	4.5%	4.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Clatsop County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	301.1	319.0	372.8	399.7	389.7	402.8	423.9
Other Travel*	3.0	4.0	5.6	6.7	5.4	6.4	6.5
Total Direct Spending	304.1	323.0	378.4	406.5	395.1	409.2	430.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	65.5	70.5	87.3	95.4	93.9	94.9	99.5
Food Service	83.6	88.4	102.6	111.1	113.5	116.0	124.3
Food Stores	26.9	28.7	30.7	33.0	32.1	33.5	35.0
Local Tran. & Gas	20.8	27.7	38.9	49.6	41.7	48.9	50.6
Arts, Ent. & Rec.	46.3	47.4	51.9	51.9	50.1	50.4	52.7
Retail Sales	58.0	56.3	61.4	58.8	58.5	59.2	61.8
Destination Spending	301.1	319.0	372.8	399.7	389.7	402.8	423.9
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	61.4	65.2	76.9	85.9	83.5	81.8	89.0
Arts, Ent. & Rec.	14.4	14.4	16.1	18.6	16.9	16.6	17.8
Retail**	10.2	10.8	11.7	12.1	11.7	11.8	12.4
Ground Tran.	1.1	1.2	1.4	1.5	1.5	1.5	1.6
Other Travel*	0.4	0.4	0.4	0.4	0.3	0.3	0.3
Total Direct Earnings	87.5	92.0	106.6	118.6	113.9	112.0	121.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,320	3,320	3,650	3,770	3,550	3,470	3,530
Arts, Ent. & Rec.	800	780	850	960	840	820	830
Retail**	520	540	550	560	540	540	540
Ground Tran.	50	50	50	50	50	50	50
Other Travel*	30	20	20	20	10	10	10
Total Direct Employment	4,710	4,710	5,120	5,370	4,990	4,900	4,970
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	4.9	5.2	6.3	6.8	6.8	7.1	7.3
State Tax Receipts	6.7	7.7	8.9	9.8	9.4	10.6	11.1
Total Local & State	11.6	12.9	15.3	16.6	16.2	17.7	18.5

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, and travel agencies. \*\*Retail includes gasoline.

## Clatsop County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	172.9	185.8	222.5	255.9	248.4	257.1	270.8
Hotel, Motel	131.1	142.2	176.8	207.1	200.1	207.3	220.0
Private Home	11.2	11.9	13.1	14.1	13.7	14.3	14.7
Other Overnight	30.6	31.7	32.6	34.7	34.6	35.5	36.1
Campground	20.1	20.6	20.5	21.6	21.7	22.1	22.4
Vacation Home	10.5	11.1	12.1	13.1	12.9	13.4	13.6
Day Travel	128.1	133.2	150.4	143.8	141.3	145.7	153.1
Spending at Destination	301.1	319.0	372.8	399.7	389.7	402.8	423.9

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$292	\$552	\$119	\$226	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$123	\$409	\$38	\$125	3.3	3.3
All Overnight	\$221	\$496	\$83	\$191	2.7	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,748	1,751	1,844	715	716	754
Private Home	462	465	472	177	178	181
Other Overnight	967	955	955	296	292	292
All Overnight	3,177	3,171	3,271	1,188	1,187	1,228

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	924	926	975	378	379	399
Private Home	152	153	155	58	59	60
Other Overnight	292	289	289	89	88	88
All Overnight	1,368	1,367	1,419	525	525	546

# COLUMBIA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$58,700
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

### Visitor Volume (2012p)

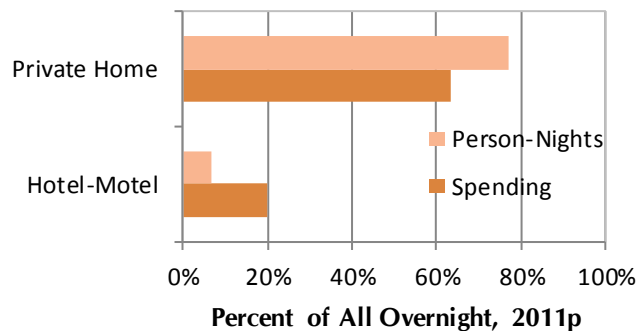
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,653
Additional employment if each resident household encouraged one additional overnight visitor	28

### Visitor Shares

Travel Share of Total Employment (2011)*	3.4%
Overnight Visitor Day Share (2012p)**	3.5%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	21	43	\$3.7
Private Home	156	485	\$11.8
Other Overnight	30	101	\$3.0
All Overnight	208	629	\$18.5



## Columbia County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	14.8	3.4	350	0	569	569
1992	16.3	3.7	360	0	641	641
1993	16.9	3.9	360	0	682	682
1994	18.1	4.2	380	0	725	725
1995	20.0	4.7	410	0	771	771
1996	21.1	5.0	420	0	784	784
1997	20.5	4.8	380	0	769	769
1998	21.3	5.2	420	0	797	797
1999	22.9	5.5	430	0	831	831
2000	24.1	5.6	440	0	846	846
2001	24.3	5.7	440	0	850	850
2002	25.0	5.9	450	0	858	858
2003	26.1	6.0	440	0	889	889
2004	27.8	6.3	490	0	941	941
2005	30.2	6.6	490	0	997	997
2006	34.1	7.4	530	0	1,095	1,095
2007	35.0	7.8	530	0	1,126	1,126
2008	36.7	7.8	530	0	1,142	1,142
2009	34.5	8.1	530	0	1,114	1,114
2010	34.1	8.3	530	0	1,132	1,132
2011	37.0	8.3	520	0	1,427	1,427
2012p	36.8	8.2	500	0	1,401	1,401
Annual Percentage Change						
11-12p	-0.5%	-0.4%	-3.8%		-1.8%	-1.8%
91-12p	4.4%	4.3%	1.7%		4.4%	4.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Columbia County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	21.3	22.8	26.9	27.9	27.1	28.5	28.3
Other Travel*	3.7	5.0	7.2	8.9	7.1	8.5	8.5
Total Direct Spending	25.0	27.8	34.1	36.7	34.1	37.0	36.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	2.0	2.1	2.9	2.8	2.5	2.4	2.2
Food Service	6.2	6.6	7.7	7.9	8.2	8.5	8.6
Food Stores	3.5	3.8	4.2	4.8	4.7	5.1	5.2
Local Tran. & Gas	1.8	2.3	3.2	3.7	3.2	3.8	3.7
Arts, Ent. & Rec.	3.4	3.5	4.0	3.8	3.7	3.7	3.7
Retail Sales	4.6	4.5	4.9	4.7	4.7	4.9	4.9
Destination Spending	21.3	22.8	26.9	27.9	27.1	28.5	28.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	3.3	3.5	4.3	4.5	5.3	5.3	5.2
Arts, Ent. & Rec.	1.1	1.1	1.3	1.4	1.3	1.2	1.2
Retail**	1.0	1.1	1.2	1.3	1.3	1.3	1.3
Ground Tran.	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.4	0.4	0.4	0.4	0.3	0.3	0.4
Total Direct Earnings	5.9	6.3	7.4	7.8	8.3	8.3	8.2
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	240	250	290	280	310	310	290
Arts, Ent. & Rec.	120	160	150	150	140	130	130
Retail**	50	60	60	60	60	60	60
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	20	30	30	20	20	20
Total Direct Employment	450	490	530	530	530	520	500
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.9	0.9	1.1	1.1	1.1	1.4	1.4
Total Local & State	0.9	0.9	1.1	1.1	1.1	1.4	1.4

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, and travel agencies. \*\*Retail includes gasoline.

## Columbia County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	13.4	14.5	17.5	18.6	17.9	18.8	18.5
Hotel, Motel	4.0	4.3	5.9	5.0	4.4	4.2	3.7
Private Home	8.5	9.3	10.5	11.1	11.0	11.6	11.8
Other Overnight	0.9	1.0	1.1	2.6	2.5	3.0	3.0
Campground	0.5	0.6	0.7	2.1	2.1	2.1	2.2
Vacation Home	0.3	0.3	0.4	0.4	0.4	0.9	0.9
Day Travel	7.9	8.3	9.5	9.2	9.2	9.7	9.8
Spending at Destination	21.3	22.8	26.9	27.9	27.1	28.5	28.3

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$205	\$418	\$86	\$176	2.4	2.0
Private Home	\$51	\$159	\$24	\$75	2.1	3.1
Other Overnight	\$93	\$314	\$30	\$101	3.1	3.4
All Overnight	\$66	\$201	\$29	\$89	2.3	3.0

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	55	50	43	23	21	18
Private Home	483	486	485	228	229	229
Other Overnight	82	101	101	25	33	33
All Overnight	619	637	629	276	283	280

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	27	25	21	11	10	9
Private Home	156	157	156	73	74	74
Other Overnight	25	30	30	8	10	10
All Overnight	207	211	208	92	94	92

# COOS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$73,480
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

### Visitor Volume (2012p)

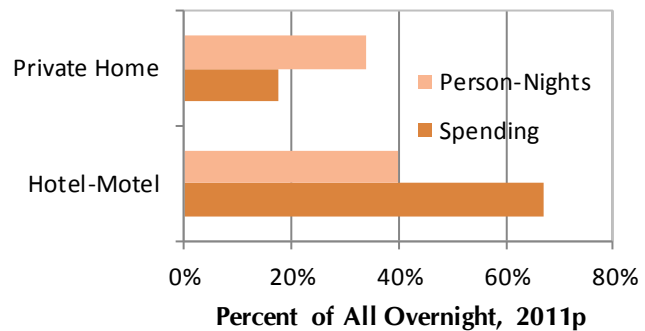
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,003
Additional employment if each resident household encouraged one additional overnight visitor	54

### Visitor Shares

Travel Share of Total Employment (2011)*	10.0%
Overnight Visitor Day Share (2012p)**	10.3%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	499	944	\$97.2
Private Home	265	805	\$25.5
Other Overnight	189	611	\$22.3
All Overnight	952	2,359	\$145.0

## Coos County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	95.8	24.8	2,540	523	2,622	3,145
1992	101.4	26.3	2,460	568	2,865	3,434
1993	104.4	27.0	2,440	656	2,985	3,641
1994	107.5	28.0	2,430	743	3,089	3,831
1995	114.0	30.2	2,570	773	3,228	4,001
1996	120.4	31.8	2,630	789	3,288	4,078
1997	119.5	31.5	2,500	735	3,214	3,949
1998	128.0	34.5	2,620	775	3,437	4,212
1999	141.6	38.3	2,780	898	3,724	4,622
2000	150.9	40.6	2,740	976	3,961	4,937
2001	159.2	42.9	2,980	1,057	4,121	5,178
2002	167.0	45.1	3,000	1,112	4,217	5,329
2003	180.0	48.2	3,110	1,118	4,507	5,624
2004	187.0	49.2	3,020	1,165	4,841	6,006
2005	196.7	50.8	2,970	1,224	5,042	6,266
2006	217.8	56.0	3,130	1,262	5,528	6,790
2007	223.5	59.3	3,220	1,303	5,752	7,055
2008	232.1	61.3	3,290	1,251	5,938	7,190
2009	192.2	53.7	2,860	1,047	5,103	6,150
2010	210.0	55.9	2,930	1,074	5,403	6,477
2011	222.4	58.5	3,040	998	6,497	7,495
2012p	233.5	61.7	3,050	1,022	6,713	7,735
Annual Percentage Change						
11-12p	5.0%	5.5%	0.4%	2.4%	3.3%	3.2%
91-12p	4.3%	4.4%	0.9%	3.2%	4.6%	4.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Coos County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	156.7	174.0	200.2	213.0	195.8	207.1	218.0
Other Travel*	10.4	13.0	17.6	19.1	14.1	15.3	15.5
Total Direct Spending	167.0	187.0	217.8	232.1	210.0	222.4	233.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	28.8	35.1	42.7	44.7	40.6	42.5	45.0
Food Service	41.3	45.0	51.5	55.6	53.9	56.2	60.2
Food Stores	17.3	18.5	19.6	21.3	19.9	20.9	21.8
Local Tran. & Gas	12.3	17.1	23.7	29.6	23.5	28.2	29.2
Arts, Ent. & Rec.	32.0	33.5	36.1	35.9	33.1	33.8	35.2
Retail Sales	24.9	24.7	26.6	26.0	24.8	25.5	26.5
Destination Spending	156.7	174.0	200.2	213.0	195.8	207.1	218.0
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	27.2	30.9	35.9	39.5	36.1	37.9	40.3
Arts, Ent. & Rec.	8.5	8.7	9.6	11.0	9.5	9.9	10.2
Retail**	5.3	5.7	6.1	6.5	6.0	6.1	6.4
Ground Tran.	0.7	0.7	0.8	0.9	0.8	0.9	0.9
Other Travel*	3.4	3.1	3.4	3.5	3.5	3.7	3.8
Total Direct Earnings	45.1	49.2	56.0	61.3	55.9	58.5	61.7
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,740	1,800	1,930	2,010	1,700	1,780	1,780
Arts, Ent. & Rec.	830	800	770	840	830	860	870
Retail**	280	280	300	310	280	290	290
Ground Tran.	30	30	30	30	30	30	30
Other Travel*	120	100	100	100	90	90	80
Total Direct Employment	3,000	3,020	3,130	3,290	2,930	3,040	3,050
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	1.1	1.2	1.3	1.3	1.1	1.0	1.0
State Tax Receipts	4.2	4.8	5.5	5.9	5.4	6.5	6.7
Total Local & State	5.3	6.0	6.8	7.2	6.5	7.5	7.7

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, and travel agencies. \*\*Retail includes gasoline.

## Coos County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	96.8	110.1	129.0	141.9	129.2	137.5	145.0
Hotel, Motel	56.2	68.1	84.1	94.5	83.5	90.6	97.2
Private Home	20.3	21.2	23.3	24.6	24.0	24.9	25.5
Other Overnight	20.3	20.8	21.6	22.8	21.6	22.0	22.3
Campground	17.5	17.8	18.4	19.4	18.3	18.6	18.8
Vacation Home	2.8	3.0	3.2	3.4	3.3	3.5	3.5
Day Travel	59.9	63.8	71.1	71.1	66.6	69.6	73.0
Spending at Destination	156.7	174.0	200.2	213.0	195.8	207.1	218.0

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$250	\$475	\$103	\$195	2.4	1.9
Private Home	\$81	\$249	\$32	\$96	2.6	3.1
Other Overnight	\$124	\$404	\$37	\$118	3.4	3.2
All Overnight	\$165	\$400	\$61	\$152	2.7	2.4

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	845	886	944	348	364	388
Private Home	799	795	805	312	310	314
Other Overnight	624	611	611	183	180	180
All Overnight	2,267	2,292	2,359	843	854	881

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	447	468	499	183	192	205
Private Home	263	261	265	102	101	102
Other Overnight	193	189	189	57	55	55
All Overnight	902	919	952	342	349	363

# CROOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$72,010
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

### Visitor Volume (2012p)

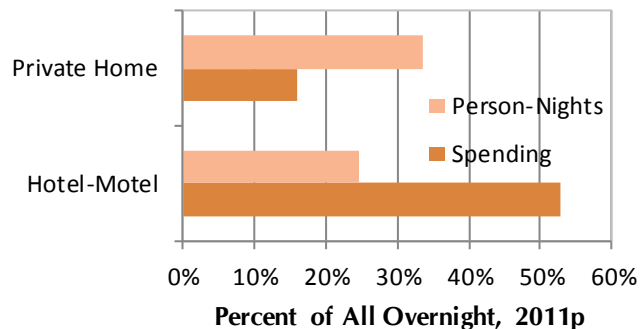
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$754
Additional employment if each resident household encouraged one additional overnight visitor	10

### Visitor Shares

Travel Share of Total Employment (2011)*	4.9%
Overnight Visitor Day Share (2012p)**	8.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	87	145	\$13.1
Private Home	77	198	\$4.0
Other Overnight	83	247	\$7.7
All Overnight	247	590	\$24.8



## Crook County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	10.1	2.7	270	91	305	397
1992	11.0	2.9	280	111	342	453
1993	12.3	3.3	300	154	381	535
1994	13.0	3.5	320	174	405	578
1995	14.1	3.8	320	179	428	607
1996	14.6	4.0	330	192	432	625
1997	15.1	4.1	320	203	439	642
1998	15.6	4.3	350	208	452	659
1999	17.7	4.9	370	232	495	726
2000	19.6	5.2	390	280	545	825
2001	19.1	5.2	380	229	538	768
2002	20.6	5.7	410	249	561	810
2003	21.1	5.7	410	250	575	825
2004	22.0	5.9	440	148	619	768
2005	23.3	6.1	450	148	648	796
2006	29.0	8.4	490	213	809	1,022
2007	29.8	8.9	540	204	840	1,044
2008	31.2	9.2	530	191	860	1,051
2009	27.7	8.6	470	154	792	946
2010	30.4	8.3	470	177	804	981
2011	31.6	8.2	450	188	939	1,127
2012p	35.5	8.8	450	216	968	1,184

### Annual Percentage Change

11-12p	12.4%	6.5%	0.2%	15.0%	3.1%	5.1%
91-12p	6.2%	5.8%	2.5%	4.2%	5.6%	5.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Crook County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	18.9	19.7	25.7	27.1	27.2	28.0	32.1
Other Travel*	1.7	2.3	3.3	4.1	3.2	3.6	3.4
Total Direct Spending	20.6	22.0	29.0	31.2	30.4	31.6	35.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	3.0	3.0	4.8	5.0	5.4	5.6	7.3
Food Service	4.7	5.0	6.4	6.8	7.2	7.2	8.3
Food Stores	3.5	3.6	4.2	4.6	4.3	4.4	4.6
Local Tran. & Gas	1.3	1.7	2.5	3.0	2.6	3.0	3.2
Arts, Ent. & Rec.	3.1	3.2	4.0	4.1	4.1	4.1	4.8
Retail Sales	3.3	3.2	3.8	3.6	3.7	3.6	3.9
Destination Spending	18.9	19.7	25.7	27.1	27.2	28.0	32.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	3.7	3.9	5.6	6.1	5.5	5.5	6.0
Arts, Ent. & Rec.	0.9	0.9	1.5	1.7	1.6	1.5	1.4
Retail**	0.8	0.8	1.0	1.0	1.0	1.0	1.0
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.2	0.2	0.2	0.2	0.1	0.1	0.1
Total Direct Earnings	5.7	5.9	8.4	9.2	8.3	8.2	8.8
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	210	210	250	270	230	230	230
Arts, Ent. & Rec.	140	170	180	190	180	160	160
Retail**	40	40	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	410	440	490	530	470	450	450
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.2	0.1	0.2	0.2	0.2	0.2	0.2
State Tax Receipts	0.6	0.6	0.8	0.9	0.8	0.9	1.0
Total Local & State	0.8	0.8	1.0	1.1	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, and travel agencies. \*\*Retail includes gasoline.

## Crook County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	13.6	14.1	18.9	20.3	20.6	21.3	24.8
Hotel, Motel	3.8	4.0	7.2	7.7	9.0	9.6	13.1
Private Home	3.1	3.4	3.9	4.3	4.2	4.1	4.0
Other Overnight	6.7	6.7	7.8	8.3	7.4	7.6	7.7
Campground	5.7	5.6	6.5	6.9	6.0	6.2	6.3
Vacation Home	1.0	1.1	1.3	1.4	1.4	1.4	1.5
Day Travel	5.4	5.6	6.8	6.7	6.7	6.7	7.2
Spending at Destination	18.9	19.7	25.7	27.1	27.2	28.0	32.1

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$221	\$368	\$90	\$150	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$105	\$311	\$31	\$93	3.4	3.0
All Overnight	\$118	\$274	\$42	\$100	2.8	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	105	108	145	43	44	59
Private Home	221	205	198	86	80	77
Other Overnight	248	247	247	74	73	73
All Overnight	574	560	590	203	197	210

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	63	65	87	26	26	36
Private Home	86	80	77	34	31	30
Other Overnight	84	83	83	25	25	25
All Overnight	233	228	247	84	82	91

# CURRY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$68,170
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.20

### Visitor Volume (2012p)

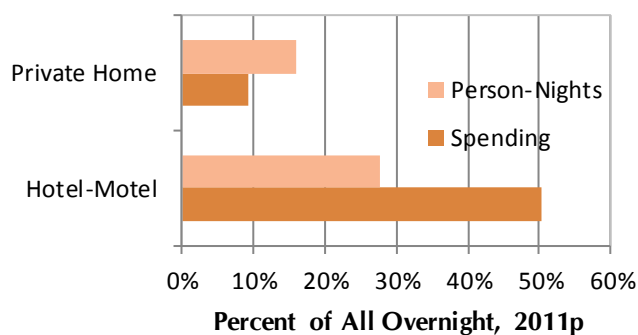
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,434
Additional employment if each resident household encouraged one additional overnight visitor	21

### Visitor Shares

Travel Share of Total Employment (2011)*	16.5%
Overnight Visitor Day Share (2012p)**	17.1%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	248	412	\$41.0
Private Home	92	236	\$7.5
Other Overnight	272	840	\$33.0
All Overnight	612	1,488	\$81.4

## Curry County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	76.7	25.3	2,100	394	1,908	2,302
1992	75.9	24.8	2,040	355	1,938	2,292
1993	74.6	24.3	1,930	337	1,925	2,262
1994	77.0	25.1	1,930	350	1,995	2,345
1995	78.2	25.5	1,870	358	2,001	2,360
1996	78.3	25.4	1,810	358	1,956	2,314
1997	78.1	25.3	1,730	350	1,919	2,269
1998	78.4	25.8	1,710	359	1,918	2,277
1999	82.3	26.9	1,670	382	1,984	2,366
2000	86.3	27.8	1,740	398	2,062	2,460
2001	92.7	30.0	1,790	433	2,187	2,620
2002	100.4	32.8	2,000	460	2,321	2,781
2003	102.0	33.1	1,980	463	2,366	2,829
2004	106.5	34.2	1,940	549	2,608	3,157
2005	105.3	33.4	1,880	538	2,562	3,100
2006	109.9	34.8	1,850	569	2,661	3,229
2007	114.1	37.3	1,910	605	2,796	3,401
2008	116.1	37.6	1,880	552	2,811	3,363
2009	113.0	38.1	1,840	559	2,783	3,342
2010	111.3	35.9	1,750	528	2,674	3,202
2011	114.6	35.1	1,710	522	3,062	3,584
2012p	118.1	36.7	1,680	520	3,123	3,644
Annual Percentage Change						
11-12p	3.1%	4.5%	-1.8%	-0.4%	2.0%	1.7%
91-12p	2.1%	1.8%	-1.0%	1.3%	2.4%	2.2%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Curry County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	98.6	104.1	106.6	112.2	108.3	110.7	114.0
Other Travel*	1.8	2.4	3.3	3.9	3.0	3.9	4.2
Total Direct Spending	100.4	106.5	109.9	116.1	111.3	114.6	118.1
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	20.1	21.4	22.6	22.8	22.4	22.1	22.4
Food Service	25.3	26.6	27.2	28.7	29.1	29.4	30.9
Food Stores	13.4	14.3	13.7	15.5	14.9	15.4	15.9
Local Tran. & Gas	7.1	9.5	11.8	14.4	12.0	13.9	14.0
Arts, Ent. & Rec.	15.4	15.7	15.2	15.3	14.6	14.5	14.9
Retail Sales	17.3	16.7	16.2	15.5	15.3	15.4	15.9
Destination Spending	98.6	104.1	106.6	112.2	108.3	110.7	114.0
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	23.2	24.4	25.2	27.0	26.0	25.3	27.6
Arts, Ent. & Rec.	5.0	5.0	4.9	5.7	5.1	5.2	4.2
Retail**	4.0	4.2	4.1	4.3	4.2	4.1	4.3
Ground Tran.	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	32.8	34.2	34.8	37.6	35.9	35.1	36.7
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,270	1,260	1,200	1,200	1,130	1,090	1,140
Arts, Ent. & Rec.	480	420	430	450	400	410	330
Retail**	220	230	200	210	190	190	190
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	2,000	1,940	1,850	1,880	1,750	1,710	1,680
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.5	0.5	0.6	0.6	0.5	0.5	0.5
State Tax Receipts	2.3	2.6	2.7	2.8	2.7	3.1	3.1
Total Local & State	2.8	3.2	3.2	3.4	3.2	3.6	3.6

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, and travel agencies. \*\*Retail includes gasoline.

## Curry County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	67.4	71.9	74.2	80.7	77.6	79.3	81.4
Hotel, Motel	34.0	36.7	39.3	41.5	39.5	40.0	41.0
Private Home	5.4	5.7	6.1	6.3	6.1	6.8	7.5
Other Overnight	27.9	29.5	28.8	32.9	32.0	32.5	33.0
Campground	25.1	26.4	25.6	29.5	28.7	29.0	29.5
Vacation Home	2.8	3.0	3.2	3.4	3.3	3.4	3.5
Day Travel	31.2	32.2	32.4	31.5	30.7	31.4	32.6
Spending at Destination	98.6	104.1	106.6	112.2	108.3	110.7	114.0

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$244	\$405	\$99	\$165	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$135	\$415	\$39	\$121	3.4	3.1
All Overnight	\$161	\$376	\$55	\$133	2.9	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	415	405	412	169	165	168
Private Home	202	218	236	79	85	92
Other Overnight	860	840	840	250	244	244
All Overnight	1,477	1,463	1,488	498	495	504

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	250	244	248	102	99	101
Private Home	79	85	92	31	33	36
Other Overnight	278	272	272	81	79	79
All Overnight	607	601	612	214	212	216

# DESCHUTES COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$82,230
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.90

### Visitor Volume (2012p)

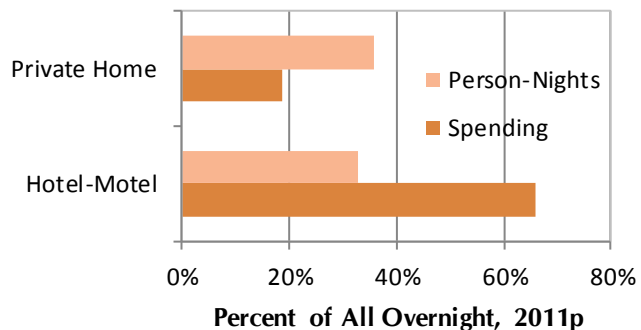
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$11,005
Additional employment if each resident household encouraged one additional overnight visitor	134

### Visitor Shares

Travel Share of Total Employment (2011)*	6.0%
Overnight Visitor Day Share (2012p)**	9.7%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	998	1,888	\$251.1
Private Home	674	2,049	\$71.6
Other Overnight	537	1,801	\$58.2
All Overnight	2,209	5,738	\$381.0



## Deschutes County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	172.9	43.9	3,340	3,330	4,217	7,547
1992	179.1	45.1	3,230	3,427	4,514	7,941
1993	183.8	46.6	3,230	3,530	4,746	8,276
1994	202.0	51.4	3,420	3,980	5,214	9,194
1995	208.1	52.4	3,350	4,016	5,292	9,308
1996	220.0	54.9	3,400	4,249	5,433	9,682
1997	235.8	58.7	3,480	4,597	5,693	10,290
1998	243.4	61.9	3,610	4,876	5,897	10,773
1999	263.2	66.4	3,790	5,280	6,277	11,557
2000	293.0	74.2	4,200	6,079	7,014	13,094
2001	290.3	73.7	4,180	6,008	6,957	12,965
2002	301.3	76.4	4,220	6,232	7,088	13,321
2003	316.9	77.8	4,150	6,174	7,321	13,495
2004	339.3	81.6	4,220	6,501	8,283	14,784
2005	372.4	86.9	4,190	6,908	8,877	15,784
2006	467.0	109.7	5,040	8,643	11,046	19,689
2007	488.6	117.8	5,390	7,813	11,663	19,476
2008	510.9	123.5	5,610	7,352	12,167	19,519
2009	488.3	115.2	5,230	6,569	11,189	17,758
2010	509.0	116.4	5,300	6,997	11,530	18,527
2011	515.8	122.3	5,530	7,452	13,814	21,266
2012p	532.8	134.3	5,660	7,708	14,455	22,162
Annual Percentage Change						
11-12p	3.3%	9.8%	2.4%	3.4%	4.6%	4.2%
91-12p	5.5%	5.5%	2.5%	4.1%	6.0%	5.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Deschutes County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	272.5	294.3	399.9	435.2	418.2	438.4	456.8
Other Travel*	28.9	45.0	67.0	75.7	90.8	77.4	76.0
Total Direct Spending	301.3	339.3	467.0	510.9	509.0	515.8	532.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	69.8	73.7	108.1	111.6	104.6	109.7	114.9
Food Service	71.1	76.7	104.0	115.9	118.1	121.6	128.7
Food Stores	26.0	28.9	34.3	38.8	37.4	39.2	40.6
Local Tran. & Gas	19.6	26.5	43.3	55.2	46.3	54.7	55.7
Arts, Ent. & Rec.	39.7	41.9	52.5	54.8	52.9	53.4	55.2
Retail Sales	46.3	46.7	57.8	59.0	58.8	59.8	61.7
Destination Spending	272.5	294.3	399.9	435.2	418.2	438.4	456.8
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	51.9	55.3	77.0	85.9	82.0	87.8	98.7
Arts, Ent. & Rec.	11.8	12.2	15.7	18.9	17.1	16.9	17.2
Retail**	8.8	9.7	11.9	13.0	12.5	12.6	13.2
Ground Tran.	1.1	1.2	1.6	1.8	1.7	1.7	1.8
Other Travel*	2.8	3.1	3.5	4.0	3.1	3.3	3.4
Total Direct Earnings	76.4	81.6	109.7	123.5	116.4	122.3	134.3
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	2,870	2,830	3,510	3,890	3,730	3,970	4,090
Arts, Ent. & Rec.	730	750	780	950	860	850	850
Retail**	440	470	560	570	540	540	550
Ground Tran.	50	50	60	60	60	60	60
Other Travel*	130	120	140	140	110	110	110
Total Direct Employment	4,220	4,220	5,040	5,610	5,300	5,530	5,660
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	6.2	6.5	8.6	7.4	7.0	7.5	7.7
State Tax Receipts	7.1	8.3	11.0	12.2	11.5	13.8	14.5
Total Local & State	13.3	14.8	19.7	19.5	18.5	21.3	22.2

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, and travel agencies. \*\*Retail includes gasoline.

## Deschutes County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	222.1	240.0	331.0	363.5	347.6	365.3	381.0
Hotel, Motel	136.1	144.1	218.0	238.6	225.6	238.7	251.1
Private Home	43.5	49.2	59.5	67.1	66.5	69.2	71.6
Other Overnight	42.5	46.6	53.6	57.8	55.5	57.4	58.2
Campground	21.3	22.4	25.0	25.3	23.3	23.8	24.1
Vacation Home	21.1	24.2	28.6	32.5	32.3	33.6	34.1
Day Travel	50.4	54.4	69.0	71.7	70.6	73.1	75.8
Spending at Destination	272.5	294.3	399.9	435.2	418.2	438.4	456.8

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$319	\$608	\$133	\$252	2.4	1.9
Private Home	\$87	\$269	\$35	\$106	2.5	3.1
Other Overnight	\$103	\$348	\$32	\$108	3.2	3.4
All Overnight	\$175	\$450	\$66	\$172	2.6	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,795	1,821	1,888	748	758	786
Private Home	2,004	2,013	2,049	809	810	826
Other Overnight	1,813	1,801	1,801	566	563	563
All Overnight	5,612	5,635	5,738	2,123	2,131	2,175

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	949	962	998	393	398	413
Private Home	659	662	674	260	261	266
Other Overnight	541	537	537	169	167	167
All Overnight	2,149	2,162	2,209	822	827	846

# DOUGLAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$75,310
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

### Visitor Volume (2012p)

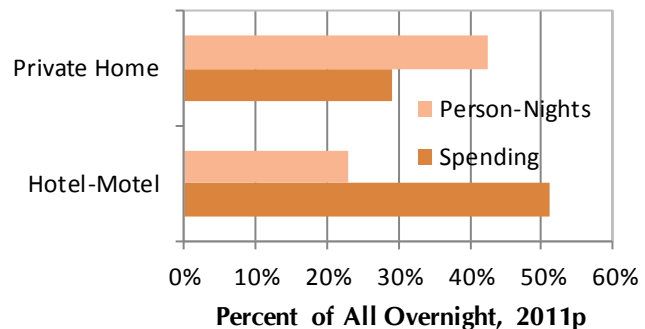
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,740
Additional employment if each resident household encouraged one additional overnight visitor	76

### Visitor Shares

Travel Share of Total Employment (2011)*	5.6%
Overnight Visitor Day Share (2012p)**	5.9%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	362	655	\$58.0
Private Home	411	1,216	\$33.1
Other Overnight	316	998	\$22.5
All Overnight	1,088	2,869	\$113.6

## Douglas County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	87.1	22.5	2,220	463	2,590	3,054
1992	89.5	23.0	2,110	471	2,758	3,229
1993	93.5	24.1	2,140	477	2,914	3,391
1994	96.2	24.8	2,130	493	3,018	3,511
1995	99.2	25.6	2,110	504	3,077	3,581
1996	113.2	29.6	2,380	540	3,317	3,858
1997	125.6	33.2	2,540	573	3,554	4,127
1998	133.5	36.0	2,700	589	3,729	4,318
1999	146.5	39.2	2,770	632	3,969	4,601
2000	151.8	39.9	2,740	709	4,069	4,778
2001	156.0	41.1	2,840	763	4,126	4,889
2002	182.2	49.4	3,300	928	4,652	5,580
2003	185.7	49.9	3,280	920	4,755	5,675
2004	194.3	51.5	3,220	966	5,087	6,053
2005	201.5	52.5	3,150	1,066	5,230	6,295
2006	212.4	54.8	3,130	1,091	5,451	6,542
2007	212.2	56.7	3,140	1,162	5,533	6,695
2008	216.0	57.2	3,100	1,107	5,579	6,686
2009	197.3	54.8	2,920	982	5,212	6,194
2010	201.3	52.9	2,770	1,012	5,169	6,181
2011	214.9	53.2	2,780	1,066	6,275	7,341
2012p	221.1	53.6	2,720	1,052	6,321	7,374
Annual Percentage Change						
11-12p	2.9%	0.8%	-2.2%	-1.3%	0.7%	0.4%
91-12p	4.5%	4.2%	1.0%	4.0%	4.3%	4.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## East Douglas County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	57.7	14.6	1,420	402	1,904	2,306
1992	58.1	14.6	1,320	391	2,011	2,402
1993	58.7	14.7	1,280	380	2,079	2,459
1994	60.7	15.2	1,280	395	2,165	2,560
1995	63.3	15.9	1,290	406	2,224	2,630
1996	75.3	19.4	1,540	434	2,437	2,871
1997	86.1	22.5	1,700	462	2,651	3,113
1998	93.5	25.1	1,880	484	2,824	3,308
1999	102.7	27.4	1,910	519	2,996	3,515
2000	112.8	29.4	2,030	588	3,195	3,782
2001	113.7	29.7	2,060	630	3,191	3,821
2002	135.8	36.8	2,460	783	3,647	4,430
2003	138.4	37.1	2,440	775	3,725	4,500
2004	145.0	38.2	2,400	813	3,972	4,786
2005	151.4	39.1	2,350	897	4,100	4,997
2006	157.9	40.2	2,310	918	4,231	5,149
2007	156.4	41.1	2,280	980	4,249	5,229
2008	162.8	42.4	2,300	946	4,357	5,304
2009	142.8	39.1	2,090	824	3,948	4,772
2010	147.9	38.2	2,000	842	3,963	4,805
2011	160.2	38.9	2,040	912	4,923	5,835
2012p	167.0	39.7	2,020	887	5,016	5,903
Annual Percentage Change						
11-12p	4.2%	2.2%	-0.7%	-2.8%	1.9%	1.2%
91-12p	5.2%	4.9%	1.7%	3.8%	4.7%	4.6%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## West Douglas County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	29.4	7.9	800	61	686	747
1992	31.4	8.4	790	80	747	828
1993	34.8	9.4	860	97	835	931
1994	35.4	9.6	840	98	852	950
1995	35.9	9.7	820	98	853	950
1996	37.9	10.2	840	106	880	986
1997	39.6	10.7	840	110	903	1,013
1998	40.0	10.9	820	105	905	1,010
1999	43.8	11.9	860	113	973	1,085
2000	39.0	10.5	710	121	875	996
2001	42.2	11.4	780	133	935	1,068
2002	46.4	12.6	830	145	1,005	1,150
2003	47.3	12.8	830	146	1,030	1,176
2004	49.3	13.3	820	153	1,114	1,267
2005	50.0	13.4	800	169	1,130	1,298
2006	54.5	14.6	830	173	1,221	1,393
2007	55.8	15.6	860	182	1,284	1,466
2008	53.2	14.9	800	161	1,222	1,383
2009	54.5	15.6	830	158	1,264	1,422
2010	53.3	14.7	760	170	1,206	1,376
2011	54.7	14.3	740	154	1,352	1,507
2012p	54.1	13.8	700	166	1,305	1,471
Annual Percentage Change						
11-12p	-1.0%	-3.1%	-6.1%	7.4%	-3.5%	-2.4%
91-12p	2.9%	2.7%	-0.7%	4.9%	3.1%	3.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Douglas County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	174.4	183.1	196.9	197.3	186.5	196.4	201.7
Other Travel*	7.8	11.1	15.5	18.7	14.8	18.5	19.4
Total Direct Spending	182.2	194.3	212.4	216.0	201.3	214.9	221.1
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	27.2	28.8	31.5	31.7	29.1	29.6	29.7
Food Service	44.8	47.0	50.6	51.2	51.0	53.1	55.4
Food Stores	19.3	20.7	21.6	22.5	21.7	23.1	24.0
Local Tran. & Gas	12.6	16.6	21.4	25.1	20.4	24.3	24.5
Arts, Ent. & Rec.	37.9	38.6	39.6	37.0	35.0	36.0	37.1
Retail Sales	32.6	31.4	32.2	29.8	29.3	30.2	31.0
Destination Spending	174.4	183.1	196.9	197.3	186.5	196.4	201.7
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	29.6	31.1	33.5	35.0	32.8	32.5	32.9
Arts, Ent. & Rec.	11.9	11.8	12.4	13.4	11.9	12.2	11.9
Retail**	6.5	6.8	7.1	7.1	6.8	6.9	7.2
Ground Tran.	0.7	0.7	0.8	0.8	0.7	0.7	0.8
Other Travel*	0.7	0.9	1.0	1.0	0.7	0.8	0.8
Total Direct Earnings	49.4	51.5	54.8	57.2	52.9	53.2	53.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,950	1,930	1,900	1,900	1,720	1,700	1,670
Arts, Ent. & Rec.	890	830	800	770	670	690	650
Retail**	370	370	360	340	320	320	330
Ground Tran.	30	30	30	30	20	30	30
Other Travel*	50	50	50	50	40	40	40
Total Direct Employment	3,300	3,220	3,130	3,100	2,770	2,780	2,720
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.9	1.0	1.1	1.1	1.0	1.1	1.1
State Tax Receipts	4.7	5.1	5.5	5.6	5.2	6.3	6.3
Total Local & State	5.6	6.1	6.5	6.7	6.2	7.3	7.4

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, and travel agencies. \*\*Retail includes gasoline.



## Douglas County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	94.6	100.4	109.0	115.8	107.6	113.6	116.4
Hotel, Motel	51.2	54.4	59.2	62.7	55.5	58.0	58.4
Private Home	25.7	26.7	28.4	31.0	30.1	33.1	35.2
Other Overnight	17.7	19.3	21.3	22.0	22.0	22.5	22.8
Campground	15.2	16.6	18.2	18.3	18.2	18.5	18.8
Vacation Home	2.5	2.7	3.1	3.7	3.9	4.0	4.0
Day Travel	79.8	82.7	87.9	81.6	78.9	82.7	85.3
Spending at Destination	174.4	183.1	196.9	197.3	186.5	196.4	201.7

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$217	\$393	\$89	\$160	2.4	1.8
Private Home	\$71	\$209	\$27	\$81	2.6	3.0
Other Overnight	\$77	\$244	\$23	\$71	3.4	3.2
All Overnight	\$111	\$285	\$40	\$104	2.8	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	542	548	547	221	224	224
Private Home	1,016	1,075	1,126	391	413	433
Other Overnight	743	726	726	218	213	213
All Overnight	2,301	2,349	2,400	830	850	870

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	295	298	297	121	122	122
Private Home	339	359	376	130	138	144
Other Overnight	233	228	228	68	67	67
All Overnight	867	885	901	319	327	333

# GILLIAM & SHERMAN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$82,130
Employee Earnings generated by \$100 Visitor Spending	\$20
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10

### Visitor Volume (2012p)

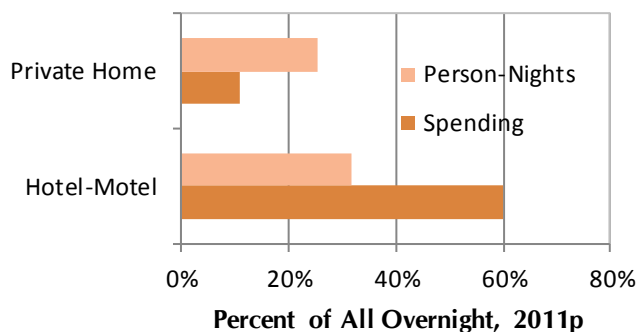
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$170
Additional employment if each resident household encouraged one additional overnight visitor	2

### Visitor Shares

Travel Share of Total Employment (2011)*	3.0%
Overnight Visitor Day Share (2012p)**	10.5%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	29	49	\$3.9
Private Home	15	39	\$0.7
Other Overnight	21	65	\$1.9
All Overnight	66	153	\$6.5

## Gilliam & Sherman County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	7.9	2.0	210	0.0	192.6	192.6
1992	7.7	1.9	190	0.0	193.4	193.4
1993	8.6	2.2	200	0.0	217.4	217.4
1994	7.3	1.8	160	0.0	189.2	189.2
1995	7.1	1.7	150	0.0	183.5	183.5
1996	7.0	1.7	150	0.0	178.2	178.2
1997	7.3	1.8	150	0.0	183.2	183.2
1998	7.2	1.8	140	0.0	181.1	181.1
1999	7.5	1.8	140	0.0	187.3	187.3
2000	7.8	1.9	140	0.0	191.1	191.1
2001	7.8	1.9	150	0.0	190.0	190.0
2002	8.2	2.0	150	0.0	193.7	193.7
2003	7.9	1.9	140	0.0	188.7	188.7
2004	8.4	2.0	140	0.0	211.5	211.5
2005	8.6	2.0	140	0.0	214.5	214.5
2006	8.5	2.0	130	0.0	209.5	209.5
2007	9.1	2.2	120	0.0	228.7	228.7
2008	9.2	2.2	120	0.0	231.3	231.3
2009	9.2	2.3	120	16.0	234.3	250.3
2010	9.1	2.2	110	13.1	228.3	241.4
2011	9.1	2.0	100	13.0	252.3	265.4
2012p	9.3	2.1	110	14.0	257.1	271.1

### Annual Percentage Change

11-12p	2.2%	1.7%	10.0%	7.4%	1.9%	2.1%
91-12p	0.8%	0.2%	-3.0%		1.4%	1.6%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Gilliam & Sherman County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	7.9	8.1	8.0	8.7	8.6	8.5	8.7
Other Travel*	0.3	0.3	0.5	0.6	0.5	0.6	0.7
Total Direct Spending	8.2	8.4	8.5	9.2	9.1	9.1	9.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	1.6	1.6	1.6	2.1	2.2	2.0	2.0
Food Service	2.0	2.0	2.0	2.1	2.2	2.1	2.2
Food Stores	1.1	1.1	1.1	1.1	1.1	1.1	1.2
Local Tran. & Gas	0.5	0.7	0.8	0.9	0.8	0.9	0.9
Arts, Ent. & Rec.	1.5	1.5	1.4	1.4	1.4	1.3	1.3
Retail Sales	1.3	1.2	1.1	1.0	1.0	1.0	1.0
Destination Spending	7.9	8.1	8.0	8.7	8.6	8.5	8.7
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	1.2	1.2	1.2	1.4	1.4	1.3	1.3
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	0.3	0.3
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	2.0	2.0	2.0	2.2	2.2	2.0	2.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	90	90	80	70	70	60	60
Arts, Ent. & Rec.	30	30	30	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	150	140	130	120	110	100	110
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.2	0.2	0.2	0.2	0.2	0.3	0.3
Total Local & State	0.2	0.2	0.2	0.2	0.2	0.3	0.3

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, and travel agencies. \*\*Retail includes gasoline.

## Gilliam & Sherman County Visitor Spending and Visitor Volume

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

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	5.5	5.7	5.6	6.6	6.6	6.5	6.5
Hotel, Motel	3.0	3.2	3.0	4.0	4.1	3.9	3.8
Private Home	0.5	0.5	0.6	0.6	0.6	0.7	0.8
Other Overnight	2.0	2.0	2.0	2.0	1.8	1.9	1.9
Campground	1.9	1.9	1.9	1.8	1.7	1.8	1.8
Vacation Home	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Day Travel	2.4	2.4	2.4	2.1	2.0	2.1	2.1
Spending at Destination	7.9	8.1	8.0	8.7	8.6	8.5	8.7

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$194	\$323	\$79	\$132	2.5	1.7
Private Home	\$46	\$117	\$18	\$46	2.6	2.6
Other Overnight	\$100	\$310	\$29	\$90	3.5	3.1
All Overnight	\$119	\$269	\$42	\$99	2.8	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	55	50	49	22	20	20
Private Home	32	35	39	13	14	15
Other Overnight	67	65	65	19	19	19
All Overnight	154	151	153	54	53	54

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	33	30	29	13	12	12
Private Home	13	14	15	5	5	6
Other Overnight	21	21	21	6	6	6
All Overnight	67	65	66	25	24	24

# GRANT COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$53,090
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$258
Additional employment if each resident household encouraged one additional overnight visitor	5

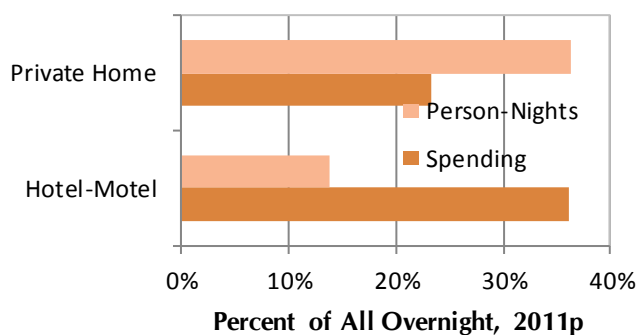
### Visitor Shares

Travel Share of Total Employment (2011)*	4.4%
Overnight Visitor Day Share (2012p)**	7.3%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	18	29	\$2.4
Private Home	30	77	\$1.6
Other Overnight	37	107	\$2.7
All Overnight	84	214	\$6.7

## Grant County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	8.0	2.1	230	55	222	276
1992	8.3	2.2	230	58	236	294
1993	8.6	2.3	230	61	249	309
1994	9.1	2.4	240	66	261	327
1995	8.9	2.4	220	64	257	321
1996	8.9	2.4	210	64	252	316
1997	8.8	2.3	200	59	246	305
1998	8.5	2.3	200	59	240	299
1999	8.8	2.3	230	61	244	305
2000	8.0	2.1	200	49	228	277
2001	8.4	2.2	200	53	230	283
2002	8.3	2.2	200	51	225	276
2003	8.6	2.2	200	51	231	282
2004	9.2	2.3	220	61	254	315
2005	9.0	2.2	200	57	246	303
2006	9.3	2.3	200	94	251	345
2007	9.7	2.4	200	105	262	367
2008	9.1	2.2	170	78	247	325
2009	9.0	2.4	180	92	247	339
2010	9.7	2.3	180	101	254	355
2011	9.7	2.3	180	88	309	396
2012p	10.0	2.4	170	82	317	399

### Annual Percentage Change

11-12p	2.7%	2.5%	-5.2%	-6.2%	2.7%	0.8%
91-12p	1.1%	0.5%	-1.5%	2.0%	1.7%	1.8%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Grant County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	7.8	8.4	8.3	8.0	8.7	8.5	8.7
Other Travel*	0.5	0.7	1.0	1.2	1.0	1.2	1.4
Total Direct Spending	8.3	9.2	9.3	9.1	9.7	9.7	10.0
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	1.3	1.5	1.5	1.5	1.7	1.6	1.5
Food Service	2.0	2.1	2.1	2.0	2.3	2.2	2.3
Food Stores	1.2	1.3	1.3	1.3	1.4	1.4	1.5
Local Tran. & Gas	0.6	0.8	0.9	1.0	0.9	1.0	1.0
Arts, Ent. & Rec.	1.4	1.4	1.3	1.2	1.3	1.2	1.2
Retail Sales	1.3	1.3	1.2	1.0	1.1	1.1	1.2
Destination Spending	7.8	8.4	8.3	8.0	8.7	8.5	8.7
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	1.4	1.5	1.5	1.5	1.5	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	0.3	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	2.3	2.3	2.2	2.3	2.3	2.4
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	120	120	120	100	110	110	100
Arts, Ent. & Rec.	50	70	60	50	50	50	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	200	220	200	170	180	180	170
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
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	0.2	0.3	0.3	0.3
Total Local & State	0.3	0.3	0.3	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, and travel agencies. \*\*Retail includes gasoline.



## Grant County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	5.7	6.3	6.1	6.2	6.8	6.6	6.7
Hotel, Motel	2.4	2.8	2.6	2.4	2.9	2.5	2.4
Private Home	1.1	1.2	1.2	1.2	1.3	1.4	1.6
Other Overnight	2.2	2.3	2.4	2.5	2.6	2.7	2.7
Campground	1.6	1.6	1.6	1.7	1.8	1.9	1.9
Vacation Home	0.6	0.7	0.7	0.8	0.8	0.8	0.8
Day Travel	2.1	2.2	2.1	1.8	1.9	1.9	2.0
Spending at Destination	7.8	8.4	8.3	8.0	8.7	8.5	8.7

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$201	\$335	\$82	\$136	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$85	\$245	\$25	\$74	3.3	2.9
All Overnight	\$90	\$222	\$31	\$79	2.9	2.5

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	37	31	29	15	13	12
Private Home	69	71	77	27	28	30
Other Overnight	108	107	107	32	32	32
All Overnight	214	209	214	74	72	74

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	22	19	18	9	8	7
Private Home	27	27	30	10	11	12
Other Overnight	37	37	37	11	11	11
All Overnight	86	83	84	31	29	30

# HARNEY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$58,170
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$329
Additional employment if each resident household encouraged one additional overnight visitor	6

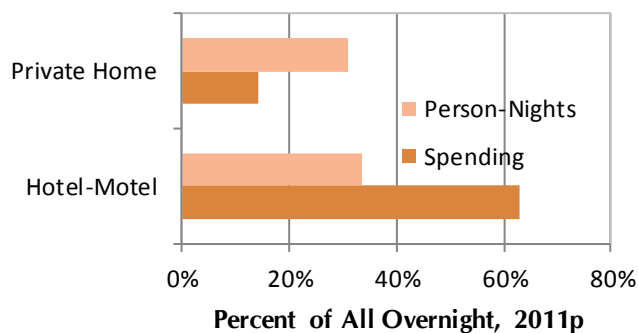
### Visitor Shares

Travel Share of Total Employment (2011)*	6.7%
Overnight Visitor Day Share (2012p)**	8.9%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	54	90	\$7.4
Private Home	32	82	\$1.7
Other Overnight	31	94	\$2.7
All Overnight	117	266	\$11.7

## Harney County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	8.6	2.6	320	54	227	281
1992	8.6	2.6	300	59	236	294
1993	8.5	2.6	280	57	239	296
1994	8.7	2.6	280	66	247	313
1995	9.7	2.9	300	83	266	349
1996	9.5	2.9	280	83	256	339
1997	10.0	3.0	290	83	262	346
1998	12.6	3.9	360	100	319	419
1999	14.1	4.4	360	119	348	467
2000	14.9	4.7	380	129	367	496
2001	15.1	4.8	390	135	368	503
2002	15.3	4.9	390	136	366	502
2003	15.5	4.9	370	136	371	507
2004	16.2	5.1	370	178	408	587
2005	15.9	4.9	330	169	400	569
2006	18.4	5.7	380	215	454	669
2007	17.2	5.5	350	209	437	647
2008	15.7	4.9	330	229	399	628
2009	14.2	4.6	300	196	368	564
2010	14.4	4.4	280	211	363	574
2011	15.5	4.3	280	224	435	660
2012p	16.8	4.6	270	245	464	709
Annual Percentage Change						
11-12p	8.2%	5.7%	-4.8%	9.2%	6.5%	7.4%
91-12p	3.3%	2.7%	-0.9%	7.4%	3.5%	4.5%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Harney County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	14.8	15.5	17.4	14.5	13.4	14.3	15.4
Other Travel*	0.5	0.7	1.0	1.2	0.9	1.2	1.4
Total Direct Spending	15.3	16.2	18.4	15.7	14.4	15.5	16.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	3.2	3.4	4.0	3.8	3.4	3.5	3.8
Food Service	3.7	3.9	4.3	3.5	3.4	3.6	3.9
Food Stores	1.7	1.8	1.9	1.6	1.6	1.8	1.9
Local Tran. & Gas	0.9	1.2	1.6	1.5	1.2	1.5	1.5
Arts, Ent. & Rec.	3.4	3.4	3.7	2.7	2.5	2.6	2.7
Retail Sales	1.9	1.8	2.0	1.4	1.4	1.4	1.5
Destination Spending	14.8	15.5	17.4	14.5	13.4	14.3	15.4
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	3.4	3.6	4.0	3.5	3.2	3.1	3.2
Arts, Ent. & Rec.	0.9	0.9	1.0	0.9	0.7	0.8	0.8
Retail**	0.4	0.5	0.5	0.4	0.4	0.4	0.4
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	5.1	5.7	4.9	4.4	4.3	4.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	210	220	220	200	170	170	160
Arts, Ent. & Rec.	140	120	120	100	80	90	90
Retail**	20	30	30	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	390	370	380	330	280	280	270
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.1	0.2	0.2	0.2	0.2	0.2	0.2
State Tax Receipts	0.4	0.4	0.5	0.4	0.4	0.4	0.5
Total Local & State	0.5	0.6	0.7	0.6	0.6	0.7	0.7

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, and travel agencies. \*\*Retail includes gasoline.

## Harney County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	10.2	10.8	12.3	11.2	10.3	10.9	11.7
Hotel, Motel	6.9	7.3	8.4	7.8	6.5	6.8	7.4
Private Home	1.1	1.1	1.2	1.2	1.2	1.4	1.7
Other Overnight	2.2	2.4	2.7	2.2	2.6	2.6	2.7
Campground	1.9	2.1	2.4	1.9	2.3	2.3	2.4
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	4.6	4.7	5.2	3.3	3.2	3.4	3.7
Spending at Destination	14.8	15.5	17.4	14.5	13.4	14.3	15.4

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$202	\$336	\$82	\$137	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$97	\$296	\$28	\$87	3.4	3.0
All Overnight	\$122	\$269	\$44	\$100	2.8	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	82	84	90	33	34	36
Private Home	64	73	82	25	28	32
Other Overnight	96	94	94	28	28	28
All Overnight	242	250	266	86	90	96

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	49	50	54	20	20	22
Private Home	25	28	32	10	11	13
Other Overnight	31	31	31	9	9	9
All Overnight	105	109	117	39	41	44

# HOOD RIVER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$79,590
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

### Visitor Volume (2012p)

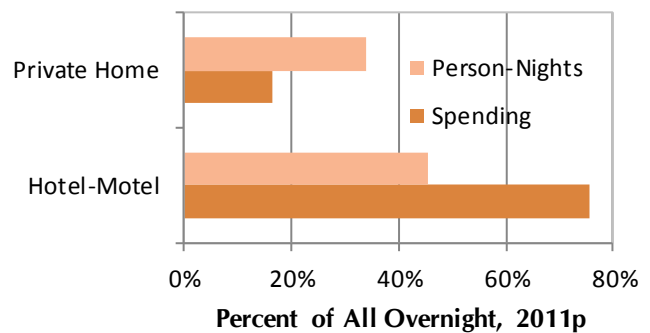
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,255
Additional employment if each resident household encouraged one additional overnight visitor	16

### Visitor Shares

Travel Share of Total Employment (2011)*	5.8%
Overnight Visitor Day Share (2012p)**	10.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	203	384	\$41.5
Private Home	95	288	\$9.0
Other Overnight	54	174	\$4.3
All Overnight	351	846	\$54.8

## Hood River County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	34.8	8.8	770	364	928	1,292
1992	39.5	10.0	820	472	1,082	1,554
1993	43.0	10.9	870	534	1,187	1,722
1994	44.0	11.2	850	558	1,225	1,783
1995	44.6	11.3	830	562	1,228	1,790
1996	44.5	11.3	810	565	1,199	1,764
1997	45.9	11.7	800	591	1,217	1,808
1998	48.5	12.6	850	657	1,280	1,937
1999	50.9	13.2	860	710	1,324	2,033
2000	54.3	13.8	870	759	1,399	2,158
2001	57.6	14.7	930	836	1,466	2,302
2002	56.3	14.5	900	791	1,416	2,207
2003	57.9	14.8	900	795	1,458	2,253
2004	59.6	15.1	890	834	1,590	2,424
2005	61.1	15.1	890	830	1,610	2,440
2006	66.8	16.4	930	917	1,740	2,657
2007	69.6	17.7	970	970	1,847	2,817
2008	68.8	17.3	920	991	1,809	2,800
2009	63.8	16.8	870	969	1,720	2,689
2010	72.1	18.1	910	1,115	1,883	2,998
2011	75.5	18.3	920	1,188	2,224	3,413
2012p	79.4	20.1	960	1,226	2,338	3,564

### Annual Percentage Change

11-12p	5.3%	9.9%	4.0%	3.2%	5.1%	4.4%
91-12p	4.0%	4.0%	1.1%	5.9%	4.5%	4.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Hood River County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	54.6	57.4	63.7	65.0	68.9	71.6	75.5
Other Travel*	1.7	2.2	3.1	3.9	3.2	3.9	3.9
Total Direct Spending	56.3	59.6	66.8	68.8	72.1	75.5	79.4
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	11.6	12.4	13.9	15.3	16.4	17.0	18.2
Food Service	15.2	15.9	17.6	17.6	19.6	20.0	21.3
Food Stores	4.7	4.9	5.3	5.5	5.7	5.9	6.2
Local Tran. & Gas	4.5	5.9	7.8	9.3	8.5	10.0	10.3
Arts, Ent. & Rec.	8.3	8.4	8.8	8.2	8.7	8.7	9.0
Retail Sales	10.3	9.9	10.4	9.2	10.0	10.0	10.5
Destination Spending	54.6	57.4	63.7	65.0	68.9	71.6	75.5
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	9.8	10.3	11.4	12.1	12.8	13.0	14.4
Arts, Ent. & Rec.	2.5	2.5	2.7	2.8	2.8	3.0	3.2
Retail**	1.7	1.8	1.9	1.9	2.0	2.0	2.1
Ground Tran.	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Other Travel*	0.2	0.2	0.2	0.2	0.1	0.1	0.2
Total Direct Earnings	14.5	15.1	16.4	17.3	18.1	18.3	20.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	640	640	660	670	660	660	690
Arts, Ent. & Rec.	150	130	150	150	140	150	150
Retail**	90	100	100	90	90	90	100
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	900	890	930	920	910	920	960
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.8	0.8	0.9	1.0	1.1	1.2	1.2
State Tax Receipts	1.4	1.6	1.7	1.8	1.9	2.2	2.3
Total Local & State	2.2	2.4	2.7	2.8	3.0	3.4	3.6

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, and travel agencies. \*\*Retail includes gasoline.



## Hood River County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	35.5	37.8	42.3	46.9	49.6	51.8	54.8
Hotel, Motel	25.9	27.9	31.4	34.8	37.0	38.9	41.5
Private Home	6.4	6.8	7.5	7.9	8.4	8.7	9.0
Other Overnight	3.2	3.1	3.5	4.2	4.2	4.3	4.3
Campground	2.4	2.2	2.6	3.2	3.1	3.2	3.3
Vacation Home	0.8	0.8	0.9	1.0	1.0	1.1	1.1
Day Travel	19.1	19.6	21.4	18.1	19.3	19.8	20.7
Spending at Destination	54.6	57.4	63.7	65.0	68.9	71.6	75.5

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$264	\$500	\$108	\$204	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$85	\$276	\$25	\$81	3.4	3.2
All Overnight	\$172	\$406	\$65	\$156	2.7	2.4

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	367	367	384	150	150	157
Private Home	285	281	288	109	108	111
Other Overnight	177	174	174	52	51	51
All Overnight	828	822	846	311	309	319

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	194	194	203	79	79	83
Private Home	94	93	95	36	36	36
Other Overnight	55	54	54	16	16	16
All Overnight	342	340	351	131	131	135

# JACKSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$84,450
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.20

### Visitor Volume (2012p)

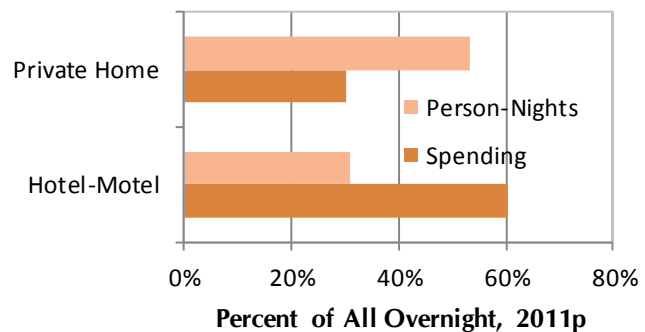
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$13,009
Additional employment if each resident household encouraged one additional overnight visitor	154

### Visitor Shares

Travel Share of Total Employment (2011)*	4.1%
Overnight Visitor Day Share (2012p)**	6.6%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	817	1,546	\$185.0
Private Home	867	2,638	\$93.1
Other Overnight	242	781	\$28.2
All Overnight	1,927	4,966	\$306.3

## Jackson County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	219.0	54.4	4,280	1,505	5,534	7,039
1992	234.1	57.4	4,190	1,651	6,050	7,701
1993	238.6	58.3	4,120	2,747	6,278	9,026
1994	246.9	60.5	4,110	2,862	6,559	9,421
1995	256.0	62.3	4,070	2,914	6,681	9,595
1996	263.3	62.9	3,990	2,906	6,627	9,533
1997	271.6	64.6	3,910	2,944	6,685	9,629
1998	276.2	67.7	4,090	3,097	6,847	9,944
1999	292.6	71.4	4,170	3,327	7,139	10,466
2000	309.2	75.8	4,290	3,667	7,619	11,285
2001	311.2	77.2	4,420	4,164	7,684	11,849
2002	336.9	83.6	4,650	4,606	8,070	12,676
2003	355.5	86.1	4,630	4,632	8,374	13,006
2004	378.3	89.2	4,650	4,828	9,187	14,015
2005	401.9	91.7	4,630	4,981	9,523	14,504
2006	419.5	94.5	4,580	5,373	9,817	15,191
2007	434.3	101.0	4,780	5,819	10,274	16,093
2008	441.6	102.4	4,840	5,724	10,403	16,127
2009	457.7	99.3	4,550	5,624	9,892	15,516
2010	454.5	101.2	4,480	6,085	10,247	16,331
2011	460.6	102.2	4,500	6,138	12,222	18,360
2012p	477.1	108.5	4,570	6,506	12,605	19,111
Annual Percentage Change						
11-12p	3.6%	6.1%	1.5%	6.0%	3.1%	4.1%
91-12p	3.8%	3.3%	0.3%	7.2%	4.0%	4.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Jackson County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	283.4	302.1	322.3	338.8	342.8	351.4	369.3
Other Travel*	53.5	76.3	97.2	102.8	111.8	109.2	107.8
Total Direct Spending	336.9	378.3	419.5	441.6	454.5	460.6	477.1
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	56.9	60.7	66.3	67.5	69.3	69.2	72.7
Food Service	75.4	80.3	85.0	90.0	95.8	96.9	103.7
Food Stores	27.4	30.0	30.3	33.5	33.1	34.4	36.0
Local Tran. & Gas	30.7	37.8	46.1	55.0	50.2	56.5	58.4
Arts, Ent. & Rec.	42.5	44.0	44.5	44.4	44.4	44.3	46.3
Retail Sales	50.4	49.4	50.0	48.3	50.0	50.1	52.3
Destination Spending	283.4	302.1	322.3	338.8	342.8	351.4	369.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	55.0	58.3	62.0	66.6	67.5	68.0	72.0
Arts, Ent. & Rec.	12.3	12.5	12.9	14.8	13.9	14.0	15.3
Retail**	9.6	10.3	10.5	11.0	10.9	10.9	11.5
Ground Tran.	2.2	2.3	2.3	2.5	2.3	2.3	2.5
Other Travel*	4.6	5.8	6.9	7.6	6.6	7.0	7.2
Total Direct Earnings	83.6	89.2	94.5	102.4	101.2	102.2	108.5
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,160	3,120	3,090	3,210	3,060	3,090	3,150
Arts, Ent. & Rec.	760	730	730	830	700	700	700
Retail**	440	460	440	450	440	430	450
Ground Tran.	100	100	90	90	80	80	80
Other Travel*	190	240	220	260	200	190	190
Total Direct Employment	4,650	4,650	4,580	4,840	4,480	4,500	4,570
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	4.6	4.8	5.4	5.7	6.1	6.1	6.5
State Tax Receipts	8.1	9.2	9.8	10.4	10.2	12.2	12.6
Total Local & State	12.7	14.0	15.2	16.1	16.3	18.4	19.1

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, and travel agencies. \*\*Retail includes gasoline.

## Jackson County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	227.1	243.0	260.3	281.2	284.1	291.4	306.3
Hotel, Motel	136.6	145.5	157.4	168.0	171.2	174.9	185.0
Private Home	66.9	70.9	76.5	83.8	85.7	88.7	93.1
Other Overnight	23.7	26.5	26.4	29.4	27.1	27.8	28.2
Campground	20.7	23.3	22.9	25.6	23.3	23.9	24.2
Vacation Home	2.9	3.2	3.5	3.8	3.8	3.9	4.0
Day Travel	56.2	59.1	62.0	57.6	58.6	60.0	63.0
Spending at Destination	283.4	302.1	322.3	338.8	342.8	351.4	369.3

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$283	\$542	\$120	\$226	2.4	1.9
Private Home	\$87	\$270	\$35	\$107	2.5	3.1
Other Overnight	\$123	\$399	\$36	\$117	3.4	3.2
All Overnight	\$157	\$405	\$62	\$159	2.5	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,495	1,477	1,546	633	624	654
Private Home	2,559	2,555	2,638	1,043	1,038	1,073
Other Overnight	794	781	781	233	229	229
All Overnight	4,848	4,813	4,966	1,909	1,892	1,956

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	790	781	817	330	326	342
Private Home	841	840	867	334	333	344
Other Overnight	246	242	242	72	71	71
All Overnight	1,878	1,863	1,927	737	730	757

# JEFFERSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$59,580
Employee Earnings generated by \$100 Visitor Spending	\$25
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$845
Additional employment if each resident household encouraged one additional overnight visitor	14

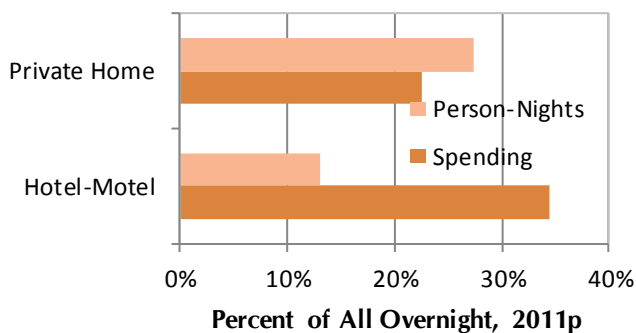
### Visitor Shares

Travel Share of Total Employment (2011)*	8.4%
Overnight Visitor Day Share (2012p)**	10.1%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	69	115	\$11.7
Private Home	94	241	\$7.7
Other Overnight	179	527	\$14.7
All Overnight	342	883	\$34.1

## Jefferson County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	21.1	4.9	450	136	557	693
1992	22.4	5.2	430	154	614	769
1993	23.5	5.5	440	172	654	826
1994	25.3	5.9	470	206	710	916
1995	27.0	6.4	480	233	748	981
1996	27.2	6.5	480	231	742	974
1997	27.6	6.6	460	231	744	976
1998	28.1	6.8	560	246	764	1,010
1999	30.7	7.5	600	299	817	1,115
2000	31.6	7.4	610	261	845	1,106
2001	33.2	7.8	660	277	878	1,155
2002	32.5	7.7	620	286	848	1,134
2003	33.7	7.9	590	288	878	1,165
2004	34.9	8.1	610	314	929	1,243
2005	36.8	8.4	600	331	964	1,295
2006	41.8	9.6	630	350	1,093	1,443
2007	42.6	10.1	670	463	1,124	1,587
2008	44.2	10.4	700	418	1,148	1,565
2009	40.9	10.1	690	392	1,088	1,480
2010	41.8	9.9	680	391	1,085	1,477
2011	44.7	9.9	690	391	1,338	1,729
2012p	48.7	11.1	760	486	1,457	1,942
Annual Percentage Change						
11-12p	8.9%	12.3%	8.9%	24.2%	8.9%	12.3%
91-12p	4.1%	4.0%	2.5%	6.2%	4.7%	5.0%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Jefferson County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	31.1	32.7	38.8	40.5	39.0	41.0	44.6
Other Travel*	1.4	2.1	3.0	3.7	2.8	3.7	4.1
Total Direct Spending	32.5	34.9	41.8	44.2	41.8	44.7	48.7
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	4.4	4.8	6.5	6.6	6.4	6.4	7.1
Food Service	7.7	8.1	9.6	10.1	10.3	10.7	11.8
Food Stores	5.1	5.3	5.6	6.0	5.8	6.2	6.5
Local Tran. & Gas	2.5	3.3	4.8	5.8	4.9	5.8	6.1
Arts, Ent. & Rec.	6.0	6.0	6.6	6.5	6.2	6.4	6.9
Retail Sales	5.4	5.2	5.6	5.5	5.4	5.6	6.1
Destination Spending	31.1	32.7	38.8	40.5	39.0	41.0	44.6
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	4.6	4.8	6.1	6.5	6.3	6.2	6.9
Arts, Ent. & Rec.	1.6	1.6	1.7	2.0	1.8	1.9	2.3
Retail**	1.3	1.4	1.5	1.6	1.5	1.5	1.7
Ground Tran.	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.2	0.2	0.2	0.1	0.2	0.2
Total Direct Earnings	7.7	8.1	9.6	10.4	9.9	9.9	11.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	320	320	360	350	350	340	360
Arts, Ent. & Rec.	210	210	180	250	240	260	300
Retail**	70	80	80	80	80	80	80
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	620	610	630	700	680	690	760
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.3	0.3	0.3	0.4	0.4	0.4	0.5
State Tax Receipts	0.8	0.9	1.1	1.1	1.1	1.3	1.5
Total Local & State	1.1	1.2	1.4	1.6	1.5	1.7	1.9

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, and travel agencies. \*\*Retail includes gasoline.



## Jefferson County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	22.8	24.2	29.3	31.0	29.8	31.3	34.1
Hotel, Motel	5.3	6.2	9.9	10.4	10.0	10.2	11.7
Private Home	4.8	5.2	5.6	6.1	5.8	6.6	7.7
Other Overnight	12.7	12.8	13.7	14.5	14.0	14.5	14.7
Campground	8.6	8.4	8.9	9.2	8.9	9.2	9.3
Vacation Home	4.1	4.4	4.8	5.3	5.0	5.3	5.4
Day Travel	8.3	8.5	9.5	9.5	9.2	9.7	10.5
Spending at Destination	31.1	32.7	38.8	40.5	39.0	41.0	44.6

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$251	\$417	\$102	\$170	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$94	\$274	\$28	\$82	3.4	2.9
All Overnight	\$114	\$288	\$39	\$100	3.0	2.5

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	104	101	115	42	41	47
Private Home	194	211	241	76	83	94
Other Overnight	531	527	527	158	157	157
All Overnight	829	840	883	276	281	298

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	63	61	69	26	25	28
Private Home	75	82	94	29	32	37
Other Overnight	180	179	179	54	54	54
All Overnight	318	322	342	109	111	118

# JOSEPHINE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$66,530
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,258
Additional employment if each resident household encouraged one additional overnight visitor	64

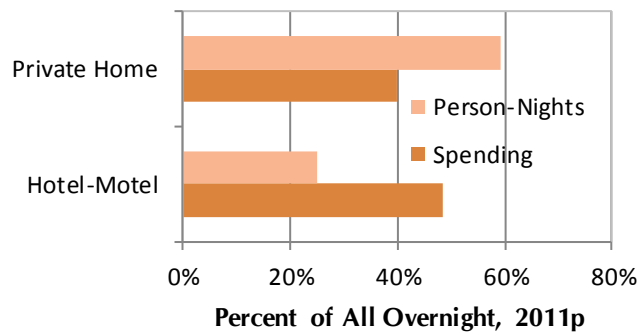
### Visitor Shares

Travel Share of Total Employment (2011)*	4.4%
Overnight Visitor Day Share (2012p)**	5.9%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	240	454	\$40.7
Private Home	353	1,073	\$33.5
Other Overnight	88	285	\$9.5
All Overnight	681	1,812	\$83.7

## Josephine County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	74.0	22.0	1,980	425	2,228	2,653
1992	75.3	22.2	1,860	429	2,356	2,785
1993	77.0	22.6	1,830	430	2,454	2,884
1994	78.4	23.0	1,800	462	2,523	2,986
1995	79.9	23.3	1,750	499	2,541	3,040
1996	80.7	23.4	1,710	504	2,502	3,007
1997	81.8	23.8	1,650	507	2,498	3,004
1998	82.4	24.5	1,680	522	2,518	3,040
1999	85.4	25.1	1,700	540	2,561	3,100
2000	89.0	25.5	1,670	565	2,638	3,203
2001	89.2	25.6	1,700	640	2,624	3,264
2002	94.4	27.5	1,760	755	2,717	3,472
2003	97.9	28.2	1,730	759	2,814	3,573
2004	100.3	28.2	1,670	912	2,986	3,897
2005	106.7	29.3	1,650	953	3,110	4,063
2006	118.8	32.4	1,770	1,144	3,408	4,552
2007	112.7	31.4	1,700	999	3,279	4,279
2008	116.4	31.7	1,720	954	3,311	4,264
2009	104.1	30.2	1,600	950	3,077	4,027
2010	109.3	29.8	1,530	956	3,127	4,083
2011	115.4	30.5	1,570	946	3,871	4,818
2012p	120.3	32.1	1,620	966	3,962	4,928
Annual Percentage Change						
11-12p	4.2%	5.2%	3.1%	2.1%	2.3%	2.3%
91-12p	2.3%	1.8%	-1.0%	4.0%	2.8%	3.0%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Josephine County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	88.2	91.3	106.3	101.5	97.8	101.4	105.9
Other Travel*	6.2	9.0	12.4	14.9	11.5	14.1	14.4
Total Direct Spending	94.4	100.3	118.8	116.4	109.3	115.4	120.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	16.0	16.5	20.6	18.0	17.2	17.1	17.7
Food Service	23.5	24.1	27.8	26.7	27.2	27.8	29.6
Food Stores	9.9	10.5	11.2	11.7	11.3	11.9	12.4
Local Tran. & Gas	7.9	10.2	14.2	15.6	13.1	15.2	15.6
Arts, Ent. & Rec.	13.9	13.9	15.1	13.9	13.4	13.5	14.0
Retail Sales	17.0	16.1	17.5	15.6	15.6	15.9	16.5
Destination Spending	88.2	91.3	106.3	101.5	97.8	101.4	105.9
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	18.2	18.6	21.9	21.1	20.3	20.7	22.0
Arts, Ent. & Rec.	4.5	4.4	4.8	5.1	4.7	4.9	5.0
Retail**	3.6	3.8	4.1	4.0	3.9	3.9	4.2
Ground Tran.	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Other Travel*	0.7	1.0	1.0	1.0	0.5	0.5	0.5
Total Direct Earnings	27.5	28.2	32.4	31.7	29.8	30.5	32.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,070	1,000	1,090	1,040	960	980	1,010
Arts, Ent. & Rec.	440	410	420	430	350	370	380
Retail**	180	180	190	180	170	180	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	40	50	50	50	30	30	30
Total Direct Employment	1,760	1,670	1,770	1,720	1,530	1,570	1,620
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.8	0.9	1.1	1.0	1.0	0.9	1.0
State Tax Receipts	2.7	3.0	3.4	3.3	3.1	3.9	4.0
Total Local & State	3.5	3.9	4.6	4.3	4.1	4.8	4.9

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, and travel agencies. \*\*Retail includes gasoline.

## Josephine County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	67.2	70.0	82.4	80.7	77.3	80.2	83.7
Hotel, Motel	34.5	35.4	44.7	40.7	38.2	39.0	40.7
Private Home	24.7	25.6	28.7	30.0	30.0	31.8	33.5
Other Overnight	8.0	9.0	9.0	10.0	9.1	9.4	9.5
Campground	6.6	7.4	7.3	8.1	7.3	7.4	7.5
Vacation Home	1.5	1.6	1.8	1.9	1.9	1.9	2.0
Day Travel	20.9	21.3	23.9	20.8	20.5	21.2	22.2
Spending at Destination	88.2	91.3	106.3	101.5	97.8	101.4	105.9

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$219	\$414	\$90	\$169	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$113	\$368	\$33	\$108	3.4	3.3
All Overnight	\$123	\$322	\$46	\$123	2.7	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	448	440	454	183	180	186
Private Home	1,017	1,034	1,073	390	397	412
Other Overnight	289	285	285	85	84	84
All Overnight	1,754	1,758	1,812	659	661	682

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	237	232	240	97	95	98
Private Home	334	340	353	128	130	135
Other Overnight	89	88	88	26	26	26
All Overnight	660	660	681	251	251	260

# KLAMATH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$75,840
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,380
Additional employment if each resident household encouraged one additional overnight visitor	45

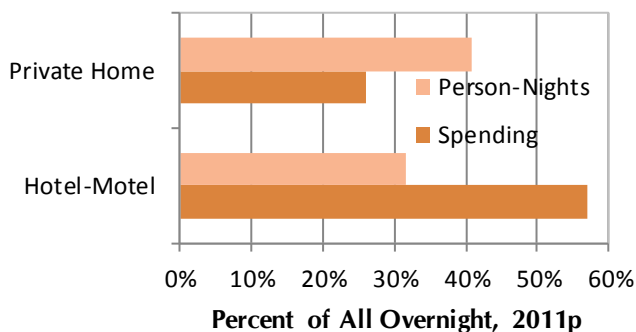
### Visitor Shares

Travel Share of Total Employment (2011)*	5.2%
Overnight Visitor Day Share (2012p)**	8.3%

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

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



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	333	631	\$56.5
Private Home	269	819	\$25.7
Other Overnight	169	555	\$17.0
All Overnight	772	2,004	\$99.2

## Klamath County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	68.9	19.4	1,520	463	1,986	2,450
1992	74.0	20.8	1,520	522	2,205	2,727
1993	76.3	21.5	1,520	544	2,311	2,855
1994	75.4	21.1	1,450	519	2,304	2,823
1995	82.9	23.3	1,530	591	2,472	3,063
1996	86.3	24.1	1,550	640	2,506	3,146
1997	87.2	24.5	1,490	646	2,500	3,146
1998	91.6	26.1	1,590	704	2,604	3,308
1999	98.7	27.7	1,730	769	2,724	3,494
2000	104.9	29.0	1,750	829	2,864	3,692
2001	102.7	28.4	1,720	804	2,796	3,600
2002	108.3	30.4	1,800	859	2,888	3,747
2003	117.3	32.7	1,810	950	3,112	4,062
2004	122.1	33.5	1,800	1,083	3,371	4,454
2005	126.1	33.7	1,750	1,093	3,427	4,520
2006	136.6	36.2	1,810	1,191	3,672	4,864
2007	139.2	37.8	1,830	1,329	3,763	5,092
2008	141.3	38.0	1,800	1,444	3,773	5,217
2009	128.2	37.2	1,740	1,371	3,580	4,952
2010	134.6	36.8	1,670	1,433	3,632	5,065
2011	142.1	37.2	1,650	1,433	4,424	5,857
2012p	138.2	37.7	1,660	1,345	4,288	5,633
Annual Percentage Change						
11-12p	-2.8%	1.3%	0.2%	-6.1%	-3.1%	-3.8%
91-12p	3.4%	3.2%	0.4%	5.2%	3.7%	4.0%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Klamath County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	97.6	109.3	119.7	123.0	120.7	128.0	123.1
Other Travel*	10.7	12.9	16.9	18.3	14.0	14.2	15.1
Total Direct Spending	108.3	122.1	136.6	141.3	134.6	142.1	138.2
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	19.6	22.9	26.4	26.2	25.7	26.8	25.0
Food Service	24.4	27.0	29.3	30.3	31.3	32.6	31.9
Food Stores	10.4	11.4	11.2	12.4	12.6	13.3	13.2
Local Tran. & Gas	9.2	12.9	16.9	20.0	16.9	20.3	19.0
Arts, Ent. & Rec.	16.9	17.9	18.3	17.6	17.3	17.7	17.1
Retail Sales	17.2	17.2	17.7	16.6	16.8	17.3	16.8
Destination Spending	97.6	109.3	119.7	123.0	120.7	128.0	123.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	20.2	22.8	25.1	26.1	25.5	26.6	27.7
Arts, Ent. & Rec.	5.2	5.4	5.6	6.2	5.8	5.0	4.4
Retail**	3.5	3.8	3.9	4.0	4.0	4.0	4.0
Ground Tran.	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Other Travel*	1.1	1.0	1.1	1.1	0.9	1.0	1.0
Total Direct Earnings	30.4	33.5	36.2	38.0	36.8	37.2	37.7
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,060	1,100	1,140	1,120	1,040	1,070	1,100
Arts, Ent. & Rec.	480	440	420	440	410	350	330
Retail**	190	190	180	180	180	180	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	50	50	40	30	30	30
Total Direct Employment	1,800	1,800	1,810	1,800	1,670	1,650	1,660
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.9	1.1	1.2	1.4	1.4	1.4	1.3
State Tax Receipts	2.9	3.4	3.7	3.8	3.6	4.4	4.3
Total Local & State	3.7	4.5	4.9	5.2	5.1	5.9	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, and travel agencies. \*\*Retail includes gasoline.



## Klamath County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	75.2	85.2	94.3	99.6	97.3	103.5	99.2
Hotel, Motel	41.4	49.5	57.8	59.5	56.4	60.9	56.5
Private Home	20.9	21.7	23.8	25.1	24.7	25.9	25.7
Other Overnight	12.9	14.0	12.7	15.1	16.2	16.8	17.0
Campground	7.8	8.6	6.9	8.8	10.1	10.4	10.6
Vacation Home	5.0	5.3	5.8	6.2	6.1	6.3	6.4
Day Travel	22.4	24.1	25.5	23.4	23.3	24.5	23.9
Spending at Destination	97.6	109.3	119.7	123.0	120.7	128.0	123.1

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$219	\$414	\$90	\$170	2.4	1.9
Private Home	\$81	\$248	\$31	\$95	2.6	3.0
Other Overnight	\$101	\$334	\$31	\$101	3.3	3.3
All Overnight	\$134	\$341	\$50	\$129	2.7	2.5

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	660	686	631	271	281	259
Private Home	827	838	819	321	323	316
Other Overnight	560	555	555	169	168	168
All Overnight	2,048	2,078	2,004	761	772	742

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	349	363	333	143	149	137
Private Home	272	275	269	105	106	104
Other Overnight	170	169	169	51	51	51
All Overnight	792	807	772	300	305	291

# LAKE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$61,230
Employee Earnings generated by \$100 Visitor Spending	\$21
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.00

### Visitor Volume (2012p)

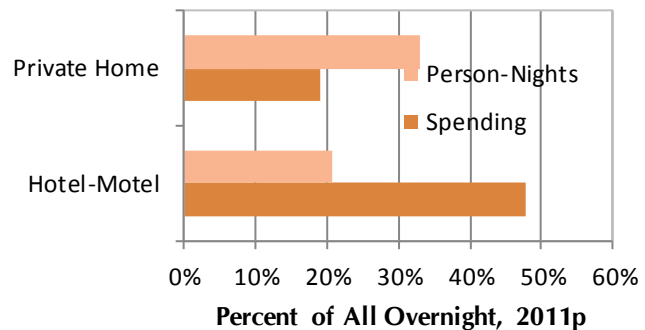
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$313
Additional employment if each resident household encouraged one additional overnight visitor	5

### Visitor Shares

Travel Share of Total Employment (2011)*	5.6%
Overnight Visitor Day Share (2012p)**	8.0%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	33	54	\$4.3
Private Home	34	86	\$1.7
Other Overnight	42	122	\$3.0
All Overnight	108	262	\$9.1

## Lake County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	7.2	1.7	240	41	200	241
1992	7.3	1.7	260	39	210	249
1993	7.6	1.7	270	41	221	262
1994	7.8	1.8	270	43	230	273
1995	8.5	1.9	270	43	242	286
1996	8.5	1.9	270	44	238	283
1997	8.5	1.9	250	42	235	276
1998	8.3	1.9	250	43	230	273
1999	9.1	2.1	260	49	245	294
2000	9.8	2.2	210	52	261	313
2001	10.2	2.3	190	56	267	323
2002	10.3	2.3	220	57	265	322
2003	10.4	2.3	220	57	267	324
2004	10.6	2.4	220	77	282	359
2005	11.0	2.4	210	85	291	376
2006	12.5	2.7	230	107	324	431
2007	13.2	3.0	260	115	344	459
2008	12.1	2.7	230	94	316	410
2009	12.1	2.9	240	103	321	424
2010	13.0	2.9	240	109	329	438
2011	14.1	2.8	240	117	404	520
2012p	13.6	2.6	200	97	391	489

### Annual Percentage Change

11-12p	-3.7%	-9.5%	-15.7%	-16.7%	-3.0%	-6.1%
91-12p	3.0%	2.1%	-0.9%	4.2%	3.2%	3.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Lake County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	9.8	9.9	11.5	10.9	12.1	12.8	12.1
Other Travel*	0.5	0.7	1.0	1.2	1.0	1.3	1.5
Total Direct Spending	10.3	10.6	12.5	12.1	13.0	14.1	13.6
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	1.7	1.8	2.4	2.2	2.7	2.8	2.4
Food Service	2.5	2.5	2.8	2.7	3.1	3.3	3.2
Food Stores	1.6	1.5	1.6	1.6	1.6	1.8	1.8
Local Tran. & Gas	0.7	0.9	1.2	1.3	1.2	1.4	1.4
Arts, Ent. & Rec.	1.7	1.6	1.8	1.7	1.8	1.9	1.8
Retail Sales	1.7	1.5	1.6	1.4	1.5	1.6	1.6
Destination Spending	9.8	9.9	11.5	10.9	12.1	12.8	12.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	1.3	1.4	1.7	1.6	1.7	1.8	1.5
Arts, Ent. & Rec.	0.5	0.5	0.5	0.6	0.6	0.5	0.5
Retail**	0.4	0.4	0.5	0.4	0.5	0.5	0.5
Ground Tran.	0.0	0.0	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	2.3	2.4	2.7	2.7	2.9	2.8	2.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	150	150	160	150	160	160	130
Arts, Ent. & Rec.	40	40	40	50	50	40	40
Retail**	30	30	30	20	20	30	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	220	220	230	230	240	240	200
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.3	0.3	0.3	0.3	0.4	0.4
Total Local & State	0.3	0.4	0.4	0.4	0.4	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, and travel agencies. \*\*Retail includes gasoline.

## Lake County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	7.0	7.1	8.4	8.3	9.2	9.8	9.1
Hotel, Motel	2.8	3.0	4.3	4.0	5.1	5.3	4.3
Private Home	1.1	1.2	1.3	1.3	1.3	1.5	1.7
Other Overnight	3.1	2.9	2.9	3.0	2.9	3.0	3.0
Campground	2.3	2.1	2.0	2.0	1.9	2.0	2.0
Vacation Home	0.8	0.8	0.9	1.0	0.9	1.0	1.0
Day Travel	2.8	2.8	3.0	2.6	2.8	3.0	3.0
Spending at Destination	9.8	9.9	11.5	10.9	12.1	12.8	12.1

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$196	\$325	\$80	\$133	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$82	\$236	\$25	\$72	3.3	2.9
All Overnight	\$98	\$232	\$35	\$84	2.8	2.4

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	66	67	54	27	27	22
Private Home	69	78	86	27	30	34
Other Overnight	123	122	122	37	37	37
All Overnight	258	266	262	91	94	93

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	39	40	33	16	16	13
Private Home	27	30	34	11	12	13
Other Overnight	42	42	42	13	13	13
All Overnight	109	113	108	40	41	39

# LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$69,360
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

### Visitor Volume (2012p)

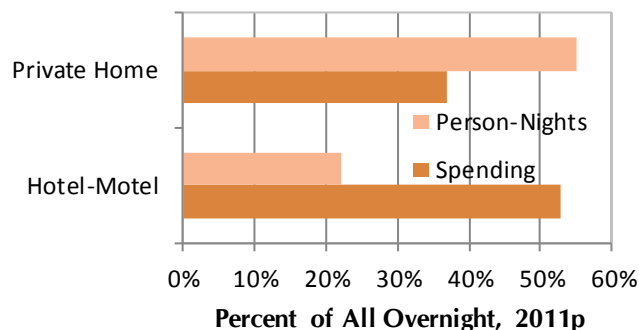
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$22,040
Additional employment if each resident household encouraged one additional overnight visitor	318

### Visitor Shares

Travel Share of Total Employment (2011)*	4.3%
Overnight Visitor Day Share (2012p)**	5.7%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	994	1,829	\$214.7
Private Home	1,516	4,573	\$149.9
Other Overnight	616	1,892	\$41.9
All Overnight	3,126	8,294	\$406.4

## Lane County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	356.0	86.7	7,550	2,277	8,896	11,174
1992	373.6	89.6	7,280	2,495	9,547	12,042
1993	402.5	94.7	7,430	3,683	10,183	13,866
1994	412.8	98.4	7,500	4,103	10,609	14,712
1995	424.4	102.5	7,480	4,329	10,885	15,213
1996	444.9	106.7	7,540	4,600	11,043	15,643
1997	455.9	110.2	7,390	4,789	11,192	15,981
1998	458.8	113.4	7,490	4,912	11,295	16,207
1999	470.0	115.2	7,320	5,054	11,416	16,470
2000	488.5	118.1	7,380	5,171	11,891	17,061
2001	493.1	120.5	7,540	5,197	11,998	17,195
2002	506.3	125.3	7,660	5,464	12,143	17,607
2003	514.6	124.1	7,450	5,315	12,261	17,576
2004	552.1	130.4	7,660	5,654	13,375	19,029
2005	592.7	138.2	7,860	6,546	14,143	20,689
2006	628.0	145.1	8,000	7,187	14,846	22,032
2007	652.5	158.1	8,560	7,699	15,661	23,360
2008	680.9	163.4	8,810	7,973	16,198	24,170
2009	649.6	149.5	7,920	7,494	14,720	22,213
2010	693.4	150.3	7,900	7,372	15,123	22,494
2011	707.3	156.2	8,150	7,916	18,478	26,394
2012p	708.3	165.9	8,240	8,062	18,856	26,917
Annual Percentage Change						
11-12p	0.1%	6.2%	1.1%	1.8%	2.0%	2.0%
91-12p	3.3%	3.1%	0.4%	6.2%	3.6%	4.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

### East Lane County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	298.9	71.0	6,040	2,151	7,648	9,799
1992	314.4	73.4	5,820	2,359	8,231	10,590
1993	341.7	78.1	5,980	3,533	8,823	12,356
1994	349.1	80.9	6,010	3,932	9,184	13,116
1995	355.9	83.6	5,950	4,121	9,370	13,492
1996	374.0	87.0	6,000	4,365	9,504	13,869
1997	383.4	90.0	5,900	4,550	9,639	14,189
1998	383.9	92.4	5,990	4,666	9,699	14,366
1999	395.1	94.3	5,870	4,800	9,833	14,633
2000	414.3	97.5	6,050	4,908	10,322	15,230
2001	416.4	99.3	6,170	4,941	10,395	15,336
2002	426.9	103.3	6,270	5,200	10,515	15,715
2003	435.9	102.6	6,110	5,068	10,644	15,711
2004	469.1	107.7	6,280	5,377	11,614	16,991
2005	505.3	114.4	6,460	6,225	12,298	18,522
2006	539.9	121.1	6,610	6,840	12,983	19,823
2007	550.0	128.3	6,880	7,318	13,466	20,784
2008	583.2	134.8	7,210	7,620	14,093	21,714
2009	558.2	122.6	6,440	6,982	12,750	19,732
2010	599.8	123.7	6,460	6,771	13,156	19,927
2011	612.9	129.9	6,730	7,303	16,316	23,619
2012p	613.0	138.6	6,830	7,503	16,663	24,166
Annual Percentage Change						
11-12p	0.0%	6.7%	1.5%	2.7%	2.1%	2.3%
91-12p	3.5%	3.2%	0.6%	6.1%	3.8%	4.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.



## West Lane County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	57.1	15.7	1,520	126	1,248	1,374
1992	59.2	16.2	1,460	137	1,315	1,452
1993	60.8	16.7	1,450	150	1,360	1,510
1994	63.7	17.5	1,490	171	1,425	1,596
1995	68.5	18.9	1,540	207	1,514	1,722
1996	71.0	19.6	1,540	235	1,538	1,774
1997	72.5	20.1	1,500	239	1,553	1,792
1998	74.9	21.0	1,500	246	1,596	1,841
1999	74.8	21.0	1,440	253	1,583	1,837
2000	74.3	20.6	1,330	262	1,569	1,831
2001	76.7	21.1	1,370	257	1,603	1,859
2002	79.4	22.0	1,390	264	1,627	1,892
2003	78.7	21.5	1,330	247	1,617	1,865
2004	83.1	22.7	1,380	277	1,761	2,037
2005	87.4	23.8	1,400	321	1,846	2,166
2006	88.1	24.0	1,390	347	1,862	2,209
2007	102.4	29.7	1,680	381	2,196	2,577
2008	97.7	28.6	1,590	352	2,105	2,457
2009	91.4	27.0	1,480	512	1,970	2,482
2010	93.6	26.5	1,440	601	1,967	2,567
2011	94.4	26.3	1,420	613	2,162	2,775
2012p	95.3	27.4	1,410	558	2,193	2,751
Annual Percentage Change						
11-12p	0.9%	4.1%	-0.9%	-9.0%	1.4%	-0.9%
91-12p	2.5%	2.7%	-0.3%	7.3%	2.7%	3.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Lane County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	423.5	443.2	491.5	537.0	512.7	541.0	555.2
Other Travel*	82.8	108.9	136.5	143.9	180.7	166.3	153.0
Total Direct Spending	506.3	552.1	628.0	680.9	693.4	707.3	708.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	65.0	68.6	82.8	98.3	87.8	93.2	95.4
Food Service	116.6	122.5	135.1	145.4	147.0	152.7	159.4
Food Stores	45.9	48.0	49.3	56.3	55.0	58.0	59.5
Local Tran. & Gas	38.8	47.8	61.8	75.4	64.4	75.2	75.9
Arts, Ent. & Rec.	70.6	72.6	75.6	77.1	74.1	75.4	76.9
Retail Sales	86.6	83.6	86.9	84.4	84.5	86.4	88.1
Destination Spending	423.5	443.2	491.5	537.0	512.7	541.0	555.2
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	78.3	82.2	92.7	106.1	99.5	104.7	112.6
Arts, Ent. & Rec.	20.7	20.8	22.1	26.0	23.5	23.5	24.4
Retail**	15.4	16.2	16.8	17.9	17.4	17.6	18.2
Ground Tran.	2.8	2.9	3.1	3.4	3.0	3.1	3.2
Other Travel*	8.2	8.4	10.5	10.0	6.9	7.2	7.5
Total Direct Earnings	125.3	130.4	145.1	163.4	150.3	156.2	165.9
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	4,430	4,430	4,610	5,050	4,580	4,820	4,910
Arts, Ent. & Rec.	2,020	1,980	2,070	2,430	2,220	2,220	2,210
Retail**	780	780	780	810	760	770	770
Ground Tran.	120	120	120	130	100	110	110
Other Travel*	300	350	420	390	240	230	240
Total Direct Employment	7,660	7,660	8,000	8,810	7,900	8,150	8,240
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	5.5	5.7	7.2	8.0	7.4	7.9	8.1
State Tax Receipts	12.1	13.4	14.8	16.2	15.1	18.5	18.9
Total Local & State	17.6	19.0	22.0	24.2	22.5	26.4	26.9

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, and travel agencies. \*\*Retail includes gasoline.

## Lane County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	297.4	312.5	351.7	405.2	382.6	406.4	417.5
Hotel, Motel	150.1	160.3	190.5	222.1	199.3	214.7	221.7
Private Home	113.0	119.8	129.2	141.5	142.3	149.9	153.3
Other Overnight	34.3	32.3	32.0	41.6	41.0	41.9	42.4
Campground	29.4	26.9	25.5	33.6	32.4	33.0	33.5
Vacation Home	4.9	5.5	6.5	7.9	8.6	8.8	9.0
Day Travel	126.1	130.8	139.8	131.7	130.1	134.6	137.7
Spending at Destination	423.5	443.2	491.5	537.0	512.7	541.0	555.2

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$278	\$518	\$117	\$216	2.4	1.9
Private Home	\$82	\$252	\$33	\$99	2.5	3.1
Other Overnight	\$75	\$228	\$22	\$68	3.4	3.1
All Overnight	\$129	\$341	\$49	\$130	2.6	2.6

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,556	1,612	1,647	658	681	697
Private Home	4,384	4,444	4,470	1,747	1,770	1,785
Other Overnight	1,305	1,279	1,279	387	380	380
All Overnight	7,245	7,335	7,395	2,793	2,831	2,861

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	837	866	884	350	362	369
Private Home	1,448	1,467	1,476	568	575	580
Other Overnight	419	410	410	125	122	122
All Overnight	2,703	2,743	2,770	1,042	1,059	1,071

# LINCOLN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$79,160
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

### Visitor Volume (2012p)

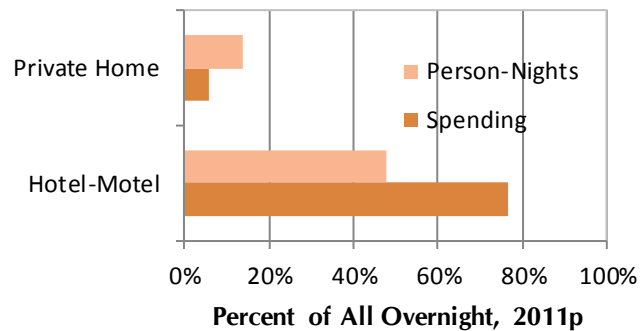
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,026
Additional employment if each resident household encouraged one additional overnight visitor	51

### Visitor Shares

Travel Share of Total Employment (2011)*	21.2%
Overnight Visitor Day Share (2012p)**	24.9%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,044	1,975	\$268.0
Private Home	189	574	\$20.3
Other Overnight	483	1,597	\$61.3
All Overnight	1,716	4,147	\$349.6

## Lincoln County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	167.0	45.6	3,770	2,727	3,996	6,723
1992	179.4	48.9	3,790	3,245	4,400	7,645
1993	193.4	52.9	3,960	3,641	4,795	8,437
1994	199.9	54.7	3,930	3,793	4,977	8,770
1995	216.3	59.2	4,080	4,140	5,299	9,439
1996	236.4	62.6	4,180	4,635	5,615	10,250
1997	253.0	67.0	4,300	5,005	5,914	10,919
1998	254.4	68.1	4,010	5,139	5,967	11,106
1999	263.7	69.9	4,230	5,248	6,084	11,332
2000	285.7	74.4	4,250	5,542	6,514	12,056
2001	305.9	79.8	4,600	5,985	6,897	12,883
2002	313.2	82.3	4,590	6,367	6,959	13,326
2003	320.1	83.7	4,660	6,399	7,134	13,533
2004	333.4	86.3	4,730	6,719	8,066	14,784
2005	346.4	88.8	4,670	7,008	8,329	15,337
2006	415.5	108.8	5,490	8,448	10,054	18,502
2007	424.0	114.5	5,680	8,115	10,438	18,553
2008	442.1	119.6	5,770	8,147	10,836	18,983
2009	421.0	117.9	5,610	8,991	10,485	19,475
2010	429.3	114.9	5,500	9,271	10,408	19,679
2011	439.6	114.2	5,450	9,201	11,701	20,902
2012p	447.2	123.1	5,570	9,096	12,085	21,181

### Annual Percentage Change

11-12p	1.7%	7.8%	2.1%	-1.1%	3.3%	1.3%
91-12p	4.8%	4.8%	1.9%	5.9%	5.4%	5.6%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Lincoln County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	309.4	328.3	408.5	433.6	422.6	431.7	439.3
Other Travel*	3.8	5.0	7.0	8.5	6.7	8.0	8.0
Total Direct Spending	313.2	333.4	415.5	442.1	429.3	439.6	447.2
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	81.3	86.6	116.2	120.8	119.9	119.6	120.5
Food Service	70.5	74.4	92.8	102.9	104.9	106.1	110.2
Food Stores	31.6	34.3	37.1	39.6	38.5	39.7	40.6
Local Tran. & Gas	21.8	28.9	43.3	53.9	45.3	52.5	52.5
Arts, Ent. & Rec.	50.7	52.1	59.7	59.3	57.2	56.9	57.8
Retail Sales	53.5	52.0	59.4	57.1	56.8	56.9	57.7
Destination Spending	309.4	328.3	408.5	433.6	422.6	431.7	439.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	56.7	59.8	78.4	86.3	83.9	85.0	91.1
Arts, Ent. & Rec.	13.4	13.5	15.8	18.1	16.4	14.7	17.1
Retail**	10.5	11.2	12.6	13.1	12.6	12.5	12.9
Ground Tran.	1.2	1.2	1.5	1.6	1.6	1.6	1.6
Other Travel*	0.5	0.5	0.5	0.5	0.4	0.4	0.4
Total Direct Earnings	82.3	86.3	108.8	119.6	114.9	114.2	123.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,150	3,180	3,830	4,100	3,900	3,950	3,940
Arts, Ent. & Rec.	780	880	940	950	930	830	960
Retail**	580	600	640	640	600	600	600
Ground Tran.	50	50	60	60	50	50	50
Other Travel*	30	30	20	20	20	20	20
Total Direct Employment	4,590	4,730	5,490	5,770	5,500	5,450	5,570
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	6.4	6.7	8.4	8.1	9.3	9.2	9.1
State Tax Receipts	7.0	8.1	10.1	10.8	10.4	11.7	12.1
Total Local & State	13.3	14.8	18.5	19.0	19.7	20.9	21.2

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, and travel agencies. \*\*Retail includes gasoline.

## Lincoln County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	231.4	247.0	313.5	345.0	336.6	343.6	349.6
Hotel, Motel	164.1	174.6	238.1	265.1	258.0	263.2	268.0
Private Home	16.0	16.8	18.5	19.7	19.3	20.0	20.3
Other Overnight	51.3	55.6	57.0	60.2	59.3	60.5	61.3
Campground	33.8	37.0	36.9	38.6	37.9	38.3	38.8
Vacation Home	17.5	18.6	20.1	21.7	21.4	22.2	22.5
Day Travel	77.9	81.4	95.0	88.6	86.0	88.0	89.6
Spending at Destination	309.4	328.3	408.5	433.6	422.6	431.7	439.3

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$332	\$627	\$136	\$257	2.4	1.9
Private Home	\$92	\$280	\$35	\$107	2.6	3.0
Other Overnight	\$126	\$417	\$38	\$127	3.3	3.3
All Overnight	\$231	\$540	\$84	\$204	2.7	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,976	1,956	1,975	808	800	808
Private Home	576	573	574	221	220	220
Other Overnight	1,625	1,597	1,597	496	488	488
All Overnight	4,176	4,126	4,147	1,525	1,508	1,517

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,044	1,034	1,044	427	423	427
Private Home	189	188	189	73	72	72
Other Overnight	491	483	483	150	147	147
All Overnight	1,725	1,705	1,716	650	642	647

# LINN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$75,120
Employee Earnings generated by \$100 Visitor Spending	\$23
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

### Visitor Volume (2012p)

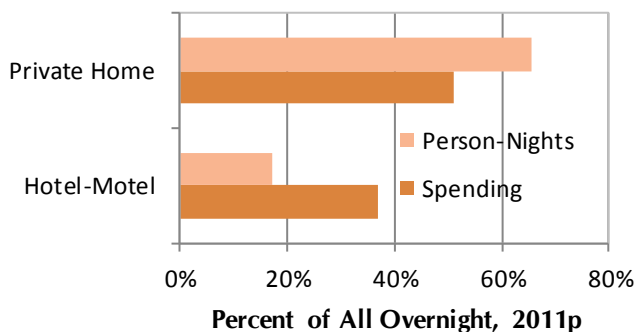
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,513
Additional employment if each resident household encouraged one additional overnight visitor	60

### Visitor Shares

Travel Share of Total Employment (2011)*	2.9%
Overnight Visitor Day Share (2012p)**	4.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	188	312	\$27.4
Private Home	464	1,192	\$37.9
Other Overnight	101	311	\$9.2
All Overnight	752	1,815	\$74.4



## Linn County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	57.3	13.1	1,370	151	1,880	2,031
1992	60.4	13.8	1,370	166	2,063	2,230
1993	63.3	14.5	1,390	174	2,198	2,373
1994	66.3	15.2	1,420	217	2,316	2,533
1995	70.2	16.2	1,450	273	2,412	2,685
1996	73.7	17.0	1,470	303	2,456	2,758
1997	76.6	17.8	1,460	331	2,506	2,837
1998	75.1	17.9	1,480	323	2,480	2,803
1999	76.6	17.9	1,370	329	2,487	2,816
2000	82.1	18.7	1,430	384	2,591	2,975
2001	84.6	19.5	1,450	451	2,653	3,104
2002	87.7	20.5	1,520	457	2,687	3,144
2003	91.4	20.9	1,510	459	2,786	3,246
2004	95.2	21.3	1,510	554	2,927	3,481
2005	103.5	22.6	1,560	610	3,109	3,719
2006	113.0	24.4	1,620	706	3,350	4,056
2007	115.8	25.9	1,670	778	3,467	4,245
2008	122.3	26.7	1,650	777	3,569	4,346
2009	107.8	25.2	1,540	688	3,295	3,983
2010	113.3	24.7	1,480	660	3,351	4,011
2011	123.4	24.8	1,480	735	4,234	4,968
2012p	128.7	26.2	1,480	805	4,319	5,124
Annual Percentage Change						
11-12p	4.3%	5.6%	0.1%	9.5%	2.0%	3.1%
91-12p	3.9%	3.3%	0.4%	8.3%	4.0%	4.5%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Linn County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	79.2	83.6	96.5	101.6	96.5	103.1	108.2
Other Travel*	8.6	11.6	16.5	20.7	16.8	20.3	20.5
Total Direct Spending	87.7	95.2	113.0	122.3	113.3	123.4	128.7
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	8.6	9.1	11.5	12.6	10.9	11.6	12.5
Food Service	22.0	23.2	26.6	27.9	28.1	29.5	31.5
Food Stores	10.3	11.0	12.0	13.1	12.7	13.6	14.1
Local Tran. & Gas	6.6	8.7	12.1	14.7	12.1	14.6	15.0
Arts, Ent. & Rec.	13.8	14.2	15.4	15.2	14.7	15.1	15.7
Retail Sales	17.8	17.4	18.8	18.1	18.0	18.7	19.4
Destination Spending	79.2	83.6	96.5	101.6	96.5	103.1	108.2
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	11.6	12.2	14.4	15.8	14.8	14.8	15.5
Arts, Ent. & Rec.	4.2	4.2	4.6	5.3	4.8	4.7	5.1
Retail**	3.4	3.6	3.9	4.0	3.9	4.0	4.2
Ground Tran.	0.4	0.4	0.5	0.5	0.5	0.5	0.5
Other Travel*	1.0	0.9	1.0	1.0	0.8	0.8	0.8
Total Direct Earnings	20.5	21.3	24.4	26.7	24.7	24.8	26.2
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	860	870	950	990	870	870	880
Arts, Ent. & Rec.	400	380	400	390	360	360	350
Retail**	190	190	190	190	190	190	200
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	50	60	60	40	40	40
Total Direct Employment	1,520	1,510	1,620	1,650	1,480	1,480	1,480
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.5	0.6	0.7	0.8	0.7	0.7	0.8
State Tax Receipts	2.7	2.9	3.4	3.6	3.4	4.2	4.3
Total Local & State	3.1	3.5	4.1	4.3	4.0	5.0	5.1

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, and travel agencies. \*\*Retail includes gasoline.

## Linn County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	51.4	54.7	64.0	70.4	65.9	70.8	74.4
Hotel, Motel	17.9	19.0	24.3	27.0	22.9	25.2	27.4
Private Home	26.0	27.8	31.2	34.2	34.2	36.6	37.9
Other Overnight	7.5	7.8	8.6	9.2	8.8	9.0	9.2
Campground	6.4	6.7	7.4	7.8	7.4	7.6	7.7
Vacation Home	1.0	1.1	1.2	1.4	1.4	1.4	1.4
Day Travel	27.8	28.9	32.5	31.2	30.6	32.3	33.7
Spending at Destination	79.2	83.6	96.5	101.6	96.5	103.1	108.2

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$216	\$359	\$88	\$146	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$101	\$310	\$29	\$91	3.4	3.1
All Overnight	\$109	\$259	\$41	\$99	2.7	2.4

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	277	289	312	113	118	127
Private Home	1,138	1,168	1,192	445	457	466
Other Overnight	316	311	311	92	90	90
All Overnight	1,731	1,768	1,815	650	665	684

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	167	174	188	68	71	76
Private Home	443	454	464	173	178	181
Other Overnight	103	101	101	30	30	30
All Overnight	712	729	752	271	278	287

# MALHEUR COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$62,150
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.50

### Visitor Volume (2012p)

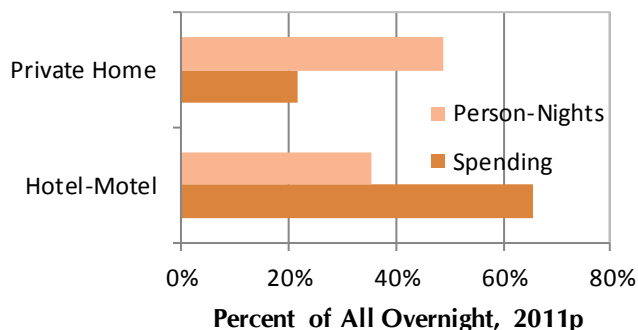
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,008
Additional employment if each resident household encouraged one additional overnight visitor	16

### Visitor Shares

Travel Share of Total Employment (2011)*	3.3%
Overnight Visitor Day Share (2012p)**	5.6%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	136	226	\$18.9
Private Home	121	311	\$6.2
Other Overnight	33	100	\$3.7
All Overnight	290	637	\$28.8

## Malheur County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	22.9	6.2	590	176	651	826
1992	24.2	6.6	590	190	710	901
1993	25.6	7.0	610	206	759	965
1994	26.5	7.3	610	236	788	1,024
1995	26.9	7.3	590	254	794	1,047
1996	27.4	7.4	580	261	791	1,052
1997	29.2	8.0	590	291	821	1,112
1998	29.5	8.2	610	302	829	1,131
1999	30.0	8.3	580	309	833	1,142
2000	32.5	8.8	610	351	909	1,260
2001	33.8	9.2	640	374	929	1,303
2002	34.9	9.6	650	388	939	1,327
2003	35.6	9.7	660	390	957	1,347
2004	35.3	9.4	610	448	1,002	1,450
2005	37.6	9.8	610	471	1,046	1,517
2006	40.3	10.4	630	546	1,104	1,650
2007	38.2	10.1	590	626	1,075	1,702
2008	36.5	9.4	530	585	1,023	1,608
2009	34.1	9.3	530	560	983	1,544
2010	37.4	9.7	540	625	1,037	1,662
2011	39.7	10.1	570	636	1,269	1,905
2012p	41.0	10.6	580	681	1,297	1,978

### Annual Percentage Change

11-12p	3.4%	5.6%	2.8%	7.0%	2.3%	3.8%
91-12p	2.8%	2.6%	-0.1%	6.7%	3.3%	4.2%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Malheur County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	32.6	32.2	35.9	31.2	33.1	34.4	35.7
Other Travel*	2.3	3.1	4.4	5.3	4.3	5.2	5.3
Total Direct Spending	34.9	35.3	40.3	36.5	37.4	39.7	41.0
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	7.1	7.0	8.0	7.9	8.5	8.7	9.1
Food Service	8.4	8.3	9.2	7.8	8.6	8.8	9.3
Food Stores	3.7	3.8	4.1	3.6	3.9	4.1	4.2
Local Tran. & Gas	2.2	2.6	3.4	3.3	3.1	3.6	3.6
Arts, Ent. & Rec.	6.2	5.9	6.3	5.0	5.2	5.2	5.4
Retail Sales	5.1	4.6	4.9	3.6	3.9	4.0	4.1
Destination Spending	32.6	32.2	35.9	31.2	33.1	34.4	35.7
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	6.5	6.3	7.1	6.4	6.8	6.8	7.1
Arts, Ent. & Rec.	1.8	1.7	1.8	1.7	1.6	2.0	2.2
Retail**	1.0	1.0	1.1	0.9	1.0	1.0	1.0
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	0.2
Total Direct Earnings	9.6	9.4	10.4	9.4	9.7	10.1	10.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	410	390	410	360	360	360	360
Arts, Ent. & Rec.	160	150	150	120	120	140	160
Retail**	60	60	60	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	650	610	630	530	540	570	580
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.4	0.4	0.5	0.6	0.6	0.6	0.7
State Tax Receipts	0.9	1.0	1.1	1.0	1.0	1.3	1.3
Total Local & State	1.3	1.5	1.6	1.6	1.7	1.9	2.0

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, and travel agencies. \*\*Retail includes gasoline.

## Malheur County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	23.9	23.6	26.5	25.1	26.7	27.7	28.8
Hotel, Motel	16.1	15.5	17.6	16.6	17.4	18.1	18.9
Private Home	4.8	4.9	5.3	5.6	5.8	6.0	6.2
Other Overnight	3.0	3.2	3.5	2.9	3.5	3.6	3.7
Campground	2.7	2.9	3.3	2.6	3.2	3.3	3.3
Vacation Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	8.8	8.6	9.4	6.1	6.5	6.7	6.9
Spending at Destination	32.6	32.2	35.9	31.2	33.1	34.4	35.7

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$204	\$340	\$83	\$139	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$126	\$383	\$37	\$112	3.4	3.1
All Overnight	\$118	\$256	\$45	\$99	2.6	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	218	220	226	89	90	92
Private Home	307	305	311	120	119	121
Other Overnight	100	100	100	29	29	29
All Overnight	624	625	637	238	238	243

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	131	132	136	53	54	55
Private Home	119	119	121	47	46	47
Other Overnight	33	33	33	10	10	10
All Overnight	283	284	290	110	110	112

# MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$76,560
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

### Visitor Volume (2012p)

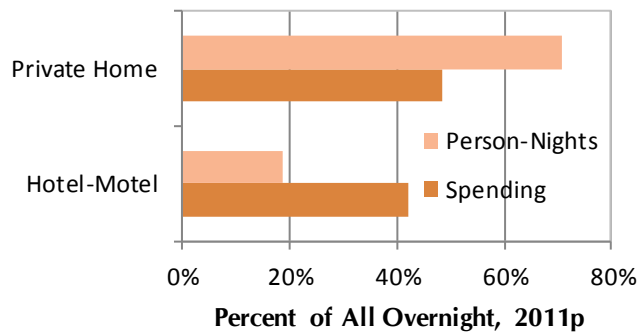
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,110
Additional employment if each resident household encouraged one additional overnight visitor	184

### Visitor Shares

Travel Share of Total Employment (2011)*	2.3%
Overnight Visitor Day Share (2012p)**	4.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	482	912	\$92.5
Private Home	1,125	3,422	\$106.8
Other Overnight	155	504	\$20.3
All Overnight	1,763	4,839	\$219.6



## Marion County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	152.0	37.1	3,280	646	4,949	5,596
1992	165.6	40.5	3,400	763	5,579	6,342
1993	174.1	42.7	3,470	828	5,974	6,801
1994	181.1	44.5	3,500	881	6,268	7,149
1995	192.1	47.4	3,570	963	6,527	7,490
1996	198.9	49.0	3,580	1,021	6,579	7,600
1997	204.5	50.7	3,520	1,054	6,654	7,708
1998	209.1	53.2	3,700	1,115	6,801	7,915
1999	216.7	54.3	3,530	1,422	6,922	8,344
2000	233.5	56.6	3,580	1,772	7,365	9,137
2001	237.2	57.7	3,610	1,793	7,416	9,209
2002	244.9	60.2	3,730	1,872	7,511	9,383
2003	254.1	61.4	3,730	1,877	7,762	9,639
2004	267.5	63.4	3,740	2,028	8,289	10,318
2005	292.2	67.7	3,860	2,261	8,821	11,082
2006	316.6	72.5	4,040	2,591	9,432	12,023
2007	325.3	76.9	4,220	2,818	9,751	12,569
2008	337.6	77.9	4,160	2,821	9,887	12,707
2009	306.8	75.8	4,000	2,606	9,359	11,965
2010	324.9	75.1	3,910	2,544	9,591	12,135
2011	340.7	76.2	3,980	2,567	11,872	14,439
2012p	349.5	79.8	3,960	2,613	11,966	14,580
Annual Percentage Change						
11-12p	2.6%	4.7%	-0.3%	1.8%	0.8%	1.0%
91-12p	4.0%	3.7%	0.9%	6.9%	4.3%	4.7%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Marion County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	219.2	233.0	268.9	279.1	278.0	284.9	293.7
Other Travel*	25.7	34.6	47.7	58.5	46.9	55.7	55.8
Total Direct Spending	244.9	267.5	316.6	337.6	324.9	340.7	349.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	28.7	30.8	39.8	42.3	40.1	40.5	41.6
Food Service	60.4	64.1	73.5	75.8	80.1	80.7	84.6
Food Stores	27.2	29.3	31.2	34.1	34.3	35.4	36.5
Local Tran. & Gas	17.9	23.8	33.0	39.1	34.1	39.3	39.7
Arts, Ent. & Rec.	37.3	38.4	41.5	40.5	40.5	40.2	41.2
Retail Sales	47.6	46.5	49.9	47.2	48.9	48.9	50.1
Destination Spending	219.2	233.0	268.9	279.1	278.0	284.9	293.7
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	35.6	37.8	44.7	48.2	47.5	48.1	51.1
Arts, Ent. & Rec.	11.2	11.3	12.4	13.9	13.1	13.8	13.8
Retail**	8.8	9.4	10.1	10.4	10.4	10.3	10.7
Ground Tran.	1.1	1.1	1.3	1.3	1.3	1.3	1.4
Other Travel*	3.6	3.8	4.0	4.1	2.7	2.6	2.7
Total Direct Earnings	60.2	63.4	72.5	77.9	75.1	76.2	79.8
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	2,210	2,220	2,440	2,470	2,340	2,360	2,440
Arts, Ent. & Rec.	850	830	890	990	920	970	890
Retail**	440	460	480	470	470	460	460
Ground Tran.	50	50	50	50	40	40	50
Other Travel*	180	190	190	180	140	130	130
Total Direct Employment	3,730	3,740	4,040	4,160	3,910	3,980	3,960
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	1.9	2.0	2.6	2.8	2.5	2.6	2.6
State Tax Receipts	7.5	8.3	9.4	9.9	9.6	11.9	12.0
Total Local & State	9.4	10.3	12.0	12.7	12.1	14.4	14.6

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, and travel agencies. \*\*Retail includes gasoline.

## Marion County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	155.8	166.7	195.1	210.0	207.4	213.1	219.6
Hotel, Motel	61.2	66.3	85.7	91.6	87.0	89.3	92.5
Private Home	78.6	83.4	91.8	98.3	100.7	103.9	106.8
Other Overnight	16.0	16.9	17.6	20.2	19.7	20.0	20.3
Campground	13.2	14.0	14.4	16.6	16.2	16.3	16.5
Vacation Home	2.7	2.9	3.2	3.5	3.6	3.7	3.8
Day Travel	63.4	66.3	73.8	69.1	70.5	71.8	74.1
Spending at Destination	219.2	233.0	268.9	279.1	278.0	284.9	293.7

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$248	\$469	\$101	\$192	2.4	1.9
Private Home	\$81	\$247	\$31	\$95	2.6	3.0
Other Overnight	\$136	\$442	\$40	\$131	3.4	3.3
All Overnight	\$120	\$325	\$45	\$125	2.6	2.7

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	906	888	912	371	363	373
Private Home	3,411	3,377	3,422	1,309	1,296	1,313
Other Overnight	517	504	504	153	149	149
All Overnight	4,834	4,770	4,839	1,833	1,809	1,836

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	479	470	482	196	192	197
Private Home	1,121	1,110	1,125	430	426	432
Other Overnight	159	155	155	47	46	46
All Overnight	1,760	1,735	1,763	673	664	675

# MORROW COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$73,360
Employee Earnings generated by \$100 Visitor Spending	\$24
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

### Visitor Volume (2012p)

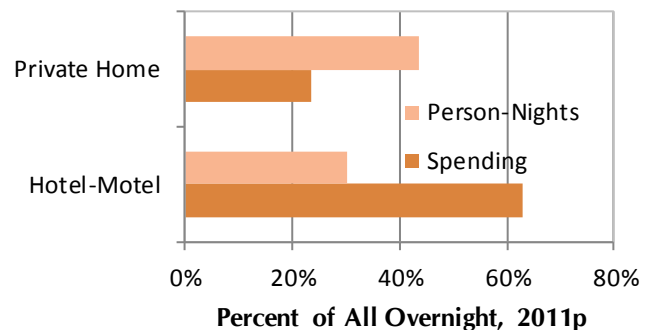
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$310
Additional employment if each resident household encouraged one additional overnight visitor	4

### Visitor Shares

Travel Share of Total Employment (2011)*	2.6%
Overnight Visitor Day Share (2012p)**	6.1%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	43	72	\$5.6
Private Home	40	104	\$2.1
Other Overnight	22	63	\$1.2
All Overnight	105	238	\$8.8

## Morrow County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	8.1	2.1	230	0	227	227
1992	8.7	2.3	240	0	251	251
1993	9.7	2.6	260	0	281	281
1994	11.3	3.0	290	0	319	319
1995	11.9	3.2	290	0	333	334
1996	10.4	2.7	250	0	297	297
1997	9.3	2.4	210	0	272	272
1998	8.9	2.3	200	0	267	267
1999	9.4	2.4	200	0	280	280
2000	10.0	2.5	190	0	296	296
2001	9.9	2.5	190	0	294	294
2002	10.6	2.7	200	0	307	307
2003	10.8	2.7	200	0	312	312
2004	11.3	2.8	190	5	341	346
2005	11.2	2.6	190	5	334	339
2006	12.2	2.8	190	5	356	361
2007	12.2	2.9	190	4	361	365
2008	13.5	3.2	200	4	385	389
2009	11.3	2.8	180	4	342	346
2010	12.2	2.8	150	4	352	356
2011	13.6	2.9	160	4	438	442
2012p	13.0	2.8	160	5	411	417
Annual Percentage Change						
11-12p	-4.4%	-6.0%	-3.8%	30.5%	-6.2%	-5.8%
91-12p	2.3%	1.3%	-1.9%	0.0%	2.9%	2.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Morrow County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	9.8	10.2	10.6	11.5	10.6	11.8	11.2
Other Travel*	0.8	1.2	1.6	2.0	1.6	1.9	1.8
Total Direct Spending	10.6	11.3	12.2	13.5	12.2	13.6	13.0
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	2.0	2.1	2.1	2.7	2.4	2.8	2.6
Food Service	2.5	2.6	2.7	2.9	2.8	3.1	3.0
Food Stores	1.2	1.2	1.3	1.3	1.3	1.4	1.3
Local Tran. & Gas	0.7	0.9	1.1	1.4	1.1	1.4	1.3
Arts, Ent. & Rec.	1.8	1.8	1.7	1.8	1.6	1.7	1.6
Retail Sales	1.6	1.5	1.5	1.4	1.4	1.4	1.4
Destination Spending	9.8	10.2	10.6	11.5	10.6	11.8	11.2
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	1.5	1.6	1.7	1.9	1.7	1.8	1.6
Arts, Ent. & Rec.	0.6	0.6	0.6	0.7	0.6	0.6	0.5
Retail**	0.4	0.4	0.5	0.5	0.4	0.5	0.4
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	2.7	2.8	2.8	3.2	2.8	2.9	2.8
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	140	130	130	140	100	110	100
Arts, Ent. & Rec.	30	30	30	30	30	30	30
Retail**	30	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	200	190	190	200	150	160	160
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Total Local & State	0.3	0.3	0.4	0.4	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, and travel agencies. \*\*Retail includes gasoline.

## Morrow County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	7.2	7.6	7.8	9.1	8.3	9.3	8.8
Hotel, Motel	4.4	4.6	4.7	5.7	5.0	5.9	5.6
Private Home	1.8	1.8	2.0	2.2	2.2	2.2	2.1
Other Overnight	1.1	1.1	1.2	1.2	1.1	1.2	1.2
Campground	0.7	0.7	0.7	0.7	0.6	0.6	0.6
Vacation Home	0.4	0.5	0.5	0.5	0.5	0.6	0.6
Day Travel	2.6	2.6	2.7	2.4	2.3	2.5	2.4
Spending at Destination	9.8	10.2	10.6	11.5	10.6	11.8	11.2

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$191	\$317	\$78	\$129	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$64	\$181	\$19	\$55	3.3	2.8
All Overnight	\$100	\$221	\$37	\$84	2.7	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	66	77	72	27	31	29
Private Home	114	112	104	45	44	41
Other Overnight	63	63	63	19	19	19
All Overnight	244	251	238	91	94	89

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	40	46	43	16	19	18
Private Home	45	44	40	17	17	16
Other Overnight	22	22	22	7	7	7
All Overnight	106	111	105	40	42	40

# MULTNOMAH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$106,060
Employee Earnings generated by \$100 Visitor Spending	\$20
Local & State Tax Revenues generated by \$100 Visitor Spending	\$7.80

### Visitor Volume (2012p)

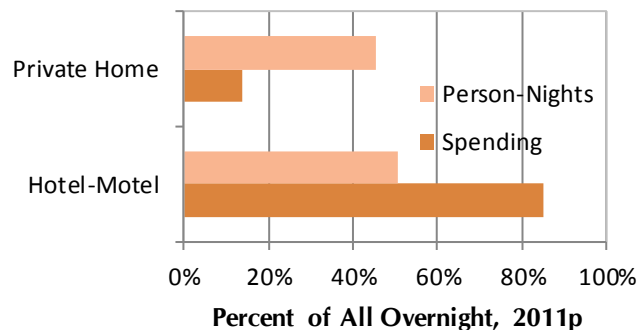
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$86,490
Additional employment if each resident household encouraged one additional overnight visitor	815

### Visitor Shares

Travel Share of Total Employment (2011)*	3.1%
Overnight Visitor Day Share (2012p)**	4.1%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	2,844	5,784	\$999.1
Private Home	1,666	5,166	\$161.0
Other Overnight	131	437	\$16.3
All Overnight	4,641	11,386	\$1,176.4



## Multnomah County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	1,055.0	270.9	13,130	10,150	21,779	31,929
1992	1,165.0	297.7	13,440	11,055	24,093	35,148
1993	1,256.0	315.8	13,750	14,898	25,475	40,373
1994	1,312.3	337.8	14,320	16,411	27,071	43,482
1995	1,391.4	361.9	15,150	18,617	28,873	47,490
1996	1,527.5	390.6	15,850	20,596	30,497	51,093
1997	1,677.2	413.2	16,430	22,193	31,976	54,168
1998	1,764.2	434.7	17,010	23,156	33,103	56,259
1999	1,862.8	465.5	17,300	24,474	35,115	59,589
2000	1,998.3	492.7	17,230	30,106	37,639	67,744
2001	1,898.7	490.3	17,350	30,154	37,476	67,630
2002	1,885.5	478.3	17,010	31,256	36,423	67,679
2003	1,904.1	460.4	16,290	31,694	35,512	67,205
2004	2,027.4	466.9	16,460	33,735	38,807	72,543
2005	2,217.5	490.7	16,730	37,629	40,811	78,440
2006	2,453.5	524.1	17,360	42,237	43,550	85,787
2007	2,567.4	559.9	18,070	46,214	46,572	92,787
2008	2,649.7	566.8	18,610	48,620	47,882	96,502
2009	2,544.0	536.2	17,200	49,815	44,424	94,239
2010	2,715.9	564.2	17,200	47,206	46,684	93,891
2011	2,843.7	594.7	17,620	54,394	54,161	108,555
2012p	2,989.3	630.2	18,090	59,425	56,674	116,099
Annual Percentage Change						
11-12p	5.1%	6.0%	2.7%	9.3%	4.6%	6.9%
91-12p	5.1%	4.1%	1.5%	8.8%	4.7%	6.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## East Multnomah County Travel Trends, 1991-2012p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	27.4	7.5	650	274	691	965
1992	29.1	7.9	640	299	747	1,046
1993	30.6	8.4	650	315	793	1,108
1994	33.2	9.1	680	347	861	1,207
1995	36.5	10.0	730	395	935	1,330
1996	39.1	10.7	760	439	982	1,421
1997	41.4	11.4	770	477	1,024	1,500
1998	42.4	11.9	780	500	1,048	1,547
1999	43.7	12.2	780	525	1,066	1,590
2000	46.7	12.8	790	636	1,127	1,763
2001	46.9	12.8	800	667	1,118	1,785
2002	44.9	12.2	750	628	1,053	1,681
2003	46.3	12.4	760	634	1,081	1,715
2004	48.2	12.8	770	682	1,176	1,857
2005	52.1	13.7	790	770	1,258	2,028
2006	56.8	14.8	840	867	1,362	2,229
2007	58.1	15.8	850	908	1,429	2,338
2008	59.3	15.9	840	942	1,451	2,394
2009	51.8	14.1	750	870	1,277	2,147
2010	55.6	14.5	750	902	1,337	2,239
2011	60.1	15.1	780	1,030	1,592	2,622
2012p	64.8	16.3	810	1,087	1,689	2,776
Annual Percentage Change						
11-12p	7.7%	8.2%	3.9%	5.6%	6.1%	5.9%
91-12p	4.2%	3.7%	1.1%	6.8%	4.3%	5.2%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## West Multnomah County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	1,027.6	263.4	12,480	9,876	21,088	30,964
1992	1,135.9	289.7	12,800	10,757	23,346	34,102
1993	1,225.3	307.5	13,100	14,583	24,682	39,265
1994	1,279.1	328.8	13,650	16,065	26,210	42,275
1995	1,354.8	351.8	14,420	18,223	27,938	46,160
1996	1,488.4	379.9	15,090	20,157	29,515	49,672
1997	1,635.9	401.7	15,660	21,716	30,952	52,668
1998	1,721.7	422.8	16,230	22,656	32,056	54,712
1999	1,819.0	453.3	16,520	23,949	34,049	57,999
2000	1,951.5	479.9	16,430	29,469	36,512	65,981
2001	1,851.8	477.5	16,550	29,487	36,359	65,846
2002	1,840.6	466.0	16,270	30,628	35,370	65,998
2003	1,857.8	448.0	15,540	31,060	34,430	65,490
2004	1,979.2	454.1	15,690	33,054	37,632	70,685
2005	2,165.4	477.0	15,940	36,860	39,552	76,412
2006	2,396.7	509.2	16,520	41,370	42,188	83,558
2007	2,509.3	544.1	17,220	45,306	45,143	90,449
2008	2,590.4	550.9	17,770	47,677	46,431	94,108
2009	2,492.2	522.1	16,450	48,945	43,147	92,092
2010	2,660.3	549.8	16,440	46,305	45,347	91,652
2011	2,783.6	579.7	16,840	53,364	52,570	105,933
2012p	2,924.6	613.9	17,280	58,338	54,986	113,324
Annual Percentage Change						
11-12p	5.1%	5.9%	2.6%	9.3%	4.6%	7.0%
91-12p	5.1%	4.1%	1.6%	8.8%	4.7%	6.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Multnomah County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	903	981	1,142	1,271	1,279	1,375	1,485
Other Travel*	982	1,046	1,312	1,378	1,437	1,469	1,504
Total Direct Spending	1,886	2,027	2,453	2,650	2,716	2,844	2,989
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	249	276	343	398	370	409	451
Food Service	236	259	296	328	353	372	405
Food Stores	43	48	51	57	58	62	66
Local Tran. & Gas	131	149	183	215	214	238	251
Arts, Ent. & Rec.	89	94	102	105	107	110	117
Retail Sales	155	155	167	169	177	184	195
Destination Spending	903	981	1,142	1,271	1,279	1,375	1,485
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	171	188	219	252	248	255	283
Arts, Ent. & Rec.	25	26	28	34	32	34	32
Retail**	23	25	27	29	29	30	33
Ground Tran.	16	17	19	21	19	20	22
Other Travel*	244	211	231	231	235	254	260
Total Direct Earnings	478	467	524	567	564	595	630
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>							
Accom. & Food Serv.	8.7	9.0	9.8	10.8	10.4	10.7	11.1
Arts, Ent. & Rec.	0.7	0.9	1.0	1.0	0.9	1.0	1.0
Retail**	0.9	1.0	1.0	1.1	1.1	1.1	1.1
Ground Tran.	0.7	0.7	0.8	0.8	0.7	0.7	0.8
Other Travel*	5.9	4.8	4.8	4.9	4.1	4.1	4.1
Total Direct Employment	17.0	16.5	17.4	18.6	17.2	17.6	18.1
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	31	34	42	49	47	54	59
State Tax Receipts	36	39	44	48	47	54	57
Total Local & State	68	73	86	97	94	109	116

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, and travel agencies. \*\*Retail includes gasoline.

## Multnomah County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	749.0	817.4	959.4	1,088.8	1,090.6	1,176.4	1,274.2
Hotel, Motel	618.7	680.6	811.3	925.3	920.8	999.1	1,089.6
Private Home	118.3	123.7	133.2	147.5	153.8	161.0	168.0
Other Overnight	11.9	13.1	14.9	15.9	15.9	16.3	16.5
Campground	8.9	9.9	11.4	12.0	11.9	12.2	12.4
Vacation Home	3.0	3.2	3.5	3.9	4.0	4.1	4.2
Day Travel	154.2	164.1	182.2	182.6	187.9	198.6	211.2
Spending at Destination	903.1	981.4	1,141.6	1,271.3	1,278.5	1,375.0	1,485.4

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$369	\$768	\$173	\$351	2.1	2.1
Private Home	\$61	\$194	\$31	\$97	2.0	3.2
Other Overnight	\$116	\$389	\$37	\$124	3.1	3.4
All Overnight	\$214	\$542	\$103	\$253	2.1	2.5

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	5,197	5,441	5,784	2,438	2,538	2,706
Private Home	5,017	5,054	5,166	2,554	2,577	2,648
Other Overnight	444	437	437	143	141	141
All Overnight	10,658	10,931	11,386	5,135	5,255	5,495

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	2,555	2,675	2,844	1,171	1,220	1,300
Private Home	1,618	1,630	1,666	802	809	830
Other Overnight	133	131	131	43	42	42
All Overnight	4,306	4,436	4,641	2,015	2,071	2,172

# POLK COUNTY TRAVEL IMPACTS

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$64,820
Employee Earnings generated by \$100 Visitor Spending	\$36
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.00

### Visitor Shares

Travel Share of Total Employment (2011)*	7.7%
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### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	26.8	28.7	36.3	39.5	39.1	39.5	41.6
Hotel, Motel	13.7	14.6	20.7	21.4	20.7	21.1	23.0
Private Home	10.1	10.9	12.3	14.3	14.7	14.7	14.8
Other Overnight	3.0	3.2	3.3	3.8	3.7	3.8	3.8
Campground	2.8	3.0	3.1	3.5	3.4	3.5	3.5
Vacation Home	0.2	0.2	0.2	0.3	0.3	0.3	0.3
Day Travel	93.9	98.8	111.4	105.8	107.3	104.9	107.6
Spending at Destination	120.7	127.4	147.6	145.2	146.3	144.4	149.1

## Polk County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	17.5	3.9	360	0	704	704
1992	18.4	4.0	330	0	781	781
1993	19.9	4.4	360	0	851	851
1994	21.2	4.7	360	0	911	911
1995	29.9	7.4	500	0	1,085	1,085
1996	44.4	12.8	770	0	1,351	1,351
1997	65.0	19.5	1,090	0	1,755	1,755
1998	92.1	28.6	1,630	0	2,318	2,318
1999	103.2	32.0	1,690	0	2,532	2,532
2000	105.2	32.1	1,700	0	2,577	2,577
2001	106.0	32.4	1,750	0	2,592	2,592
2002	125.9	39.0	2,060	0	2,964	2,964
2003	129.0	39.5	2,020	0	3,036	3,036
2004	134.8	40.3	1,980	0	3,143	3,143
2005	155.3	46.1	2,270	0	3,551	3,551
2006	158.4	47.0	2,210	0	3,661	3,661
2007	157.3	49.7	2,160	0	3,812	3,812
2008	159.0	50.3	2,130	0	3,875	3,875
2009	149.2	48.2	2,010	0	3,671	3,671
2010	157.6	48.6	1,980	0	3,767	3,767
2011	157.4	49.1	2,000	0	4,270	4,270
2012p	161.8	54.9	2,330	0	4,502	4,502

### Annual Percentage Change

11-12p	2.8%	11.9%	16.5%	0.0%	5.4%	5.4%
91-12p	11.2%	13.5%	9.3%	0.0%	9.2%	9.2%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Polk County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	120.7	127.4	147.6	145.2	146.3	144.4	149.1
Other Travel*	5.3	7.3	10.8	13.7	11.2	13.0	12.6
Total Direct Spending	125.9	134.8	158.4	159.0	157.6	157.4	161.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	8.4	9.0	13.0	13.6	13.1	13.3	14.4
Food Service	20.1	21.5	25.2	25.7	27.4	27.0	28.3
Food Stores	8.7	9.5	10.4	11.3	11.4	11.5	11.8
Local Tran. & Gas	4.3	5.6	7.8	9.2	8.2	9.1	9.2
Arts, Ent. & Rec.	76.0	78.8	87.7	81.9	82.6	79.9	81.8
Retail Sales	3.1	3.1	3.4	3.5	3.6	3.5	3.6
Destination Spending	120.7	127.4	147.6	145.2	146.3	144.4	149.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	11.4	12.2	15.1	16.0	16.0	16.2	18.2
Arts, Ent. & Rec.	25.0	25.4	28.9	31.1	29.5	29.9	33.6
Retail**	1.7	1.8	2.0	2.2	2.2	2.1	2.2
Ground Tran.	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.6	0.6	0.6	0.7	0.5	0.5	0.5
Total Direct Earnings	39.0	40.3	47.0	50.3	48.6	49.1	54.9
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	830	890	1,000	970	940	950	1,000
Arts, Ent. & Rec.	1,080	940	1,050	990	880	900	1,180
Retail**	100	110	110	110	110	110	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	40	40	40	40	30	30	30
Total Direct Employment	2,060	1,980	2,210	2,130	1,980	2,000	2,330
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	3.0	3.1	3.7	3.9	3.8	4.3	4.5
Total Local & State	3.0	3.1	3.7	3.9	3.8	4.3	4.5

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, and travel agencies. \*\*Retail includes gasoline.



# TILLAMOOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$94,410
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10

### Visitor Volume (2012p)

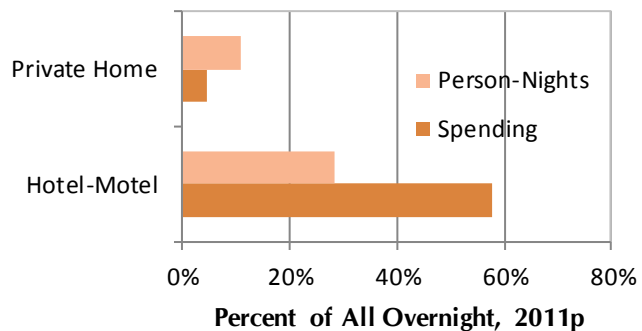
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,214
Additional employment if each resident household encouraged one additional overnight visitor	13

### Visitor Shares

Travel Share of Total Employment (2011)*	16.1%
Overnight Visitor Day Share (2012p)**	25.2%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	406	676	\$65.3
Private Home	100	258	\$5.2
Other Overnight	504	1,444	\$42.5
All Overnight	1,010	2,378	\$112.9

## Tillamook County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	75.3	20.9	1,420	260	1,701	1,961
1992	81.2	22.6	1,450	302	1,869	2,171
1993	86.4	24.2	1,500	336	2,004	2,339
1994	87.8	24.5	1,470	343	2,045	2,388
1995	90.8	25.3	1,470	362	2,093	2,455
1996	93.8	26.2	1,470	400	2,119	2,519
1997	98.0	27.4	1,470	423	2,179	2,602
1998	100.4	28.5	1,540	439	2,221	2,661
1999	103.3	29.2	1,520	461	2,262	2,723
2000	108.5	30.2	1,510	474	2,361	2,835
2001	118.8	33.2	1,640	581	2,546	3,127
2002	125.2	35.2	1,710	601	2,629	3,230
2003	129.3	36.2	1,730	604	2,726	3,329
2004	133.7	37.2	1,710	761	2,924	3,685
2005	138.5	38.3	1,690	796	3,015	3,812
2006	181.4	51.9	2,170	1,209	3,964	5,172
2007	179.9	53.7	2,130	1,021	4,044	5,065
2008	187.8	56.1	2,240	1,025	4,192	5,217
2009	179.6	55.0	2,140	983	4,044	5,027
2010	187.1	55.3	2,100	1,023	4,119	5,142
2011	188.9	55.5	2,120	1,053	4,591	5,644
2012p	197.6	59.4	2,050	1,119	4,787	5,905
Annual Percentage Change						
11-12p	4.6%	6.9%	-3.2%	6.2%	4.3%	4.6%
91-12p	4.7%	5.1%	1.8%	7.2%	5.0%	5.4%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Tillamook County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	123.0	130.9	177.5	183.2	183.5	184.5	193.1
Other Travel*	2.1	2.8	3.8	4.6	3.6	4.4	4.5
Total Direct Spending	125.2	133.7	181.4	187.8	187.1	188.9	197.6
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	17.2	18.5	32.7	34.3	35.4	34.6	36.4
Food Service	33.1	35.3	47.1	48.9	51.1	51.1	54.3
Food Stores	18.0	19.6	22.4	24.1	23.4	24.1	25.0
Local Tran. & Gas	7.2	9.5	14.8	17.5	15.2	17.3	17.7
Arts, Ent. & Rec.	22.5	23.3	30.7	30.5	30.2	29.6	30.9
Retail Sales	25.1	24.7	29.8	27.8	28.2	27.9	28.9
Destination Spending	123.0	130.9	177.5	183.2	183.5	184.5	193.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	22.8	24.2	35.5	38.3	38.4	38.3	41.4
Arts, Ent. & Rec.	6.2	6.3	8.4	9.7	9.0	9.4	9.8
Retail**	5.5	5.9	7.0	7.1	7.0	6.9	7.2
Ground Tran.	0.5	0.5	0.7	0.7	0.7	0.7	0.8
Other Travel*	0.3	0.3	0.3	0.3	0.2	0.2	0.2
Total Direct Earnings	35.2	37.2	51.9	56.1	55.3	55.5	59.4
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,000	970	1,290	1,280	1,270	1,270	1,240
Arts, Ent. & Rec.	350	360	460	550	460	480	440
Retail**	330	340	390	370	340	340	340
Ground Tran.	20	20	30	20	20	20	20
Other Travel*	20	20	10	10	10	10	10
Total Direct Employment	1,710	1,710	2,170	2,240	2,100	2,120	2,050
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.6	0.8	1.2	1.0	1.0	1.1	1.1
State Tax Receipts	2.6	2.9	4.0	4.2	4.1	4.6	4.8
Total Local & State	3.2	3.7	5.2	5.2	5.1	5.6	5.9

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, and travel agencies. \*\*Retail includes gasoline.

## Tillamook County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	62.4	67.1	98.1	107.1	107.4	107.6	112.9
Hotel, Motel	24.8	26.1	53.9	59.9	62.0	60.9	65.3
Private Home	3.7	4.0	4.4	4.7	4.7	4.9	5.2
Other Overnight	33.9	37.1	39.8	42.5	40.8	41.9	42.5
Campground	24.2	26.5	28.3	30.1	28.6	29.1	29.5
Vacation Home	9.7	10.6	11.5	12.4	12.2	12.7	12.9
Day Travel	60.6	63.7	79.5	76.1	76.0	76.9	80.2
Spending at Destination	123.0	130.9	177.5	183.2	183.5	184.5	193.1

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$237	\$394	\$97	\$161	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$97	\$277	\$29	\$84	3.3	2.8
All Overnight	\$139	\$315	\$47	\$112	2.9	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	661	636	676	269	259	276
Private Home	247	246	258	96	96	101
Other Overnight	1,464	1,444	1,444	443	437	437
All Overnight	2,372	2,326	2,378	809	793	813

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	397	382	406	162	156	166
Private Home	96	96	100	37	37	39
Other Overnight	510	504	504	155	153	153
All Overnight	1,003	982	1,010	355	347	358

# UMATILLA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$61,560
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,396
Additional employment if each resident household encouraged one additional overnight visitor	55

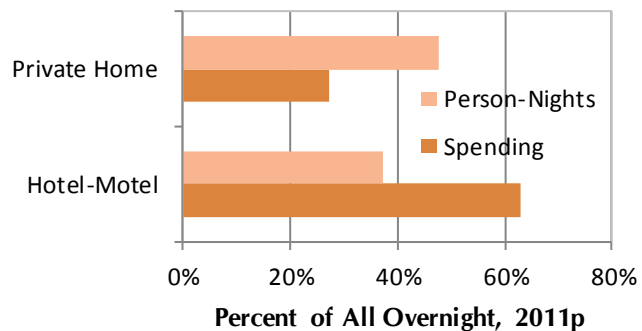
### Visitor Shares

Travel Share of Total Employment (2011)*	5.3%
Overnight Visitor Day Share (2012p)**	5.5%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	356	593	\$55.5
Private Home	296	760	\$24.1
Other Overnight	84	242	\$8.6
All Overnight	736	1,594	\$88.3

## Umatilla County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	55.3	14.7	1,380	356	1,691	2,046
1992	60.7	16.1	1,430	390	1,915	2,305
1993	63.7	17.0	1,450	427	2,043	2,470
1994	65.8	17.6	1,450	477	2,122	2,600
1995	72.4	19.5	1,590	545	2,251	2,796
1996	79.6	21.4	1,710	565	2,346	2,910
1997	81.5	22.0	1,670	567	2,361	2,929
1998	88.2	24.3	1,870	623	2,537	3,159
1999	94.1	25.8	1,890	671	2,653	3,324
2000	103.9	27.8	1,970	754	2,898	3,651
2001	101.3	27.2	1,930	725	2,817	3,543
2002	113.0	31.1	2,140	771	3,058	3,829
2003	114.4	31.2	2,050	775	3,109	3,884
2004	119.9	32.1	2,050	906	3,332	4,238
2005	127.8	33.7	2,080	976	3,498	4,474
2006	134.8	35.2	2,150	1,014	3,652	4,666
2007	136.0	36.8	2,150	1,184	3,756	4,940
2008	137.6	36.8	2,140	1,129	3,755	4,885
2009	125.5	35.7	2,040	1,118	3,561	4,679
2010	132.7	35.7	2,010	1,216	3,643	4,860
2011	146.0	36.3	2,060	1,228	4,534	5,762
2012p	139.3	40.1	2,070	1,179	4,560	5,738
Annual Percentage Change						
11-12p	-4.6%	10.4%	0.5%	-4.0%	0.6%	-0.4%
91-12p	4.5%	4.9%	1.9%	5.9%	4.8%	5.0%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Umatilla County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	105.4	110.5	122.4	122.9	121.1	132.8	125.6
Other Travel*	7.6	9.3	12.4	14.6	11.6	13.2	13.7
Total Direct Spending	113.0	119.9	134.8	137.6	132.7	146.0	139.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	18.3	19.5	22.3	25.7	25.5	27.6	25.0
Food Service	26.6	27.7	30.7	30.2	31.4	33.9	32.7
Food Stores	10.7	11.1	11.6	11.6	11.4	12.5	12.3
Local Tran. & Gas	8.8	11.5	15.4	17.9	15.3	19.0	17.5
Arts, Ent. & Rec.	24.2	24.4	25.6	22.3	22.0	23.3	22.3
Retail Sales	17.0	16.2	16.9	15.1	15.4	16.4	15.8
Destination Spending	105.4	110.5	122.4	122.9	121.1	132.8	125.6
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	19.7	20.7	23.0	24.6	24.3	24.9	28.4
Arts, Ent. & Rec.	6.4	6.3	6.7	6.8	6.3	6.4	6.7
Retail**	3.5	3.7	3.8	3.7	3.7	3.9	3.8
Ground Tran.	0.5	0.5	0.6	0.6	0.6	0.6	0.6
Other Travel*	1.0	0.9	1.0	1.1	0.9	0.5	0.6
Total Direct Earnings	31.1	32.1	35.2	36.8	35.7	36.3	40.1
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	1,230	1,220	1,280	1,280	1,220	1,250	1,290
Arts, Ent. & Rec.	650	580	610	610	570	580	570
Retail**	180	180	180	180	170	180	160
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	50	50	50	40	30	30
Total Direct Employment	2,140	2,050	2,150	2,140	2,010	2,060	2,070
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.8	0.9	1.0	1.1	1.2	1.2	1.2
State Tax Receipts	3.1	3.3	3.7	3.8	3.6	4.5	4.6
Total Local & State	3.8	4.2	4.7	4.9	4.9	5.8	5.7

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, and travel agencies. \*\*Retail includes gasoline.

## Umatilla County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	66.2	70.3	79.0	87.0	85.3	94.0	88.3
Hotel, Motel	39.6	43.0	50.2	56.9	55.2	61.6	55.5
Private Home	18.4	19.0	20.3	21.5	21.8	23.9	24.1
Other Overnight	8.3	8.3	8.6	8.6	8.3	8.5	8.6
Campground	5.8	5.7	5.8	5.6	5.3	5.4	5.5
Vacation Home	2.4	2.6	2.7	3.0	3.0	3.1	3.1
Day Travel	39.2	40.3	43.4	35.9	35.8	38.7	37.4
Spending at Destination	105.4	110.5	122.4	122.9	121.1	132.8	125.6

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$230	\$382	\$94	\$156	2.5	1.7
Private Home	\$81	\$209	\$32	\$82	2.6	2.6
Other Overnight	\$119	\$341	\$36	\$103	3.3	2.9
All Overnight	\$144	\$308	\$55	\$120	2.6	2.1

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	623	667	593	254	272	242
Private Home	726	764	760	284	299	297
Other Overnight	244	242	242	74	73	73
All Overnight	1,593	1,672	1,594	611	643	611

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	375	401	356	153	163	145
Private Home	282	297	296	110	116	116
Other Overnight	84	84	84	26	25	25
All Overnight	741	782	736	289	305	286



# UNION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$52,630
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.20

### Visitor Volume (2012p)

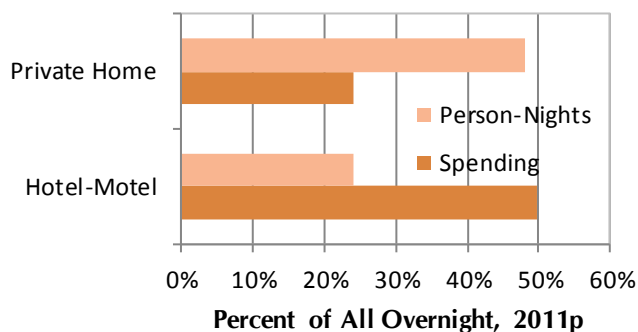
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$981
Additional employment if each resident household encouraged one additional overnight visitor	19

### Visitor Shares

Travel Share of Total Employment (2011)*	3.7%
Overnight Visitor Day Share (2012p)**	5.6%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	78	130	\$10.7
Private Home	101	259	\$5.2
Other Overnight	49	150	\$5.6
All Overnight	227	538	\$21.5

## Union County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	25.3	8.1	800	214	682	896
1992	26.2	8.4	750	274	728	1,002
1993	27.8	8.9	770	313	782	1,094
1994	28.9	9.3	780	340	815	1,155
1995	28.2	9.2	730	356	796	1,152
1996	29.5	9.6	740	383	808	1,191
1997	30.1	9.8	720	384	812	1,196
1998	29.0	9.6	700	367	789	1,156
1999	29.8	9.7	680	377	798	1,175
2000	29.4	9.5	650	377	790	1,167
2001	30.8	10.1	720	412	813	1,225
2002	28.9	9.4	630	364	765	1,129
2003	29.1	9.4	610	366	774	1,140
2004	32.4	10.2	640	382	881	1,263
2005	31.0	9.5	580	347	845	1,192
2006	32.6	9.9	610	407	883	1,291
2007	33.2	10.3	620	394	909	1,303
2008	32.3	9.8	570	423	882	1,305
2009	29.3	9.5	570	369	828	1,197
2010	29.5	9.4	540	350	832	1,182
2011	30.7	9.2	540	386	1,002	1,388
2012p	31.8	9.0	530	420	992	1,412
Annual Percentage Change						
11-12p	3.6%	-2.9%	-2.5%	8.6%	-0.9%	1.7%
91-12p	1.1%	0.5%	-2.0%	3.3%	1.8%	2.2%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Union County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	26.9	29.7	28.9	27.8	25.9	26.2	27.3
Other Travel*	2.0	2.7	3.7	4.5	3.6	4.4	4.5
Total Direct Spending	28.9	32.4	32.6	32.3	29.5	30.7	31.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	5.7	6.2	6.1	6.3	5.7	5.6	5.8
Food Service	6.7	7.4	7.3	6.8	6.7	6.7	7.1
Food Stores	3.6	4.3	3.9	4.0	3.8	4.0	4.1
Local Tran. & Gas	1.7	2.3	2.7	3.0	2.5	2.8	2.9
Arts, Ent. & Rec.	5.0	5.3	4.9	4.3	4.0	3.9	4.0
Retail Sales	4.1	4.2	4.0	3.3	3.2	3.3	3.4
Destination Spending	26.9	29.7	28.9	27.8	25.9	26.2	27.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	6.5	7.1	6.9	6.9	6.8	6.5	6.3
Arts, Ent. & Rec.	1.6	1.6	1.5	1.6	1.3	1.5	1.3
Retail**	1.0	1.1	1.0	1.0	0.9	0.9	1.0
Ground Tran.	0.1	0.2	0.2	0.1	0.1	0.1	0.1
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	9.4	10.2	9.9	9.8	9.4	9.2	9.0
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	350	380	350	350	340	320	310
Arts, Ent. & Rec.	200	180	190	160	140	160	150
Retail**	50	60	50	50	50	50	50
Ground Tran.	10	10	10	0	0	0	0
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	630	640	610	570	540	540	530
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.4	0.4	0.4	0.4	0.3	0.4	0.4
State Tax Receipts	0.8	0.9	0.9	0.9	0.8	1.0	1.0
Total Local & State	1.1	1.3	1.3	1.3	1.2	1.4	1.4

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, and travel agencies. \*\*Retail includes gasoline.

## Union County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	20.3	22.6	21.9	22.2	20.5	20.7	21.5
Hotel, Motel	11.9	12.2	12.1	11.9	10.5	10.3	10.7
Private Home	3.6	3.9	4.3	4.6	4.6	4.9	5.2
Other Overnight	4.9	6.6	5.5	5.7	5.4	5.5	5.6
Campground	4.5	6.2	5.1	5.2	5.0	5.1	5.2
Vacation Home	0.3	0.3	0.4	0.4	0.4	0.4	0.4
Day Travel	6.6	7.2	7.1	5.6	5.4	5.5	5.8
Spending at Destination	26.9	29.7	28.9	27.8	25.9	26.2	27.3

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$203	\$338	\$83	\$138	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$128	\$393	\$37	\$115	3.4	3.1
All Overnight	\$109	\$252	\$40	\$95	2.7	2.3

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	133	126	130	54	51	53
Private Home	244	249	259	96	97	101
Other Overnight	152	150	150	44	44	44
All Overnight	529	525	538	194	192	197

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	80	76	78	33	31	32
Private Home	95	97	101	37	38	39
Other Overnight	49	49	49	14	14	14
All Overnight	224	221	227	84	83	85

# WALLOWA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$59,530
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$320
Additional employment if each resident household encouraged one additional overnight visitor	5

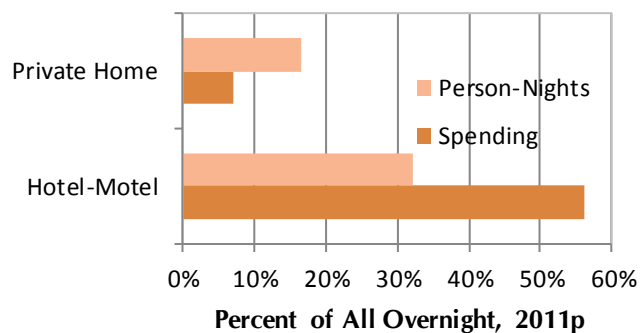
### Visitor Shares

Travel Share of Total Employment (2011)*	8.7%
Overnight Visitor Day Share (2012p)**	16.3%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	82	136	\$11.0
Private Home	27	69	\$1.4
Other Overnight	73	215	\$7.2
All Overnight	181	420	\$19.6

## Wallowa County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	8.9	2.6	260	0	231	231
1992	12.1	3.7	360	0	309	309
1993	14.5	4.6	440	0	368	368
1994	15.3	4.9	440	14	387	400
1995	16.1	5.2	450	94	400	494
1996	16.1	5.1	430	158	392	549
1997	16.5	5.3	420	161	395	556
1998	17.1	5.5	450	175	405	580
1999	17.9	5.8	450	189	417	606
2000	19.1	6.1	480	204	442	646
2001	19.8	6.3	480	217	451	668
2002	20.0	6.4	500	215	448	663
2003	20.4	6.5	500	216	458	674
2004	21.0	6.7	470	206	497	703
2005	22.3	7.0	450	228	522	750
2006	26.3	8.5	550	300	613	913
2007	25.2	8.3	500	272	602	874
2008	25.9	8.6	510	296	614	911
2009	25.4	8.7	500	283	608	891
2010	25.7	8.4	490	291	602	893
2011	26.0	7.3	410	281	632	913
2012p	26.5	8.0	430	282	653	936

### Annual Percentage Change

11-12p	1.9%	8.5%	3.6%	0.4%	3.3%	2.4%
91-12p	5.3%	5.4%	2.5%	0.0%	5.1%	6.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Wallowa County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	19.4	20.4	25.3	24.8	24.8	24.8	25.3
Other Travel*	0.6	0.7	1.0	1.2	1.0	1.2	1.2
Total Direct Spending	20.0	21.0	26.3	25.9	25.7	26.0	26.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	3.8	4.0	5.8	6.2	6.2	6.0	6.1
Food Service	4.8	5.0	6.3	5.9	6.2	6.2	6.4
Food Stores	2.9	3.1	3.2	3.3	3.4	3.5	3.6
Local Tran. & Gas	1.2	1.5	2.2	2.5	2.1	2.4	2.4
Arts, Ent. & Rec.	3.6	3.6	4.5	4.0	3.9	3.8	3.9
Retail Sales	3.1	3.0	3.4	2.9	2.9	2.9	2.9
Destination Spending	19.4	20.4	25.3	24.8	24.8	24.8	25.3
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	4.2	4.4	5.8	6.0	5.9	5.2	5.8
Arts, Ent. & Rec.	1.0	1.0	1.3	1.4	1.3	0.9	0.9
Retail**	1.0	1.1	1.1	1.1	1.1	1.1	1.1
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	6.4	6.7	8.5	8.6	8.4	7.3	8.0
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	350	320	370	320	300	260	280
Arts, Ent. & Rec.	100	90	120	130	140	100	90
Retail**	50	60	60	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	500	470	550	510	490	410	430
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.2	0.2	0.3	0.3	0.3	0.3	0.3
State Tax Receipts	0.4	0.5	0.6	0.6	0.6	0.6	0.7
Total Local & State	0.7	0.7	0.9	0.9	0.9	0.9	0.9

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, and travel agencies. \*\*Retail includes gasoline.

## Wallowa County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	13.9	14.7	18.7	19.3	19.2	19.3	19.6
Hotel, Motel	6.7	7.0	11.2	11.4	11.0	10.8	11.0
Private Home	1.1	1.1	1.2	1.3	1.3	1.3	1.4
Other Overnight	6.1	6.5	6.3	6.6	7.0	7.1	7.2
Campground	5.1	5.5	5.2	5.4	5.7	5.8	5.9
Vacation Home	1.0	1.1	1.2	1.3	1.3	1.3	1.3
Day Travel	5.5	5.7	6.7	5.5	5.5	5.6	5.7
Spending at Destination	19.4	20.4	25.3	24.8	24.8	24.8	25.3

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$199	\$331	\$81	\$135	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$113	\$332	\$34	\$99	3.4	2.9
All Overnight	\$134	\$299	\$47	\$108	2.9	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	141	135	136	58	55	55
Private Home	67	68	69	26	26	27
Other Overnight	219	215	215	65	64	64
All Overnight	428	418	420	149	145	146

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	85	81	82	35	33	33
Private Home	26	26	27	10	10	11
Other Overnight	74	73	73	22	22	22
All Overnight	185	180	181	67	65	65



# WASCO COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$60,030
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

### Visitor Volume (2012p)

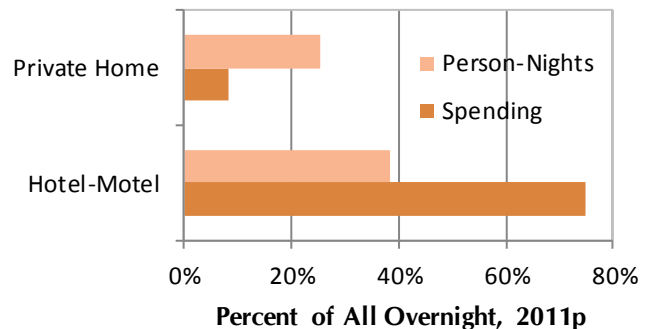
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,210
Additional employment if each resident household encouraged one additional overnight visitor	20

### Visitor Shares

Travel Share of Total Employment (2011)*	10.0%
Overnight Visitor Day Share (2012p)**	10.5%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	231	383	\$43.0
Private Home	99	254	\$4.8
Other Overnight	121	363	\$9.8
All Overnight	450	1,000	\$57.6

## Wasco County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	45.9	13.5	1,100	252	1,096	1,348
1992	48.6	14.3	1,130	293	1,183	1,476
1993	50.0	14.7	1,120	370	1,225	1,596
1994	52.6	15.5	1,150	317	1,293	1,611
1995	56.8	16.8	1,180	292	1,374	1,666
1996	55.3	16.3	1,110	320	1,317	1,638
1997	59.7	17.8	1,160	301	1,396	1,697
1998	61.4	18.6	1,250	312	1,427	1,739
1999	64.8	19.5	1,280	330	1,489	1,819
2000	66.8	19.9	1,300	349	1,531	1,880
2001	68.5	20.4	1,280	350	1,554	1,903
2002	69.1	20.7	1,310	385	1,544	1,929
2003	71.6	21.4	1,350	387	1,603	1,991
2004	74.0	21.9	1,290	407	1,703	2,110
2005	77.7	22.8	1,330	502	1,771	2,273
2006	83.3	24.3	1,370	526	1,885	2,411
2007	86.0	25.8	1,450	623	1,975	2,599
2008	89.8	27.0	1,490	546	2,058	2,604
2009	86.6	26.9	1,470	668	2,017	2,685
2010	89.7	26.7	1,400	660	2,030	2,690
2011	90.8	26.5	1,380	660	2,284	2,944
2012p	90.5	27.6	1,440	656	2,321	2,977
Annual Percentage Change						
11-12p	-0.3%	4.2%	4.2%	-0.6%	1.6%	1.1%
91-12p	3.3%	3.5%	1.3%	4.7%	3.6%	3.8%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## North Wasco County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	30.2	8.4	750	252	761	1,013
1992	32.2	8.9	760	293	828	1,121
1993	32.9	9.1	750	370	854	1,225
1994	34.8	9.7	780	317	906	1,223
1995	37.6	10.5	810	292	958	1,251
1996	36.2	10.0	750	320	912	1,232
1997	39.8	11.2	790	301	977	1,278
1998	41.0	11.8	810	312	999	1,312
1999	43.1	12.3	810	330	1,035	1,365
2000	42.5	12.0	780	349	1,026	1,375
2001	43.0	12.1	770	350	1,027	1,377
2002	42.2	11.9	760	385	993	1,378
2003	43.7	12.3	770	387	1,030	1,417
2004	45.1	12.5	750	407	1,104	1,510
2005	47.8	13.1	770	502	1,157	1,659
2006	52.5	14.5	810	526	1,261	1,787
2007	53.8	15.5	870	623	1,321	1,944
2008	55.6	16.0	880	546	1,356	1,901
2009	54.6	16.4	890	668	1,347	2,015
2010	55.7	15.9	830	660	1,341	2,002
2011	56.7	15.7	820	660	1,539	2,199
2012p	56.9	16.5	860	656	1,572	2,228
Annual Percentage Change						
11-12p	0.4%	5.2%	4.7%	-0.6%	2.1%	1.3%
91-12p	3.1%	3.3%	0.6%	4.7%	3.5%	3.8%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

### South Wasco County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	15.7	5.2	350	0	335	335
1992	16.4	5.4	370	0	355	355
1993	17.0	5.6	370	0	371	371
1994	17.8	5.9	370	0	387	387
1995	19.2	6.3	370	0	416	416
1996	19.0	6.3	360	0	405	405
1997	19.9	6.6	370	0	419	419
1998	20.4	6.9	440	0	428	428
1999	21.7	7.3	470	0	453	453
2000	24.3	7.9	520	0	506	506
2001	25.4	8.3	510	0	527	527
2002	26.9	8.8	560	0	551	551
2003	27.9	9.1	580	0	574	574
2004	28.9	9.4	540	0	599	599
2005	29.8	9.7	560	0	614	614
2006	30.8	9.8	560	0	624	624
2007	32.2	10.3	580	0	655	655
2008	34.3	11.0	610	0	702	702
2009	31.9	10.6	580	0	670	670
2010	34.0	10.8	560	0	689	689
2011	34.1	10.8	560	0	744	744
2012p	33.6	11.1	580	0	749	749
Annual Percentage Change						
11-12p	-1.5%	2.7%	3.4%	0.0%	0.6%	0.6%
91-12p	3.7%	3.7%	2.5%	0.0%	3.9%	3.9%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Wasco County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	67.1	71.4	79.8	85.5	86.2	86.4	86.0
Other Travel*	1.9	2.6	3.5	4.3	3.5	4.3	4.5
Total Direct Spending	69.1	74.0	83.3	89.8	89.7	90.8	90.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	17.9	19.1	21.9	24.8	24.9	24.6	24.0
Food Service	16.1	17.2	19.4	20.5	21.7	21.6	21.9
Food Stores	6.8	7.4	7.6	8.5	8.4	8.7	8.8
Local Tran. & Gas	3.6	4.8	6.3	7.6	6.7	7.6	7.4
Arts, Ent. & Rec.	11.7	12.1	13.1	13.4	13.4	13.0	12.8
Retail Sales	11.1	10.9	11.5	10.8	11.1	11.0	11.0
Destination Spending	67.1	71.4	79.8	85.5	86.2	86.4	86.0
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	14.6	15.6	17.4	19.3	19.4	19.3	20.1
Arts, Ent. & Rec.	3.5	3.6	3.9	4.6	4.4	4.3	4.5
Retail**	2.1	2.3	2.4	2.5	2.5	2.4	2.5
Ground Tran.	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	20.7	21.9	24.3	27.0	26.7	26.5	27.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	900	860	930	960	920	910	940
Arts, Ent. & Rec.	290	300	310	400	360	350	370
Retail**	100	100	110	100	100	100	100
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,310	1,290	1,370	1,490	1,400	1,380	1,440
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.4	0.4	0.5	0.5	0.7	0.7	0.7
State Tax Receipts	1.5	1.7	1.9	2.1	2.0	2.3	2.3
Total Local & State	1.9	2.1	2.4	2.6	2.7	2.9	3.0

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, and travel agencies. \*\*Retail includes gasoline.

## Wasco County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	41.1	44.1	49.5	57.4	57.7	57.6	56.8
Hotel, Motel	30.1	32.0	37.3	43.1	43.7	43.0	41.8
Private Home	3.5	3.8	4.1	4.5	4.5	4.8	5.1
Other Overnight	7.5	8.4	8.1	9.8	9.5	9.8	9.9
Campground	6.2	7.0	6.6	8.0	7.7	7.9	8.0
Vacation Home	1.2	1.3	1.5	1.8	1.8	1.8	1.8
Day Travel	26.0	27.3	30.2	28.1	28.5	28.9	29.2
Spending at Destination	67.1	71.4	79.8	85.5	86.2	86.4	86.0

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$275	\$458	\$112	\$187	2.5	1.7
Private Home	\$48	\$125	\$19	\$49	2.6	2.6
Other Overnight	\$91	\$271	\$27	\$81	3.4	3.0
All Overnight	\$159	\$342	\$58	\$128	2.8	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	423	402	383	173	164	156
Private Home	237	243	254	92	95	99
Other Overnight	372	363	363	110	107	107
All Overnight	1,032	1,008	1,000	375	366	363

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	254	242	231	104	99	94
Private Home	92	95	99	36	37	39
Other Overnight	124	121	121	37	36	36
All Overnight	471	457	450	177	171	169

# WASHINGTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$88,560
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.60

### Visitor Volume (2012p)

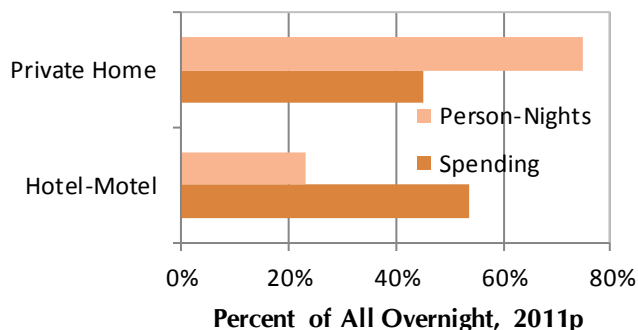
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$28,795
Additional employment if each resident household encouraged one additional overnight visitor	325

### Visitor Shares

Travel Share of Total Employment (2011)*	2.0%
Overnight Visitor Day Share (2012p)**	3.7%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	807	1,647	\$196.4
Private Home	1,731	5,370	\$164.3
Other Overnight	43	150	\$4.8
All Overnight	2,582	7,166	\$365.5

## Washington County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	209.0	55.3	3,920	2,008	6,642	8,649
1992	224.7	59.1	3,930	2,208	7,384	9,592
1993	240.2	63.3	4,080	2,385	7,995	10,380
1994	257.6	68.1	4,210	2,619	8,586	11,205
1995	284.9	75.9	4,520	3,084	9,238	12,322
1996	308.2	82.0	4,750	3,489	9,636	13,125
1997	320.4	85.9	4,740	3,712	9,880	13,592
1998	319.9	87.9	4,770	3,724	9,981	13,706
1999	342.5	93.1	4,830	3,839	10,481	14,320
2000	385.9	101.7	5,210	4,288	11,683	15,971
2001	381.3	99.9	5,130	3,790	11,649	15,439
2002	375.0	98.3	4,950	3,540	11,421	14,961
2003	404.6	105.9	5,190	3,709	12,203	15,912
2004	421.7	108.4	5,100	3,759	13,064	16,823
2005	461.7	115.8	5,340	4,143	13,958	18,101
2006	506.9	125.2	5,550	4,876	15,086	19,962
2007	530.4	134.5	5,800	6,845	15,772	22,617
2008	558.0	139.5	5,950	6,793	16,262	23,055
2009	482.2	127.6	5,480	5,684	14,790	20,473
2010	538.4	134.5	5,640	6,120	15,792	21,912
2011	602.3	139.4	5,830	7,691	19,861	27,552
2012p	598.2	147.9	5,900	7,333	19,908	27,241
Annual Percentage Change						
11-12p	-0.7%	6.1%	1.1%	-4.7%	0.2%	-1.1%
91-12p	5.1%	4.8%	2.0%	6.4%	5.4%	5.6%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.



## Washington County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	328.7	355.5	417.2	446.7	444.2	492.4	487.6
Other Travel*	46.3	66.2	89.7	111.3	94.1	109.9	110.5
Total Direct Spending	375.0	421.7	506.9	558.0	538.4	602.3	598.2
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	51.8	55.5	70.9	80.9	70.4	86.3	86.6
Food Service	99.9	108.8	126.5	135.1	143.3	154.6	154.8
Food Stores	26.1	29.0	31.9	35.1	35.9	38.4	38.0
Local Tran. & Gas	34.8	43.6	57.2	67.0	62.3	74.1	71.9
Arts, Ent. & Rec.	42.9	45.4	50.1	49.9	50.3	52.7	51.8
Retail Sales	73.1	73.3	80.6	78.8	82.1	86.3	84.6
Destination Spending	328.7	355.5	417.2	446.7	444.2	492.4	487.6
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	61.2	66.2	78.8	88.2	85.4	87.1	94.8
Arts, Ent. & Rec.	12.3	12.7	14.3	16.4	15.6	17.3	17.5
Retail**	11.3	12.4	13.7	14.3	14.5	15.0	15.0
Ground Tran.	4.8	5.2	5.9	6.3	6.2	6.8	6.7
Other Travel*	8.7	11.9	12.4	14.2	12.8	13.2	13.9
Total Direct Earnings	98.3	108.4	125.2	139.5	134.5	139.4	147.9
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	3,180	3,240	3,570	3,820	3,600	3,670	3,780
Arts, Ent. & Rec.	760	750	800	890	880	970	970
Retail**	470	490	540	550	550	570	540
Ground Tran.	210	210	220	220	210	230	220
Other Travel*	340	400	410	460	410	400	390
Total Direct Employment	4,950	5,100	5,550	5,950	5,640	5,830	5,900
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	3.5	3.8	4.9	6.8	6.1	7.7	7.3
State Tax Receipts	11.4	13.1	15.1	16.3	15.8	19.9	19.9
Total Local & State	15.0	16.8	20.0	23.1	21.9	27.6	27.2

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, and travel agencies. \*\*Retail includes gasoline.

## Washington County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	235.8	255.7	303.6	334.0	327.6	368.6	365.5
Hotel, Motel	118.6	128.1	158.5	176.6	161.9	197.1	196.4
Private Home	113.5	123.8	140.9	152.8	161.1	166.7	164.3
Other Overnight	3.6	3.9	4.1	4.6	4.6	4.8	4.8
Campground	2.0	2.1	2.2	2.5	2.4	2.5	2.5
Vacation Home	1.6	1.8	1.9	2.2	2.2	2.3	2.3
Day Travel	93.0	99.8	113.6	112.7	116.6	123.7	122.2
Spending at Destination	328.7	355.5	417.2	446.7	444.2	492.4	487.6

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party	Length of
	Day	Trip	Day	Trip	Size	Stay (nights)
Hotel, Motel	\$255	\$531	\$119	\$243	2.1	2.1
Private Home	\$61	\$193	\$31	\$95	2.0	3.2
Other Overnight	\$92	\$319	\$32	\$111	2.8	3.5
All Overnight	\$104	\$296	\$51	\$142	2.0	2.8

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,450	1,696	1,647	681	791	771
Private Home	5,590	5,567	5,370	2,780	2,769	2,686
Other Overnight	151	150	150	53	53	53
All Overnight	7,191	7,412	7,166	3,513	3,613	3,510

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	711	831	807	326	380	370
Private Home	1,802	1,795	1,731	880	877	849
Other Overnight	44	43	43	15	15	15
All Overnight	2,557	2,669	2,582	1,222	1,272	1,234

# WHEELER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$65,600
Employee Earnings generated by \$100 Visitor Spending	\$23
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.20

### Visitor Volume (2012p)

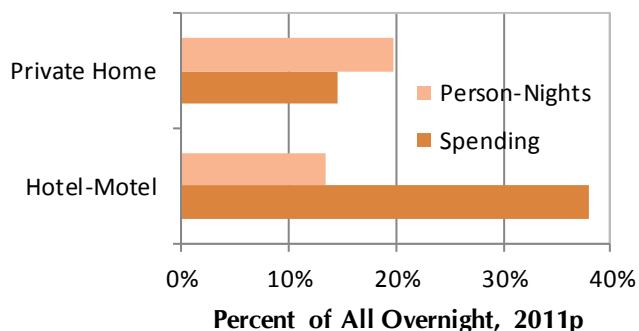
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$43
Additional employment if each resident household encouraged one additional overnight visitor	1

### Visitor Shares

Travel Share of Total Employment (2011)*	4.4%
Overnight Visitor Day Share (2012p)**	13.3%

\*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	6	9	\$0.7
Private Home	5	14	\$0.3
Other Overnight	16	47	\$0.9
All Overnight	27	70	\$1.9

## Wheeler County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	1.2	0.3	30	0	38	38
1992	1.3	0.3	30	0	41	41
1993	1.3	0.3	30	0	44	44
1994	1.7	0.4	40	0	54	54
1995	1.7	0.4	40	0	53	53
1996	1.9	0.4	50	0	57	57
1997	1.9	0.4	40	0	56	56
1998	2.2	0.5	50	0	62	62
1999	2.3	0.5	50	0	63	63
2000	2.2	0.5	40	0	60	60
2001	2.3	0.5	40	0	61	61
2002	2.4	0.5	40	0	62	62
2003	2.4	0.6	40	0	64	64
2004	2.5	0.6	40	0	67	67
2005	2.4	0.5	40	0	64	64
2006	2.7	0.6	40	0	71	71
2007	2.9	0.7	50	0	77	77
2008	2.9	0.7	40	0	75	75
2009	2.6	0.6	40	0	68	68
2010	2.9	0.6	40	0	74	74
2011	3.1	0.7	40	0	89	89
2012p	2.8	0.6	40	0	81	81
Annual Percentage Change						
11-12p	-9.2%	-11.1%	-6.3%		-8.9%	-8.9%
91-12p	4.0%	4.0%	0.8%		3.7%	3.7%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

## Wheeler County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	2.3	2.3	2.5	2.7	2.7	2.8	2.6
Other Travel*	0.1	0.1	0.2	0.2	0.2	0.2	0.2
Total Direct Spending	2.4	2.5	2.7	2.9	2.9	3.1	2.8
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	0.4	0.4	0.5	0.5	0.5	0.6	0.5
Food Service	0.6	0.6	0.6	0.6	0.7	0.7	0.7
Food Stores	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Local Tran. & Gas	0.2	0.2	0.3	0.4	0.3	0.4	0.3
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail Sales	0.4	0.4	0.4	0.3	0.3	0.4	0.3
Destination Spending	2.3	2.3	2.5	2.7	2.7	2.8	2.6
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	0.3	0.3	0.4	0.4	0.4	0.4	0.3
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	0.5	0.6	0.6	0.7	0.6	0.7	0.6
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	30	30	30	30	30	30	30
Arts, Ent. & Rec.	10	10	10	10	10	10	10
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	40	40
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
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, and travel agencies. \*\*Retail includes gasoline.

## Wheeler County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	1.6	1.7	1.8	2.0	2.0	2.2	1.9
Hotel, Motel	0.6	0.6	0.8	0.9	0.9	1.0	0.7
Private Home	0.2	0.2	0.2	0.3	0.3	0.3	0.3
Other Overnight	0.8	0.8	0.8	0.9	0.9	0.9	0.9
Campground	0.5	0.5	0.6	0.6	0.6	0.6	0.6
Vacation Home	0.2	0.2	0.3	0.3	0.3	0.3	0.3
Day Travel	0.7	0.7	0.7	0.6	0.7	0.7	0.6
Spending at Destination	2.3	2.3	2.5	2.7	2.7	2.8	2.6

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$190	\$316	\$77	\$129	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$65	\$192	\$19	\$57	3.4	3.0
All Overnight	\$83	\$210	\$27	\$71	3.0	2.5

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	12	13	9	5	5	4
Private Home	14	14	14	6	6	5
Other Overnight	48	47	47	14	14	14
All Overnight	74	74	70	25	25	23

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	7	8	6	3	3	2
Private Home	5	6	5	2	2	2
Other Overnight	16	16	16	5	5	5
All Overnight	29	29	27	10	10	9

# YAMHILL COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$61,600
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

### Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$2,893
Additional employment if each resident household encouraged one additional overnight visitor	47

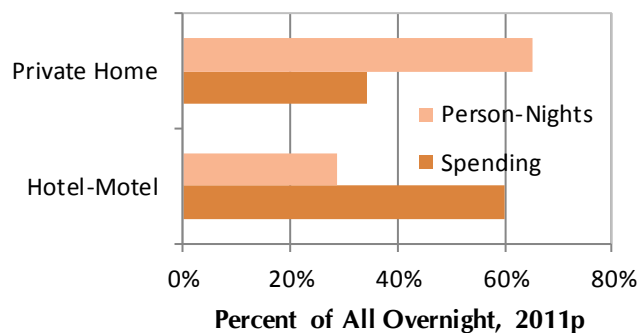
### Visitor Shares

Travel Share of Total Employment (2011)*	3.1%
Overnight Visitor Day Share (2012p)**	4.1%

\*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.



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	257	428	\$34.3
Private Home	379	974	\$19.6
Other Overnight	30	88	\$3.2
All Overnight	666	1,491	\$57.0

## Yamhill County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	29.0	6.6	740	39	1,058	1,098
1992	31.2	7.0	730	39	1,178	1,217
1993	32.7	7.4	740	38	1,261	1,299
1994	33.5	7.5	740	41	1,317	1,358
1995	37.0	8.4	790	47	1,408	1,455
1996	37.0	8.3	750	52	1,393	1,445
1997	40.1	9.1	780	60	1,457	1,517
1998	47.8	11.5	980	68	1,639	1,706
1999	51.9	12.4	960	70	1,724	1,794
2000	56.4	13.2	1,020	78	1,834	1,912
2001	57.6	13.5	1,060	80	1,854	1,934
2002	59.1	13.9	1,050	82	1,866	1,947
2003	61.5	14.2	1,030	82	1,933	2,015
2004	64.8	14.6	1,040	104	2,060	2,164
2005	68.4	14.9	1,030	106	2,141	2,246
2006	74.9	16.1	1,090	111	2,308	2,419
2007	81.1	18.1	1,180	140	2,488	2,627
2008	87.5	19.2	1,180	125	2,607	2,732
2009	80.4	19.1	1,130	121	2,497	2,618
2010	94.2	21.5	1,240	258	2,765	3,023
2011	104.5	23.6	1,390	382	3,550	3,933
2012p	103.1	25.0	1,430	405	3,564	3,969
Annual Percentage Change						
11-12p	-1.3%	6.0%	3.1%	6.0%	0.4%	0.9%
91-12p	6.2%	6.6%	3.2%	11.7%	6.0%	6.3%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.



## Yamhill County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
<b>Total Direct Travel Spending (\$Million)</b>							
Destination Spending	52.0	55.1	61.0	69.9	79.9	87.3	85.8
Other Travel*	7.1	9.6	13.8	17.6	14.3	17.2	17.3
Total Direct Spending	59.1	64.8	74.9	87.5	94.2	104.5	103.1
<b>Visitor Spending by Commodity Purchased (\$Million)</b>							
Accommodations	7.0	7.5	8.6	11.2	14.4	16.4	16.0
Food Service	14.6	15.5	17.2	19.4	22.9	24.5	24.5
Food Stores	7.0	7.6	8.1	9.4	9.9	10.7	10.6
Local Tran. & Gas	3.8	4.9	6.4	8.2	8.1	9.8	9.4
Arts, Ent. & Rec.	9.1	9.3	9.8	10.7	12.3	13.1	12.8
Retail Sales	10.5	10.2	10.8	11.0	12.2	12.8	12.5
Destination Spending	52.0	55.1	61.0	69.9	79.9	87.3	85.8
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>							
Accom. & Food Serv.	8.1	8.6	9.6	11.7	13.5	14.3	15.2
Arts, Ent. & Rec.	2.8	2.8	3.0	3.7	4.1	5.3	5.7
Retail**	2.0	2.2	2.3	2.6	2.7	2.8	2.8
Ground Tran.	0.3	0.3	0.4	0.4	0.5	0.5	0.5
Other Travel*	0.7	0.7	0.8	0.9	0.7	0.7	0.7
Total Direct Earnings	13.9	14.6	16.1	19.2	21.5	23.6	25.0
<b>Industry Employment Generated by Travel Spending (Jobs)</b>							
Accom. & Food Serv.	590	590	590	680	730	760	770
Arts, Ent. & Rec.	300	290	330	330	340	450	490
Retail**	110	110	110	120	120	120	120
Ground Tran.	10	10	10	10	20	20	20
Other Travel*	40	40	50	40	40	40	40
Total Direct Employment	1,050	1,040	1,090	1,180	1,240	1,390	1,430
<b>Government Revenue Generated by Travel Spending (\$Million)</b>							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.3	0.4	0.4
State Tax Receipts	1.9	2.1	2.3	2.6	2.8	3.6	3.6
Total Local & State	1.9	2.2	2.4	2.7	3.0	3.9	4.0

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, and travel agencies. \*\*Retail includes gasoline.

## Yamhill County Visitor Spending and Visitor Volume

### Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	30.9	33.0	36.8	44.9	52.5	58.1	57.0
Hotel, Motel	15.2	16.0	17.9	23.2	30.6	35.1	34.3
Private Home	13.3	14.4	16.2	18.6	18.8	19.8	19.6
Other Overnight	2.4	2.6	2.7	3.1	3.0	3.1	3.2
Campground	2.1	2.3	2.3	2.7	2.6	2.6	2.7
Vacation Home	0.3	0.4	0.4	0.5	0.5	0.5	0.5
Day Travel	21.1	22.1	24.2	25.0	27.4	29.2	28.8
Spending at Destination	52.0	55.1	61.0	69.9	79.9	87.3	85.8

### Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$196	\$327	\$80	\$133	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$121	\$359	\$36	\$107	3.4	3.0
All Overnight	\$98	\$218	\$38	\$86	2.6	2.2

### Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	401	444	428	163	181	175
Private Home	998	1,003	974	390	392	381
Other Overnight	90	88	88	27	26	26
All Overnight	1,489	1,535	1,491	580	599	582

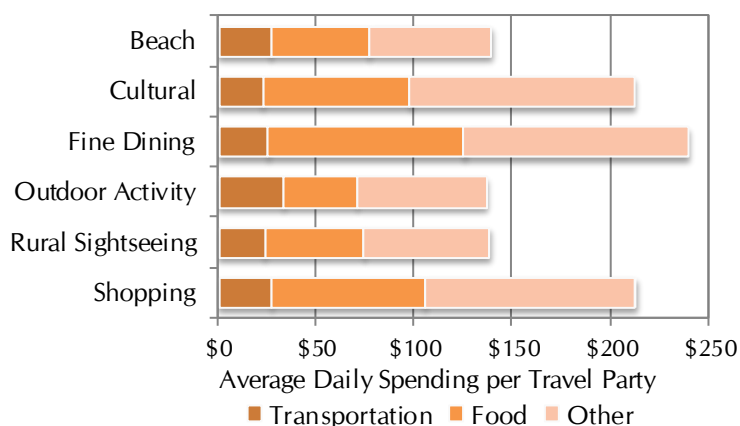
	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	241	267	257	98	109	105
Private Home	388	390	379	152	152	148
Other Overnight	30	30	30	9	9	9
All Overnight	659	686	666	259	270	262

## V. OREGON DAY TRAVEL, 2012P

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.

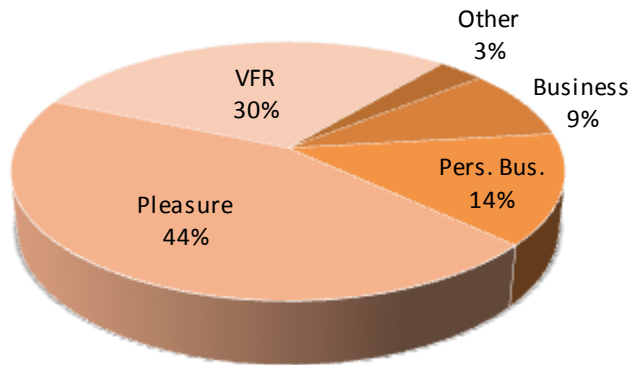
**Day Trip Activity, 2012p**



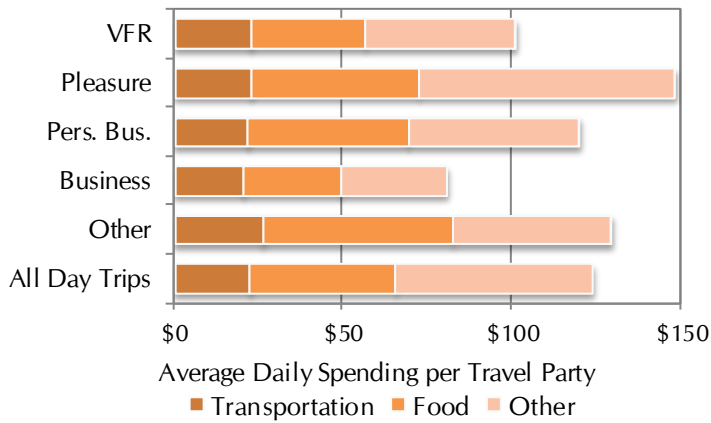
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
Beach	\$152.5	\$32.2	\$56.1	\$64.2	2.8
Cultural	\$229.0	\$27.2	\$84.0	\$117.8	2.8
Fine Dining	\$260.0	\$30.7	\$111.6	\$117.8	2.6
Outdoor Activity	\$150.0	\$40.0	\$42.0	\$68.0	2.8
Rural Sightseeing	\$151.0	\$28.4	\$56.7	\$66.0	2.7
Shopping	\$231.1	\$32.7	\$87.2	\$111.1	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

### Purpose of Day Trip, 2012p



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.

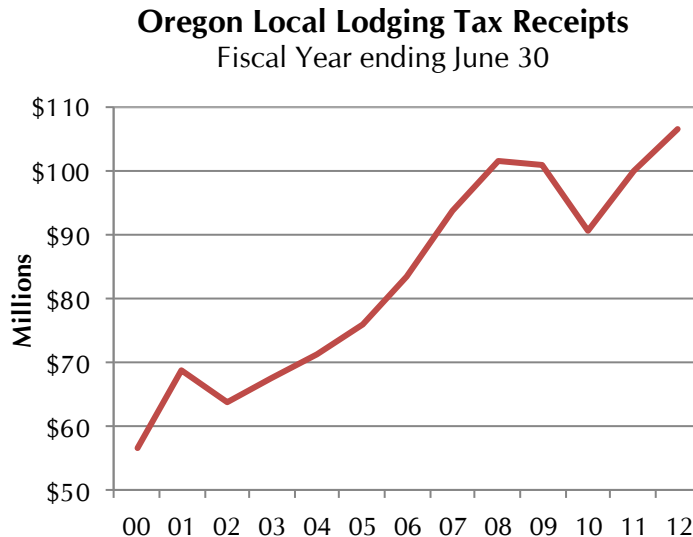
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
VFR	\$100.9	\$22.6	\$33.8	\$44.6	2.4
Pleasure	\$148.0	\$22.7	\$49.7	\$75.7	2.7
Personal Business	\$119.8	\$21.8	\$47.4	\$50.6	2.2
Business	\$80.6	\$20.3	\$28.8	\$31.5	1.6
Other	\$129.2	\$26.1	\$56.2	\$46.9	2.0
Total	\$123.6	\$22.4	\$43.0	\$58.2	2.4

## 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 2012, eighty-four cities and fifteen counties in Oregon levied a locally administered transient lodging tax. This tax, ranging from 2 percent to 11.5 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 6.5 percent from the 2011 to 2012 fiscal years.



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.<sup>1</sup>

<sup>1</sup> See <http://www.oregon.gov/dor/stats/pages/statistics.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	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>BAKER COUNTY</b>											
Baker City		241	232	0							
County-wide	*				312	301	318	385	411	394	413
<b>BENTON COUNTY</b>											
Corvallis	9.0%	754	742	760	875	947	1,021	1,095	1,126	1,076	1,062
<b>CLACKAMAS COUNTY</b>											
Sandy	3.0%	11	14	15	15	12	17	18	15	21	21
Lake Oswego	6.0%	360	359	368	410	459	532	615	733	678	796
Oregon City	4.0%	39	35	31	32	37	42	52	57	54	52
Wilsonville	5.0%	230	192	143	263	190	207	268	275	219	193
County-wide	6.0%	2,052	1,967	1,971	2,030	2,225	2,454	2,777	3,071	2,661	2,432
<b>CLATSOP COUNTY</b>											
Astoria	9.0%	344	397	509	657	745	932	1,029	1,195	976	1,024
Cannon Beach	6.0%	1,499	1,539	1,595	1,663	1,750	1,867	1,997	2,110	2,049	2,074
Gearhart	7.0%	114	112	118	123	112	112	119	120	130	135
Seaside	8.0%	1,267	1,291	1,414	2,084	2,183	2,356	2,596	2,702	2,638	2,654
Warrenton	12.0%	205	213	228	281	281	274	316	328	308	458
Unincorporated	7.0%	76	81	89	88	109	122	135	116	153	164
<b>COLUMBIA COUNTY</b>											
<b>COOS COUNTY</b>											
Bandon	6.0%	321	341	361	367	375	383	434	426	386	391
Coos Bay	7.0%	379	380	415	430	468	496	554	561	461	464
Coquille Indian Tribe	8.0%										274
Lakeside	7.5%	23	27	28	35	36	37	39	40	37	23
North Bend	7.0%	152	185	196	202	215	233	245	246	307	84
<b>CROOK COUNTY</b>											
Prineville	8.5%	137	111	123	124	146	163	197	194	163	149
<b>CURRY COUNTY</b>											
Brookings	6.0%	138	143	153	161	171	160	171	178	160	141
Gold Beach	6.0%	285	296	334	323	341	333	357	370	347	349
Port Orford	6.0%	19	36	20	30	23	44	45	47	42	46

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. Prior to the 2003 fiscal year, only Baker City collected the tax.

# Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>DESCHUTES COUNTY</b>												
Bend	9.0%	1,985	1,987	2,120	2,502	2,799	3,107	3,303	3,427	2,938	2,960	3,280
Redmond	9.0%	257	270	313	388	406	463	493	509	436	458	504
Sisters	8.0%	145	150	147	146	184	213	224	267	280	275	288
Unincorporated	7.0%	2,967	3,009	2,952	3,017	3,056	3,231	3,304	3,511	3,270	2,960	3,139
<b>DOUGLAS COUNTY</b>												
Reedsport	5.0%-7.0% *	106	115	128	141	158	164	173	175	151	142	136
Roseburg	8.0%	574	615	719	752	799	835	881	892	826	775	785
Sutherlin	5.0%	45	47	54	62	67	60	73	68	55	64	79
Winston	5.0%	12	12	18	14	10	10	9	9	7	6	7
<b>GILLIAM COUNTY</b>												
<b>GRANT COUNTY</b>												
County-wide	8.0%	50	53	54	48	63	93	98	85	84	92	96
<b>HARNEY COUNTY</b>												
Burns	9.0%	77	76	78	68	64	64	79	99	71	67	93
Hines	8.0%	90	96	99	100	104	117	129	150	143	130	135
<b>HOOD RIVER COUNTY</b>												
Cascade Locks	7.0%	90	91	90	96	100	110	117	129	119	129	135
Hood River	8.0%	394	422	378	466	465	538	578	630	694	715	804
Unincorporated	8.0%	177	204	225	226	211	213	224	236	176	180	224
<b>JACKSON COUNTY</b>												
Ashland	9.0%	997	1,106	1,316	1,287	1,390	1,414	1,558	1,551	1,537	1,854	1,923
Jacksonville	9.0%	41	52	56	61	64	57	64	70	79	81	78
Medford	9.0%	1,417	1,655	1,759	1,767	1,868	2,148	2,410	2,553	2,283	2,273	2,373
Phoenix	6.0%	29	29	29	17	16	39	27	36	24	13	11
Rogue River	6.0%	47	50	50	51	50	50	48	47	40	44	44
Shady Cove	6.0%	41	43	48	62	66	66	65	81	68	43	45
Talent	6.0%	6	5	6	7	7	7	5	2	4	4	5
<b>JEFFERSON COUNTY</b>												
Madras	9.0%	95	113	126	127	136	149	172	202	196	183	195
Metolius	6.0%	2	1	1	2	2	2	2	2	1	1	1
Unincorporated	6.0%	161	156	158	147	165	182	228	227	203	205	188

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.

## Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>JOSEPHINE COUNTY</b>												
Grants Pass	9.0%	687	779	918	914	928	1,003	1,047	1,024	970	941	939
<b>KLAMATH COUNTY</b>												
County-wide	8.0%	890	876	954	974	1,050	1,095	1,330	1,477	1,421	1,376	1,409
<b>LAKE COUNTY</b>												
County-wide	6.0%	66	71	70	69	78	96	111	107	94	98	125
<b>LANE COUNTY</b>												
Coburg	8.0%	20	19	31	34	41	45	48	50	47	38	39
Cottage Grove	9.0%	148	133	133	147	168	182	213	224	227	205	186
Creswell	8.0%	34	32	46	59	55	68	82	81	80	83	128
Dunes City	8.0%	12	20	21	22	23	25	24	24	20	21	26
Eugene	9.5%	2,455	2,522	2,545	2,676	2,872	3,114	3,470	3,686	3,611	3,175	3,458
Florence	9.0%	235	236	231	230	259	276	297	299	498	538	565
Junction City	8.0%	21	22	22	21	21	22	26	24	20	18	20
McKenzie	8.0%	118	121	129	130	137	173	173	241	387	205	220
Oakridge	8.0%	36	33	40	39	40	43	51	83	69	50	54
Springfield	9.5%	1,309	1,271	1,276	1,210	1,218	1,483	1,597	1,655	1,630	1,435	1,641
Veneta	8.0%	*	*	*	*	*	*	*	*	*	*	*
Westfir	8.0%	3	3	5	5	8	7	10	9	1	1	1
Unincorporated	8.0%	448	445	462	470	497	512	546	571	475	416	470
<b>LINCOLN COUNTY</b>												
Depoe Bay	8.0%	205	257	273	348	390	420	365	380	379	457	453
Lincoln City	9.5%	2,381	2,340	2,787	2,796	3,138	3,083	3,438	3,704	4,417	4,352	4,260
Newport	9.5%	1,453	1,464	1,492	1,716	1,866	2,113	2,272	2,378	2,232	2,223	2,291
Waldport	7.0%	17	15	22	23	22	23	23	23	23	23	23
Yachats	7.0%	279	343	364	394	418	442	503	520	496	477	429
Unincorporated	9.0%	901	900	870	874	968	1,078	1,119	1,389	1,599	1,556	1,673
<b>LINN COUNTY</b>												
Albany	9.0%	445	501	499	513	546	606	701	744	671	607	648
Lebanon	9.0%	9	12	16	20	20	22	30	36	36	34	35
Sweet Home	6.0%	18	13	13	14	14	18	18	19	21	21	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.

\*Receipts for Veneta generally less than \$500 per fiscal year.



## Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>MALHEUR COUNTY</b>												
Ontario	8.0%	397	417	442	440	453	520	607	618	578	583	634
<b>MARION COUNTY</b>												
Keizer	6.0%	64	56	58	63	57	66	76	80	69	61	63
Salem	9.0%	1,555	1,565	1,611	1,667	1,828	2,052	2,395	2,507	2,349	2,104	2,181
Sublimity	7.0%	21	28	27	28	34	32	40	38	23	23	22
Woodburn	9.0%	152	167	192	228	210	218	224	239	271	215	256
<b>MORROW COUNTY</b>												
Heppner	5.0%	7	6	7	5	5	5	4	4	5	4	4
<b>MULTNOMAH COUNTY</b>												
Fairview	6.0%	36	41	42	51	40	39	39	43	38	37	38
Gresham	6.0%	518	440	417	439	420	470	555	616	563	455	461
Portland	6.0%	13,384	12,490	12,828	13,325	14,170	15,964	17,456	19,535	19,381	17,918	18,807
Troutdale	6.95%	312	298	298	290	313	356	341	375	414	403	429
Wood Village	6.0%	51	55	67	68	84	84	98	105	100	85	89
County-Wide	5.5%	15,228	11,131	12,227	12,352	13,467	14,794	16,726	18,491	16,115	15,441	18,208
<b>POLK COUNTY</b>												
<b>SHERMAN COUNTY</b>												
Condon	6.0%									16	13	14
<b>TILLAMOOK COUNTY</b>												
Garibaldi	8.0%	23	41	61	57	64	65	93	81	57	58	80
Manzanita	7.0%	191	213	229	239	262	289	313	355	378	384	374
Rockaway Beach	7.0%	155	224	222	210	221	230	226	257	255	224	257
Tillamook	10.0%	167	166	189	195	202	223	316	344	292	276	313
Wheeler	7.0%	11	15	16	18	18	19	20	22	23	17	25
<b>UMATILLA COUNTY</b>												
Hermiston	8.0% *	162	186	187	265	276	300	313	320	339	359	361
Milton-Freewater	7.0%									15	20	9
Pendleton	8.0%	495	473	551	594	633	649	768	791	777	778	805
Umatilla	3.5%	22	21	19	19	15	17	16	17	18	18	30

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. \*\*The lodging tax for Milton-Freewater was effective October 1, 2008.

\*\*\*The rate for Pendleton is 8.0% plus \$1.50 per room or \$0.50 per campsite for each night. \*\*\*\*The rate for Umatilla is \$1.00 per room or \$0.50 per campsite for each night.

## Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
<b>UNION COUNTY</b>												
LaGrande	5.0%	178	191	191	204	229	241	232	271	238	203	262
County-wide	3.0%	109	117	116	124	139	147	143	167	146	125	147
<b>WALLOWA COUNTY</b>												
Enterprise	3.0%	20	20	20	29	32	37	39	36	39	37	34
County-wide	5.0%	159	167	168	172	181	209	232	244	253	248	240
<b>WASCO COUNTY</b>												
The Dalles	8.0%	319	315	354	428	477	490	562	524	688	652	671
<b>WASHINGTON COUNTY</b>												
County-wide	9.0%	4,334	3,530	3,666	3,968	3,941	4,537	6,480	7,014	6,355	5,665	6,870
<b>WHEELER COUNTY</b>												
<b>YAMHILL COUNTY</b>												
Newberg	6.0%	93	94	93	91	95	100	129	121	120	216	352

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.

## **APPENDICES**

APPENDIX A	2012 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

## **2012 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.

### **REVISIONS TO 2012 REPORT**

There are three revisions of note in this year's report:

- All spending and related impacts were revised to reflect revisions to the state lodging tax receipts reported by the Oregon Department of Revenue. These revisions are not substantial.
- Estimates for travel-generated employment beginning in the year 2008 were revised. The employment estimates for 2008 through 2011 are slightly lower than previously reported. The overall employment trend since 2008 is similar.

### **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.

## **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 2011. 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 Minnesota IMPLAN Group, Inc. 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.

## **PRELIMINARY ESTIMATES**

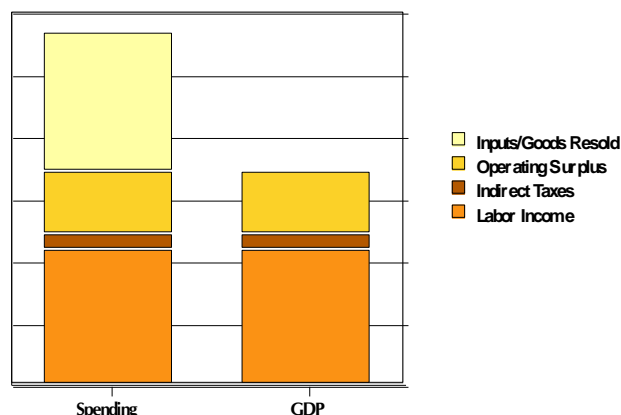
Preliminary estimates for 2011 were prepared at the state and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2011 becomes available.

## **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.

**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.

**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 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	<b>656,000 x \$79 = \$56,100,000 (calculated from person-trips)</b>	<b>56.1</b>
Hotel, Motel	<b>160,000 x \$200 = \$32,000,000 (calculated from party-nights)</b>	<b>32.0</b>
Private Home	<b>1,030,000 x \$20 = \$20,600,000 (calculated from person-nights)</b>	<b>20.6</b>
Other Overnight	<b>10,000 x \$350 = \$3,500,000 (calculated from party-trips)</b>	<b>3.5</b>
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	<b>\$200</b>	\$340	\$83	\$142	<b>2.4</b>	1.7
Private Home	\$50	\$130	<b>\$20</b>	\$52	2.5	<b>2.6</b>
Other Overnight	\$117	<b>\$350</b>	\$34	\$103	3.4	3.0
All Overnight	\$494	\$214	\$197	<b>\$86</b>	2.5	2.3

#### Overnight Visitor Volume, YEAR

	Visitor-Nights (000)		Party-Nights (000)	
	YEAR		YEAR	
Hotel, Motel	<b>160 x 2.4 =</b>	384	<b>160</b>	
Private Home		<b>1,030</b>		412
Other Overnight		102		30
All Overnight		1,516		602

	Visitor-Trips (000)		Party-Trips (000)	
	YEAR		YEAR	
Hotel, Motel		226		94
Private Home	<b>1,030 / 2.6 =</b>	396		158
Other Overnight		34		<b>10</b>
All Overnight		<b>656</b>		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,  
Airmiles



**Visitor Spending**  
(Type of  
Accommodation and  
Type of Commodity)



**Business Receipts**  
(not reported)



**Earnings**  
(By Industry)



**Employment**  
(By Industry)

**Point of Sale Taxes**

(Sales and Excise Taxes  
associated with Visitor  
Spending)

**Business Taxes**

(Taxes on business  
income or receipts)

**Personal Taxes**

(Local, state and  
federal income and  
payroll taxes)



*Note: Receipts equals  
Spending less  
POS Taxes*

Ratio of  
Earnings to  
Receipts for  
relevant  
Industry



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.*

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## 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.”<sup>1</sup>

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.

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<sup>1</sup> 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.<sup>2</sup> 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.<sup>3</sup> 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

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<sup>2</sup> The North American Industrial Classification System (NAICS) is the current standard in the United States.

<sup>3</sup> 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.<sup>4</sup>

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*.<sup>5</sup>

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<sup>4</sup> 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.

<sup>5</sup> 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.<sup>6</sup>

**Bureau of Economic Analysis Tourism Industries  
Distribution of Travel-Generated Compensation  
in United States, 2007**

<b>Accommodation &amp; Food Services</b>	<b>38.1%</b>
Traveler accommodations	21.5%
Food services and drinking places	16.6%
<b>Transportation</b>	<b>23.3%</b>
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%
<b>Recreation</b>	<b>11.2%</b>
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%
<b>Retail &amp; Nondurable Goods Production</b>	<b>16.2%</b>
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%
<b>Travel Arrangement</b>	<b>7.3%</b>
<b>All other industries</b>	<b>2.2%</b>
<b>Total Tourism Compensation</b>	<b>100.0%</b>

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.

<sup>6</sup> 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)
<b>Accommodation &amp; Food Services</b>	Accommodation (721) Food Services and Drinking Places (722)
<b>Arts, Entertainment &amp; Recreation</b>	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487)
<b>Retail</b>	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)
<b>Ground Transportation</b>	Interurban and Rural Bus Transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
<b>Air Transportation</b>	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
<b>Travel Arrangement Services</b>	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.<sup>7</sup> 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.<sup>8</sup> 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,

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<sup>7</sup> Conversely, the spending of U.S. visitors in other countries is treated as an import in the international transaction accounts.

<sup>8</sup> 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.<sup>9</sup>

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.<sup>10</sup> 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.

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<sup>9</sup> 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.

<sup>10</sup> 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).

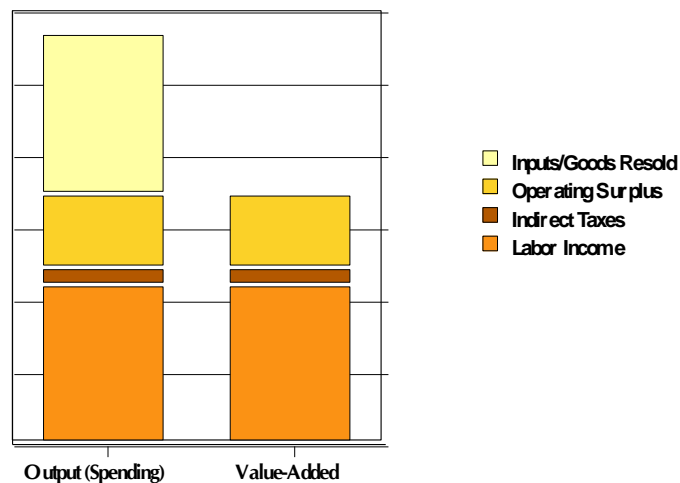
## COMPONENTS OF INDUSTRY OUTPUT

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:<sup>11</sup>

- 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

<sup>11</sup> 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.<sup>12</sup>

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.<sup>13</sup> 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.<sup>14</sup> 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.

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<sup>12</sup> 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.

<sup>13</sup> 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.

<sup>14</sup> 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.<sup>15</sup> 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.

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<sup>15</sup> 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, 2011

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
<b>Primarily Export-Oriented</b>	<b>16,250</b>	<b>15.6%</b>	<b>285</b>	<b>12.8%</b>
Agriculture, Forestry, Fishing and related	2,631	2.5%	98	4.4%
Mining	145	0.1%	5	0.2%
Manufacturing	13,475	12.9%	182	8.2%
<i>**Travel</i>	2,083	2.0%	90	4.0%
<b>Primarily Non Export-Oriented</b>	<b>50,565</b>	<b>48.4%</b>	<b>1,081</b>	<b>48.7%</b>
Construction	5,804	5.6%	104	4.7%
Utilities	677	0.6%	5	0.2%
Wholesale trade	6,695	6.4%	82	3.7%
Retail trade	6,982	6.7%	230	10.4%
Real estate and rental and leasing	1,762	1.7%	104	4.7%
Management of companies and enterprises	2,944	2.8%	32	1.4%
Administrative and waste services	3,631	3.5%	115	5.2%
Other services, except public administration	3,959	3.8%	115	5.2%
Government and government enterprises	18,111	17.4%	295	13.3%
<b>Mixed</b>	<b>37,557</b>	<b>36.0%</b>	<b>855</b>	<b>38.5%</b>
Transportation and warehousing	3,274	3.1%	63	2.8%
Information	2,910	2.8%	40	1.8%
Finance and insurance	4,928	4.7%	94	4.2%
Professional and technical services	7,534	7.2%	136	6.1%
Educational services	1,378	1.3%	56	2.5%
Health care and social assistance	13,269	12.7%	257	11.6%
Leisure and Hospitality	4,263	4.1%	211	9.5%
<b>Oregon Total**</b>	<b>104,372</b>	<b>100.0%</b>	<b>2,222</b>	<b>100.0%</b>

\*\*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

### **Accomm. & Food Serv.**

- Eating & Drinking
- Hotels and Lodging Places

### **Agric. & Food Proc.**

- Agricultural- Forestry- Fishery Services
- Animal and Marine Fats and Oils
- Blended and Prepared Flour
- Bottled and Canned Soft Drinks & Water
- Bread- Cake- and Related Products
- Canned and Cured Sea Foods
- Canned Fruits and Vegetables
- Canned Specialties
- Cattle Feedlots
- Cereal Preparations
- Cheese- Natural and Processed
- Chewing and Smoking Tobacco
- Chewing Gum
- Chocolate and Cocoa Products
- Cigarettes
- Cigars
- Commercial Fishing
- Condensed and Evaporated Milk
- Confectionery Products
- Cookies and Crackers
- Cotton
- Cottonseed Oil Mills
- Creamery Butter
- Dairy Farm Products
- Dehydrated Food Products
- Distilled Liquor- Except Brandy
- Dog- Cat- and Other Pet Food
- Feed Grains
- Flavoring Extracts and Syrups- N.E.C.
- Flour and Other Grain Mill Products
- Fluid Milk
- Food Grains
- Food Preparations- N.E.C
- Forest Products
- Forestry Products
- Frozen Fruits- Juices and Vegetables
- Frozen Specialties
- Fruits
- Grass Seeds

**Agric. & Food Proc.**

- Greenhouse and Nursery Products
- Hay and Pasture
- Hogs- Pigs and Swine
- Ice Cream and Frozen Desserts
- Landscape and Horticultural Services
- Macaroni and Spaghetti
- Malt
- Malt Beverages
- Manufactured Ice
- Meat Packing Plants
- Miscellaneous Crops
- Miscellaneous Livestock
- Oil Bearing Crops
- Other Meat Animal Products
- Pickles- Sauces- and Salad Dressings
- Potato Chips & Similar Snacks
- Poultry and Eggs
- Poultry Processing
- Prepared Feeds- N.E.C
- Prepared Fresh Or Frozen Fish Or Seafood
- Ranch Fed Cattle
- Range Fed Cattle
- Rice Milling
- Roasted Coffee
- Salted and Roasted Nuts & Seeds
- Sausages and Other Prepared Meats
- Sheep- Lambs and Goats
- Shortening and Cooking Oils
- Soybean Oil Mills
- Sugar
- Sugar Crops
- Tobacco
- Tobacco Stemming and Redrying
- Tree Nuts
- Vegetable Oil Mills- N.E.C
- Vegetables
- Wet Corn Milling
- Wines- Brandy- and Brandy Spirits

**Arts, Entertain., Rec.**

- Amusement and Recreation Services- N.E.C.
- Bowling Alleys and Pool Halls
- Commercial Sports Except Racing
- Membership Sports and Recreation Clubs
- Motion Pictures
- Other Nonprofit Organizations
- Racing and Track Operation
- Theatrical Producers- Bands Etc.
- Water Transportation

**Construction**

- Maintenance and Repair Oil and Gas Wells
- Maintenance and Repair Other Facilities
- Maintenance and Repair- Residential
- New Farm Structures
- New Government Facilities
- New Highways and Streets
- New Industrial and Commercial Buildings
- New Mineral Extraction Facilities
- New Residential Structures
- New Utility Structures

**Finance, Real Estate**

- Banking
- Credit Agencies
- Insurance Agents and Brokers
- Insurance Carriers
- Owner-occupied Dwellings
- Real Estate
- Security and Commodity Brokers

**Government**

- Commodity Credit Corporation
- Federal Electric Utilities
- Federal Government - Military
- Federal Government - Non-Military
- Local Government Passenger Transit
- Other Federal Government Enterprises
- Other State and Local Govt Enterprises
- State & Local Government - Education
- State & Local Government - Non-Education
- State and Local Electric Utilities
- U.S. Postal Service

**Misc. Manf.**

*Includes all utilities, mining and manufacturing industries  
not elsewhere classified*

**Misc. Services**

- Advertising
- Beauty and Barber Shops
- Computer and Data Processing Services
- Detective and Protective Services
- Domestic Services
- Electrical Repair Service
- Equipment Rental and Leasing
- Funeral Service and Crematories
- Laundry- Cleaning and Shoe Repair
- Miscellaneous Personal Services
- Miscellaneous Repair Shops
- Other Business Services
- Personnel Supply Services
- Photofinishing- Commercial Photography
- Portrait and Photographic Studios
- Services To Buildings
- Watch- Clock- Jewelry and Furniture Repair

**Prof. Services**

- Accounting- Auditing and Bookkeeping
- Business Associations
- Child Day Care Services
- Colleges- Universities- Schools
- Doctors and Dentists
- Elementary and Secondary Schools
- Engineering- Architectural Services
- Hospitals
- Job Trainings & Related Services
- Labor and Civic Organizations
- Legal Services
- Management and Consulting Services
- Nursing and Protective Care
- Other Educational Services
- Other Medical and Health Services
- Religious Organizations
- Research- Development & Testing Services
- Residential Care
- Social Services- N.E.C.

**Retail Trade**

- Apparel & Accessory Stores
- Building Materials & Gardening
- Food Stores
- Furniture & Home Furnishings Stores
- General Merchandise Stores
- Miscellaneous Retail
- Wholesale Trade

**Transportation**

- Air Transportation
- Arrangement Of Passenger Transportation
- Automobile Parking and Car Wash
- Automobile Rental and Leasing
- Automobile Repair and Services
- Automotive Dealers & Service Stations
- Local- Interurban Passenger Transit
- Motor Freight Transport and Warehousing
- Railroads and Related Services
- Transportation Services