

Oregon Travel Impacts *1991-2014p*

April 2015

Prepared for

Oregon Tourism Commission
Salem, Oregon

OREGON TRAVEL IMPACTS, 1991-2014P

STATEWIDE PRELIMINARY ESTIMATES

DETAILED COUNTY ESTIMATES

OVERNIGHT VISITOR VOLUME

April 2015

Prepared for

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EXECUTIVE SUMMARY

This report provides detailed statewide, regional and county travel impact estimates for Oregon from 1991 to 2014. The report also provides average spending and volume estimates for overnight visitors for most counties. The estimates for 2014 are preliminary. Secondary impacts and travel industry GDP are provided at the state level.

TRAVEL SPENDING, EMPLOYMENT AND EARNINGS CONTINUE TO EXPAND

The Oregon travel industry continued its post-recessionary expansion in 2014. By most measures, 2014 was the strongest year of travel industry growth prior to the 2008-2009 recession.

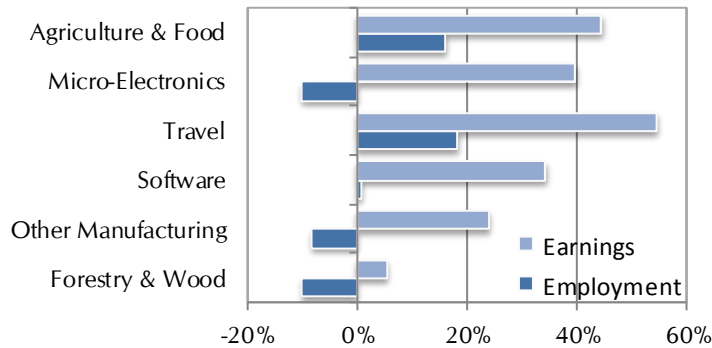
- **Spending.** Statewide travel spending, \$10.3 billion, increased by 4.3 percent in current dollars and 3.5 percent in real dollars (adjusted for inflation). This is the fifth consecutive year of spending growth. In real dollars spending has increased by 2.1 percent per year since 2010.
- **Travel Activity.** An estimated 26.8 million overnight visitors traveled to Oregon destinations in 2014 (preliminary). This represents a 2.1 percent increase over 2013. Domestic visitor air arrivals to Oregon (3.2 million) increased by 6.2 percent for the year (preliminary). Room demand, as measured by STR, Inc., increased by 4.0 percent for the year.¹
- **Employment.** Total travel generated employment was 101,100 in 2014p. This represents a 3.1 percent increase over 2013, the fourth consecutive year of employment growth following the steep decline from 2008 to 2010. Employment has increased by 3.0 percent per year since 2011.
- **Secondary Impacts.** The re-spending of travel-generated revenues by businesses and employees generates additional impacts. In 2014, these secondary impacts were equivalent to 52,500 jobs with earnings of \$2.2 billion. Most of these jobs were in various professional and business services.
- **GDP.** The Gross Domestic Product of the travel industry was \$4.0 billion in 2014. Overall, the travel industry is one of the three largest export-oriented industries in rural Oregon counties (the other two being agriculture/food processing and logging/wood products).

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

THE OREGON TRAVEL INDUSTRY IS A LEADING EXPORT-ORIENTED INDUSTRY

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

Change in Earnings and Employment (2003-2013) *Selected Export-Oriented Industries*

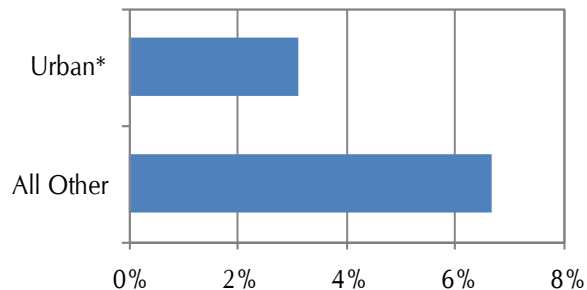


(Note: The most current data is for 2013.)

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 (2013)



*The urban counties are Clackamas, Lane, Marion, Multnomah and Washington. The most current data is for 2013.

Oregon Travel Impacts, 1991-2014p

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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 2014. 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 2014 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 Warren, Insight and Planning Manager, and Todd Davidson, Chief Executive Officer of Travel Oregon, for their support and assistance.

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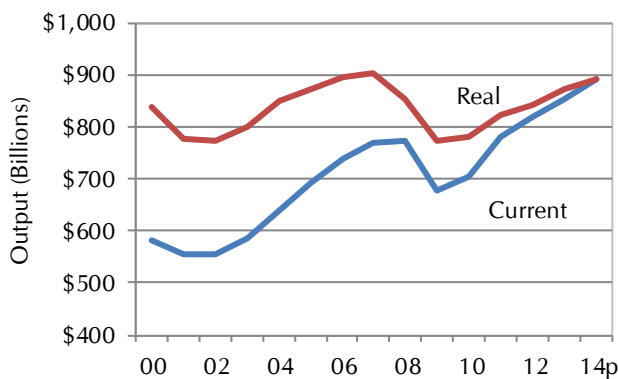
I. U.S. TRAVEL



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

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

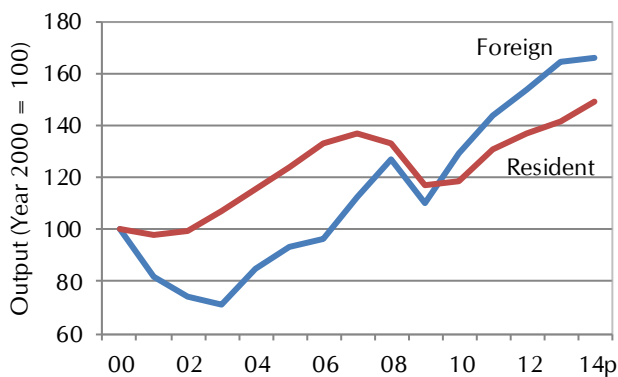
Annual Direct Travel Spending in U.S., 2000-14p



Spending by resident and foreign visitors was \$894 billion in 2014 in current dollars. This represents a 4.5 percent increase over 2013. When adjusted for changes in prices (real dollars), spending increased by 2.5 percent – compared to a 3.6 percent increase from 2012 to 2013.

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

(Current Dollars; Year 2000 = 100)



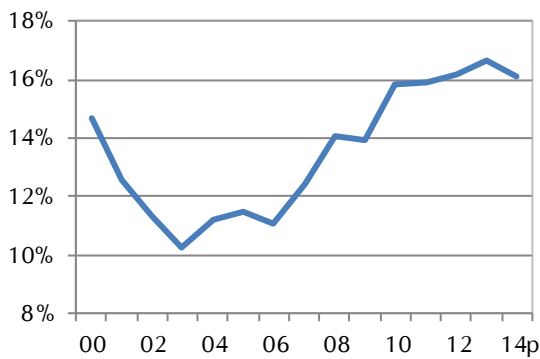
The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2014, the increase in spending by resident visitors (5.1 percent) exceeded the increase in foreign visitor spending (1.0 percent). This is the first time that resident spending growth was greater than foreign since the 2008-09 recession.

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

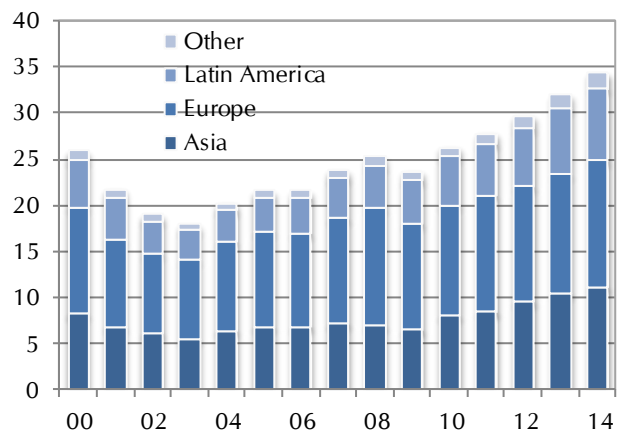
¹ See <http://www.bea.gov/industry/index.htm#satellite>.

The top left chart shows that the foreign share of U.S. internal travel declined in 2014 because of the lower rate of growth of foreign visitor spending (shown in preceding chart).² However, as the graph on the right indicates, overseas arrivals to the U.S. (34.4 million in 2014) continued to increase – 7.4 percent in 2014, following a 7.6 percent increase in 2013. Rather, much of the explanation for the declining foreign share of internal travel in the U.S. is due to the increasing value of U.S. currency (see bottom left chart). As the value of foreign currencies fall relative to the U.S. dollar, foreign visitors have less money to spend on U.S. goods and services.

Foreign Share of U.S. Internal Travel

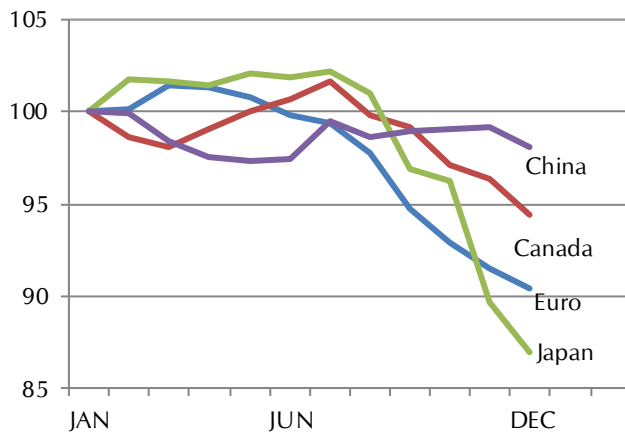


Overseas Arrivals (Millions)



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

Monthly Averages, 2014



Sources:

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

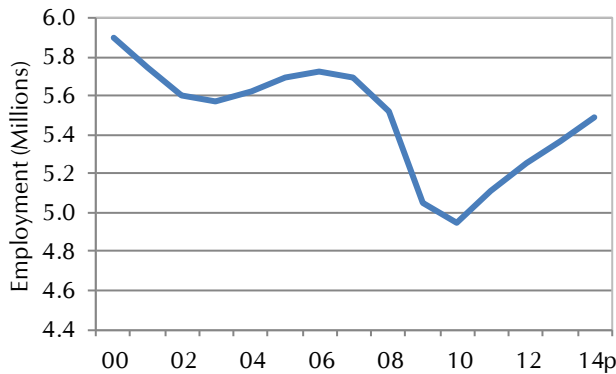
Overseas Arrivals: Office of Travel and Tourism Industries, U.S. Department of Commerce.

Relative Value of Selected Foreign Currencies: USForex, Inc. (www.usforex.com)

² Internal travel does not include spending on international airfares to U.S carriers.

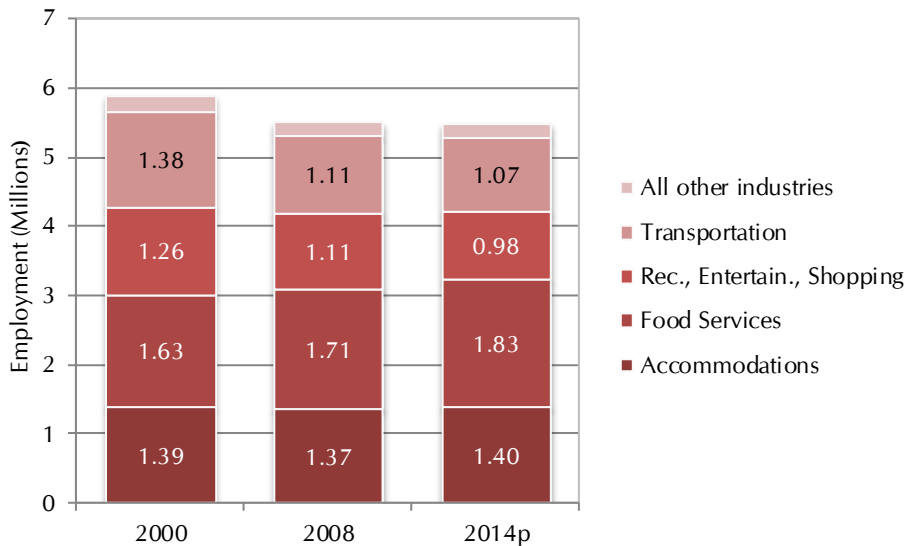
The following two graphs show employment trends since 2000. The first graph shows that travel-generated employment has increased at a steady rate since 2010, although it is still below the level attained prior to the 2008-09 recession. The second graph shows the employment trends of different types of businesses within the travel industry. The only industry that has exhibited substantial growth has been food services.

U.S. Travel Industry Employment



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

Components of U.S. Travel Industry Employment



II. OREGON TRAVEL IMPACTS



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

IMPACTS OF TRAVEL IN OREGON: A SUMMARY

- Visitation and spending increased for the fifth consecutive year. In real dollars (adjusted for inflation), spending has increased by 2.1 percent per year since 2010.
- Travel spending increased by 4.3 percent in current dollars from 2013 to 2014 to \$10.3 billion. In real dollars, spending increased by 3.5 percent.¹ An estimated 26.8 million overnight visitors traveled to Oregon destinations in 2014 (preliminary). This represents a 2.1 percent increase over 2013. Domestic visitor air arrivals to Oregon (3.2 million) increased by 6.2 percent for the year (preliminary).
- Total travel generated employment was 101,100 in 2014p. This represents a 3.1 percent increase over 2013, the fourth consecutive year of employment growth following the steep decline from 2008 to 2010. Employment has increased by 3.0 percent per year since 2011.
- The Gross Domestic Product of the travel industry was \$4.0 billion in 2014. 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 2014, these secondary impacts were equivalent to 52,500 jobs with earnings of \$2.2 billion.

¹ All spending estimates in this report are expressed in current dollars except for the graph on page 8.

ANNUAL TRAVEL TRENDS

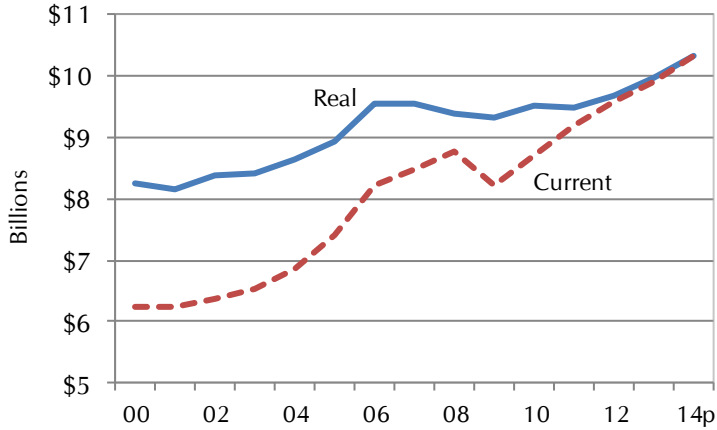
Total direct travel spending in Oregon was \$10.3 billion in 2014. The increase from 2013 to 2014 (4.3 percent) followed a 3.5 percent increase in the preceding year. This is the fifth consecutive year of growth in travel spending, following the recession. Travel-generated employment increased for the fourth consecutive year (101,100 jobs in 2014). Employment has increased by 3.0 percent per year since 2011.

Oregon Travel Trends, 1991-2014p

	Spending (\$Billion)	Earnings (\$Billion)	Employment (Thousand)	Tax Receipts (\$Million)		
				Local	State	Federal
1991	3.8	1.0	71.6	31	95	205
1992	4.0	1.1	71.4	36	104	223
1993	4.3	1.1	73.1	47	111	238
1994	4.5	1.2	74.2	51	117	248
1995	4.7	1.2	76.0	56	122	262
1996	5.0	1.3	77.5	61	125	275
1997	5.4	1.4	78.1	65	129	291
1998	5.5	1.4	80.8	68	133	303
1999	5.8	1.5	81.8	72	139	320
2000	6.2	1.6	83.5	82	148	340
2001	6.2	1.6	85.1	85	149	341
2002	6.4	1.7	86.6	89	150	353
2003	6.5	1.7	85.6	90	152	354
2004	6.9	1.7	85.8	95	165	371
2005	7.4	1.8	86.9	103	174	392
2006	8.2	2.0	92.0	117	190	426
2007	8.5	2.1	95.0	125	199	451
2008	8.8	2.2	96.4	127	204	460
2009	8.2	2.1	90.7	121	191	449
2010	8.7	2.1	89.9	122	197	459
2011	9.2	2.2	92.8	133	224	435
2012	9.6	2.3	95.1	141	231	453
2013	9.9	2.4	98.1	159	239	509
2014p	10.3	2.6	101.1	175	246	535
<i>Annual Percentage Change</i>						
13-14p	4.3	6.0	3.1	9.5	3.3	5.1
91-14p	4.5	4.3	1.5	7.9	4.2	4.3

Estimates for 2014p are preliminary. The percentage change for 1991-2014p 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. All monetary values are expressed in current dollars.

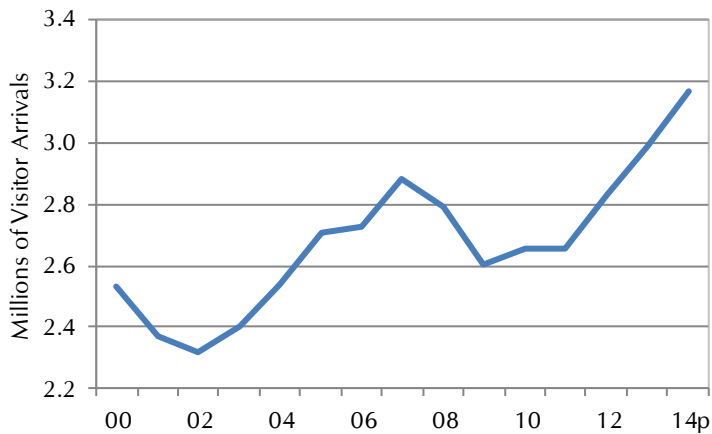
Oregon Direct Travel Spending Real and Current Dollars



Real travel spending (adjusted for inflation) increased by 3.5 percent from 2013 to 2014p, compared to the 4.3 percent increase in current dollars. Room rates were the only item that showed significant increase, while motor fuel prices declined

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

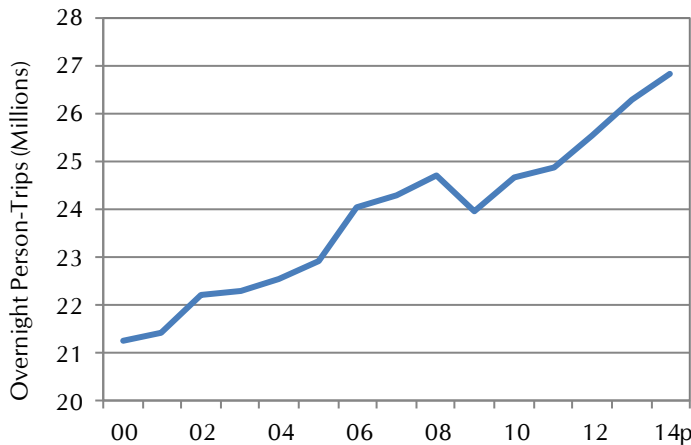
Air Passenger Visitor Arrivals to Oregon U.S. Air Carriers



Domestic visitor air arrivals to Oregon increased by 6.2 percent from 2013 to 2014(p). Domestic visitor air travel to Oregon has increased at a greater rate than U.S. air travel for the past three years.

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

Oregon Overnight Person-Trips



There were 26.8 million overnight person-trips to Oregon destinations in 2014, an increase of 2.1 percent from 2013.

Source: See table notes on following page.

OVERNIGHT VISITOR VOLUME AND AVERAGE SPENDING

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

Average Expenditures for Overnight Visitors, 2014p

By Type of Accommodation and Mode of Transportation

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel						
All Modes	\$367	\$917	\$158	\$390	2.3	2.5
Air	\$395	\$1,378	\$212	\$741	1.9	3.5
Other	\$359	\$840	\$148	\$346	2.4	2.3
Private Homes						
All Modes	\$102	\$405	\$44	\$173	2.3	4.0
Air	\$124	\$782	\$70	\$445	1.8	6.3
Other	\$85	\$307	\$35	\$126	2.4	3.6
Other Overnight	\$125	\$464	\$38	\$140	3.3	3.7
All Overnight	\$197	\$644	\$80	\$261	2.5	3.3

Oregon Overnight Visitor Volume, 2012-2014p

	Person-Nights (Millions)			Party-Nights (Millions)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	26.2	27.4	28.5	11.3	11.8	12.3
Private Home	41.4	41.7	41.9	17.9	18.1	18.2
Other Overnight	16.0	16.5	16.6	4.8	5.0	5.0
All Overnight	83.5	85.6	87.1	34.0	34.9	35.5

	Person-Trips (Millions)			Party-Trips (Millions)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	10.6	11.1	11.6	4.5	4.7	4.9
Private Home	10.7	10.7	10.8	4.5	4.6	4.6
Other Overnight	4.3	4.4	4.5	1.3	1.3	1.3
All Overnight	25.6	26.3	26.8	10.3	10.6	10.9

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

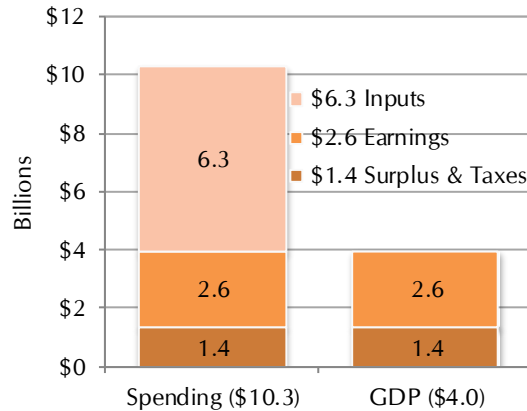
OREGON TRAVEL INDUSTRY GROSS DOMESTIC PRODUCT

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

Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits, dividends, interest and other payments). Estimates of travel spending and travel industry GDP are shown in the chart below. Oregon travel industry GDP amounted to \$4.0 billion in 2014.

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

Oregon Travel Industry Gross Domestic Product, 2014p



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

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

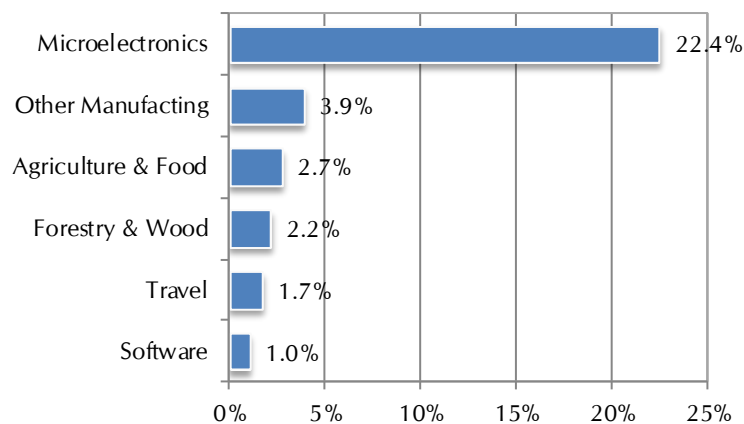
A COMPARISON OF OREGON EXPORT-ORIENTED INDUSTRIES

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations.² 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 2013. It should be noted that the largest industry, microelectronics, is concentrated in the urbanized areas of Oregon, primarily Washington County. The primary export-oriented industries in most rural counties are agriculture & food processing, forestry & wood products, and the travel industry.

Oregon Gross Domestic Product, 2013
Share of Selected Export-Oriented Industries

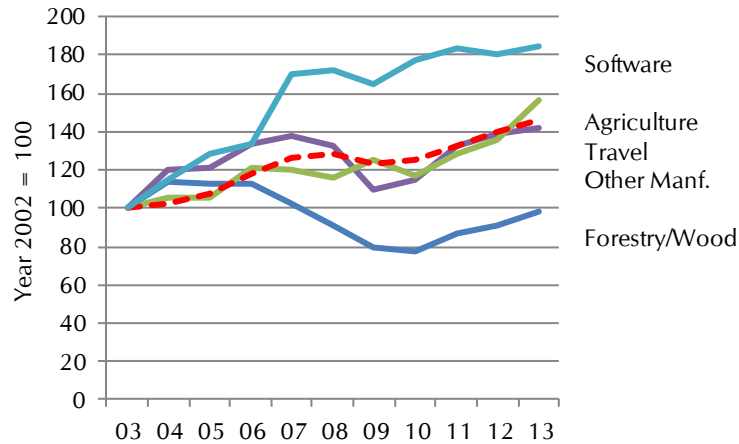


Source: Dean Runyan Associates and Bureau of Economic Analysis. *Note: The “other manufacturing” category is not a distinct industry. It is shown for comparative purposes only. The most current data is for 2013. GDP estimates by Dean Runyan Associates.

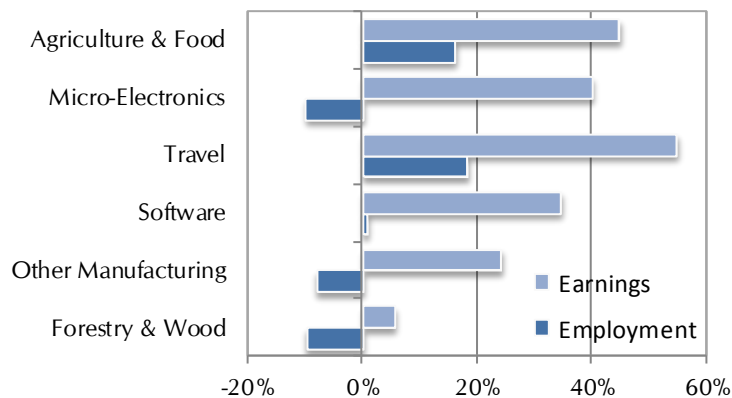
² See also Appendices A and E.

The following two graphs provide additions comparisons of these export-oriented industries. The first chart shows the change in GDP from 2003 through 2013. The second chart shows changes in employment and earnings for the same period. Micro-electronics is not included in the GDP graph because of its extraordinary growth.³ The travel industry compares favorably to the other export industries for all measures (excluding the GDP of micro-electronics).

Change in Oregon Gross Domestic Product, 2003-2013
Selected Export-Oriented Industries



Change in Earnings and Employment, 2003-2013
Selected Export-Oriented Industries



³ Micro-electronics value in 2013 was 420 – an increase of 420 percent. However, most of this growth was due extraordinary gains in operating surplus, rather than employee compensation (see bottom graph). In recent years, employee compensation has accounted for less than 15 percent of micro-electronics GDP in Oregon. This compares to two-thirds share for the travel industry. (See preceding graph on travel industry GDP.)

SECONDARY IMPACTS

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

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

Total Employment and Earnings Generated by Travel Spending in Oregon, 2014p



Note: Indirect and induced impacts estimated by Dean Runyan Associates with IMPLAN model (Implan Group, LLC.). Percentages may not add to 100% due to rounding. Total direct and secondary employment was 153,600 jobs. The employment multiplier is 1.52 (153.6/101.1). Total direct and secondary earnings were \$4.8 billion. The earnings multiplier is 1.85 (\$4.8/\$2.6).

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

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

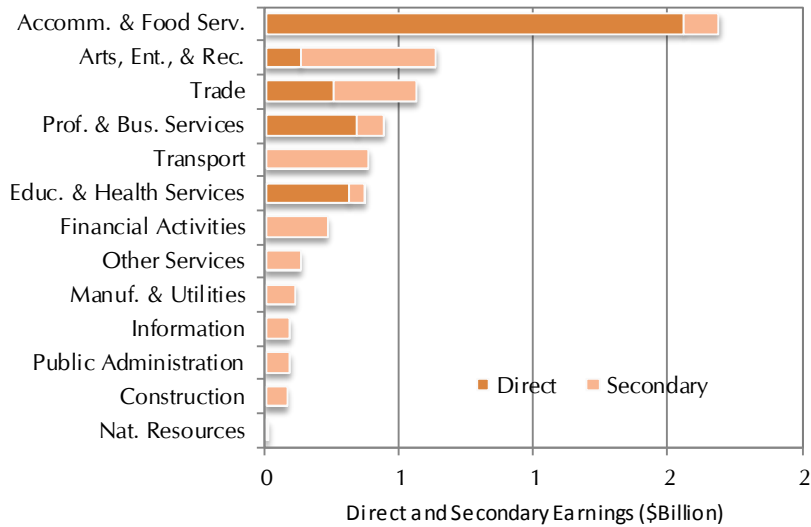
As is indicated in the following tables and graphs, the total direct employment and earnings of these four industry groups is identical to the total direct employment and earnings shown in the first part of this section. The only difference is that these industry groups represent industry groupings (firms)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

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

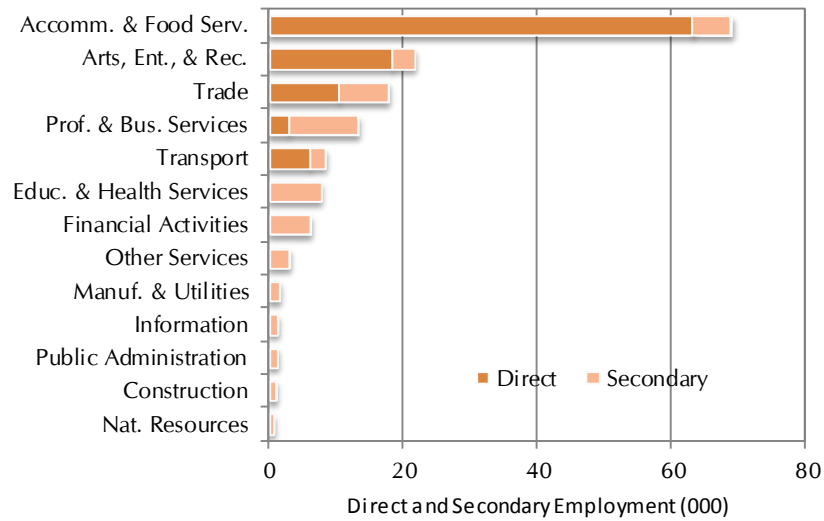
- **Professional & Business Services** (10,300 jobs and \$500 million earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Education and Health Services** (7,800 jobs and \$380 million earnings). The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services
- **Financial Activities** (6,200 jobs and \$230 million earnings). Both businesses and individuals make use of banking and insurance institutions.
- **Other Services** (3,100 jobs and \$130 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops.

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

Direct and Secondary Earnings Generated by Travel Spending in Oregon, 2014p



Direct and Secondary Employment Generated by Travel Spending in Oregon, 2014p



See notes at end of table on page 15.

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

Direct and Secondary Travel-Generated Earnings in Oregon, 2014p

(Million)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	\$1,550	\$50	\$80	\$130	\$1,680
Professional & Business Services	\$130	\$360	\$140	\$500	\$630
Trade	\$250	\$50	\$260	\$310	\$560
Transportation	\$340	\$60	\$40	\$100	\$450
Education and Health Services		\$0	\$370	\$380	\$380
Arts, Entertainment & Recreation	\$310	\$40	\$20	\$60	\$370
Financial Activities		\$100	\$120	\$230	\$230
Other Services		\$50	\$80	\$130	\$130
Manufacturing & Utilities		\$70	\$40	\$110	\$110
Public Administration		\$60	\$30	\$90	\$90
Information		\$60	\$30	\$90	\$90
Construction		\$40	\$40	\$80	\$80
Natural Resources & Mining		\$10	\$10	\$10	\$10
All Industries	\$2,590	\$940	\$1,270	\$2,210	\$4,800

Direct and Secondary Travel-Generated Employment in Oregon, 2014p

(thousand jobs)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	63.2	2.3	3.6	5.9	69.0
Arts, Entertainment & Recreation	18.4	2.2	1.1	3.3	21.6
Trade	10.5	0.8	6.6	7.4	17.9
Professional & Business Services	3.0	7.3	3.1	10.3	13.3
Transportation	6.1	1.5	0.8	2.3	8.4
Education and Health Services		0.1	7.6	7.8	7.8
Financial Activities		2.8	3.4	6.2	6.2
Other Services		0.8	2.3	3.1	3.1
Manufacturing & Utilities		1.0	0.6	1.6	1.6
Information		0.9	0.5	1.4	1.4
Construction		0.7	0.6	1.3	1.3
Public Administration		0.7	0.4	1.1	1.1
Natural Resources & Mining		0.4	0.3	0.8	0.8
All Industries	101.1	21.5	31.0	52.5	153.7

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 2014p follow.

Oregon Travel Impacts, 1992-2004

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

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

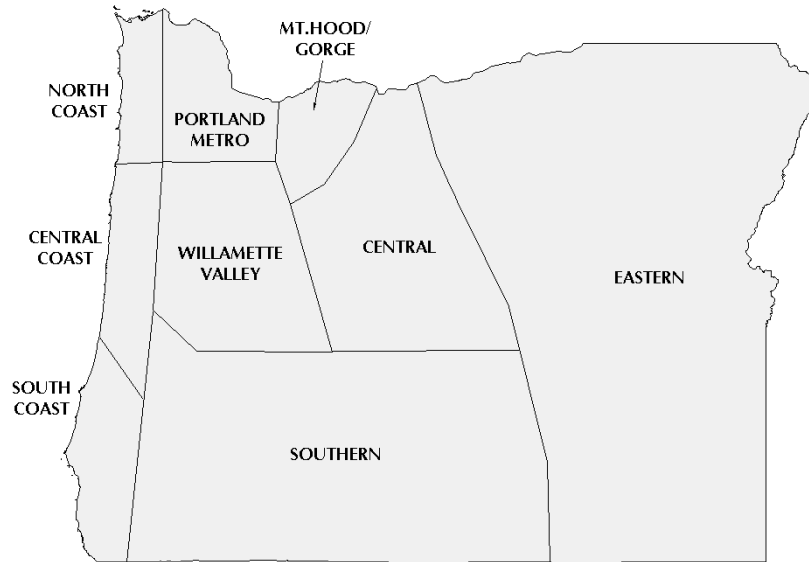
Oregon Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	7,151	7,686	7,519	7,999	8,377	8,698	9,047
Other Travel*	1,056	1,087	1,187	1,175	1,192	1,201	1,273
Total Direct Spending	8,207	8,774	8,706	9,174	9,568	9,898	10,320
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel	3,310	3,715	3,571	3,824	4,057	4,258	4,511
Private Home	1,500	1,636	1,670	1,755	1,809	1,833	1,866
Campground	379	422	391	401	417	441	445
Vacation Home	149	167	164	174	177	177	180
Day Travel	1,813	1,747	1,723	1,846	1,917	1,988	2,046
Destination Spending	7,151	7,686	7,519	7,999	8,377	8,698	9,047
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1,307	1,431	1,361	1,473	1,573	1,664	1,806
Food Service	1,590	1,697	1,764	1,835	1,953	2,068	2,179
Food Stores	525	574	563	595	621	646	676
Local Tran. & Gas	1,281	1,561	1,337	1,579	1,632	1,622	1,601
Arts, Ent. & Rec.	899	886	869	887	918	951	980
Retail Sales	968	935	950	982	1,020	1,050	1,071
Visitor Air Tran.	581	602	675	648	659	695	735
Destination Spending	7,151	7,686	7,519	7,999	8,377	8,698	9,047
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1,134	1,252	1,219	1,296	1,379	1,459	1,550
Arts, Ent. & Rec.	265	301	279	281	292	298	313
Retail**	208	217	213	223	231	241	251
Ground Tran.	54	57	54	58	60	62	67
Visitor Air Tran.	92	93	99	106	108	115	122
Other Travel*	232	237	242	258	268	267	283
Total Direct Earnings	1,984	2,157	2,106	2,222	2,339	2,441	2,587
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	55.8	58.6	55.2	57.4	59.2	61.3	63.2
Arts, Ent. & Rec.	17.1	18.4	16.9	17.1	17.3	17.7	18.4
Retail**	9.9	9.9	9.4	9.7	9.9	10.2	10.5
Ground Tran.	2.1	2.1	1.9	1.9	2.0	2.0	2.1
Visitor Air Tran.	1.9	2.0	1.7	1.7	1.7	1.8	1.8
Other Travel*	5.3	5.5	4.8	4.9	5.0	5.1	5.2
Total Direct Employment	92.0	96.4	89.9	92.8	95.1	98.1	101.1
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	117	127	122	133	141	159	175
State Tax Receipts	190	204	197	224	231	239	246
Federal Tax Receipts	426	460	459	435	453	509	535
Total Direct Tax Receipts	733	791	778	792	825	907	956

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

III. REGIONAL TRAVEL IMPACTS



North Coast	Willamette Valley	Southern	Eastern
Clatsop	Benton	Douglas (East)	Baker
Tillamook	Clackamas (South)	Jackson	Gilliam
	Lane (East)	Josephine	Grant
Central Coast	Linn	Klamath	Harney
Douglas (West)	Marion	Lake	Malheur
Lincoln	Polk	Central	Morrow
Lane (West)	Yamhill	Crook	Sherman
South Coast	Portland Metro	Deschutes	Umatilla
Coos	Clackamas (West)	Jefferson	Union
Curry	Columbia	Wasco (South)	Wallowa
	Multnomah (West)	Mt. Hood/Gorge	Wheeler
	Washington	Clackamas (East)	
		Multnomah (East)	
		Hood River	
		Wasco (North)	

2014p Regional Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment (thousand)	Tax Revenue (\$Million)		
	All Travel	Destination			Local	State	Total
Willamette Valley	1,720	1,490	421	20.0	16	47	63
North Coast	738	732	206	7.6	11	17	28
Central Coast	688	665	188	8.4	12	17	28
South Coast	377	369	108	4.8	2	10	12
Oregon Coast	1,803	1,782	504	20.9	24	43	68
Portland	4,396	3,261	1,023	31.3	104	93	197
Southern	957	867	249	11.0	11	26	37
Central	747	690	191	8.3	11	19	29
Eastern	346	331	103	5.4	4	10	14
Mt. Hood/Gorge	351	333	97	4.4	5	9	14

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).

2014p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	19.0	7.4	6.3	2.5
North Coast	6.3	2.3	2.3	0.9
Central Coast	6.0	2.1	2.1	0.8
South Coast	4.0	1.5	1.4	0.5
Oregon Coast	16.3	5.9	5.7	2.1
Portland	24.3	11.8	7.8	3.7
Southern	11.3	4.3	3.7	1.4
Central	8.2	3.1	2.8	1.0
Eastern	4.8	1.8	1.8	0.7
Mt. Hood/Gorge	3.2	1.2	1.1	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 (2014p)

Amount of Visitor Spending that supports 1 Job	\$79,040
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$84,745
Additional employment if each resident household encouraged one additional overnight visitor	1,070

Visitor Shares

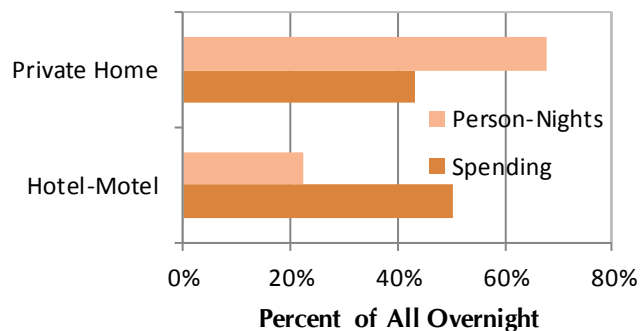
Travel Share of Total Employment (2013)*	3.4%
Overnight Visitor Day Share of Resident Population (2014p)**	4.6%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	2,006	4,259	\$542
Private Home	3,814	12,942	\$463
Other Overnight	493	1,848	\$70
All Overnight	6,313	19,049	\$1,076

Willamette Valley Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	641	154	13,720	3.4	19.0	22.4
1992	683	163	13,570	3.8	20.9	24.6
1993	731	173	13,930	5.0	22.4	27.3
1994	756	180	14,100	5.8	23.4	29.3
1995	797	193	14,380	6.2	24.4	30.6
1996	844	205	14,700	6.6	24.9	31.5
1997	890	219	14,870	6.9	25.7	32.6
1998	925	235	15,840	7.1	26.5	33.6
1999	964	243	15,400	7.5	27.1	34.7
2000	1,020	251	15,840	8.2	28.5	36.7
2001	1,029	255	16,090	8.4	28.7	37.1
2002	1,072	270	16,690	8.8	29.3	38.0
2003	1,102	272	16,420	8.7	30.0	38.7
2004	1,173	282	16,730	9.6	32.2	41.8
2005	1,278	304	17,470	10.7	34.4	45.1
2006	1,380	327	18,090	11.8	36.7	48.5
2007	1,419	350	18,750	12.6	38.3	50.9
2008	1,486	361	18,990	12.8	39.4	52.3
2009	1,376	340	17,620	11.6	36.6	48.2
2010	1,480	349	17,680	11.5	38.0	49.6
2011	1,573	367	18,400	12.3	44.1	56.4
2012	1,641	385	18,850	13.2	45.2	58.4
2013	1,678	400	19,420	14.3	46.2	60.5
2014p	1,720	421	19,970	15.6	47.0	62.6
Annual Percentage Change						
13-14p	2.5	5.2	2.9	8.8	1.7	3.4
91-14p	4.4	4.5	1.6	6.8	4.0	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.

Willamette Valley Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,215	1,296	1,276	1,358	1,424	1,456	1,490
Other Travel*	165	190	204	214	217	222	231
Total Direct Spending	1,380	1,486	1,480	1,573	1,641	1,678	1,720
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	165	183	171	183	197	207	222
Food Service	289	306	318	334	358	372	386
Food Stores	113	127	126	134	141	144	149
Local Tran. & Gas	205	251	211	253	263	257	250
Arts, Ent. & Rec.	234	228	225	232	240	244	247
Retail Sales	178	173	176	183	192	194	195
Visitor Air Tran.	30	28	49	38	34	38	41
Destination Spending	1,215	1,296	1,276	1,358	1,424	1,456	1,490
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	184.0	204.0	198.2	211.3	224.4	233.4	246.0
Arts, Ent. & Rec.	72.7	81.8	76.7	75.7	74.6	76.5	80.2
Retail**	39.2	41.4	40.9	43.1	45.0	46.1	47.5
Ground Tran.	6.5	6.7	6.4	6.8	7.0	7.1	7.6
Visitor Air Tran.	2.2	1.6	1.3	1.3	1.4	1.5	1.6
Other Travel*	22.1	25.5	25.2	28.9	32.5	35.3	37.7
Total Direct Earnings	326.7	361.0	348.8	367.1	384.9	399.8	420.7
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	10.1	10.5	9.8	10.3	10.7	11.0	11.2
Arts, Ent. & Rec.	4.9	5.3	4.9	4.9	4.9	5.0	5.3
Retail**	1.9	2.0	1.9	2.0	2.0	2.1	2.1
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.9	0.9	0.9	0.9	1.0	1.1	1.1
Total Direct Employment	18.1	19.0	17.7	18.4	18.8	19.4	20.0
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	11.8	12.8	11.5	12.3	13.2	14.3	15.6
State Tax Receipts	36.7	39.4	38.0	44.1	45.2	46.2	47.0
Total Local & State	48.5	52.3	49.6	56.4	58.4	60.5	62.6

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Willamette Valley Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	837	934	915	971	1,023	1,047	1,076
Hotel, Motel	410	457	433	465	500	519	542
Private Home	374	410	419	442	457	458	463
Other Overnight	53	67	62	64	66	69	70
Campground	42	54	49	50	52	55	56
Vacation Home	11	13	13	14	14	14	14
Day Travel	378	362	361	387	401	409	414
Spending at Destination	1,215	1,296	1,276	1,358	1,424	1,456	1,490

Willamette Valley Visitor Volume and Visitor Spending

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$305	\$653	\$127	\$270	2.4	2.1
Private Home	\$90	\$310	\$36	\$121	2.5	3.4
Other Overnight	\$129	\$482	\$38	\$143	3.4	3.8
All Overnight	\$144	\$436	\$56	\$170	2.6	3.0

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	4,024	4,184	4,259	1,675	1,744	1,776
Private Home	12,896	12,871	12,942	5,090	5,093	5,127
Other Overnight	1,768	1,837	1,848	523	543	547
All Overnight	18,688	18,892	19,049	7,288	7,380	7,450

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,897	1,973	2,006	784	816	830
Private Home	3,802	3,795	3,814	1,486	1,485	1,494
Other Overnight	471	490	493	140	145	146
All Overnight	6,170	6,257	6,313	2,409	2,446	2,469

NORTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$96,860
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,259
Additional employment if each resident household encouraged one additional overnight visitor	50

Visitor Shares

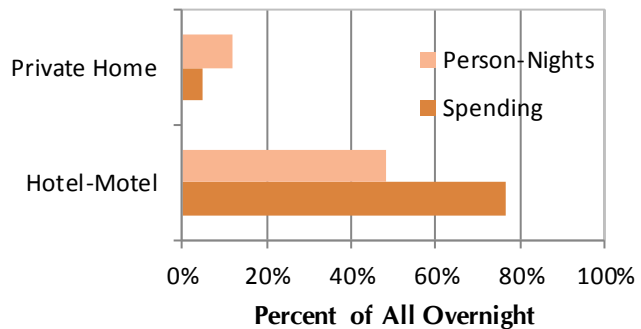
Travel Share of Total Employment (2013)*	20.0%
Overnight Visitor Day Share of Resident Population (2014p)**	27.2%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,409	3,029	\$349
Private Home	223	752	\$21
Other Overnight	697	2,487	\$84
All Overnight	2,330	6,268	\$454

North Coast Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	263	74	5,240	2.6	6.2	8.8
1992	278	78	5,220	2.9	6.6	9.6
1993	297	84	5,410	3.2	7.1	10.3
1994	316	89	5,560	3.5	7.6	11.2
1995	326	92	5,540	3.7	7.8	11.5
1996	330	93	5,420	3.8	7.7	11.5
1997	340	97	5,370	4.0	7.8	11.8
1998	351	101	5,600	4.2	8.0	12.3
1999	367	105	5,770	4.5	8.3	12.8
2000	391	111	5,960	4.9	8.8	13.7
2001	411	117	6,230	5.1	9.1	14.3
2002	430	123	6,420	5.5	9.4	14.8
2003	447	128	6,480	5.5	9.8	15.3
2004	464	132	6,460	5.9	10.8	16.8
2005	485	137	6,470	6.2	11.2	17.5
2006	569	163	7,310	7.5	13.1	20.6
2007	567	168	7,290	7.5	13.4	20.9
2008	600	177	7,620	7.8	14.1	21.9
2009	575	175	7,400	7.6	13.7	21.3
2010	591	174	7,110	7.8	13.8	21.6
2011	602	175	6,920	8.1	14.7	22.9
2012	639	185	7,050	8.5	15.3	23.9
2013	680	195	7,340	9.5	16.2	25.7
2014p	738	206	7,580	10.6	17.1	27.7

Annual Percentage Change

13-14p	8.4	6.0	3.2	11.4	5.7	7.8
91-14p	4.6	4.6	1.6	6.3	4.5	5.1

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.

North Coast Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	552	586	574	585	620	674	732
Other Travel*	17	15	17	17	19	6	6
Total Direct Spending	569	600	591	602	639	680	738
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	119	129	129	129	138	150	165
Food Service	149	159	164	164	176	196	218
Food Stores	53	57	55	57	60	65	70
Local Tran. & Gas	58	72	61	70	73	75	78
Arts, Ent. & Rec.	82	82	80	79	83	90	97
Retail Sales	91	86	86	86	90	98	104
Destination Spending	552	586	574	585	620	674	732
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	111.8	123.6	121.3	122.9	130.4	143.7	151.8
Arts, Ent. & Rec.	24.4	28.1	25.7	25.3	26.0	26.1	27.4
Retail**	18.8	19.3	18.7	19.0	19.9	21.6	23.5
Ground Tran.	2.1	2.3	2.2	2.3	2.4	2.6	3.0
Other Travel*	5.7	4.1	5.8	5.2	6.1	0.6	0.7
Total Direct Earnings	162.8	177.5	173.7	174.7	184.8	194.6	206.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,910	5,020	4,790	4,670	4,790	5,080	5,220
Arts, Ent. & Rec.	1,300	1,510	1,290	1,210	1,190	1,190	1,210
Retail**	950	940	880	880	910	970	1,030
Ground Tran.	80	80	70	70	80	80	90
Other Travel*	70	70	70	80	90	20	20
Total Direct Employment	7,310	7,620	7,110	6,920	7,050	7,340	7,580
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.5	7.8	7.8	8.1	8.5	9.5	10.6
State Tax Receipts	13.1	14.1	13.8	14.7	15.3	16.2	17.1
Total Local & State	20.6	21.9	21.6	22.9	23.9	25.7	27.7

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

North Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	322	365	357	360	382	416	454
Hotel, Motel	231	268	263	264	283	313	349
Private Home	18	19	18	20	20	21	21
Other Overnight	73	78	75	77	79	83	84
Campground	49	52	50	50	52	56	57
Vacation Home	24	26	25	27	27	27	28
Day Travel	231	221	217	225	237	258	277
Spending at Destination	552	586	574	585	620	674	732

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$282	\$606	\$115	\$248	2.4	2.1
Private Home	\$72	\$242	\$28	\$94	2.6	3.4
Other Overnight	\$111	\$396	\$34	\$121	3.3	3.6
All Overnight	\$199	\$519	\$72	\$195	2.7	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	2,392	2,707	3,029	978	1,106	1,238
Private Home	739	746	752	286	288	290
Other Overnight	2,406	2,469	2,487	732	749	755
All Overnight	5,538	5,922	6,268	1,995	2,144	2,283

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,115	1,262	1,409	456	516	576
Private Home	220	222	223	85	86	86
Other Overnight	676	692	697	206	211	212
All Overnight	2,011	2,175	2,330	747	812	874

CENTRAL COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$80,620
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$7,378
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

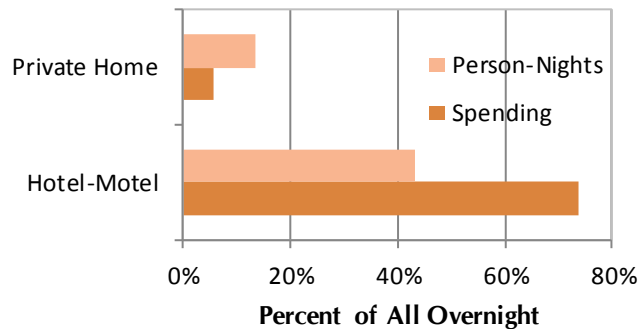
Travel Share of Total Employment (2013)*	23.6%
Overnight Visitor Day Share of Resident Population (2014p)**	25.4%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,181	2,582	\$350
Private Home	238	813	\$27
Other Overnight	685	2,576	\$98
All Overnight	2,104	5,971	\$475

Central Coast Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	259	71	6,140	2.9	6.0	9.0
1992	276	76	6,100	3.5	6.6	10.0
1993	295	81	6,320	3.9	7.1	11.0
1994	305	84	6,310	4.1	7.4	11.5
1995	327	90	6,500	4.4	7.8	12.3
1996	353	95	6,630	5.0	8.2	13.2
1997	373	101	6,700	5.4	8.5	13.9
1998	377	103	6,380	5.5	8.6	14.1
1999	391	106	6,580	5.6	8.8	14.4
2000	408	109	6,350	5.9	9.2	15.1
2001	433	116	6,790	6.4	9.6	16.0
2002	446	120	6,850	6.8	9.7	16.5
2003	451	120	6,860	6.8	9.9	16.7
2004	471	124	6,970	7.1	11.0	18.2
2005	488	128	6,900	7.5	11.4	18.9
2006	566	151	7,780	9.0	13.3	22.3
2007	591	163	8,310	8.7	14.1	22.8
2008	602	167	8,240	8.7	14.4	23.0
2009	576	164	8,010	9.7	13.9	23.6
2010	587	161	7,830	10.1	13.8	23.9
2011	592	160	7,650	9.9	14.7	24.6
2012	605	168	7,790	9.9	15.0	24.9
2013	642	176	8,070	10.9	15.6	26.6
2014p	688	188	8,450	11.9	16.5	28.4
Annual Percentage Change						
13-14p	7.2	6.7	4.7	9.0	5.5	6.9
91-14p	4.3	4.3	1.4	6.3	4.5	5.1

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.

Central Coast Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	552	584	571	573	585	621	665
Other Travel*	14	18	16	19	20	22	23
Total Direct Spending	566	602	587	592	605	642	688
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	133	143	143	142	144	151	164
Food Service	132	143	147	144	149	162	178
Food Stores	55	59	57	58	60	64	68
Local Tran. & Gas	60	74	62	70	71	72	73
Arts, Ent. & Rec.	85	84	81	79	80	85	91
Retail Sales	87	82	82	81	82	87	91
Destination Spending	552	584	571	573	585	621	665
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	102.8	113.9	111.3	110.7	115.8	123.2	130.7
Arts, Ent. & Rec.	23.2	26.5	24.0	23.4	25.1	23.8	25.8
Retail**	18.4	18.8	18.2	18.2	18.6	19.8	21.3
Ground Tran.	2.0	2.1	2.0	2.1	2.1	2.3	2.6
Other Travel*	4.2	5.5	5.1	6.0	6.7	7.4	7.8
Total Direct Earnings	150.6	166.8	160.7	160.4	168.2	176.4	188.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,110	5,480	5,230	5,110	5,130	5,320	5,490
Arts, Ent. & Rec.	1,560	1,640	1,550	1,460	1,570	1,590	1,740
Retail**	910	910	850	850	850	900	940
Ground Tran.	70	70	70	70	70	70	80
Other Travel*	120	150	140	150	170	190	200
Total Direct Employment	7,780	8,240	7,830	7,650	7,790	8,070	8,450
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.0	8.7	10.1	9.9	9.9	10.9	11.9
State Tax Receipts	13.3	14.4	13.8	14.7	15.0	15.6	16.5
Total Local & State	22.3	23.0	23.9	24.6	24.9	26.6	28.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Central Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	375	419	410	407	416	441	475
Hotel, Motel	267	305	298	293	298	318	350
Private Home	23	24	24	25	26	27	27
Other Overnight	85	90	88	89	92	96	98
Campground	61	64	62	62	64	69	70
Vacation Home	24	26	26	27	28	28	28
Day Travel	177	165	161	166	169	180	190
Spending at Destination	552	584	571	573	585	621	665

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$332	\$725	\$136	\$296	2.4	2.2
Private Home	\$87	\$297	\$33	\$115	2.6	3.4
Other Overnight	\$126	\$474	\$38	\$143	3.3	3.8
All Overnight	\$221	\$608	\$80	\$226	2.8	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	2,137	2,331	2,582	874	953	1,056
Private Home	781	801	813	301	309	314
Other Overnight	2,478	2,558	2,576	748	771	777
All Overnight	5,396	5,689	5,971	1,923	2,033	2,146

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	978	1,066	1,181	400	436	483
Private Home	228	234	238	88	90	92
Other Overnight	659	680	685	199	205	206
All Overnight	1,865	1,981	2,104	687	731	781

SOUTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$76,720
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,737
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

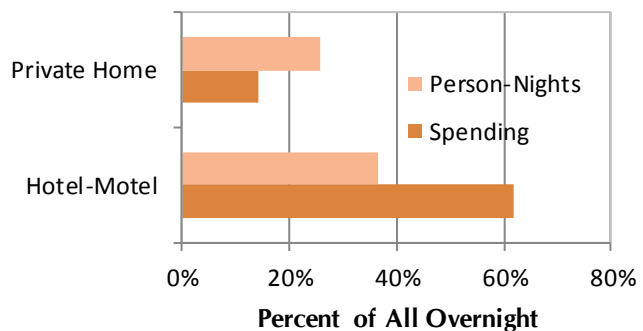
Travel Share of Total Employment (2013)*	11.8%
Overnight Visitor Day Share of Resident Population (2014p)**	12.9%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	687	1,469	\$155
Private Home	304	1,045	\$36
Other Overnight	411	1,521	\$60
All Overnight	1,401	4,035	\$251

South Coast Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	173	50	4,630	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	1.2	5.2	6.4
1996	199	57	4,440	1.2	5.2	6.4
1997	198	57	4,220	1.1	5.1	6.2
1998	206	60	4,320	1.2	5.3	6.5
1999	224	65	4,450	1.3	5.7	7.0
2000	237	68	4,480	1.4	6.0	7.4
2001	252	73	4,760	1.5	6.3	7.8
2002	267	78	4,990	1.6	6.5	8.2
2003	282	81	5,080	1.7	6.9	8.5
2004	294	83	4,950	1.8	7.4	9.2
2005	302	84	4,840	1.8	7.6	9.4
2006	328	91	4,980	1.9	8.2	10.1
2007	338	96	5,130	2.0	8.5	10.5
2008	348	99	5,180	1.9	8.7	10.6
2009	306	92	4,710	1.6	7.9	9.5
2010	322	92	4,680	1.7	8.1	9.7
2011	334	94	4,730	1.6	9.0	10.5
2012	348	98	4,770	1.6	9.2	10.8
2013	366	104	4,810	1.7	9.5	11.2
2014p	377	108	4,850	1.8	9.8	11.5

Annual Percentage Change

13-14p	3.1	4.6	0.8	4.1	2.5	2.7
91-14p	3.5	3.4	0.2	2.9	3.4	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.

South Coast Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	318	337	313	324	339	357	369
Other Travel*	10	11	9	9	9	8	8
Total Direct Spending	328	348	322	334	348	366	377
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	65	68	63	65	68	71	74
Food Service	79	84	83	84	89	97	102
Food Stores	33	37	35	36	37	40	41
Local Tran. & Gas	41	51	41	48	50	50	49
Arts, Ent. & Rec.	51	51	48	48	50	52	54
Retail Sales	43	42	40	40	42	44	45
Visitor Air Tran.	5	4	3	3	3	4	3
Destination Spending	318	337	313	324	339	357	369
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	61.1	66.5	62.2	64.0	67.6	71.0	75.0
Arts, Ent. & Rec.	14.5	16.7	14.7	14.7	14.8	15.8	15.7
Retail**	10.4	11.0	10.3	10.6	10.9	11.6	12.1
Ground Tran.	1.2	1.3	1.2	1.3	1.3	1.4	1.5
Visitor Air Tran.	1.6	1.6	1.7	1.9	2.1	2.7	2.8
Other Travel*	1.7	1.8	2.0	1.8	1.6	1.2	1.3
Total Direct Earnings	90.6	98.9	92.1	94.2	98.3	103.6	108.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,130	3,210	2,830	2,870	2,940	2,970	2,980
Arts, Ent. & Rec.	1,200	1,290	1,230	1,250	1,210	1,210	1,200
Retail**	520	530	490	490	490	500	530
Ground Tran.	40	40	40	40	40	40	50
Visitor Air Tran.	40	40	30	30	40	50	50
Other Travel*	60	60	60	50	40	40	40
Total Direct Employment	4,980	5,180	4,680	4,730	4,770	4,810	4,850
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.9	1.9	1.7	1.6	1.6	1.7	1.8
State Tax Receipts	8.2	8.7	8.1	9.0	9.2	9.5	9.8
Total Local & State	10.1	10.6	9.7	10.5	10.8	11.2	11.5

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

South Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	212	233	214	221	231	243	251
Hotel, Motel	128	142	128	133	140	148	155
Private Home	33	34	33	34	35	36	36
Other Overnight	51	57	53	54	56	60	60
Campground	45	50	47	47	49	52	53
Vacation Home	7	7	7	7	7	7	7
Day Travel	105	105	99	103	108	114	118
Spending at Destination	318	337	313	324	339	357	369

Average Expenditures for Overnight Visitors, 2014p

	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	\$88	\$304	\$34	\$118	2.6	3.5
Other Overnight	\$136	\$503	\$40	\$147	3.4	3.7
All Overnight	\$173	\$483	\$62	\$179	2.8	2.8

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,279	1,388	1,469	524	569	602
Private Home	1,030	1,040	1,045	402	407	408
Other Overnight	1,451	1,512	1,521	424	441	444
All Overnight	3,761	3,940	4,035	1,351	1,417	1,454

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	600	649	687	245	266	281
Private Home	299	302	304	116	117	118
Other Overnight	392	408	411	115	119	120
All Overnight	1,291	1,360	1,401	476	503	519

OREGON COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$86,320
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$20,273
Additional employment if each resident household encouraged one additional overnight visitor	230

Visitor Shares

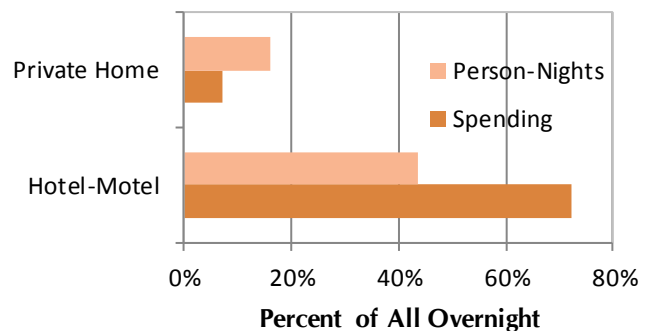
Travel Share of Total Employment (2013)*	18.1%
Overnight Visitor Day Share of Resident Population (2014p)**	20.9%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,105	7,080	\$863
Private Home	724	2,610	\$85
Other Overnight	1,890	6,584	\$244
All Overnight	5,719	16,274	\$1,192

Oregon Coast Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	694	196	16,090	6.5	16.7	23.2
1992	731	206	15,890	7.3	18.0	25.3
1993	770	217	16,180	8.1	19.2	27.3
1994	806	227	16,300	8.7	20.1	28.8
1995	846	239	16,550	9.3	20.8	30.1
1996	881	247	16,570	10.0	21.2	31.1
1997	911	255	16,360	10.4	21.5	32.0
1998	935	265	16,370	10.9	22.0	32.9
1999	982	277	16,880	11.5	22.8	34.3
2000	1,036	289	16,860	12.2	24.0	36.2
2001	1,096	306	17,850	13.0	25.1	38.1
2002	1,144	321	18,330	13.9	25.7	39.5
2003	1,180	330	18,500	13.9	26.6	40.5
2004	1,229	341	18,450	14.9	29.3	44.2
2005	1,275	350	18,270	15.6	30.2	45.8
2006	1,463	405	20,140	18.4	34.6	53.0
2007	1,496	429	20,790	18.2	36.1	54.2
2008	1,551	444	21,110	18.3	37.2	55.6
2009	1,457	432	20,180	18.9	35.6	54.5
2010	1,500	427	19,690	19.5	35.7	55.2
2011	1,527	430	19,360	19.6	38.4	58.0
2012	1,592	452	19,670	20.1	39.5	59.6
2013	1,688	476	20,290	22.1	41.4	63.5
2014p	1,803	504	20,940	24.3	43.4	67.7
Annual Percentage Change						
13-14p	6.8	5.9	3.2	9.6	4.9	6.5
91-14p	4.2	4.2	1.2	5.9	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.

Oregon Coast Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,437	1,525	1,472	1,500	1,561	1,669	1,782
Other Travel*	26	26	28	28	31	19	21
Total Direct Spending	1,463	1,551	1,500	1,527	1,592	1,688	1,803
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	318	340	335	336	351	372	403
Food Service	360	387	393	392	413	455	499
Food Stores	142	152	146	151	157	168	179
Local Tran. & Gas	174	215	179	206	211	214	216
Arts, Ent. & Rec.	218	217	208	205	212	228	243
Retail Sales	220	210	208	207	214	228	240
Visitor Air Tran.	5	4	3	3	3	4	3
Destination Spending	1,437	1,525	1,472	1,500	1,561	1,669	1,782
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	275.7	304.1	294.7	297.6	313.9	337.8	357.5
Arts, Ent. & Rec.	62.2	71.3	64.4	63.4	65.8	65.6	68.9
Retail**	48.1	49.6	47.7	48.3	49.9	53.6	57.4
Ground Tran.	5.3	5.7	5.4	5.6	5.8	6.3	7.1
Visitor Air Tran.	1.6	1.6	1.7	1.9	2.1	2.7	2.8
Other Travel*	12.2	11.9	13.4	13.6	14.9	9.7	10.4
Total Direct Earnings	405.1	444.2	427.4	430.4	452.5	475.7	504.0
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	13.1	13.7	12.8	12.7	12.9	13.4	13.7
Arts, Ent. & Rec.	4.1	4.4	4.1	3.9	4.0	4.0	4.2
Retail**	2.4	2.4	2.3	2.3	2.3	2.4	2.5
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*	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Total Direct Employment	20.1	21.1	19.7	19.4	19.7	20.3	20.9
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	18.4	18.3	19.5	19.6	20.1	22.1	24.3
State Tax Receipts	34.6	37.2	35.7	38.4	39.5	41.4	43.4
Total Local & State	53.0	55.6	55.2	58.0	59.6	63.5	67.7

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Oregon Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	918	1,030	990	1,000	1,042	1,112	1,192
Hotel, Motel	633	724	696	698	729	787	863
Private Home	74	78	76	79	83	84	85
Other Overnight	211	227	218	223	230	241	244
Campground	157	168	159	161	168	179	181
Vacation Home	55	60	59	61	63	63	64
Day Travel	518	496	482	500	520	557	590
Spending at Destination	1,437	1,525	1,472	1,500	1,561	1,669	1,782

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$298	\$680	\$122	\$278	2.4	2.3
Private Home	\$84	\$302	\$32	\$117	2.6	3.6
Other Overnight	\$124	\$431	\$37	\$129	3.3	3.5
All Overnight	\$203	\$563	\$73	\$208	2.8	2.8

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	5,808	6,426	7,080	2,376	2,628	2,896
Private Home	2,551	2,587	2,610	989	1,004	1,012
Other Overnight	6,336	6,538	6,584	1,904	1,961	1,976
All Overnight	14,695	15,551	16,274	5,268	5,593	5,884

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	2,551	2,821	3,105	1,043	1,153	1,269
Private Home	708	718	724	274	278	280
Other Overnight	1,819	1,877	1,890	546	562	566
All Overnight	5,077	5,416	5,719	1,863	1,994	2,116

PORTLAND METRO TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$119,230
Employee Earnings generated by \$100 Visitor Spending	\$24
Local & State Tax Revenues generated by \$100 Visitor Spending	\$6.00

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$233,223
Additional employment if each resident household encouraged one additional overnight visitor	1,960

Visitor Shares

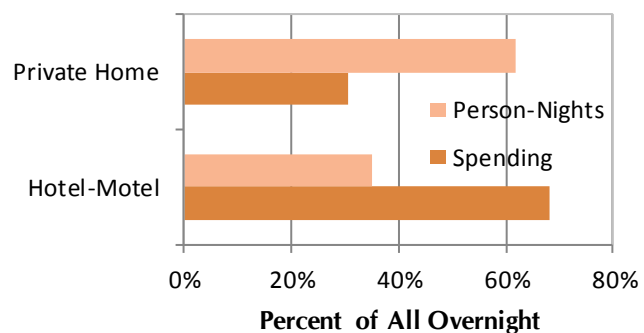
Travel Share of Total Employment (2013)*	2.8%
Overnight Visitor Day Share of Resident Population (2014p)**	4.0%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,551	8,524	\$1,902
Private Home	4,102	14,968	\$858
Other Overnight	192	759	\$29
All Overnight	7,845	24,251	\$2,790

Portland Metro Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	1,464	377	20,090	12.4	33.5	45.9
1992	1,617	416	20,540	15.4	37.3	52.8
1993	1,747	446	21,290	23.4	39.9	63.3
1994	1,813	469	21,840	25.5	42.0	67.5
1995	1,940	506	23,020	28.6	44.8	73.4
1996	2,096	539	23,900	31.9	46.6	78.5
1997	2,283	571	24,540	35.0	48.6	83.6
1998	2,364	592	25,050	36.8	49.6	86.4
1999	2,513	637	25,500	38.6	52.7	91.3
2000	2,698	677	26,010	45.1	56.8	101.9
2001	2,621	677	26,150	46.2	56.9	103.2
2002	2,584	662	25,640	48.4	55.5	103.9
2003	2,609	644	24,920	48.9	55.0	103.9
2004	2,752	652	25,010	51.0	59.5	110.4
2005	3,023	695	25,740	56.1	63.2	119.3
2006	3,339	747	26,840	62.5	67.8	130.3
2007	3,496	799	27,940	69.3	71.9	141.2
2008	3,621	813	28,700	71.8	73.9	145.7
2009	3,391	772	26,750	68.3	68.8	137.0
2010	3,639	808	26,700	67.2	72.3	139.5
2011	3,899	882	28,560	76.2	83.5	159.7
2012	4,076	931	29,400	82.2	86.9	169.0
2013	4,204	967	30,340	94.9	89.7	184.6
2014p	4,396	1,023	31,250	104.4	92.7	197.1
Annual Percentage Change						
13-14p	4.6	5.8	3.0	10.0	3.4	6.8
91-14p	4.9	4.4	1.9	9.7	4.5	6.5

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.

Portland Metro Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	2,391	2,620	2,614	2,840	2,997	3,118	3,261
Other Travel*	948	1,001	1,025	1,058	1,079	1,086	1,135
Total Direct Spending	3,339	3,621	3,639	3,899	4,076	4,204	4,396
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	445	515	472	554	607	641	705
Food Service	485	530	563	604	647	679	706
Food Stores	97	109	109	119	125	129	134
Local Tran. & Gas	395	472	426	493	513	523	528
Arts, Ent. & Rec.	174	177	178	188	196	201	205
Retail Sales	297	296	306	324	339	347	350
Visitor Air Tran.	497	520	560	558	571	598	633
Destination Spending	2,391	2,620	2,614	2,840	2,997	3,118	3,261
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	336	384	375	420	451	478	505
Arts, Ent. & Rec.	49	58	55	58	65	64	67
Retail**	52	55	55	59	62	64	66
Ground Tran.	34	36	33	37	38	39	42
Visitor Air Tran.	85	87	93	100	101	108	114
Other Travel*	191	193	197	208	214	215	228
Total Direct Earnings	747	813	808	882	931	967	1,023
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	15.1	16.5	15.8	17.2	18.0	18.6	19.3
Arts, Ent. & Rec.	2.4	2.6	2.4	2.7	2.6	2.7	2.8
Retail**	2.1	2.1	2.1	2.2	2.3	2.3	2.3
Ground Tran.	1.3	1.3	1.2	1.3	1.3	1.3	1.4
Visitor Air Tran.	1.7	1.8	1.5	1.5	1.5	1.6	1.6
Other Travel*	4.2	4.3	3.7	3.7	3.7	3.8	3.9
Total Direct Employment	26.8	28.7	26.7	28.6	29.4	30.3	31.3
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	62.5	71.8	67.2	76.2	82.2	94.9	104.4
State Tax Receipts	67.8	73.9	72.3	83.5	86.9	89.7	92.7
Total Local & State	130.3	145.7	139.5	159.7	169.0	184.6	197.1

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Portland Metro Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	2,009	2,234	2,222	2,410	2,549	2,655	2,790
Hotel, Motel	1,309	1,474	1,439	1,593	1,708	1,793	1,902
Private Home	677	732	757	791	813	833	858
Other Overnight	23	27	26	27	28	29	29
Campground	16	20	18	18	19	20	21
Vacation Home	7	8	8	8	9	9	9
Day Travel	382	386	392	430	448	462	471
Spending at Destination	2,391	2,620	2,614	2,840	2,997	3,118	3,261

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$475	\$1,166	\$223	\$536	2.1	2.5
Private Home	\$114	\$424	\$57	\$209	2.0	3.7
Other Overnight	\$117	\$467	\$39	\$153	3.0	4.0
All Overnight	\$236	\$750	\$115	\$356	2.1	3.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	8,161	8,422	8,524	3,810	3,940	4,007
Private Home	14,725	14,882	14,968	7,384	7,480	7,550
Other Overnight	729	753	759	242	249	251
All Overnight	23,615	24,057	24,251	11,436	11,669	11,807

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	3,400	3,508	3,551	1,554	1,606	1,632
Private Home	4,036	4,079	4,102	1,982	2,007	2,023
Other Overnight	184	191	192	60	62	63
All Overnight	7,619	7,777	7,845	3,597	3,675	3,718

SOUTHERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$80,970
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$35,889
Additional employment if each resident household encouraged one additional overnight visitor	440

Visitor Shares

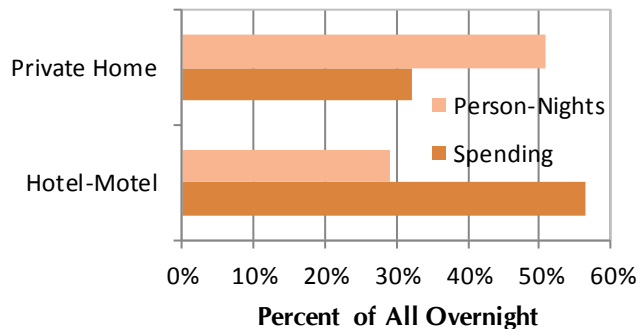
Travel Share of Total Employment (2013)*	4.7%
Overnight Visitor Day Share of Resident Population (2014p)**	6.6%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,475	3,276	\$383
Private Home	1,602	5,719	\$218
Other Overnight	594	2,257	\$78
All Overnight	3,672	11,252	\$679

Southern Oregon Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	424	112	9,440	2.8	11.8	14.7
1992	446	117	9,150	3.0	12.8	15.8
1993	456	119	9,040	3.6	13.3	16.9
1994	467	122	8,920	3.8	13.8	17.6
1995	489	127	8,930	4.0	14.2	18.1
1996	514	133	9,090	4.1	14.4	18.4
1997	536	139	9,080	4.2	14.6	18.8
1998	553	146	9,540	4.4	15.1	19.5
1999	589	155	9,800	4.7	15.7	20.4
2000	627	163	10,000	5.2	16.6	21.9
2001	627	164	10,120	5.9	16.6	22.5
2002	684	181	10,910	6.7	17.6	24.3
2003	717	187	10,850	6.9	18.3	25.2
2004	754	192	10,740	7.5	19.8	27.3
2005	796	197	10,610	7.9	20.5	28.4
2006	847	208	10,760	8.7	21.5	30.2
2007	855	215	10,850	9.2	21.9	31.1
2008	875	218	10,910	9.1	22.2	31.3
2009	845	210	10,280	8.7	20.9	29.6
2010	864	212	10,040	9.4	21.5	30.8
2011	895	219	10,260	9.4	24.3	33.8
2012	924	227	10,430	9.8	24.7	34.4
2013	941	236	10,710	10.3	25.2	35.5
2014p	957	249	10,960	11.2	25.6	36.8
Annual Percentage Change						
13-14p	1.7	5.5	2.3	8.0	1.7	3.5
91-14p	3.6	3.5	0.7	6.1	3.4	4.1

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.

Southern Oregon Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	762	785	775	804	834	851	867
Other Travel*	85	90	89	91	91	90	90
Total Direct Spending	847	875	864	895	924	941	957
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	141	139	137	140	145	148	156
Food Service	181	186	194	198	209	219	226
Food Stores	70	75	74	78	81	83	86
Local Tran. & Gas	121	146	123	145	149	145	139
Arts, Ent. & Rec.	111	107	105	106	109	112	113
Retail Sales	109	102	105	106	109	112	112
Visitor Air Tran.	31	30	37	32	32	33	34
Destination Spending	762	785	775	804	834	851	867
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	135.1	140.8	138.9	143.4	150.2	156.6	166.8
Arts, Ent. & Rec.	33.6	37.2	34.4	34.8	35.3	36.7	37.8
Retail**	25.0	25.5	25.2	26.0	26.8	27.6	28.5
Ground Tran.	3.7	4.0	3.8	4.1	4.2	4.3	4.4
Visitor Air Tran.	2.0	2.3	2.2	2.4	2.4	2.6	2.7
Other Travel*	8.5	8.5	7.6	8.2	8.2	8.5	9.0
Total Direct Earnings	207.8	218.3	212.2	218.8	227.2	236.2	249.2
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	6.9	6.9	6.5	6.6	6.8	7.0	7.2
Arts, Ent. & Rec.	2.2	2.3	2.0	2.1	2.1	2.1	2.2
Retail**	1.2	1.2	1.1	1.1	1.2	1.2	1.2
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Visitor Air Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.3	0.3	0.2	0.2	0.2	0.2	0.3
Total Direct Employment	10.8	10.9	10.0	10.3	10.4	10.7	11.0
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.7	9.1	9.4	9.4	9.8	10.3	11.2
State Tax Receipts	21.5	22.2	21.5	24.3	24.7	25.2	25.6
Total Local & State	30.2	31.3	30.8	33.8	34.4	35.5	36.8

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Southern Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	582	619	610	630	653	666	679
Hotel, Motel	335	350	340	352	366	374	383
Private Home	181	195	200	207	214	216	218
Other Overnight	66	74	70	72	73	77	78
Campground	51	57	53	55	56	60	60
Vacation Home	15	16	16	17	17	17	18
Day Travel	180	166	165	174	180	185	188
Spending at Destination	762	785	775	804	834	851	867

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$282	\$629	\$117	\$260	2.4	2.2
Private Home	\$96	\$348	\$38	\$136	2.5	3.6
Other Overnight	\$116	\$443	\$35	\$131	3.4	3.8
All Overnight	\$158	\$481	\$60	\$185	2.6	3.0

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	3,135	3,231	3,276	1,305	1,344	1,362
Private Home	5,655	5,698	5,719	2,234	2,250	2,260
Other Overnight	2,161	2,243	2,257	641	665	669
All Overnight	10,952	11,172	11,252	4,180	4,258	4,291

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,413	1,455	1,475	584	602	610
Private Home	1,584	1,596	1,602	618	623	625
Other Overnight	569	591	594	169	175	176
All Overnight	3,566	3,642	3,672	1,371	1,399	1,411

CENTRAL OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$84,410
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$17,681
Additional employment if each resident household encouraged one additional overnight visitor	210

Visitor Shares

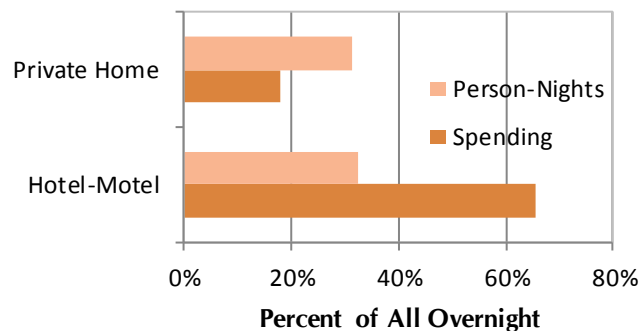
Travel Share of Total Employment (2013)*	6.8%
Overnight Visitor Day Share of Resident Population (2014p)**	10.7%

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

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

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

Overnight Visitor Spending and Volume



	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
2014p			
Hotel, Motel	1,236	2,683	\$378
Private Home	746	2,591	\$104
Other Overnight	784	2,954	\$94
All Overnight	2,766	8,228	\$576

Central Oregon Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	221	57	4,430	3.6	5.4	9.0
1992	230	59	4,320	3.7	5.8	9.5
1993	238	61	4,350	3.9	6.2	10.0
1994	260	67	4,580	4.4	6.7	11.1
1995	270	69	4,540	4.5	6.9	11.4
1996	283	72	4,580	4.7	7.0	11.8
1997	301	77	4,650	5.1	7.3	12.4
1998	310	81	4,970	5.4	7.6	13.0
1999	336	87	5,250	5.9	8.1	14.0
2000	371	96	5,730	6.7	9.0	15.7
2001	370	96	5,750	6.6	8.9	15.6
2002	382	99	5,810	6.9	9.1	16.0
2003	401	101	5,750	6.9	9.4	16.3
2004	427	105	5,840	7.2	10.5	17.7
2005	464	111	5,820	7.7	11.1	18.8
2006	570	138	6,720	9.5	13.6	23.1
2007	594	147	7,180	8.9	14.3	23.2
2008	622	154	7,450	8.4	14.9	23.2
2009	592	146	6,990	7.5	13.8	21.3
2010	617	146	7,020	7.9	14.1	22.0
2011	634	154	7,190	8.4	16.0	24.4
2012	673	163	7,500	9.0	16.7	25.7
2013	720	176	7,910	10.2	17.7	27.9
2014p	747	191	8,290	11.0	18.5	29.5
Annual Percentage Change						
13-14p	3.7	8.6	4.7	8.1	4.3	5.7
91-14p	5.4	5.4	2.8	5.0	5.5	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.

Central Oregon Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	526	573	557	581	621	666	690
Other Travel*	44	49	59	53	52	54	56
Total Direct Spending	570	622	617	634	673	720	747
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	133	138	131	138	150	166	180
Food Service	126	139	142	147	160	173	181
Food Stores	46	52	50	52	55	58	61
Local Tran. & Gas	66	84	70	84	88	88	85
Arts, Ent. & Rec.	67	70	68	69	73	77	79
Retail Sales	70	71	71	73	77	80	81
Visitor Air Tran.	18	19	27	18	19	23	24
Destination Spending	526	573	557	581	621	666	690
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	96.5	107.1	102.1	107.6	115.2	124.8	136.1
Arts, Ent. & Rec.	20.1	24.1	21.9	22.3	23.5	25.8	28.5
Retail**	15.4	16.8	16.1	16.8	17.7	18.7	19.3
Ground Tran.	2.0	2.2	2.1	2.3	2.4	2.6	2.8
Visitor Air Tran.	0.6	0.6	0.6	0.6	0.6	0.7	0.7
Other Travel*	3.1	3.5	3.5	4.0	3.7	3.7	3.9
Total Direct Earnings	137.7	154.3	146.3	153.6	163.1	176.3	191.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,540	4,950	4,710	4,810	4,990	5,270	5,530
Arts, Ent. & Rec.	1,230	1,530	1,400	1,440	1,540	1,630	1,720
Retail**	750	760	720	740	770	810	820
Ground Tran.	70	70	70	70	80	80	80
Visitor Air Tran.	20	20	20	20	20	20	20
Other Travel*	110	110	100	110	100	100	110
Total Direct Employment	6,720	7,450	7,020	7,190	7,500	7,910	8,290
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.5	8.4	7.9	8.4	9.0	10.2	11.0
State Tax Receipts	13.6	14.9	14.1	16.0	16.7	17.7	18.5
Total Local & State	23.1	23.2	22.0	24.4	25.7	27.9	29.5

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Central Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	433	476	463	480	515	554	576
Hotel, Motel	270	297	286	300	328	358	378
Private Home	81	91	93	94	98	103	104
Other Overnight	82	89	83	86	89	93	94
Campground	45	47	42	43	45	48	48
Vacation Home	37	42	41	43	44	45	46
Day Travel	93	97	95	100	107	112	115
Spending at Destination	526	573	557	581	621	666	690

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$339	\$741	\$141	\$306	2.4	2.2
Private Home	\$99	\$351	\$40	\$139	2.5	3.5
Other Overnight	\$104	\$392	\$32	\$120	3.3	3.8
All Overnight	\$188	\$551	\$70	\$208	2.7	2.9

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	2,409	2,600	2,683	999	1,078	1,114
Private Home	2,545	2,600	2,591	1,020	1,046	1,046
Other Overnight	2,832	2,931	2,954	870	900	907
All Overnight	7,787	8,130	8,228	2,889	3,023	3,066

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,110	1,198	1,236	458	494	510
Private Home	734	749	746	289	296	295
Other Overnight	752	777	784	231	238	240
All Overnight	2,596	2,725	2,766	978	1,028	1,046

EASTERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$61,360
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$9,815
Additional employment if each resident household encouraged one additional overnight visitor	160

Visitor Shares

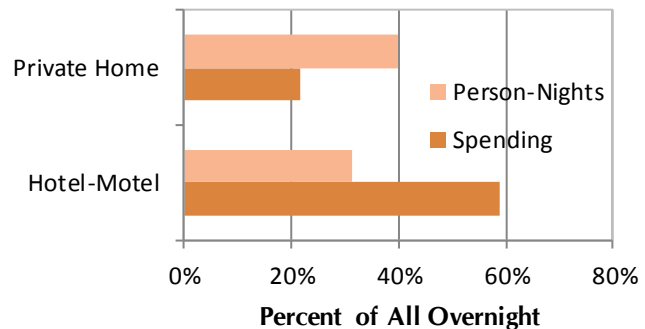
Travel Share of Total Employment (2013)*	5.2%
Overnight Visitor Day Share of Resident Population (2014p)**	7.0%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	766	1,518	\$144
Private Home	630	1,937	\$54
Other Overnight	389	1,389	\$48
All Overnight	1,785	4,843	\$246

Eastern Oregon Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	170	47	4,750	1.0	4.8	5.8
1992	184	51	4,830	1.2	5.3	6.5
1993	197	55	5,030	1.3	5.8	7.1
1994	206	58	5,140	1.5	6.1	7.5
1995	216	60	5,190	1.7	6.2	7.9
1996	223	62	5,190	1.8	6.2	8.0
1997	229	64	5,110	1.8	6.3	8.1
1998	238	68	5,440	1.9	6.6	8.5
1999	249	71	5,400	2.0	6.7	8.7
2000	263	73	5,440	2.1	7.1	9.2
2001	264	74	5,490	2.2	7.0	9.2
2002	280	79	5,740	2.2	7.3	9.6
2003	284	79	5,630	2.2	7.5	9.7
2004	297	82	5,530	2.5	8.0	10.5
2005	307	83	5,380	2.6	8.2	10.8
2006	328	88	5,620	2.9	8.7	11.6
2007	327	90	5,540	3.2	8.8	12.1
2008	324	88	5,310	3.1	8.7	11.8
2009	300	87	5,150	3.0	8.3	11.3
2010	316	87	5,050	3.2	8.5	11.7
2011	338	91	5,210	3.3	9.7	13.0
2012	335	96	5,310	3.3	9.8	13.1
2013	340	98	5,380	3.4	9.8	13.3
2014p	346	103	5,440	3.6	10.0	13.6
Annual Percentage Change						
13-14p	1.9	4.7	1.2	4.4	1.3	2.1
91-14p	3.1	3.5	0.6	5.7	3.2	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.

Eastern Oregon Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	314	307	302	322	319	324	331
Other Travel*	14	17	14	16	16	16	15
Total Direct Spending	328	324	316	338	335	340	346
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	59	64	64	66	64	67	70
Food Service	76	72	75	79	79	81	85
Food Stores	34	33	33	35	35	36	38
Local Tran. & Gas	46	53	45	55	54	51	50
Arts, Ent. & Rec.	56	48	48	49	49	49	50
Retail Sales	42	36	37	38	38	38	39
Destination Spending	314	307	302	322	319	324	331
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	59.0	60.1	59.7	62.9	67.6	69.0	72.3
Arts, Ent. & Rec.	15.5	15.6	14.4	14.9	15.5	15.9	16.6
Retail**	10.9	10.3	10.3	10.8	10.8	11.0	11.4
Ground Tran.	1.5	1.4	1.4	1.5	1.5	1.5	1.6
Other Travel*	0.9	0.8	1.1	0.7	0.7	0.7	0.7
Total Direct Earnings	88.0	88.5	86.9	90.7	96.1	98.0	102.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,440	3,270	3,110	3,240	3,290	3,310	3,350
Arts, Ent. & Rec.	1,490	1,410	1,340	1,370	1,430	1,480	1,490
Retail**	570	520	500	510	500	500	510
Ground Tran.	60	50	50	50	50	50	50
Visitor Air Tran.	10	10	0	0	0	0	0
Other Travel*	50	50	50	40	40	40	40
Total Direct Employment	5,620	5,310	5,050	5,210	5,310	5,380	5,440
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.9	3.1	3.2	3.3	3.3	3.4	3.6
State Tax Receipts	8.7	8.7	8.5	9.7	9.8	9.8	10.0
Total Local & State	11.6	11.8	11.7	13.0	13.1	13.3	13.6

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Eastern Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	219	231	226	239	237	241	246
Hotel, Motel	131	141	135	143	140	140	144
Private Home	45	48	49	52	52	53	54
Other Overnight	43	43	42	44	45	47	48
Campground	34	32	32	33	34	37	37
Vacation Home	10	10	10	11	11	11	11
Day Travel	95	76	76	83	82	84	85
Spending at Destination	314	307	302	322	319	324	331

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$233	\$462	\$95	\$188	2.5	2.0
Private Home	\$71	\$218	\$28	\$85	2.6	3.1
Other Overnight	\$116	\$413	\$35	\$123	3.4	3.6
All Overnight	\$138	\$365	\$51	\$138	2.7	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,510	1,487	1,518	616	606	619
Private Home	1,894	1,902	1,937	739	742	756
Other Overnight	1,334	1,379	1,389	397	410	413
All Overnight	4,738	4,768	4,843	1,752	1,758	1,787

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	762	750	766	311	306	312
Private Home	616	619	630	240	241	246
Other Overnight	374	386	389	112	115	116
All Overnight	1,752	1,755	1,785	663	663	674

MT. HOOD/GORGE TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$78,580
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$7,131
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

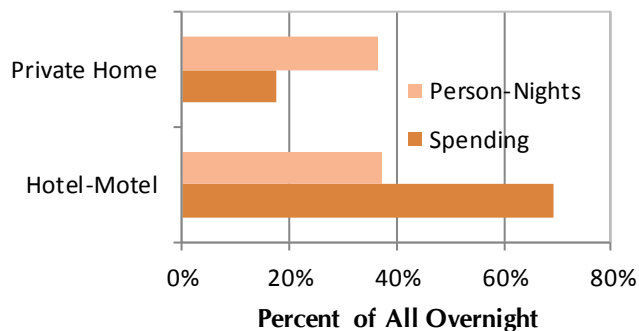
Travel Share of Total Employment (2013)*	7.1%
Overnight Visitor Day Share of Resident Population (2014p)**	9.2%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	551	1,195	\$148
Private Home	338	1,164	\$37
Other Overnight	219	832	\$29
All Overnight	1,107	3,191	\$214

Mt. Hood/Gorge Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	140	37	3,130	1.0	3.6	4.6
1992	154	40	3,220	1.2	4.0	5.2
1993	164	43	3,340	1.4	4.3	5.7
1994	172	46	3,380	1.5	4.5	6.0
1995	181	48	3,430	1.5	4.7	6.2
1996	193	52	3,520	1.6	4.9	6.5
1997	205	55	3,600	1.7	5.1	6.8
1998	207	57	3,640	1.8	5.1	7.0
1999	216	59	3,620	1.9	5.3	7.2
2000	228	61	3,680	2.2	5.5	7.7
2001	232	62	3,720	2.3	5.6	7.9
2002	226	61	3,580	2.3	5.4	7.6
2003	231	61	3,590	2.3	5.5	7.7
2004	240	63	3,590	2.4	6.0	8.4
2005	255	66	3,680	2.7	6.3	9.0
2006	280	72	3,900	3.0	6.8	9.9
2007	290	78	4,060	3.3	7.2	10.5
2008	295	79	4,040	3.3	7.3	10.6
2009	272	76	3,810	3.2	6.8	10.0
2010	290	77	3,760	3.4	7.2	10.5
2011	309	81	3,860	3.6	8.1	11.7
2012	326	85	4,010	3.9	8.4	12.3
2013	327	89	4,130	4.1	8.6	12.7
2014p	351	97	4,350	4.6	9.1	13.8
Annual Percentage Change						
13-14p	7.1	9.2	5.5	12.6	6.7	8.6
91-14p	4.1	4.3	1.5	6.8	4.2	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.

Mt. Hood/The Gorge Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	267	281	275	293	309	310	333
Other Travel*	13	14	15	16	17	17	18
Total Direct Spending	280	295	290	309	326	327	351
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	46	53	52	55	60	63	70
Food Service	74	76	79	82	87	88	96
Food Stores	23	25	25	26	27	28	30
Local Tran. & Gas	33	41	35	42	43	41	41
Arts, Ent. & Rec.	39	38	37	38	40	39	42
Retail Sales	52	48	48	49	52	51	54
Destination Spending	267	281	275	293	309	310	333
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	47.0	51.7	50.4	53.5	57.0	59.7	65.8
Arts, Ent. & Rec.	11.6	13.1	12.0	12.3	12.8	13.6	14.6
Retail**	9.4	9.5	9.3	9.7	10.1	10.2	11.0
Ground Tran.	1.1	1.1	1.1	1.2	1.2	1.2	1.4
Other Travel*	3.5	3.2	4.0	4.0	4.2	4.3	4.6
Total Direct Earnings	72.5	78.7	76.8	80.7	85.4	89.0	97.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,560	2,650	2,460	2,560	2,680	2,760	2,930
Arts, Ent. & Rec.	750	830	740	730	740	790	810
Retail**	440	420	400	420	440	430	460
Ground Tran.	40	40	40	40	40	40	40
Other Travel*	110	90	110	110	110	110	110
Total Direct Employment	3,900	4,040	3,760	3,860	4,010	4,130	4,350
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.0	3.3	3.4	3.6	3.9	4.1	4.6
State Tax Receipts	6.8	7.3	7.2	8.1	8.4	8.6	9.1
Total Local & State	9.9	10.6	10.5	11.7	12.3	12.7	13.8

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Mt. Hood/Gorge Visitor Volume and Visitor Spending

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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	159	182	176	186	198	199	214
Hotel, Motel	106	122	118	126	134	135	148
Private Home	30	32	33	35	36	36	37
Other Overnight	22	27	25	26	27	28	29
Campground	16	20	18	19	19	21	21
Vacation Home	6	7	7	7	8	8	8
Day Travel	109	100	99	106	111	112	119
Spending at Destination	267	281	275	293	309	310	333

Average Expenditures for Overnight Visitors, 2014p

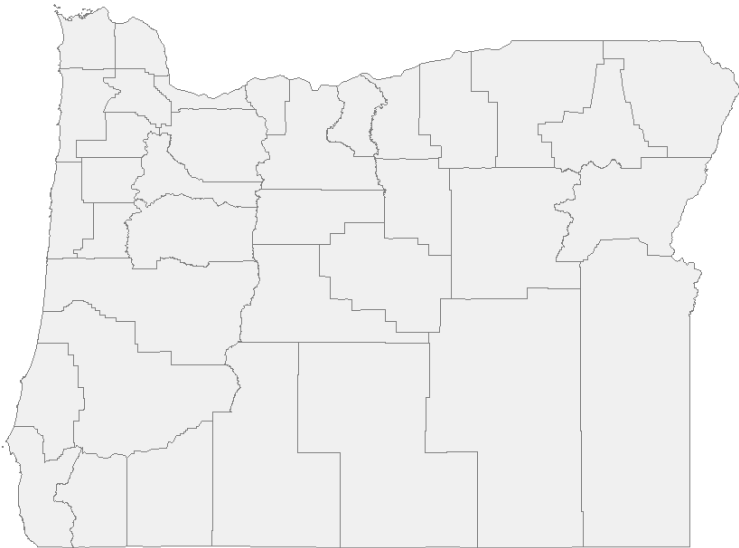
	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$286	\$635	\$124	\$269	2.3	2.2
Private Home	\$78	\$276	\$32	\$110	2.4	3.5
Other Overnight	\$115	\$439	\$34	\$131	3.3	3.8
All Overnight	\$172	\$494	\$67	\$194	2.6	2.9

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,133	1,099	1,195	490	476	518
Private Home	1,137	1,123	1,164	465	461	479
Other Overnight	797	826	832	238	247	249
All Overnight	3,066	3,048	3,191	1,194	1,184	1,246

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	521	505	551	221	214	234
Private Home	330	326	338	131	130	135
Other Overnight	209	217	219	62	65	65
All Overnight	1,060	1,048	1,107	415	409	434

IV. COUNTY TRAVEL IMPACTS AND VISITOR VOLUME



2014p County Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment	Tax Revenue (\$000)		
	All Travel	Destination			Local	State	Total
Baker	43.7	41.2	12.2	710	410	1,180	1,590
Benton	115.6	100.1	29.2	1,510	1,460	3,500	4,960
Clackamas	551.0	461.3	140.6	5,780	4,610	15,660	20,260
Clatsop	516.7	509.7	140.6	5,420	9,320	12,180	21,490
Columbia	38.7	30.9	10.1	590	0	1,370	1,370
Coos	253.2	238.7	66.7	3,060	1,220	6,670	7,890
Crook	40.3	37.1	10.1	470	220	1,000	1,230
Curry	123.9	120.4	41.7	1,780	540	3,110	3,650
Deschutes	621.3	531.5	153.5	6,240	10,250	15,190	25,440
Douglas	230.5	212.6	61.3	2,970	1,180	6,170	7,350
East Douglas	171.5	154.9	45.0	2,190	990	4,800	5,790
West Douglas	59.0	57.7	16.3	790	190	1,370	1,560
Gilliam	4.2	3.9	0.9	50	0	110	110
Grant	10.6	9.5	2.4	160	70	290	360
Harney	16.8	15.6	5.2	290	240	440	680
Hood River	87.4	83.7	23.0	1,040	1,540	2,380	3,930
Jackson	506.3	390.4	122.7	5,040	7,390	12,500	19,890
Jefferson	47.5	44.2	14.3	940	510	1,460	1,980
Josephine	123.9	109.7	35.4	1,680	1,100	3,750	4,850
Klamath	141.5	128.9	43.1	1,840	1,570	4,190	5,760
Lake	13.6	12.4	2.9	210	110	360	470
Lane	849.5	609.9	218.6	9,770	10,490	20,560	31,050
East Lane	727.4	503.7	180.7	8,020	9,780	17,840	27,620
West Lane	122.1	106.2	38.0	1,750	720	2,710	3,430
Lincoln	507.3	496.2	133.9	5,920	10,990	12,420	23,410
Linn	136.6	117.2	29.7	1,630	930	4,160	5,090
Malheur	40.3	35.5	11.0	570	680	1,190	1,870
Marion	383.6	326.6	92.1	4,540	3,400	11,830	15,230
Morrow	14.5	12.7	3.4	180	0	430	430
Multnomah	3,410.4	1,709.3	761.3	20,950	92,900	62,600	155,500
East Multnomah	74.3	69.6	20.1	940	1,270	1,840	3,110
West Multnomah	3,336.1	1,639.7	741.2	20,010	91,630	60,760	152,390
Polk	164.8	152.7	42.2	1,950	0	3,680	3,680
Sherman	4.8	4.5	1.2	50	10	130	140
Tillamook	221.1	217.1	65.7	2,160	1,310	4,930	6,240
Umatilla	147.9	135.4	45.1	2,310	1,390	4,470	5,850
Union	33.1	29.1	10.4	560	490	960	1,450
Wallowa	27.6	26.5	10.3	540	300	710	1,010
Wasco	102.4	98.4	34.4	1,640	850	2,630	3,480
North Wasco	64.9	61.1	21.0	1,000	850	1,780	2,630
South Wasco	37.5	37.3	13.4	640	0	850	850
Washington	671.2	540.1	182.5	7,020	9,080	20,520	29,610
Wheeler	2.8	2.6	0.6	30	0	70	70
Yamhill	115.6	98.6	28.6	1,540	0	3,550	3,550

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).

2014p County Overnight Visitor Volume

	Nights (000)		Trips (000)	
	Persons	Parties	Persons	Parties
Baker	633	225	233	85
Benton	1,387	541	627	247
Clackamas	6,988	3,217	2,493	1,122
Clatsop	3,733	1,412	1,651	640
Columbia	662	295	220	98
Coos	2,501	936	1,018	388
Crook	637	228	271	100
Curry	1,534	519	631	223
Deschutes	6,258	2,386	2,437	938
Douglas	2,430	880	916	338
Gilliam/Sherman	148	52	62	23
Gilliam	67	23	27	10
Grant	219	76	88	31
Harney	258	93	113	42
Hood River	884	333	368	142
Jackson	5,165	2,035	2,013	791
Jefferson	853	286	329	113
Josephine	1,828	687	688	262
Klamath	2,062	763	793	299
Lake	257	91	107	39
Lane	7,727	3,008	2,913	1,131
Lincoln	4,514	1,659	1,888	715
Linn	1,887	711	789	301
Malheur	620	236	280	108
Marion	5,161	1,960	1,893	726
Morrow	258	96	115	44
Multnomah	11,862	5,747	4,848	2,276
Polk	1,065	409	450	174
Sherman (see Gilliam)				
Tillamook	2,535	871	1,090	389
Umatilla	1,655	635	766	298
Union	554	203	234	88
Wallowa	428	148	183	66
Wasco	1,075	391	488	183
Washington	7,629	3,749	2,747	1,316
Wheeler	70	23	27	9
Yamhill	1,611	629	730	287

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 (2014p)

Amount of Visitor Spending that supports 1 Job	\$58,530
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$918
Additional employment if each resident household encouraged one additional overnight visitor	16

Visitor Shares

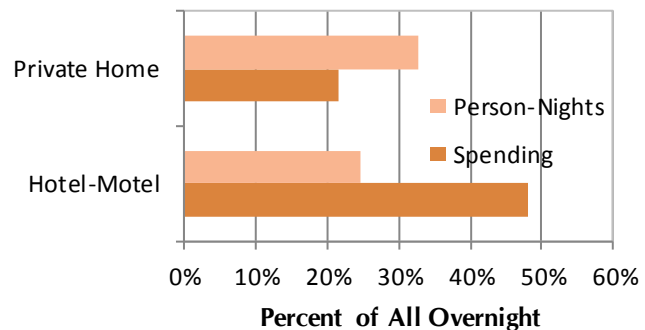
Travel Share of Total Employment (2013)*	8.5%
Overnight Visitor Day Share of Resident Population (2014p)**	10.7%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	82	155	\$14.5
Private Home	68	208	\$6.5
Other Overnight	82	270	\$9.2
All Overnight	233	633	\$30.2

Baker County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	23.5	6.0	680	147	627	774
1992	25.7	6.6	700	187	708	895
1993	27.9	7.2	740	220	781	1,001
1994	31.1	8.2	820	250	876	1,125
1995	32.1	8.4	800	270	885	1,155
1996	32.1	8.3	770	270	862	1,132
1997	34.3	9.1	790	265	911	1,177
1998	34.7	9.4	840	265	922	1,187
1999	34.8	9.3	820	264	912	1,176
2000	35.0	9.1	760	250	911	1,161
2001	34.7	9.0	740	244	894	1,138
2002	38.4	10.2	830	288	968	1,256
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	1,454
2010	41.7	10.9	670	403	1,075	1,477
2011	42.4	10.9	650	394	1,174	1,568
2012	43.2	11.6	700	400	1,197	1,597
2013	42.8	11.9	710	393	1,195	1,589
2014p	43.7	12.2	710	407	1,179	1,586
Annual Percentage Change						
13-14p	2.2%	2.8%	0.1%	3.7%	-1.4%	-0.1%
91-14p	2.7%	3.1%	0.2%	4.5%	2.8%	3.2%

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.

**Baker County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	41.4	38.9	39.5	39.7	40.6	40.2	41.2
Other Travel*	2.3	2.8	2.2	2.6	2.7	2.6	2.5
Total Direct Spending	43.6	41.7	41.7	42.4	43.2	42.8	43.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.9	7.3	7.5	7.2	7.3	7.4	7.6
Food Service	11.1	10.2	10.8	10.8	11.1	11.2	11.7
Food Stores	4.9	4.6	4.7	4.8	5.0	5.1	5.3
Local Tran. & Gas	5.3	5.7	5.0	5.7	5.7	5.2	5.1
Arts, Ent. & Rec.	6.2	5.3	5.3	5.2	5.3	5.3	5.4
Retail Sales	7.0	5.8	6.0	6.0	6.1	6.0	6.1
Destination Spending	41.4	38.9	39.5	39.7	40.6	40.2	41.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	7.5	7.4	7.5	7.5	7.8	8.0	8.2
Arts, Ent. & Rec.	1.7	1.7	1.6	1.6	1.9	2.1	2.1
Retail**	1.6	1.5	1.5	1.5	1.6	1.6	1.6
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	11.2	10.9	10.9	10.9	11.6	11.9	12.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	450	430	400	390	390	400	400
Arts, Ent. & Rec.	200	180	180	170	220	220	220
Retail**	90	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	750	700	670	650	700	710	710
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.4	0.4	0.4	0.4	0.4	0.4
State Tax Receipts	1.1	1.1	1.1	1.2	1.2	1.2	1.2
Total Local & State	1.5	1.5	1.5	1.6	1.6	1.6	1.6

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Baker County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	28.6	29.0	29.3	29.3	29.8	29.5	30.2
Hotel, Motel	14.5	15.2	15.0	14.7	14.8	14.1	14.5
Private Home	5.6	5.8	6.0	6.2	6.3	6.3	6.5
Other Overnight	8.5	8.0	8.3	8.4	8.7	9.1	9.2
Campground	5.8	5.1	5.4	5.5	5.7	6.1	6.2
Vacation Home	2.7	2.9	2.8	2.9	2.9	3.0	3.0
Day Travel	12.8	9.9	10.2	10.4	10.7	10.7	11.0
Spending at Destination	41.4	38.9	39.5	39.7	40.6	40.2	41.2

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$228	\$432	\$93	\$177	2.4	1.9
Private Home	\$82	\$249	\$31	\$96	2.6	3.0
Other Overnight	\$113	\$372	\$34	\$112	3.3	3.3
All Overnight	\$135	\$358	\$48	\$130	2.8	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	163	152	155	67	62	64
Private Home	203	201	208	78	77	80
Other Overnight	259	268	270	78	81	81
All Overnight	625	621	633	223	220	225

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	86	81	82	35	33	34
Private Home	67	66	68	26	25	26
Other Overnight	79	82	82	24	25	25
All Overnight	232	228	233	85	83	85

BENTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$68,560
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,092
Additional employment if each resident household encouraged one additional overnight visitor	60

Visitor Shares

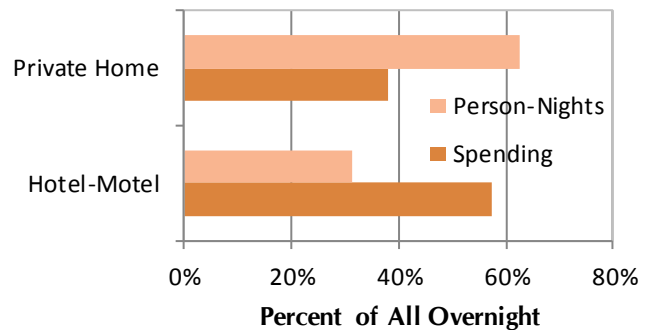
Travel Share of Total Employment (2013)*	3.0%
Overnight Visitor Day Share of Resident Population (2014p)**	4.3%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	261	434	\$42.0
Private Home	338	869	\$27.8
Other Overnight	28	84	\$3.3
All Overnight	627	1,387	\$73.1

Benton County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	48.9	13.0	1,250	404	1,576	1,980
1992	51.9	13.7	1,240	449	1,734	2,184
1993	54.2	14.3	1,250	476	1,840	2,316
1994	58.7	15.6	1,330	555	1,993	2,548
1995	62.2	16.6	1,360	628	2,075	2,702
1996	64.4	17.1	1,360	667	2,089	2,756
1997	65.1	17.4	1,320	676	2,080	2,756
1998	64.8	17.8	1,340	666	2,075	2,741
1999	65.8	17.7	1,250	694	2,069	2,763
2000	71.2	18.7	1,320	757	2,197	2,953
2001	71.1	18.7	1,320	756	2,178	2,934
2002	72.5	19.2	1,320	758	2,189	2,947
2003	75.5	19.7	1,320	777	2,263	3,040
2004	84.8	22.0	1,490	937	2,565	3,502
2005	88.5	22.3	1,490	993	2,638	3,631
2006	94.1	23.4	1,510	1,082	2,764	3,845
2007	95.2	24.3	1,520	1,102	2,825	3,927
2008	99.8	25.0	1,530	1,153	2,891	4,044
2009	88.2	23.6	1,420	995	2,676	3,671
2010	99.1	25.1	1,460	1,158	2,880	4,038
2011	107.8	26.6	1,550	1,081	3,386	4,467
2012	114.3	28.4	1,590	1,302	3,494	4,795
2013	115.9	28.1	1,540	1,410	3,501	4,911
2014p	115.6	29.2	1,510	1,463	3,501	4,964
Annual Percentage Change						
13-14p	-0.2%	3.8%	-1.8%	3.8%	0.0%	1.1%
91-14p	3.8%	3.6%	0.8%	5.8%	3.5%	4.1%

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.

Benton County
Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	80.1	83.1	85.4	91.3	97.2	100.0	100.1
Other Travel*	14.0	16.8	13.7	16.5	17.1	15.8	15.5
Total Direct Spending	94.1	99.8	99.1	107.8	114.3	115.9	115.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.6	14.6	14.5	15.4	16.7	18.0	18.7
Food Service	21.9	22.5	24.6	25.8	27.9	29.1	29.5
Food Stores	8.1	8.7	9.0	9.6	10.1	10.3	10.5
Local Tran. & Gas	10.3	12.3	11.1	13.3	14.0	13.7	12.8
Arts, Ent. & Rec.	11.9	11.5	11.9	12.2	12.9	13.1	13.0
Retail Sales	14.3	13.5	14.4	14.9	15.6	15.8	15.6
Destination Spending	80.1	83.1	85.4	91.3	97.2	100.0	100.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	14.4	15.5	15.8	16.9	18.0	18.4	19.4
Arts, Ent. & Rec.	4.1	4.6	4.4	4.6	4.9	4.5	4.4
Retail**	3.0	3.0	3.1	3.3	3.4	3.5	3.6
Ground Tran.	0.4	0.4	0.4	0.5	0.5	0.5	0.5
Other Travel*	1.6	1.6	1.3	1.4	1.6	1.2	1.3
Total Direct Earnings	23.4	25.0	25.1	26.6	28.4	28.1	29.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	840	850	800	850	870	880	900
Arts, Ent. & Rec.	430	450	440	470	480	420	380
Retail**	160	160	160	160	170	170	170
Ground Tran.	10	10	10	10	20	20	20
Other Travel*	60	60	50	50	60	50	50
Total Direct Employment	1,510	1,530	1,460	1,550	1,590	1,540	1,510
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.2	1.2	1.1	1.3	1.4	1.5
State Tax Receipts	2.8	2.9	2.9	3.4	3.5	3.5	3.5
Total Local & State	3.8	4.0	4.0	4.5	4.8	4.9	5.0

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Benton County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	56.1	60.9	62.0	66.2	70.7	72.9	73.1
Hotel, Motel	30.9	33.5	33.4	36.2	39.6	41.8	42.0
Private Home	22.2	24.3	25.7	27.0	28.0	27.8	27.8
Other Overnight	3.0	3.0	2.9	3.0	3.1	3.3	3.3
Campground	2.5	2.5	2.4	2.4	2.5	2.7	2.7
Vacation Home	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Day Travel	24.0	22.2	23.3	25.1	26.5	27.1	27.0
Spending at Destination	80.1	83.1	85.4	91.3	97.2	100.0	100.1

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$237	\$394	\$97	\$161	2.5	1.7
Private Home	\$82	\$211	\$32	\$82	2.6	2.6
Other Overnight	\$134	\$402	\$40	\$119	3.4	3.0
All Overnight	\$135	\$296	\$53	\$117	2.6	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	421	442	434	172	180	177
Private Home	879	875	869	344	342	340
Other Overnight	80	83	84	24	25	25
All Overnight	1,381	1,401	1,387	539	547	541

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	253	266	261	103	108	106
Private Home	342	340	338	134	133	132
Other Overnight	27	28	28	8	8	8
All Overnight	622	634	627	245	250	247

CLACKAMAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$85,560
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$21,140
Additional employment if each resident household encouraged one additional overnight visitor	247

Visitor Shares

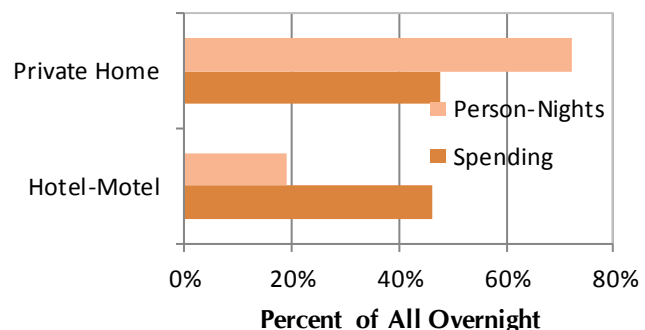
Travel Share of Total Employment (2013)*	2.5%
Overnight Visitor Day Share of Resident Population (2014p)**	4.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	675	1,340	\$144.9
Private Home	1,636	5,045	\$150.4
Other Overnight	182	603	\$18.8
All Overnight	2,493	6,988	\$314.1

Clackamas County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	208.2	52.9	4,110	672	6,195	6,867
1992	227.6	57.9	4,230	744	6,930	7,674
1993	246.9	63.3	4,480	959	7,525	8,484
1994	252.2	64.8	4,420	1,176	7,745	8,921
1995	270.9	70.5	4,570	1,283	8,105	9,388
1996	287.6	75.4	4,700	1,553	8,323	9,876
1997	310.0	82.5	4,860	1,746	8,734	10,480
1998	297.9	79.5	4,620	1,767	8,463	10,230
1999	314.0	82.9	4,640	1,850	8,735	10,585
2000	337.0	87.3	4,800	2,110	9,215	11,324
2001	340.0	88.2	4,810	2,032	9,227	11,259
2002	341.4	88.7	4,840	2,102	9,126	11,228
2003	344.6	88.5	4,710	2,039	9,245	11,284
2004	363.9	91.7	4,870	2,168	9,994	12,162
2005	394.4	98.1	5,010	2,869	10,611	13,480
2006	433.3	107.4	5,270	3,282	11,496	14,778
2007	451.6	116.5	5,490	3,644	12,088	15,732
2008	469.1	119.5	5,580	3,770	12,344	16,114
2009	430.4	117.0	5,340	3,134	11,633	14,766
2010	460.1	116.0	5,180	3,215	12,582	15,797
2011	499.3	123.4	5,370	3,618	14,651	18,269
2012	529.3	130.6	5,530	3,932	15,111	19,043
2013	533.3	134.6	5,630	4,267	15,378	19,645
2014p	551.0	140.6	5,780	4,605	15,657	20,262
Annual Percentage Change						
13-14p	3.3%	4.5%	2.7%	7.9%	1.8%	3.1%
91-14p	4.3%	4.3%	1.5%	8.7%	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, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	380.0	405.7	386.1	413.8	440.0	444.3	461.3
Other Travel*	53.3	63.5	74.0	85.5	89.3	88.9	89.7
Total Direct Spending	433.3	469.1	460.1	499.3	529.3	533.3	551.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	59.2	66.8	58.5	65.5	72.0	73.7	79.5
Food Service	110.5	118.0	119.0	124.7	133.8	137.3	144.3
Food Stores	28.4	32.4	30.8	32.8	34.5	35.1	36.8
Local Tran. & Gas	47.0	56.2	48.9	56.8	59.5	57.4	56.8
Arts, Ent. & Rec.	47.3	47.6	45.3	46.7	49.0	49.3	50.8
Retail Sales	87.6	84.7	83.7	87.2	91.2	91.5	93.2
Destination Spending	380.0	405.7	386.1	413.8	440.0	444.3	461.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	68.7	77.0	72.0	77.6	82.4	84.0	87.5
Arts, Ent. & Rec.	14.2	16.5	14.8	15.3	16.0	17.6	18.1
Retail**	13.9	14.6	13.9	14.6	15.3	15.5	16.2
Ground Tran.	4.0	4.3	4.1	4.4	4.6	4.7	5.0
Other Travel*	6.6	7.1	11.2	11.4	12.3	12.8	13.7
Total Direct Earnings	107.4	119.5	116.0	123.4	130.6	134.6	140.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,270	3,460	3,130	3,320	3,430	3,450	3,530
Arts, Ent. & Rec.	1,020	1,120	1,010	980	1,010	1,070	1,100
Retail**	580	600	560	580	600	600	600
Ground Tran.	150	140	140	140	150	150	150
Other Travel*	260	250	350	350	350	370	390
Total Direct Employment	5,270	5,580	5,180	5,370	5,530	5,630	5,780
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.3	3.8	3.2	3.6	3.9	4.3	4.6
State Tax Receipts	11.5	12.3	12.6	14.7	15.1	15.4	15.7
Total Local & State	14.8	16.1	15.8	18.3	19.0	19.6	20.3

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Clackamas County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	281.6	310.6	293.0	314.1	335.1	338.1	351.9
Hotel, Motel	132.2	147.1	133.1	144.9	158.4	160.1	169.6
Private Home	133.1	142.9	141.7	150.4	157.5	157.9	161.8
Other Overnight	16.3	20.6	18.2	18.8	19.3	20.1	20.5
Campground	10.2	13.9	11.4	11.7	12.0	12.8	12.9
Vacation Home	6.1	6.7	6.8	7.1	7.3	7.4	7.5
Day Travel	98.3	95.1	93.2	99.7	104.9	106.2	109.5
Spending at Destination	380.0	405.7	386.1	413.8	440.0	444.3	461.3

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$271	\$554	\$127	\$251	2.1	2.0
Private Home	\$67	\$213	\$32	\$99	2.1	3.2
Other Overnight	\$110	\$365	\$34	\$112	3.2	3.3
All Overnight	\$109	\$314	\$50	\$141	2.2	2.9

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,295	1,297	1,340	601	603	626
Private Home	4,979	4,970	5,045	2,358	2,362	2,405
Other Overnight	579	598	603	179	185	186
All Overnight	6,853	6,866	6,988	3,138	3,150	3,217

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	653	653	675	294	295	306
Private Home	1,615	1,612	1,636	747	747	760
Other Overnight	175	181	182	54	56	56
All Overnight	2,442	2,446	2,493	1,095	1,098	1,122

CLATSOP COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$94,460
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,141
Additional employment if each resident household encouraged one additional overnight visitor	33

Visitor Shares

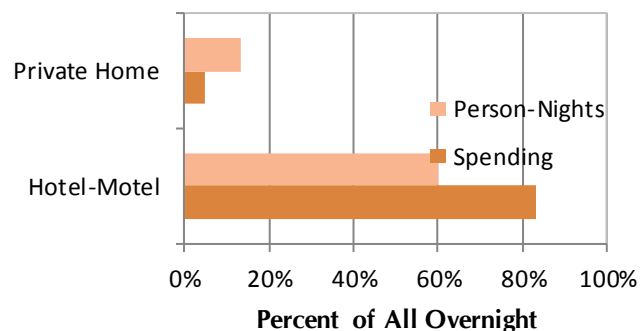
Travel Share of Total Employment (2013)*	22.3%
Overnight Visitor Day Share of Resident Population (2014p)**	27.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,190	2,252	\$270.5
Private Home	162	492	\$15.5
Other Overnight	299	989	\$38.2
All Overnight	1,651	3,733	\$324.2

Clatsop County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	187.8	53.3	3,830	2,370	4,460	6,829
1992	196.9	55.8	3,780	2,624	4,779	7,402
1993	210.4	59.8	3,920	2,866	5,149	8,015
1994	228.0	65.0	4,100	3,182	5,592	8,775
1995	235.9	67.3	4,080	3,339	5,712	9,051
1996	236.1	67.3	3,960	3,414	5,599	9,013
1997	242.7	69.4	3,910	3,557	5,672	9,229
1998	251.3	72.9	4,070	3,777	5,837	9,614
1999	264.0	76.4	4,260	4,076	6,059	10,135
2000	283.0	80.9	4,460	4,386	6,452	10,839
2001	292.5	83.6	4,600	4,538	6,600	11,139
2002	305.5	88.0	4,720	4,850	6,775	11,626
2003	317.6	92.1	4,760	4,875	7,088	11,962
2004	331.0	95.4	4,760	5,179	7,910	13,090
2005	346.4	98.9	4,780	5,428	8,223	13,651
2006	388.2	111.1	5,140	6,282	9,177	15,459
2007	387.6	114.2	5,170	6,511	9,365	15,877
2008	412.7	121.5	5,390	6,762	9,954	16,716
2009	395.3	120.3	5,260	6,604	9,686	16,290
2010	405.2	118.6	5,010	6,812	9,665	16,476
2011	414.1	119.8	4,930	7,087	10,399	17,486
2012	439.3	127.8	5,090	7,461	10,874	18,336
2013	467.5	134.4	5,280	8,321	11,501	19,822
2014p	516.7	140.6	5,420	9,317	12,176	21,493
Annual Percentage Change						
13-14p	10.5%	4.6%	2.7%	12.0%	5.9%	8.4%
91-14p	4.5%	4.3%	1.5%	6.1%	4.5%	5.1%

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.

Clatsop County
Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	370.3	397.1	387.0	396.2	419.2	460.4	509.7
Other Travel*	17.9	15.5	18.2	17.9	20.1	7.1	7.0
Total Direct Spending	388.2	412.7	405.2	414.1	439.3	467.5	516.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	86.5	94.6	93.2	94.7	100.9	109.6	122.6
Food Service	101.9	110.4	112.7	113.1	121.2	137.0	155.1
Food Stores	30.6	32.8	31.8	33.0	34.7	37.9	41.7
Local Tran. & Gas	38.7	49.2	41.4	47.6	49.6	52.2	55.0
Arts, Ent. & Rec.	51.6	51.6	49.8	49.4	51.8	56.9	62.7
Retail Sales	61.1	58.5	58.1	58.4	61.0	66.8	72.6
Destination Spending	370.3	397.1	387.0	396.2	419.2	460.4	509.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	76.4	85.3	83.0	84.5	90.4	100.5	103.9
Arts, Ent. & Rec.	16.0	18.4	16.7	16.6	17.3	17.9	18.9
Retail**	11.7	12.0	11.6	11.8	12.4	13.6	15.1
Ground Tran.	1.4	1.5	1.5	1.5	1.6	1.8	2.1
Other Travel*	5.7	4.1	5.8	5.3	6.2	0.7	0.7
Total Direct Earnings	111.1	121.5	118.6	119.8	127.8	134.4	140.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,620	3,740	3,520	3,490	3,600	3,810	3,880
Arts, Ent. & Rec.	850	960	830	780	800	810	830
Retail**	550	560	540	540	550	580	630
Ground Tran.	50	50	50	50	50	60	60
Other Travel*	80	70	70	80	90	30	30
Total Direct Employment	5,140	5,390	5,010	4,930	5,090	5,280	5,420
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.3	6.8	6.8	7.1	7.5	8.3	9.3
State Tax Receipts	9.2	10.0	9.7	10.4	10.9	11.5	12.2
Total Local & State	15.5	16.7	16.5	17.5	18.3	19.8	21.5

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Clatsop County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	220.8	254.1	246.7	250.7	265.9	291.5	324.2
Hotel, Motel	175.1	205.3	198.9	201.3	214.7	238.7	270.5
Private Home	13.1	14.1	13.6	14.4	15.1	15.2	15.5
Other Overnight	32.6	34.7	34.2	35.0	36.1	37.6	38.2
Campground	20.5	21.6	21.3	21.6	22.4	23.9	24.2
Vacation Home	12.1	13.1	12.9	13.5	13.7	13.7	14.0
Day Travel	149.5	143.0	140.3	145.5	153.3	168.9	185.5
Spending at Destination	370.3	397.1	387.0	396.2	419.2	460.4	509.7

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$294	\$555	\$120	\$227	2.4	1.9
Private Home	\$82	\$249	\$31	\$96	2.6	3.0
Other Overnight	\$126	\$420	\$39	\$128	3.3	3.3
All Overnight	\$230	\$506	\$87	\$196	2.6	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,739	1,977	2,252	712	809	921
Private Home	482	487	492	185	187	189
Other Overnight	957	982	989	293	300	302
All Overnight	3,179	3,446	3,733	1,190	1,296	1,412

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	920	1,045	1,190	376	428	487
Private Home	159	160	162	61	61	62
Other Overnight	289	297	299	88	90	91
All Overnight	1,367	1,502	1,651	525	580	640

COLUMBIA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$53,810
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,779
Additional employment if each resident household encouraged one additional overnight visitor	33

Visitor Shares

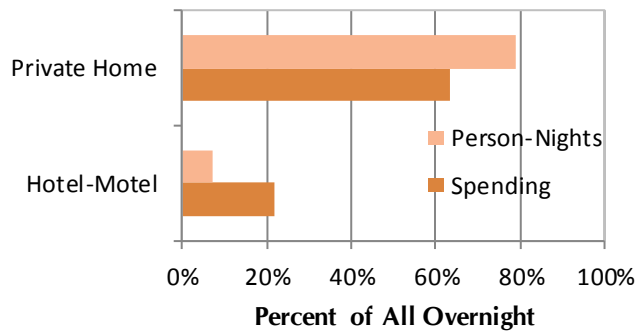
Travel Share of Total Employment (2013)*	3.6%
Overnight Visitor Day Share of Resident Population (2014p)**	3.6%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	23	48	\$4.4
Private Home	169	524	\$12.8
Other Overnight	28	90	\$3.0
All Overnight	220	662	\$20.2

Columbia County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	14.5	3.2	340	0	561	561
1992	16.0	3.6	350	0	633	633
1993	16.7	3.7	350	0	673	673
1994	17.8	4.0	370	0	716	716
1995	19.7	4.6	400	0	761	761
1996	20.8	4.8	410	0	774	774
1997	20.1	4.6	370	0	757	757
1998	20.9	5.0	410	0	784	784
1999	22.4	5.2	420	0	818	818
2000	23.7	5.4	430	0	833	833
2001	23.9	5.5	430	0	837	837
2002	24.5	5.7	440	0	844	844
2003	25.8	5.8	440	0	879	879
2004	27.5	6.1	480	0	930	930
2005	29.9	6.4	480	0	986	986
2006	33.7	7.2	530	0	1,084	1,084
2007	34.6	7.6	530	0	1,114	1,114
2008	36.4	7.6	520	0	1,130	1,130
2009	34.4	8.0	530	0	1,108	1,108
2010	33.7	8.2	530	0	1,111	1,111
2011	38.4	9.1	590	0	1,353	1,353
2012	37.6	9.3	570	0	1,332	1,332
2013	36.4	9.2	560	0	1,318	1,318
2014p	38.7	10.1	590	0	1,372	1,372
Annual Percentage Change						
13-14p	6.1%	10.4%	5.7%	0.0%	4.1%	4.1%
91-14p	4.3%	5.1%	2.5%	0.0%	4.0%	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.

Columbia County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	26.9	27.9	27.0	30.2	29.3	28.4	30.9
Other Travel*	6.8	8.5	6.7	8.1	8.3	8.0	7.8
Total Direct Spending	33.7	36.4	33.7	38.4	37.6	36.4	38.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.9	2.8	2.5	2.8	2.6	2.2	2.7
Food Service	7.7	7.9	8.2	9.0	8.8	8.8	9.7
Food Stores	4.2	4.8	4.7	5.3	5.2	5.3	5.7
Local Tran. & Gas	3.2	3.7	3.2	4.0	3.8	3.6	3.7
Arts, Ent. & Rec.	4.0	3.8	3.7	4.0	3.8	3.7	4.0
Retail Sales	4.9	4.7	4.7	5.2	5.0	4.9	5.2
Destination Spending	26.9	27.9	27.0	30.2	29.3	28.4	30.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	4.3	4.5	5.2	5.9	6.2	6.1	6.9
Arts, Ent. & Rec.	1.3	1.4	1.3	1.4	1.3	1.3	1.3
Retail**	1.2	1.3	1.2	1.4	1.3	1.3	1.5
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.2	0.2	0.2	0.2	0.3	0.3	0.3
Total Direct Earnings	7.2	7.6	8.2	9.1	9.3	9.2	10.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	290	280	310	330	340	340	360
Arts, Ent. & Rec.	150	150	140	160	140	140	140
Retail**	60	60	60	70	60	60	70
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	20	20	20	20	20	20
Total Direct Employment	530	520	530	590	570	560	590
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	1.1	1.1	1.1	1.4	1.3	1.3	1.4
Total Local & State	1.1	1.1	1.1	1.4	1.3	1.3	1.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Columbia County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	17.5	18.6	17.8	19.9	19.3	18.4	20.2
Hotel, Motel	5.9	5.0	4.4	5.1	4.5	3.5	4.4
Private Home	10.5	11.1	10.9	12.3	11.9	12.0	12.8
Other Overnight	1.1	2.6	2.5	2.5	2.8	3.0	3.0
Campground	0.7	2.1	2.0	2.1	2.4	2.5	2.5
Vacation Home	0.4	0.4	0.4	0.4	0.4	0.4	0.5
Day Travel	9.5	9.2	9.1	10.3	10.0	10.0	10.7
Spending at Destination	26.9	27.9	27.0	30.2	29.3	28.4	30.9

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$218	\$444	\$92	\$187	2.4	2.0
Private Home	\$52	\$161	\$24	\$76	2.1	3.1
Other Overnight	\$108	\$354	\$33	\$108	3.3	3.3
All Overnight	\$68	\$206	\$30	\$92	2.2	3.0

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	52	39	48	22	16	20
Private Home	492	493	524	232	232	247
Other Overnight	86	90	90	27	28	28
All Overnight	631	622	662	281	277	295

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	26	19	23	11	8	10
Private Home	159	159	169	75	75	80
Other Overnight	26	27	28	8	8	8
All Overnight	211	206	220	94	91	98

COOS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$80,300
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,192
Additional employment if each resident household encouraged one additional overnight visitor	52

Visitor Shares

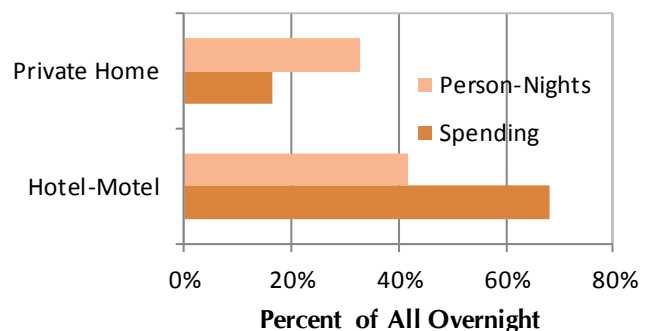
Travel Share of Total Employment (2013)*	9.9%
Overnight Visitor Day Share of Resident Population (2014p)**	10.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	550	1,040	\$107.2
Private Home	269	818	\$26.2
Other Overnight	199	643	\$24.1
All Overnight	1,018	2,501	\$157.5

Coos County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	96.0	24.8	2,540	523	2,623	3,146
1992	101.6	26.3	2,460	568	2,867	3,436
1993	104.6	27.1	2,440	656	2,988	3,644
1994	107.8	28.1	2,430	764	3,092	3,856
1995	114.3	30.3	2,570	796	3,231	4,027
1996	120.7	31.8	2,640	811	3,292	4,104
1997	119.8	31.5	2,500	756	3,217	3,973
1998	128.4	34.6	2,620	802	3,440	4,242
1999	141.9	38.4	2,780	934	3,727	4,661
2000	151.2	40.7	2,740	1,015	3,963	4,979
2001	159.5	43.0	2,980	1,109	4,124	5,233
2002	167.3	45.1	3,000	1,179	4,220	5,399
2003	180.5	48.3	3,110	1,188	4,513	5,701
2004	187.3	49.3	3,020	1,237	4,844	6,081
2005	196.9	50.8	2,970	1,310	5,043	6,354
2006	218.0	56.0	3,140	1,346	5,528	6,874
2007	223.8	59.3	3,220	1,393	5,752	7,145
2008	232.3	61.3	3,300	1,334	5,939	7,273
2009	193.0	54.0	2,870	1,089	5,122	6,210
2010	210.8	56.3	2,940	1,128	5,417	6,546
2011	220.7	58.4	3,020	1,048	6,074	7,122
2012	230.6	60.4	3,020	1,071	6,190	7,261
2013	243.6	63.4	3,010	1,157	6,466	7,622
2014p	253.2	66.7	3,060	1,218	6,669	7,886
Annual Percentage Change						
13-14p	3.9%	5.2%	1.9%	5.3%	3.1%	3.5%
91-14p	4.3%	4.4%	0.8%	3.7%	4.1%	4.1%

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.

**Coos County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	200.2	213.0	195.9	205.4	215.0	228.3	238.7
Other Travel*	17.8	19.3	14.8	15.3	15.5	15.4	14.5
Total Direct Spending	218.0	232.3	210.8	220.7	230.6	243.6	253.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	42.7	44.7	40.7	42.9	45.3	47.6	50.1
Food Service	51.5	55.6	53.9	55.3	58.7	64.1	68.5
Food Stores	19.6	21.3	19.9	20.7	21.7	23.0	24.2
Local Tran. & Gas	23.7	29.6	23.5	27.7	28.6	29.1	29.0
Arts, Ent. & Rec.	36.1	35.9	33.1	33.5	34.8	37.0	38.5
Retail Sales	26.6	26.0	24.8	25.2	26.1	27.6	28.4
Destination Spending	200.2	213.0	195.9	205.4	215.0	228.3	238.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	35.9	39.5	36.1	37.9	38.8	40.3	42.7
Arts, Ent. & Rec.	9.6	11.0	9.5	9.7	10.5	11.2	11.5
Retail**	6.1	6.5	6.0	6.2	6.4	6.8	7.2
Ground Tran.	0.8	0.9	0.8	0.9	0.9	1.0	1.1
Other Travel*	3.5	3.5	3.8	3.8	3.8	4.0	4.2
Total Direct Earnings	56.0	61.3	56.3	58.4	60.4	63.4	66.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,930	2,010	1,700	1,750	1,750	1,740	1,780
Arts, Ent. & Rec.	770	840	830	870	870	850	850
Retail**	300	310	280	280	290	300	310
Ground Tran.	30	30	30	30	30	30	30
Other Travel*	100	110	100	90	90	90	90
Total Direct Employment	3,140	3,300	2,940	3,020	3,020	3,010	3,060
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.3	1.3	1.1	1.0	1.1	1.2	1.2
State Tax Receipts	5.5	5.9	5.4	6.1	6.2	6.5	6.7
Total Local & State	6.9	7.3	6.5	7.1	7.3	7.6	7.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Coos County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	129.0	141.9	129.3	135.3	141.9	150.3	157.5
Hotel, Motel	84.1	94.5	83.9	88.9	93.7	100.6	107.2
Private Home	23.3	24.6	24.2	24.9	25.6	25.9	26.2
Other Overnight	21.6	22.8	21.2	21.5	22.5	23.8	24.1
Campground	18.4	19.4	17.9	18.1	19.0	20.3	20.6
Vacation Home	3.2	3.4	3.3	3.4	3.5	3.5	3.5
Day Travel	71.1	71.1	66.6	70.1	73.1	78.0	81.3
Spending at Destination	200.2	213.0	195.9	205.4	215.0	228.3	238.7

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$251	\$475	\$103	\$195	2.4	1.9
Private Home	\$82	\$251	\$32	\$97	2.6	3.1
Other Overnight	\$128	\$414	\$37	\$121	3.4	3.2
All Overnight	\$168	\$406	\$63	\$155	2.7	2.4

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	878	968	1,040	361	398	427
Private Home	807	815	818	315	319	320
Other Overnight	615	639	643	181	188	189
All Overnight	2,300	2,423	2,501	857	904	936

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	464	512	550	191	210	226
Private Home	265	268	269	103	104	104
Other Overnight	190	198	199	56	58	58
All Overnight	920	978	1,018	349	372	388

CROOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$80,720
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$915
Additional employment if each resident household encouraged one additional overnight visitor	11

Visitor Shares

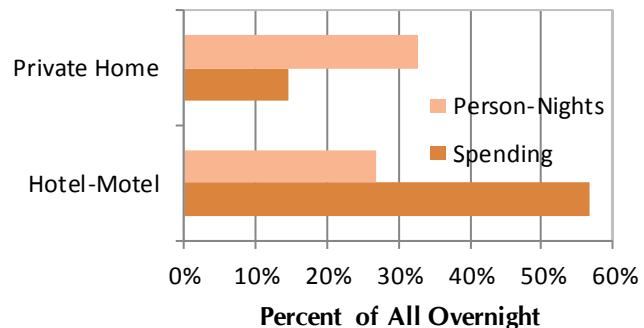
Travel Share of Total Employment (2013)*	5.1%
Overnight Visitor Day Share of Resident Population (2014p)**	8.3%

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

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

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

Overnight Visitor Spending and Volume



2014p	Trips (Thousands)	Nights (Thousands)	Spending (Millions)
Hotel, Motel	103	172	\$16.4
Private Home	81	209	\$4.2
Other Overnight	86	257	\$8.3
All Overnight	271	637	\$28.9

Crook County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	10.0	2.6	260	91	301	393
1992	10.8	2.8	270	111	338	449
1993	12.1	3.2	300	154	377	531
1994	12.9	3.5	310	174	400	574
1995	13.9	3.7	320	179	423	602
1996	14.5	3.9	320	192	427	619
1997	14.9	4.0	310	203	434	637
1998	15.4	4.2	340	208	446	653
1999	17.5	4.7	370	232	488	720
2000	19.4	5.1	390	280	539	819
2001	19.0	5.1	380	229	532	761
2002	20.4	5.5	410	249	554	803
2003	20.9	5.6	400	250	570	820
2004	21.8	5.8	440	148	614	762
2005	23.2	6.0	450	148	642	791
2006	28.8	8.3	490	213	804	1,017
2007	29.7	8.8	530	204	834	1,038
2008	31.0	9.1	530	191	854	1,045
2009	27.6	8.6	470	154	789	943
2010	29.5	8.1	460	177	772	949
2011	31.2	8.4	490	188	877	1,065
2012	36.2	9.2	490	217	945	1,162
2013	40.4	9.8	490	221	1,003	1,224
2014p	40.3	10.1	470	225	1,002	1,226
Annual Percentage Change						
13-14p	-0.1%	3.1%	-5.0%	1.6%	-0.1%	0.2%
91-14p	6.3%	6.1%	2.5%	4.0%	5.4%	5.1%

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.

**Crook County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	25.7	27.1	26.7	27.8	32.7	37.0	37.1
Other Travel*	3.2	3.9	2.9	3.4	3.5	3.4	3.3
Total Direct Spending	28.8	31.0	29.5	31.2	36.2	40.4	40.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	4.8	5.0	5.4	5.6	7.3	9.0	9.2
Food Service	6.4	6.8	7.0	7.2	8.5	9.6	9.7
Food Stores	4.2	4.6	4.2	4.3	4.7	5.0	5.1
Local Tran. & Gas	2.5	3.0	2.5	3.0	3.3	3.5	3.3
Arts, Ent. & Rec.	4.0	4.1	4.0	4.1	4.9	5.5	5.4
Retail Sales	3.8	3.6	3.6	3.6	4.0	4.3	4.3
Destination Spending	25.7	27.1	26.7	27.8	32.7	37.0	37.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	5.6	6.1	5.4	5.6	5.9	6.5	7.0
Arts, Ent. & Rec.	1.5	1.7	1.6	1.6	2.0	1.9	1.7
Retail**	1.0	1.0	1.0	1.0	1.1	1.2	1.2
Ground Tran.	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	8.3	9.1	8.1	8.4	9.2	9.8	10.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	250	270	230	230	230	240	240
Arts, Ent. & Rec.	180	190	180	200	200	190	160
Retail**	50	50	50	50	50	50	50
Ground Tran.	0	0	0	0	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	490	530	460	490	490	490	470
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.2	0.2	0.2	0.2	0.2
State Tax Receipts	0.8	0.9	0.8	0.9	0.9	1.0	1.0
Total Local & State	1.0	1.0	0.9	1.1	1.2	1.2	1.2

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Crook County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	18.9	20.3	20.2	21.0	25.1	28.7	28.9
Hotel, Motel	7.2	7.7	9.1	9.6	13.1	16.3	16.4
Private Home	3.9	4.3	3.9	4.1	4.3	4.3	4.2
Other Overnight	7.8	8.3	7.2	7.4	7.7	8.1	8.3
Campground	6.5	6.9	5.8	6.0	6.3	6.7	6.8
Vacation Home	1.3	1.4	1.4	1.4	1.4	1.4	1.5
Day Travel	6.8	6.7	6.5	6.8	7.6	8.2	8.2
Spending at Destination	25.7	27.1	26.7	27.8	32.7	37.0	37.1

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$234	\$389	\$95	\$158	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$109	\$321	\$32	\$96	3.4	3.0
All Overnight	\$127	\$290	\$45	\$107	2.8	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	144	176	172	59	72	70
Private Home	211	213	209	83	83	82
Other Overnight	246	255	257	73	76	76
All Overnight	602	644	637	214	231	228

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	87	106	103	35	43	42
Private Home	82	83	81	32	32	32
Other Overnight	83	86	86	25	26	26
All Overnight	252	274	271	92	101	100

CURRY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$67,800
Employee Earnings generated by \$100 Visitor Spending	\$35
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.00

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,424
Additional employment if each resident household encouraged one additional overnight visitor	21

Visitor Shares

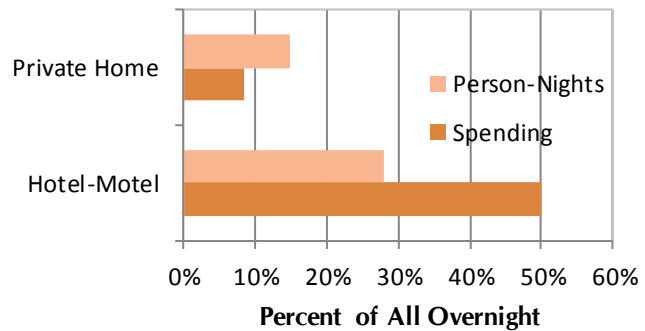
Travel Share of Total Employment (2013)*	17.3%
Overnight Visitor Day Share of Resident Population (2014p)**	18.6%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	258	430	\$42.8
Private Home	88	227	\$7.3
Other Overnight	284	878	\$35.3
All Overnight	631	1,534	\$85.4

Curry County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	76.6	25.2	2,090	394	1,903	2,296
1992	75.7	24.7	2,040	355	1,932	2,287
1993	74.5	24.2	1,920	337	1,920	2,257
1994	76.8	25.0	1,920	350	1,989	2,339
1995	78.0	25.3	1,870	358	1,995	2,353
1996	78.1	25.2	1,800	358	1,949	2,307
1997	77.9	25.2	1,720	350	1,911	2,261
1998	78.1	25.6	1,700	359	1,910	2,269
1999	82.0	26.8	1,670	382	1,975	2,357
2000	86.1	27.7	1,740	398	2,053	2,451
2001	92.5	29.9	1,780	433	2,179	2,612
2002	100.1	32.6	1,990	460	2,312	2,772
2003	101.8	33.0	1,970	463	2,359	2,822
2004	106.3	34.1	1,930	549	2,601	3,150
2005	105.1	33.3	1,870	538	2,555	3,092
2006	109.8	34.7	1,850	569	2,656	3,225
2007	114.0	37.2	1,910	604	2,791	3,395
2008	116.1	37.6	1,880	553	2,810	3,363
2009	112.8	38.0	1,840	557	2,777	3,335
2010	111.1	35.7	1,740	528	2,676	3,204
2011	112.9	35.8	1,710	524	2,890	3,414
2012	117.7	37.9	1,740	528	2,965	3,494
2013	122.0	40.2	1,800	531	3,077	3,608
2014p	123.9	41.7	1,780	540	3,111	3,650
Annual Percentage Change						
13-14p	1.6%	3.8%	-1.0%	1.6%	1.1%	1.2%
91-14p	2.1%	2.2%	-0.7%	1.4%	2.2%	2.0%

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.

**Curry County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	106.7	112.5	108.0	109.1	113.9	118.3	120.4
Other Travel*	3.1	3.7	3.1	3.7	3.8	3.6	3.5
Total Direct Spending	109.8	116.1	111.1	112.9	117.7	122.0	123.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	22.6	22.9	22.3	22.1	23.1	23.7	24.0
Food Service	27.2	28.8	29.1	28.8	30.5	32.5	33.7
Food Stores	13.7	15.5	14.7	15.1	15.8	16.6	17.2
Local Tran. & Gas	11.8	14.5	12.0	13.6	14.0	13.8	13.3
Arts, Ent. & Rec.	15.3	15.3	14.6	14.3	14.8	15.4	15.7
Retail Sales	16.2	15.5	15.3	15.2	15.7	16.3	16.5
Destination Spending	106.7	112.5	108.0	109.1	113.9	118.3	120.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	25.2	27.0	26.0	26.1	28.8	30.6	32.3
Arts, Ent. & Rec.	4.9	5.7	5.1	5.0	4.3	4.5	4.2
Retail**	4.1	4.3	4.1	4.2	4.3	4.5	4.7
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	34.7	37.6	35.7	35.8	37.9	40.2	41.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,200	1,200	1,130	1,110	1,190	1,220	1,200
Arts, Ent. & Rec.	430	450	400	390	340	370	360
Retail**	200	210	190	190	190	190	200
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,850	1,880	1,740	1,710	1,740	1,800	1,780
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.6	0.6	0.5	0.5	0.5	0.5	0.5
State Tax Receipts	2.7	2.8	2.7	2.9	3.0	3.1	3.1
Total Local & State	3.2	3.4	3.2	3.4	3.5	3.6	3.7

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Curry County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	74.3	80.9	77.4	77.7	81.1	84.0	85.4
Hotel, Motel	39.4	41.7	39.7	39.3	41.2	42.0	42.8
Private Home	6.1	6.3	6.5	6.9	7.1	7.2	7.3
Other Overnight	28.8	32.9	31.2	31.5	32.8	34.8	35.3
Campground	25.6	29.5	27.9	28.1	29.4	31.3	31.7
Vacation Home	3.2	3.4	3.3	3.5	3.5	3.5	3.6
Day Travel	32.4	31.6	30.7	31.4	32.8	34.3	35.0
Spending at Destination	106.7	112.5	108.0	109.1	113.9	118.3	120.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$244	\$406	\$100	\$166	2.5	1.7
Private Home	\$82	\$211	\$32	\$82	2.6	2.6
Other Overnight	\$138	\$426	\$40	\$124	3.4	3.1
All Overnight	\$165	\$383	\$56	\$135	3.0	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	401	419	430	163	171	175
Private Home	224	225	227	87	88	89
Other Overnight	836	873	878	243	254	255
All Overnight	1,461	1,517	1,534	494	513	519

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	241	252	258	98	103	105
Private Home	87	88	88	34	34	34
Other Overnight	271	282	284	79	82	83
All Overnight	599	622	631	211	219	223

DESCHUTES COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$87,240
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$12,438
Additional employment if each resident household encouraged one additional overnight visitor	143

Visitor Shares

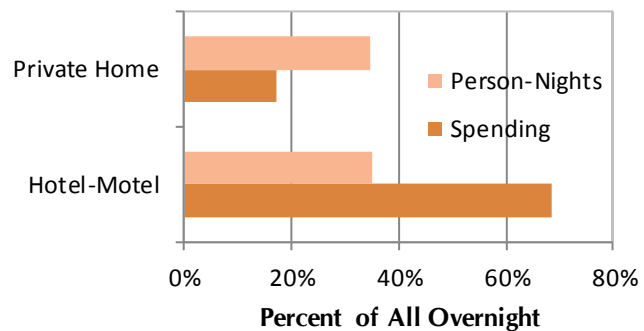
Travel Share of Total Employment (2013)*	6.0%
Overnight Visitor Day Share of Resident Population (2014p)**	10.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,156	2,187	\$305.2
Private Home	710	2,161	\$76.7
Other Overnight	570	1,910	\$62.9
All Overnight	2,437	6,258	\$444.7

Deschutes County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	174.0	44.2	3,370	3,330	4,236	7,566
1992	180.3	45.5	3,250	3,427	4,536	7,963
1993	185.3	47.2	3,250	3,530	4,776	8,306
1994	203.9	52.1	3,440	4,024	5,252	9,276
1995	210.0	53.1	3,380	4,067	5,330	9,397
1996	222.2	55.7	3,430	4,310	5,479	9,789
1997	238.7	59.8	3,510	4,670	5,753	10,423
1998	246.0	62.8	3,640	4,945	5,950	10,895
1999	266.0	67.4	3,820	5,355	6,334	11,689
2000	295.9	75.3	4,230	6,182	7,075	13,257
2001	292.7	74.5	4,210	6,120	7,004	13,124
2002	302.7	76.7	4,230	6,401	7,104	13,505
2003	318.7	78.3	4,180	6,407	7,347	13,754
2004	341.8	82.3	4,250	6,759	8,323	15,082
2005	374.7	87.6	4,210	7,235	8,914	16,149
2006	468.6	110.1	5,050	8,977	11,066	20,043
2007	490.1	118.1	5,400	8,201	11,678	19,879
2008	512.8	123.9	5,620	7,745	12,187	19,932
2009	491.6	116.4	5,260	6,917	11,255	18,172
2010	510.8	117.5	5,310	7,365	11,538	18,903
2011	524.4	124.2	5,430	7,835	13,137	20,972
2012	557.1	131.5	5,630	8,334	13,698	22,032
2013	596.2	140.9	5,870	9,388	14,504	23,892
2014p	621.3	153.5	6,240	10,246	15,193	25,439
Annual Percentage Change						
13-14p	4.2%	9.0%	6.3%	9.1%	4.7%	6.5%
91-14p	5.7%	5.6%	2.7%	5.0%	5.7%	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.

**Deschutes County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	399.9	435.3	417.2	443.3	476.4	509.1	531.5
Other Travel*	68.7	77.5	93.6	81.1	80.7	87.1	89.9
Total Direct Spending	468.6	512.8	510.8	524.4	557.1	596.2	621.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	108.1	111.6	104.7	111.6	121.3	134.4	146.4
Food Service	104.0	116.0	117.8	122.6	133.5	144.4	151.8
Food Stores	34.3	38.8	37.1	39.4	41.8	44.0	45.9
Local Tran. & Gas	43.3	55.2	46.3	55.3	58.5	58.8	57.3
Arts, Ent. & Rec.	52.5	54.8	52.7	53.9	57.2	60.4	62.0
Retail Sales	57.8	59.0	58.6	60.5	64.0	67.1	68.1
Destination Spending	399.9	435.3	417.2	443.3	476.4	509.1	531.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	77.0	85.9	81.9	87.0	93.9	100.7	110.1
Arts, Ent. & Rec.	15.7	18.9	17.0	17.5	17.3	18.7	21.0
Retail**	11.9	13.0	12.4	13.0	13.8	14.5	15.1
Ground Tran.	1.6	1.8	1.7	1.8	2.0	2.1	2.3
Other Travel*	3.9	4.4	4.4	4.9	4.6	4.8	5.0
Total Direct Earnings	110.1	123.9	117.5	124.2	131.5	140.9	153.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,510	3,890	3,720	3,810	3,970	4,160	4,390
Arts, Ent. & Rec.	780	950	860	860	870	900	1,010
Retail**	560	570	540	560	580	600	620
Ground Tran.	60	60	60	60	60	70	70
Other Travel*	150	150	140	140	140	140	150
Total Direct Employment	5,050	5,620	5,310	5,430	5,630	5,870	6,240
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.0	7.7	7.4	7.8	8.3	9.4	10.2
State Tax Receipts	11.1	12.2	11.5	13.1	13.7	14.5	15.2
Total Local & State	20.0	19.9	18.9	21.0	22.0	23.9	25.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Deschutes County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	331.0	363.5	347.0	368.2	396.4	424.5	444.7
Hotel, Motel	218.0	238.7	226.1	241.3	263.5	287.0	305.2
Private Home	59.5	67.1	66.0	70.0	73.6	75.8	76.7
Other Overnight	53.6	57.8	54.9	56.9	59.3	61.8	62.9
Campground	25.0	25.3	22.6	22.9	24.3	25.9	26.2
Vacation Home	28.6	32.5	32.3	34.0	34.9	35.9	36.6
Day Travel	69.0	71.7	70.2	75.2	80.0	84.5	86.7
Spending at Destination	399.9	435.3	417.2	443.3	476.4	509.1	531.5

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$335	\$638	\$140	\$264	2.4	1.9
Private Home	\$87	\$272	\$35	\$108	2.5	3.1
Other Overnight	\$105	\$354	\$33	\$110	3.2	3.4
All Overnight	\$186	\$474	\$71	\$182	2.6	2.5

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,963	2,109	2,187	817	878	911
Private Home	2,105	2,157	2,161	848	872	877
Other Overnight	1,831	1,894	1,910	573	592	597
All Overnight	5,898	6,160	6,258	2,237	2,342	2,386

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,038	1,115	1,156	429	461	479
Private Home	692	709	710	273	281	282
Other Overnight	546	565	570	170	176	178
All Overnight	2,276	2,389	2,437	872	918	938

DOUGLAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$72,670
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,900
Additional employment if each resident household encouraged one additional overnight visitor	81

Visitor Shares

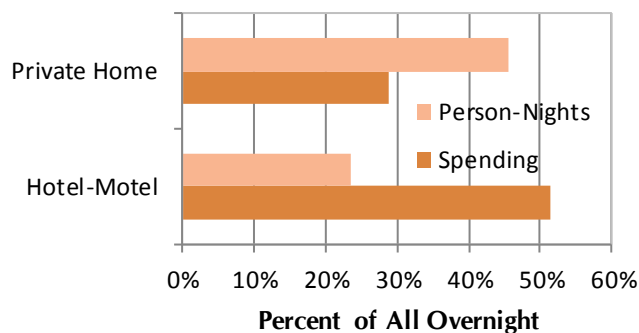
Travel Share of Total Employment (2013)*	6.0%
Overnight Visitor Day Share of Resident Population (2014p)**	6.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	312	573	\$62.2
Private Home	369	1,107	\$34.8
Other Overnight	235	750	\$24.0
All Overnight	916	2,430	\$121.1

Douglas County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	87.2	22.5	2,220	463	2,589	3,053
1992	89.6	23.0	2,110	471	2,758	3,229
1993	93.6	24.1	2,140	477	2,913	3,390
1994	96.3	24.8	2,130	493	3,018	3,511
1995	99.4	25.6	2,110	504	3,076	3,581
1996	113.3	29.6	2,380	540	3,317	3,858
1997	125.8	33.2	2,540	573	3,554	4,127
1998	133.6	36.0	2,700	589	3,728	4,317
1999	146.7	39.2	2,770	632	3,968	4,600
2000	152.0	40.0	2,740	709	4,070	4,778
2001	156.2	41.1	2,840	763	4,126	4,889
2002	182.4	49.4	3,300	928	4,652	5,580
2003	185.7	49.8	3,280	920	4,749	5,669
2004	194.3	51.4	3,220	966	5,081	6,047
2005	201.4	52.4	3,150	1,066	5,222	6,288
2006	213.8	55.1	3,160	1,111	5,479	6,590
2007	211.8	56.5	3,130	1,140	5,519	6,659
2008	216.4	57.2	3,100	1,114	5,581	6,694
2009	197.5	54.8	2,930	976	5,215	6,191
2010	204.4	53.7	2,810	1,014	5,250	6,264
2011	215.5	55.5	2,870	1,064	5,941	7,006
2012	219.8	55.9	2,830	1,056	5,908	6,964
2013	224.2	58.6	2,940	1,099	6,051	7,150
2014p	230.5	61.3	2,970	1,178	6,169	7,347
Annual Percentage Change						
13-14p	2.8%	4.6%	1.0%	7.1%	2.0%	2.7%
91-14p	4.3%	4.4%	1.3%	4.1%	3.8%	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.

East Douglas County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	57.8	14.6	1,420	402	1,903	2,306
1992	58.2	14.6	1,320	391	2,011	2,401
1993	58.8	14.7	1,280	380	2,079	2,459
1994	60.9	15.2	1,280	395	2,166	2,561
1995	63.4	15.9	1,290	406	2,224	2,630
1996	75.4	19.4	1,540	434	2,437	2,871
1997	86.2	22.5	1,700	462	2,651	3,113
1998	93.6	25.1	1,880	484	2,823	3,307
1999	102.9	27.4	1,910	519	2,996	3,515
2000	113.0	29.4	2,030	588	3,195	3,783
2001	113.9	29.7	2,060	630	3,191	3,821
2002	136.0	36.8	2,460	783	3,647	4,430
2003	138.5	37.0	2,450	775	3,720	4,495
2004	145.0	38.1	2,400	813	3,968	4,781
2005	151.4	39.0	2,350	897	4,094	4,991
2006	159.4	40.5	2,330	938	4,260	5,198
2007	156.1	40.9	2,270	959	4,237	5,195
2008	163.2	42.4	2,310	953	4,361	5,313
2009	143.0	39.1	2,100	818	3,950	4,769
2010	150.7	38.9	2,040	842	4,035	4,877
2011	161.0	40.7	2,110	912	4,637	5,549
2012	165.1	41.2	2,090	885	4,630	5,516
2013	168.3	43.3	2,180	921	4,747	5,668
2014p	171.5	45.0	2,190	985	4,802	5,787
Annual Percentage Change						
13-14p	1.9%	3.8%	0.2%	7.0%	1.2%	2.1%
91-14p	4.8%	5.0%	1.9%	4.0%	4.1%	4.1%

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.

West Douglas County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	834	931
1994	35.5	9.6	840	98	852	950
1995	35.9	9.7	820	98	853	950
1996	38.0	10.2	840	106	880	986
1997	39.6	10.7	840	110	903	1,013
1998	40.1	10.9	820	105	905	1,010
1999	43.8	11.9	860	113	973	1,085
2000	39.1	10.5	710	121	875	996
2001	42.3	11.4	780	133	935	1,068
2002	46.5	12.6	830	145	1,005	1,150
2003	47.3	12.8	830	146	1,029	1,174
2004	49.3	13.3	820	153	1,113	1,266
2005	50.0	13.4	800	169	1,128	1,297
2006	54.5	14.5	830	173	1,219	1,392
2007	55.8	15.6	860	182	1,282	1,464
2008	53.2	14.8	800	161	1,220	1,381
2009	54.5	15.7	830	158	1,264	1,423
2010	53.7	14.8	770	172	1,215	1,387
2011	54.4	14.8	760	153	1,304	1,457
2012	54.8	14.7	740	171	1,278	1,449
2013	55.9	15.3	760	178	1,304	1,482
2014p	59.0	16.3	790	192	1,367	1,560
Annual Percentage Change						
13-14p	5.5%	6.7%	3.2%	8.1%	4.8%	5.2%
91-14p	3.1%	3.2%	-0.1%	5.1%	3.0%	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, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	198.4	197.8	188.8	196.9	200.8	205.8	212.6
Other Travel*	15.4	18.6	15.6	18.6	19.0	18.4	17.9
Total Direct Spending	213.8	216.4	204.4	215.5	219.8	224.2	230.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	31.9	31.8	29.2	29.6	29.8	30.5	32.4
Food Service	51.0	51.3	51.7	53.1	55.0	57.5	60.5
Food Stores	21.7	22.5	21.9	23.1	23.7	24.6	25.6
Local Tran. & Gas	21.6	25.2	20.6	24.3	24.5	23.8	23.1
Arts, Ent. & Rec.	39.9	37.1	35.6	36.3	37.0	37.9	38.9
Retail Sales	32.4	29.8	29.8	30.4	30.8	31.5	32.0
Destination Spending	198.4	197.8	188.8	196.9	200.8	205.8	212.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	33.8	35.1	33.1	34.3	34.3	35.6	36.7
Arts, Ent. & Rec.	12.5	13.4	12.1	12.3	12.7	13.7	14.9
Retail**	7.1	7.1	6.8	7.1	7.2	7.5	7.8
Ground Tran.	0.8	0.8	0.7	0.8	0.8	0.8	0.9
Other Travel*	0.9	0.8	0.9	0.9	1.0	1.0	1.1
Total Direct Earnings	55.1	57.2	53.7	55.5	55.9	58.6	61.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,910	1,910	1,740	1,760	1,740	1,780	1,780
Arts, Ent. & Rec.	800	780	680	710	690	760	770
Retail**	360	340	320	330	330	340	340
Ground Tran.	30	30	20	30	30	30	30
Other Travel*	50	50	50	50	50	50	50
Total Direct Employment	3,160	3,100	2,810	2,870	2,830	2,940	2,970
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.1	1.0	1.1	1.1	1.1	1.2
State Tax Receipts	5.5	5.6	5.3	5.9	5.9	6.1	6.2
Total Local & State	6.6	6.7	6.3	7.0	7.0	7.2	7.3

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Douglas County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	110.0	116.1	108.7	112.5	114.6	116.9	121.1
Hotel, Motel	60.1	63.0	55.8	57.4	58.0	58.9	62.2
Private Home	28.5	31.1	31.5	33.4	34.1	34.3	34.8
Other Overnight	21.3	22.0	21.5	21.8	22.5	23.7	24.0
Campground	18.2	18.3	17.6	17.8	18.4	19.6	19.9
Vacation Home	3.1	3.7	3.9	4.0	4.1	4.1	4.2
Day Travel	88.4	81.7	80.0	84.3	86.2	88.8	91.5
Spending at Destination	198.4	197.8	188.8	196.9	200.8	205.8	212.6

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$265	\$488	\$108	\$200	2.4	1.8
Private Home	\$82	\$245	\$31	\$94	2.6	3.0
Other Overnight	\$109	\$348	\$32	\$102	3.4	3.2
All Overnight	\$138	\$358	\$50	\$132	2.8	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	534	549	573	218	224	234
Private Home	1,091	1,095	1,107	419	421	425
Other Overnight	717	746	750	210	219	220
All Overnight	2,342	2,390	2,430	848	864	880

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	290	298	312	119	122	127
Private Home	364	365	369	140	141	142
Other Overnight	225	234	235	66	69	69
All Overnight	879	897	916	324	331	338

GILLIAM & SHERMAN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$86,800
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.00

Visitor Volume (2014p)

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

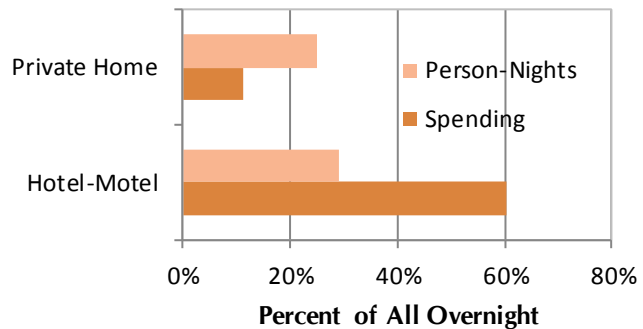
Travel Share of Total Employment (2013)*	2.9%
Overnight Visitor Day Share of Resident Population (2014p)**	10.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	26	43	\$3.9
Private Home	15	37	\$0.7
Other Overnight	22	68	\$1.8
All Overnight	62	148	\$6.4

Gilliam & Sherman County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	7.9	2.0	210		192.6	192.6
1992	7.7	1.9	190		193.4	193.4
1993	8.6	2.2	200		217.4	217.4
1994	7.3	1.8	160		189.2	189.2
1995	7.1	1.7	150		183.5	183.5
1996	7.0	1.7	150		178.2	178.2
1997	7.3	1.8	150		183.2	183.2
1998	7.2	1.8	140		181.1	181.1
1999	7.5	1.8	140		187.3	187.3
2000	7.8	1.9	140		191.1	191.1
2001	7.8	1.9	150		190.0	190.0
2002	8.2	2.0	150		193.7	193.7
2003	7.9	1.9	140		188.7	188.7
2004	8.4	2.0	140		211.5	211.5
2005	8.6	2.0	140		214.4	214.4
2006	8.5	2.0	130		209.5	209.5
2007	9.1	2.2	120		228.7	228.7
2008	9.2	2.2	120		231.3	231.3
2009	9.2	2.3	120	16.0	234.4	250.3
2010	9.1	2.2	110	13.1	230.6	243.7
2011	9.1	2.2	110	13.0	246.1	259.1
2012	9.6	2.3	110	14.6	251.4	266.0
2013	8.8	2.2	100	13.7	237.3	251.0
2014p	9.0	2.2	100	14.2	237.7	251.9
Annual Percentage Change						
13-14p	2.4%	1.0%	0.0%	3.7%	0.2%	0.4%
91-14p	0.6%	0.4%	-3.2%		0.9%	1.2%

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.

Gilliam & Sherman Counties Travel Impacts, 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.0	8.7	8.6	8.5	9.0	8.2	8.4
Other Travel*	0.5	0.6	0.5	0.6	0.6	0.6	0.6
Total Direct Spending	8.5	9.2	9.1	9.1	9.6	8.8	9.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1.6	2.1	2.2	2.0	2.1	1.9	2.0
Food Service	2.0	2.1	2.2	2.1	2.3	2.1	2.2
Food Stores	1.1	1.1	1.1	1.1	1.2	1.1	1.2
Local Tran. & Gas	0.8	0.9	0.8	0.9	0.9	0.8	0.8
Arts, Ent. & Rec.	1.4	1.4	1.4	1.3	1.4	1.2	1.3
Retail Sales	1.1	1.0	1.0	1.0	1.1	1.0	1.0
Destination Spending	8.0	8.7	8.6	8.5	9.0	8.2	8.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.2	1.4	1.5	1.4	1.5	1.4	1.4
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	2.2	2.2	2.2	2.3	2.2	2.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	80	70	70	70	70	60	60
Arts, Ent. & Rec.	30	20	20	20	20	20	20
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	130	120	110	110	110	100	100
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.2	0.2	0.2	0.2	0.3	0.2	0.2
Total Local & State	0.2	0.2	0.2	0.3	0.3	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

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	5.6	6.6	6.6	6.4	6.8	6.1	6.3
Hotel, Motel	3.0	4.0	4.1	3.9	4.1	3.4	3.5
Private Home	0.6	0.6	0.7	0.7	0.7	0.7	0.8
Other Overnight	2.0	2.0	1.8	1.8	1.9	2.0	2.0
Campground	1.9	1.8	1.7	1.7	1.8	1.9	1.9
Vacation Home	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Day Travel	2.4	2.1	2.1	2.1	2.2	2.1	2.1
Spending at Destination	8.0	8.7	8.6	8.5	9.0	8.2	8.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$221	\$367	\$90	\$150	2.5	1.7
Private Home	\$49	\$125	\$19	\$49	2.6	2.6
Other Overnight	\$93	\$288	\$27	\$84	3.5	3.1
All Overnight	\$124	\$284	\$43	\$103	2.9	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	52	42	43	21	17	18
Private Home	37	36	37	15	14	15
Other Overnight	65	67	68	19	20	20
All Overnight	154	145	148	55	51	52

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	32	25	26	13	10	11
Private Home	14	14	15	6	5	6
Other Overnight	21	22	22	6	6	6
All Overnight	67	61	62	25	22	23

GRANT COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$58,770
Employee Earnings generated by \$100 Visitor Spending	\$25
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.70

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$278
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

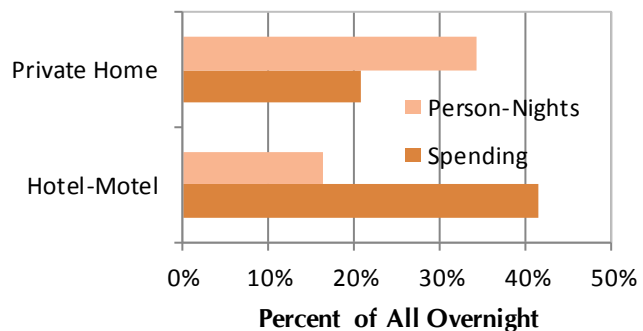
Travel Share of Total Employment (2013)*	4.2%
Overnight Visitor Day Share of Resident Population (2014p)**	8.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	22	36	\$3.0
Private Home	29	75	\$1.5
Other Overnight	37	108	\$2.8
All Overnight	88	219	\$7.4

Grant County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	9.8	2.4	180	101	261	361
2011	9.7	2.3	170	88	282	370
2012	9.7	2.3	160	82	279	362
2013	10.1	2.4	170	62	288	350
2014p	10.6	2.4	160	69	287	355
Annual Percentage Change						
13-14p	5.1%	-1.2%	-3.4%	11.4%	-0.5%	1.6%
91-14p	1.2%	0.5%	-1.4%	1.0%	1.1%	1.1%

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.

**Grant County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.3	8.0	8.8	8.5	8.5	8.9	9.5
Other Travel*	1.0	1.2	1.0	1.2	1.2	1.2	1.1
Total Direct Spending	9.3	9.1	9.8	9.7	9.7	10.1	10.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1.5	1.5	1.7	1.6	1.5	1.7	1.8
Food Service	2.1	2.0	2.3	2.2	2.2	2.4	2.6
Food Stores	1.3	1.3	1.4	1.4	1.4	1.5	1.6
Local Tran. & Gas	0.9	1.0	0.9	1.0	1.0	1.0	1.0
Arts, Ent. & Rec.	1.3	1.2	1.3	1.2	1.2	1.2	1.3
Retail Sales	1.2	1.0	1.2	1.1	1.1	1.2	1.2
Destination Spending	8.3	8.0	8.8	8.5	8.5	8.9	9.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.5	1.5	1.6	1.5	1.5	1.6	1.6
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.3
Retail**	0.3	0.3	0.3	0.3	0.3	0.4	0.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.3	2.2	2.4	2.3	2.3	2.4	2.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	120	100	110	100	100	100	100
Arts, Ent. & Rec.	60	50	50	50	40	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	170	180	170	160	170	160
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.2	0.3	0.3	0.3	0.3	0.3
Total Local & State	0.3	0.3	0.4	0.4	0.4	0.3	0.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Grant County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	6.1	6.2	6.9	6.6	6.5	6.9	7.4
Hotel, Motel	2.6	2.4	2.9	2.5	2.4	2.7	3.0
Private Home	1.2	1.2	1.4	1.4	1.5	1.5	1.5
Other Overnight	2.4	2.5	2.5	2.6	2.6	2.7	2.8
Campground	1.6	1.7	1.8	1.8	1.8	2.0	2.0
Vacation Home	0.7	0.8	0.8	0.8	0.8	0.8	0.8
Day Travel	2.1	1.8	1.9	1.9	2.0	2.0	2.1
Spending at Destination	8.3	8.0	8.8	8.5	8.5	8.9	9.5

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$209	\$347	\$85	\$141	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$86	\$250	\$26	\$75	3.3	2.9
All Overnight	\$96	\$234	\$34	\$84	2.9	2.4

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	30	32	36	12	13	15
Private Home	72	74	75	28	29	29
Other Overnight	104	107	108	31	32	32
All Overnight	206	213	219	72	74	76

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	18	19	22	7	8	9
Private Home	28	29	29	11	11	11
Other Overnight	36	37	37	11	11	11
All Overnight	82	85	88	29	30	31

HARNEY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$54,940
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$328
Additional employment if each resident household encouraged one additional overnight visitor	6

Visitor Shares

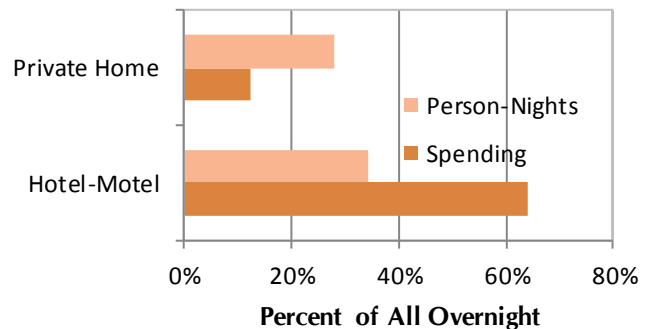
Travel Share of Total Employment (2013)*	7.0%
Overnight Visitor Day Share of Resident Population (2014p)**	9.8%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	53	89	\$7.6
Private Home	28	73	\$1.5
Other Overnight	32	96	\$2.8
All Overnight	113	258	\$11.9

Harney County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	14.6	4.5	280	211	373	584
2011	15.5	4.7	290	225	421	646
2012	16.7	4.9	290	253	433	687
2013	16.3	4.9	290	231	430	661
2014p	16.8	5.2	290	242	438	680
Annual Percentage Change						
13-14p	3.0%	4.3%	-1.6%	4.6%	2.0%	2.9%
91-14p	3.0%	3.0%	-0.5%	6.7%	2.9%	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.

Harney County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	17.4	14.5	13.6	14.3	15.5	15.1	15.6
Other Travel*	1.0	1.2	1.0	1.2	1.2	1.2	1.1
Total Direct Spending	18.4	15.7	14.6	15.5	16.7	16.3	16.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	4.0	3.8	3.4	3.5	3.9	3.9	4.0
Food Service	4.3	3.5	3.4	3.6	3.9	3.8	4.0
Food Stores	1.9	1.6	1.7	1.8	1.9	1.9	1.9
Local Tran. & Gas	1.6	1.5	1.2	1.5	1.5	1.4	1.4
Arts, Ent. & Rec.	3.7	2.7	2.5	2.6	2.8	2.7	2.7
Retail Sales	2.0	1.4	1.4	1.4	1.5	1.5	1.5
Destination Spending	17.4	14.5	13.6	14.3	15.5	15.1	15.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	4.0	3.5	3.2	3.4	3.5	3.6	3.8
Arts, Ent. & Rec.	1.0	0.9	0.7	0.8	0.8	0.8	0.8
Retail**	0.5	0.4	0.4	0.4	0.4	0.4	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	5.7	4.9	4.5	4.7	4.9	4.9	5.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	220	200	180	180	170	180	180
Arts, Ent. & Rec.	120	100	90	80	90	90	80
Retail**	30	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	380	330	280	290	290	290	290
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.2	0.2	0.3	0.2	0.2
State Tax Receipts	0.5	0.4	0.4	0.4	0.4	0.4	0.4
Total Local & State	0.7	0.6	0.6	0.6	0.7	0.7	0.7

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Harney County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	12.3	11.2	10.3	10.8	11.8	11.5	11.9
Hotel, Motel	8.4	7.8	6.5	6.8	7.7	7.3	7.6
Private Home	1.2	1.2	1.4	1.5	1.5	1.4	1.5
Other Overnight	2.7	2.2	2.5	2.5	2.6	2.8	2.8
Campground	2.4	1.9	2.2	2.2	2.3	2.5	2.5
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	5.2	3.3	3.3	3.5	3.7	3.6	3.7
Spending at Destination	17.4	14.5	13.6	14.3	15.5	15.1	15.6

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$211	\$350	\$86	\$143	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$100	\$304	\$29	\$89	3.4	3.0
All Overnight	\$128	\$283	\$46	\$105	2.8	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	93	86	89	38	35	36
Private Home	74	70	73	29	27	28
Other Overnight	92	96	96	27	28	28
All Overnight	259	252	258	94	91	93

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	56	52	53	23	21	22
Private Home	29	27	28	11	11	11
Other Overnight	30	31	32	9	9	9
All Overnight	115	111	113	43	41	42

HOOD RIVER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$81,570
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,386
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

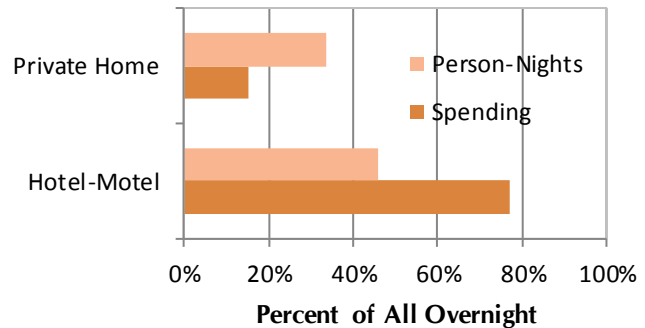
Travel Share of Total Employment (2013)*	6.1%
Overnight Visitor Day Share of Resident Population (2014p)**	10.6%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	215	407	\$47.0
Private Home	97	296	\$9.3
Other Overnight	56	180	\$4.6
All Overnight	368	884	\$60.9

Hood River County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	35.0	8.9	770	364	932	1,297
1992	39.8	10.1	820	472	1,087	1,559
1993	43.2	11.0	870	534	1,193	1,727
1994	44.3	11.3	860	558	1,231	1,789
1995	44.9	11.5	840	562	1,234	1,796
1996	44.8	11.4	810	565	1,206	1,771
1997	46.3	11.8	800	591	1,224	1,816
1998	48.9	12.7	850	657	1,287	1,945
1999	51.3	13.3	860	710	1,332	2,042
2000	54.7	14.0	880	759	1,408	2,166
2001	58.0	14.9	930	836	1,474	2,311
2002	56.9	14.7	900	791	1,430	2,221
2003	58.6	15.1	910	795	1,473	2,267
2004	60.3	15.3	890	834	1,604	2,438
2005	61.7	15.4	890	830	1,623	2,453
2006	67.4	16.7	940	917	1,753	2,670
2007	70.2	17.9	980	970	1,859	2,830
2008	69.2	17.4	930	991	1,816	2,807
2009	64.1	16.9	870	969	1,726	2,695
2010	73.1	18.4	920	1,163	1,905	3,068
2011	76.1	18.8	910	1,148	2,118	3,266
2012	81.4	20.0	950	1,281	2,209	3,490
2013	83.1	21.2	990	1,415	2,276	3,690
2014p	87.4	23.0	1,040	1,543	2,383	3,926
Annual Percentage Change						
13-14p	5.2%	8.1%	4.1%	9.1%	4.7%	6.4%
91-14p	4.1%	4.2%	1.3%	6.5%	4.2%	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, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	63.7	65.0	69.8	72.2	77.4	79.3	83.7
Other Travel*	3.7	4.2	3.3	3.9	4.0	3.9	3.8
Total Direct Spending	67.4	69.2	73.1	76.1	81.4	83.1	87.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.9	15.3	16.7	17.0	18.6	20.6	22.4
Food Service	17.6	17.6	19.9	20.2	21.8	22.3	23.8
Food Stores	5.3	5.5	5.7	6.0	6.3	6.4	6.8
Local Tran. & Gas	7.8	9.3	8.6	10.1	10.6	10.0	9.9
Arts, Ent. & Rec.	8.8	8.2	8.7	8.8	9.3	9.3	9.7
Retail Sales	10.4	9.2	10.1	10.2	10.8	10.7	11.1
Destination Spending	63.7	65.0	69.8	72.2	77.4	79.3	83.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	11.4	12.1	13.0	13.4	14.5	15.7	17.3
Arts, Ent. & Rec.	2.7	2.8	2.9	2.9	2.8	2.8	2.8
Retail**	1.9	1.9	2.0	2.0	2.2	2.2	2.3
Ground Tran.	0.3	0.3	0.3	0.3	0.3	0.3	0.4
Other Travel*	0.4	0.3	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	16.7	17.4	18.4	18.8	20.0	21.2	23.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	660	670	670	660	700	740	780
Arts, Ent. & Rec.	150	150	140	140	130	130	130
Retail**	100	90	90	100	100	100	100
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	10	10	10	10	10	10
Total Direct Employment	940	930	920	910	950	990	1,040
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.9	1.0	1.2	1.1	1.3	1.4	1.5
State Tax Receipts	1.8	1.8	1.9	2.1	2.2	2.3	2.4
Total Local & State	2.7	2.8	3.1	3.3	3.5	3.7	3.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Hood River County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	42.3	46.9	50.3	51.9	55.8	57.4	60.9
Hotel, Motel	31.4	34.8	37.8	39.0	42.3	43.9	47.0
Private Home	7.5	7.9	8.5	8.7	9.1	9.0	9.3
Other Overnight	3.5	4.2	4.1	4.2	4.3	4.5	4.6
Campground	2.6	3.2	3.0	3.1	3.2	3.4	3.5
Vacation Home	0.9	1.0	1.0	1.1	1.1	1.1	1.1
Day Travel	21.4	18.1	19.4	20.4	21.6	21.8	22.8
Spending at Destination	63.7	65.0	69.8	72.2	77.4	79.3	83.7

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$282	\$534	\$115	\$218	2.4	1.9
Private Home	\$82	\$249	\$31	\$96	2.6	3.0
Other Overnight	\$86	\$280	\$25	\$82	3.4	3.2
All Overnight	\$183	\$429	\$69	\$165	2.7	2.4

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	389	386	407	159	158	166
Private Home	293	289	296	112	111	114
Other Overnight	172	179	180	51	53	53
All Overnight	854	854	884	322	322	333

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	206	204	215	84	84	88
Private Home	96	95	97	37	36	37
Other Overnight	53	55	56	16	16	16
All Overnight	355	355	368	137	136	142

JACKSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$81,660
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$13,782
Additional employment if each resident household encouraged one additional overnight visitor	169

Visitor Shares

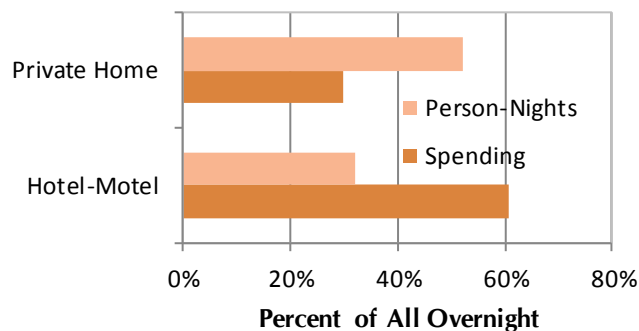
Travel Share of Total Employment (2013)*	4.3%
Overnight Visitor Day Share of Resident Population (2014p)**	6.7%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	874	1,653	\$195.9
Private Home	889	2,704	\$96.2
Other Overnight	250	808	\$29.8
All Overnight	2,013	5,165	\$321.9

Jackson County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	215.5	54.0	4,260	1,505	5,500	7,006
1992	230.8	57.1	4,170	1,651	6,023	7,674
1993	235.4	58.1	4,110	2,209	6,260	8,468
1994	243.8	60.4	4,100	2,373	6,541	8,914
1995	253.2	62.3	4,060	2,440	6,668	9,109
1996	261.5	63.3	4,000	2,471	6,639	9,110
1997	269.9	65.0	3,930	2,534	6,695	9,229
1998	274.2	67.9	4,090	2,662	6,848	9,510
1999	290.3	71.6	4,180	2,862	7,135	9,997
2000	307.9	76.5	4,300	3,199	7,645	10,844
2001	308.6	77.2	4,420	3,735	7,675	11,409
2002	333.7	83.7	4,660	4,169	8,064	12,233
2003	352.3	86.2	4,640	4,284	8,369	12,653
2004	375.8	89.4	4,660	4,525	9,190	13,715
2005	399.8	92.2	4,640	4,815	9,536	14,351
2006	419.1	95.7	4,610	5,251	9,875	15,127
2007	432.6	101.4	4,790	5,732	10,276	16,008
2008	440.6	103.1	4,860	5,629	10,429	16,058
2009	456.4	100.4	4,580	5,476	9,945	15,421
2010	452.9	102.5	4,500	5,962	10,282	16,243
2011	460.2	104.9	4,530	6,006	11,498	17,504
2012	479.1	109.7	4,640	6,397	11,794	18,191
2013	494.1	115.5	4,870	6,746	12,225	18,971
2014p	506.3	122.7	5,040	7,390	12,500	19,890
Annual Percentage Change						
13-14p	2.5%	6.2%	3.5%	9.5%	2.3%	4.8%
91-14p	3.8%	3.6%	0.7%	7.2%	3.6%	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.

**Jackson County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	317.3	334.0	337.4	347.1	367.0	381.6	390.4
Other Travel*	101.8	106.6	115.5	113.1	112.1	112.4	115.9
Total Direct Spending	419.1	440.6	452.9	460.2	479.1	494.1	506.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	66.4	67.3	69.2	70.3	74.2	77.5	82.3
Food Service	85.2	89.9	95.8	96.5	103.7	110.4	114.5
Food Stores	30.3	33.5	33.0	34.3	36.1	37.6	38.9
Local Tran. & Gas	40.8	50.7	45.0	51.5	53.9	53.6	51.1
Arts, Ent. & Rec.	44.6	44.3	44.4	44.2	46.4	48.2	48.9
Retail Sales	50.0	48.2	50.0	50.3	52.7	54.4	54.6
Destination Spending	317.3	334.0	337.4	347.1	367.0	381.6	390.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	62.1	66.5	67.4	68.9	72.6	76.7	82.9
Arts, Ent. & Rec.	12.9	14.8	13.9	13.9	14.2	14.9	14.9
Retail**	10.5	11.0	10.9	11.1	11.7	12.2	12.5
Ground Tran.	1.9	2.2	2.1	2.2	2.3	2.4	2.4
Other Travel*	8.4	8.7	8.1	8.7	8.9	9.4	10.0
Total Direct Earnings	95.7	103.1	102.5	104.9	109.7	115.5	122.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,100	3,200	3,060	3,110	3,210	3,370	3,550
Arts, Ent. & Rec.	730	830	700	660	660	700	680
Retail**	440	450	440	450	460	470	480
Ground Tran.	70	80	70	70	80	80	70
Other Travel*	270	300	230	230	240	250	260
Total Direct Employment	4,610	4,860	4,500	4,530	4,640	4,870	5,040
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.3	5.6	6.0	6.0	6.4	6.7	7.4
State Tax Receipts	9.9	10.4	10.3	11.5	11.8	12.2	12.5
Total Local & State	15.1	16.1	16.2	17.5	18.2	19.0	19.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Jackson County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	255.3	276.5	278.8	285.9	302.4	314.3	321.9
Hotel, Motel	152.3	163.2	166.0	169.3	180.3	189.4	195.9
Private Home	76.6	83.9	86.2	89.6	94.3	95.5	96.2
Other Overnight	26.4	29.4	26.5	27.0	27.8	29.4	29.8
Campground	22.9	25.6	22.7	23.1	23.7	25.3	25.6
Vacation Home	3.5	3.8	3.8	4.0	4.1	4.1	4.2
Day Travel	62.1	57.5	58.7	61.1	64.6	67.3	68.4
Spending at Destination	317.3	334.0	337.4	347.1	367.0	381.6	390.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$281	\$537	\$119	\$224	2.4	1.9
Private Home	\$87	\$273	\$36	\$108	2.5	3.1
Other Overnight	\$126	\$407	\$37	\$119	3.4	3.2
All Overnight	\$158	\$407	\$62	\$160	2.5	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,519	1,619	1,653	643	683	698
Private Home	2,669	2,705	2,704	1,086	1,099	1,101
Other Overnight	770	803	808	226	235	237
All Overnight	4,959	5,127	5,165	1,954	2,018	2,035

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	803	856	874	336	357	365
Private Home	878	889	889	348	353	353
Other Overnight	238	249	250	70	73	73
All Overnight	1,919	1,994	2,013	754	783	791

JEFFERSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$47,550
Employee Earnings generated by \$100 Visitor Spending	\$32
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$787
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

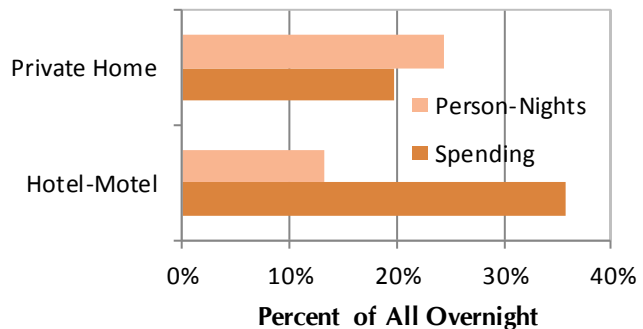
Travel Share of Total Employment (2013)*	11.1%
Overnight Visitor Day Share of Resident Population (2014p)**	10.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	68	113	\$12.1
Private Home	81	208	\$6.7
Other Overnight	180	532	\$15.1
All Overnight	329	853	\$33.8

Jefferson County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	20.9	4.8	450	136	554	690
1992	22.3	5.1	430	154	610	765
1993	23.3	5.4	440	172	650	822
1994	25.1	5.9	460	206	706	912
1995	26.8	6.3	470	233	743	976
1996	27.0	6.4	470	231	737	969
1997	27.4	6.5	450	231	739	970
1998	27.9	6.7	550	246	758	1,003
1999	30.5	7.4	590	299	810	1,109
2000	31.4	7.3	600	261	839	1,100
2001	33.0	7.7	660	277	872	1,149
2002	32.5	7.7	620	286	848	1,134
2003	33.5	7.8	590	288	873	1,160
2004	34.7	8.0	610	314	924	1,237
2005	36.6	8.3	600	331	958	1,289
2006	41.6	9.5	630	350	1,088	1,438
2007	42.5	10.0	670	463	1,118	1,581
2008	44.0	10.3	700	418	1,142	1,560
2009	40.8	10.1	690	392	1,085	1,476
2010	42.5	10.0	690	391	1,108	1,499
2011	44.4	10.2	710	391	1,250	1,641
2012	46.6	11.7	810	486	1,333	1,818
2013	49.4	13.6	930	552	1,462	2,014
2014p	47.5	14.3	940	514	1,462	1,975
Annual Percentage Change						
13-14p	-3.9%	5.9%	1.3%	-6.9%	0.0%	-1.9%
91-14p	3.6%	4.8%	3.3%	5.9%	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.

Jefferson County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	38.8	40.5	39.5	40.8	43.0	46.0	44.2
Other Travel*	2.8	3.5	3.0	3.6	3.5	3.4	3.3
Total Direct Spending	41.6	44.0	42.5	44.4	46.6	49.4	47.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.5	6.6	6.3	6.4	7.1	8.2	7.8
Food Service	9.6	10.1	10.5	10.6	11.4	12.3	12.0
Food Stores	5.6	6.0	5.8	6.1	6.2	6.5	6.6
Local Tran. & Gas	4.8	5.8	4.9	5.8	6.0	6.1	5.4
Arts, Ent. & Rec.	6.6	6.5	6.3	6.4	6.6	6.9	6.7
Retail Sales	5.6	5.5	5.6	5.6	5.8	6.0	5.8
Destination Spending	38.8	40.5	39.5	40.8	43.0	46.0	44.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.1	6.5	6.4	6.5	7.0	8.2	8.5
Arts, Ent. & Rec.	1.7	2.0	1.8	1.8	2.8	3.4	3.8
Retail**	1.5	1.6	1.5	1.6	1.6	1.7	1.7
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	9.5	10.3	10.0	10.2	11.7	13.6	14.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	360	350	360	350	370	420	430
Arts, Ent. & Rec.	180	250	250	270	350	400	410
Retail**	80	80	80	80	80	90	80
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	630	700	690	710	810	930	940
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.4	0.4	0.4	0.5	0.6	0.5
State Tax Receipts	1.1	1.1	1.1	1.2	1.3	1.5	1.5
Total Local & State	1.4	1.6	1.5	1.6	1.8	2.0	2.0

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Jefferson County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	29.3	31.0	30.1	31.0	32.9	35.3	33.8
Hotel, Motel	9.9	10.4	10.0	10.2	11.8	13.6	12.1
Private Home	5.6	6.1	6.4	6.7	6.8	6.9	6.7
Other Overnight	13.7	14.5	13.7	14.1	14.3	14.8	15.1
Campground	8.9	9.2	8.7	8.9	9.1	9.7	9.7
Vacation Home	4.8	5.3	5.0	5.2	5.2	5.2	5.3
Day Travel	9.5	9.5	9.4	9.8	10.2	10.7	10.4
Spending at Destination	38.8	40.5	39.5	40.8	43.0	46.0	44.2

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$262	\$435	\$107	\$177	2.5	1.7
Private Home	\$82	\$211	\$32	\$82	2.6	2.6
Other Overnight	\$95	\$279	\$28	\$84	3.4	2.9
All Overnight	\$118	\$298	\$40	\$103	3.0	2.5

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	114	130	113	47	53	46
Private Home	215	216	208	84	85	81
Other Overnight	511	528	532	152	157	158
All Overnight	840	875	853	283	295	286

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	69	78	68	28	32	28
Private Home	84	84	81	33	33	32
Other Overnight	173	179	180	52	53	54
All Overnight	325	341	329	113	118	113

JOSEPHINE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$67,150
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,421
Additional employment if each resident household encouraged one additional overnight visitor	66

Visitor Shares

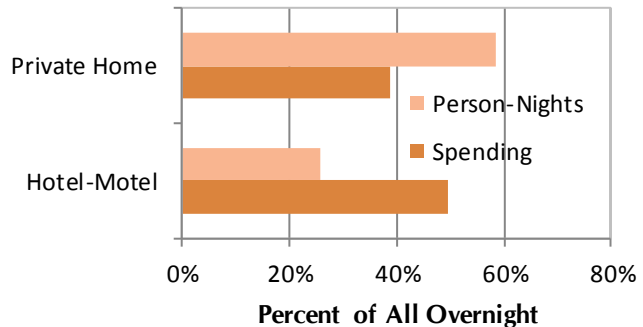
Travel Share of Total Employment (2013)*	4.5%
Overnight Visitor Day Share of Resident Population (2014p)**	5.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	247	467	\$42.7
Private Home	351	1,066	\$33.5
Other Overnight	91	294	\$10.0
All Overnight	688	1,828	\$86.3

Josephine County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	74.6	22.2	2,000	425	2,237	2,662
1992	75.8	22.4	1,880	429	2,365	2,794
1993	77.6	22.9	1,850	430	2,465	2,895
1994	79.1	23.2	1,820	462	2,536	2,998
1995	80.6	23.6	1,770	499	2,553	3,051
1996	82.2	24.0	1,730	504	2,534	3,038
1997	84.1	24.7	1,690	507	2,548	3,055
1998	85.1	25.6	1,720	522	2,576	3,099
1999	87.4	25.9	1,730	540	2,605	3,144
2000	91.2	26.4	1,710	565	2,685	3,250
2001	91.6	26.5	1,730	640	2,674	3,315
2002	96.0	28.0	1,770	755	2,749	3,504
2003	98.6	28.3	1,730	759	2,823	3,582
2004	100.6	28.2	1,670	912	2,983	3,895
2005	107.1	29.4	1,650	955	3,112	4,067
2006	119.2	32.5	1,770	1,145	3,409	4,554
2007	113.4	31.5	1,700	999	3,284	4,284
2008	117.1	31.9	1,720	954	3,318	4,272
2009	105.2	30.7	1,610	950	3,099	4,050
2010	111.8	30.7	1,570	974	3,183	4,157
2011	116.5	31.1	1,560	935	3,593	4,528
2012	121.0	32.0	1,590	970	3,624	4,594
2013	125.4	33.2	1,620	1,086	3,725	4,811
2014p	123.9	35.4	1,680	1,102	3,751	4,854
Annual Percentage Change						
13-14p	-1.1%	6.6%	3.5%	1.5%	0.7%	0.9%
91-14p	2.2%	2.1%	-0.8%	4.2%	2.3%	2.6%

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.

**Josephine County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	106.0	101.2	99.2	101.5	105.8	110.7	109.7
Other Travel*	13.2	15.9	12.6	15.0	15.2	14.6	14.3
Total Direct Spending	119.2	117.1	111.8	116.5	121.0	125.4	123.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	20.4	17.9	17.4	17.2	17.8	19.1	19.4
Food Service	27.7	26.7	27.7	27.8	29.5	31.4	31.6
Food Stores	11.2	11.7	11.4	11.8	12.4	12.9	13.1
Local Tran. & Gas	14.2	15.6	13.3	15.2	15.7	15.6	14.5
Arts, Ent. & Rec.	15.1	13.8	13.6	13.5	14.0	14.6	14.4
Retail Sales	17.4	15.6	15.9	15.9	16.5	17.1	16.7
Destination Spending	106.0	101.2	99.2	101.5	105.8	110.7	109.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	21.8	21.0	20.6	20.8	21.7	22.7	24.4
Arts, Ent. & Rec.	4.8	5.1	4.7	4.7	4.6	4.6	5.1
Retail**	4.1	4.0	4.0	4.0	4.2	4.4	4.4
Ground Tran.	0.5	0.5	0.5	0.5	0.5	0.6	0.6
Other Travel*	1.2	1.3	1.0	1.0	1.0	0.9	1.0
Total Direct Earnings	32.5	31.9	30.7	31.1	32.0	33.2	35.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,090	1,040	980	970	990	1,030	1,060
Arts, Ent. & Rec.	420	420	360	350	360	340	370
Retail**	190	180	180	180	180	190	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	50	40	40	40	40	40
Total Direct Employment	1,770	1,720	1,570	1,560	1,590	1,620	1,680
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.0	1.0	0.9	1.0	1.1	1.1
State Tax Receipts	3.4	3.3	3.2	3.6	3.6	3.7	3.8
Total Local & State	4.6	4.3	4.2	4.5	4.6	4.8	4.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Josephine County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	82.1	80.4	78.4	79.9	83.3	87.1	86.3
Hotel, Motel	44.4	40.4	38.8	38.9	40.6	43.4	42.7
Private Home	28.7	30.0	30.7	31.9	33.3	33.9	33.5
Other Overnight	9.0	10.0	8.9	9.1	9.4	9.9	10.0
Campground	7.3	8.1	7.0	7.1	7.4	7.9	8.0
Vacation Home	1.8	1.9	1.9	1.9	2.0	2.0	2.0
Day Travel	23.9	20.8	20.8	21.6	22.6	23.6	23.4
Spending at Destination	106.0	101.2	99.2	101.5	105.8	110.7	109.7

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$224	\$423	\$91	\$173	2.4	1.9
Private Home	\$82	\$249	\$31	\$96	2.6	3.0
Other Overnight	\$115	\$375	\$34	\$111	3.4	3.3
All Overnight	\$126	\$329	\$47	\$125	2.7	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	448	482	467	183	197	191
Private Home	1,065	1,083	1,066	409	416	409
Other Overnight	281	292	294	83	86	87
All Overnight	1,794	1,857	1,828	675	699	687

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	237	255	247	97	104	101
Private Home	350	356	351	134	137	135
Other Overnight	86	90	91	26	27	27
All Overnight	673	701	688	257	267	262

KLAMATH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$71,470
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,572
Additional employment if each resident household encouraged one additional overnight visitor	50

Visitor Shares

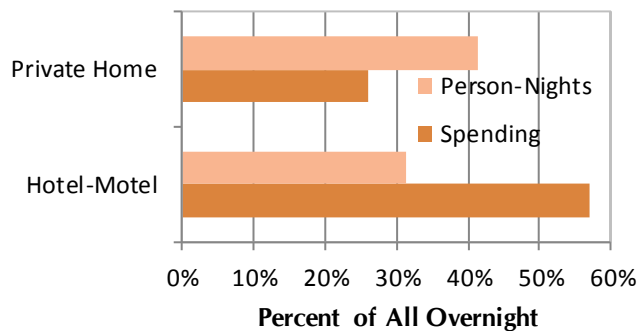
Travel Share of Total Employment (2013)*	6.0%
Overnight Visitor Day Share of Resident Population (2014p)**	8.5%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	340	644	\$58.9
Private Home	281	854	\$26.9
Other Overnight	172	564	\$17.6
All Overnight	793	2,062	\$103.4

Klamath County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	69.0	19.4	1,520	463	1,984	2,447
1992	74.1	20.8	1,520	522	2,203	2,725
1993	76.4	21.5	1,520	544	2,310	2,853
1994	75.5	21.1	1,450	519	2,303	2,822
1995	83.1	23.3	1,530	591	2,470	3,061
1996	86.4	24.1	1,550	640	2,505	3,145
1997	87.3	24.4	1,490	646	2,498	3,145
1998	91.7	26.0	1,600	704	2,602	3,306
1999	98.8	27.7	1,730	769	2,722	3,492
2000	105.0	29.0	1,750	829	2,862	3,691
2001	102.9	28.4	1,720	843	2,794	3,637
2002	108.4	30.4	1,800	918	2,886	3,804
2003	117.4	32.8	1,810	1,008	3,112	4,121
2004	122.4	33.5	1,800	1,138	3,373	4,511
2005	126.4	33.7	1,750	1,153	3,431	4,584
2006	137.0	36.3	1,820	1,243	3,677	4,921
2007	139.6	37.9	1,830	1,389	3,768	5,157
2008	142.0	38.2	1,810	1,494	3,787	5,281
2009	128.5	37.3	1,740	1,394	3,584	4,979
2010	135.3	37.1	1,680	1,476	3,642	5,119
2011	143.4	39.1	1,820	1,465	4,209	5,674
2012	145.6	41.5	1,880	1,431	4,252	5,683
2013	140.0	41.4	1,820	1,476	4,138	5,613
2014p	141.5	43.1	1,840	1,567	4,191	5,758
Annual Percentage Change						
13-14p	1.0%	4.1%	1.1%	6.2%	1.3%	2.6%
91-14p	3.2%	3.5%	0.8%	5.4%	3.3%	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.

Klamath County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	119.7	123.4	121.2	129.1	130.4	125.1	128.9
Other Travel*	17.2	18.6	14.1	14.2	15.2	14.9	12.5
Total Direct Spending	137.0	142.0	135.3	143.4	145.6	140.0	141.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	26.4	26.3	25.9	27.4	27.4	25.7	27.2
Food Service	29.3	30.3	31.4	32.8	33.7	33.0	34.5
Food Stores	11.2	12.4	12.5	13.3	13.5	13.5	14.1
Local Tran. & Gas	16.9	20.0	17.1	20.5	20.4	18.5	17.9
Arts, Ent. & Rec.	18.3	17.6	17.4	17.8	18.0	17.5	17.9
Retail Sales	17.7	16.7	16.9	17.4	17.5	17.0	17.3
Destination Spending	119.7	123.4	121.2	129.1	130.4	125.1	128.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	25.1	26.2	25.7	27.2	29.6	29.8	31.4
Arts, Ent. & Rec.	5.6	6.2	5.8	5.9	6.0	5.8	5.6
Retail**	3.9	4.0	4.0	4.2	4.2	4.1	4.3
Ground Tran.	0.6	0.6	0.6	0.7	0.7	0.6	0.7
Other Travel*	1.2	1.1	1.0	1.1	1.1	1.1	1.1
Total Direct Earnings	36.3	38.2	37.1	39.1	41.5	41.4	43.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,140	1,120	1,040	1,110	1,180	1,150	1,150
Arts, Ent. & Rec.	420	440	410	460	450	440	450
Retail**	180	180	180	190	190	180	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	40	40	40	40	40	40
Total Direct Employment	1,820	1,810	1,680	1,820	1,880	1,820	1,840
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.2	1.5	1.5	1.5	1.4	1.5	1.6
State Tax Receipts	3.7	3.8	3.6	4.2	4.3	4.1	4.2
Total Local & State	4.9	5.3	5.1	5.7	5.7	5.6	5.8

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Klamath County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	94.3	99.9	97.8	104.1	105.0	100.3	103.4
Hotel, Motel	57.8	59.7	57.1	61.5	61.9	57.0	58.9
Private Home	23.8	25.1	24.9	26.2	26.5	26.0	26.9
Other Overnight	12.7	15.1	15.9	16.3	16.7	17.3	17.6
Campground	6.9	8.8	9.8	10.0	10.3	10.9	11.1
Vacation Home	5.8	6.2	6.1	6.3	6.4	6.4	6.5
Day Travel	25.5	23.5	23.4	25.1	25.4	24.8	25.5
Spending at Destination	119.7	123.4	121.2	129.1	130.4	125.1	128.9

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$223	\$423	\$92	\$173	2.4	1.9
Private Home	\$82	\$249	\$32	\$96	2.6	3.0
Other Overnight	\$103	\$340	\$31	\$102	3.3	3.3
All Overnight	\$136	\$346	\$50	\$130	2.7	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	682	632	644	280	259	264
Private Home	842	826	854	325	319	329
Other Overnight	543	560	564	164	169	170
All Overnight	2,068	2,018	2,062	769	747	763

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	361	334	340	148	137	139
Private Home	277	272	281	107	105	108
Other Overnight	165	170	172	50	51	52
All Overnight	803	776	793	304	293	299

LAKE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$58,480
Employee Earnings generated by \$100 Visitor Spending	\$23
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$295
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

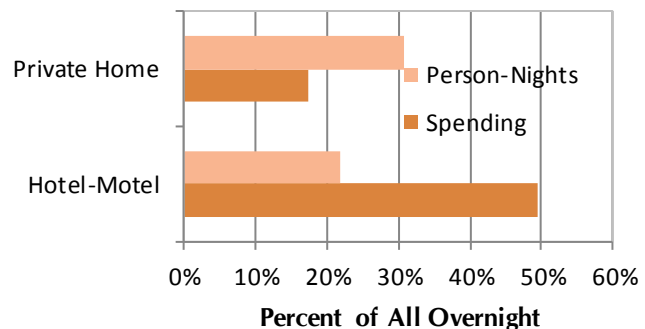
Travel Share of Total Employment (2013)*	5.3%
Overnight Visitor Day Share of Resident Population (2014p)**	8.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	34	56	\$4.6
Private Home	31	79	\$1.6
Other Overnight	42	122	\$3.1
All Overnight	107	257	\$9.3

Lake County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	246	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	343	459
2008	12.1	2.7	230	94	316	410
2009	12.1	2.9	240	103	321	424
2010	13.3	2.9	250	109	341	450
2011	14.0	3.0	250	117	385	502
2012	13.4	2.7	220	94	355	449
2013	13.2	2.7	220	100	354	454
2014p	13.6	2.9	210	108	365	473
Annual Percentage Change						
13-14p	2.9%	7.5%	-2.0%	8.0%	3.1%	4.1%
91-14p	2.8%	2.5%	-0.6%	4.3%	2.6%	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.

**Lake County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	11.5	10.9	12.3	12.7	12.1	11.9	12.4
Other Travel*	1.0	1.2	1.1	1.3	1.3	1.3	1.2
Total Direct Spending	12.5	12.1	13.3	14.0	13.4	13.2	13.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.4	2.2	2.7	2.8	2.5	2.4	2.6
Food Service	2.8	2.7	3.2	3.3	3.2	3.2	3.4
Food Stores	1.6	1.6	1.7	1.7	1.7	1.7	1.8
Local Tran. & Gas	1.2	1.3	1.2	1.4	1.4	1.3	1.2
Arts, Ent. & Rec.	1.8	1.7	1.9	1.9	1.8	1.7	1.8
Retail Sales	1.6	1.4	1.6	1.6	1.5	1.5	1.6
Destination Spending	11.5	10.9	12.3	12.7	12.1	11.9	12.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.7	1.6	1.8	1.8	1.6	1.6	1.8
Arts, Ent. & Rec.	0.5	0.6	0.6	0.6	0.6	0.5	0.6
Retail**	0.5	0.4	0.5	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.7	2.7	2.9	3.0	2.7	2.7	2.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	160	150	160	160	140	140	130
Arts, Ent. & Rec.	40	50	50	60	60	50	50
Retail**	30	20	30	30	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	230	230	250	250	220	220	210
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Total Local & State	0.4	0.4	0.4	0.5	0.4	0.5	0.5

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lake County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	8.4	8.3	9.4	9.7	9.1	9.0	9.3
Hotel, Motel	4.3	4.0	5.1	5.2	4.7	4.4	4.6
Private Home	1.3	1.3	1.5	1.6	1.5	1.5	1.6
Other Overnight	2.9	3.0	2.8	2.9	2.9	3.0	3.1
Campground	2.0	2.0	1.9	1.9	1.9	2.0	2.1
Vacation Home	0.9	1.0	0.9	1.0	1.0	1.0	1.0
Day Travel	3.0	2.6	2.9	3.0	3.0	3.0	3.1
Spending at Destination	11.5	10.9	12.3	12.7	12.1	11.9	12.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$202	\$336	\$82	\$137	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$84	\$240	\$25	\$73	3.3	2.9
All Overnight	\$103	\$241	\$36	\$87	2.8	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	58	54	56	24	22	23
Private Home	76	77	79	30	30	31
Other Overnight	118	121	122	36	37	37
All Overnight	252	252	257	89	89	91

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	35	33	34	14	13	14
Private Home	29	30	31	12	12	12
Other Overnight	41	42	42	12	13	13
All Overnight	105	104	107	38	38	39

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$70,340
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$23,870
Additional employment if each resident household encouraged one additional overnight visitor	339

Visitor Shares

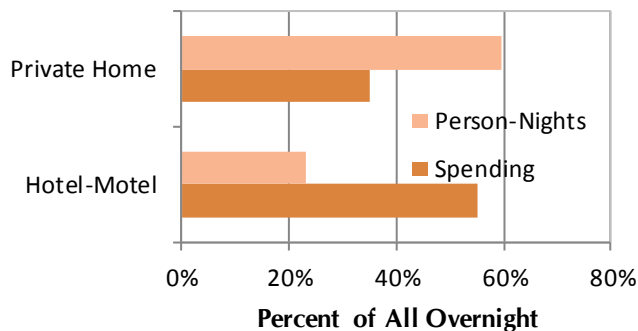
Travel Share of Total Employment (2013)*	5.0%
Overnight Visitor Day Share of Resident Population (2014p)**	5.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	969	1,802	\$251.5
Private Home	1,520	4,604	\$160.2
Other Overnight	424	1,320	\$44.8
All Overnight	2,913	7,727	\$456.5

Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	361.1	88.6	7,650	2,277	8,998	11,275
1992	379.2	91.7	7,370	2,495	9,660	12,155
1993	408.1	96.7	7,520	3,619	10,293	13,912
1994	418.2	100.3	7,590	4,290	10,713	15,003
1995	429.9	104.4	7,570	4,507	10,985	15,492
1996	451.5	109.0	7,640	4,807	11,170	15,977
1997	463.1	112.7	7,500	5,005	11,328	16,334
1998	464.4	115.1	7,560	5,131	11,380	16,511
1999	475.8	116.9	7,380	5,281	11,504	16,786
2000	494.4	119.9	7,440	5,437	11,983	17,420
2001	499.4	122.2	7,610	5,591	12,092	17,683
2002	511.1	126.6	7,720	5,868	12,215	18,083
2003	520.5	126.2	7,510	5,796	12,377	18,173
2004	558.3	132.3	7,730	6,242	13,483	19,724
2005	601.7	142.0	8,010	7,178	14,365	21,543
2006	654.3	155.8	8,380	7,748	15,446	23,194
2007	689.1	173.0	9,060	8,317	16,500	24,817
2008	717.0	178.0	9,290	8,457	17,013	25,470
2009	677.3	161.8	8,340	7,850	15,412	23,261
2010	732.8	167.9	8,460	7,820	16,056	23,876
2011	762.4	180.9	8,830	8,391	18,606	26,997
2012	786.9	193.2	9,100	8,760	19,242	28,002
2013	811.1	205.2	9,500	9,584	19,906	29,490
2014p	849.5	218.6	9,770	10,492	20,558	31,050
Annual Percentage Change						
13-14p	4.7%	6.5%	2.9%	9.5%	3.3%	5.3%
91-14p	3.8%	4.0%	1.1%	6.9%	3.7%	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.

East Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	303.1	72.7	6,120	2,151	7,737	9,888
1992	319.1	75.2	5,900	2,359	8,330	10,689
1993	346.4	79.9	6,060	3,469	8,921	12,390
1994	353.6	82.6	6,090	4,120	9,275	13,394
1995	360.5	85.3	6,020	4,300	9,460	13,760
1996	379.3	89.1	6,090	4,572	9,615	14,187
1997	389.4	92.2	5,990	4,766	9,759	14,525
1998	388.6	93.9	6,050	4,885	9,776	14,662
1999	400.0	95.8	5,930	5,028	9,914	14,941
2000	419.2	99.1	6,100	5,175	10,405	15,580
2001	421.8	100.9	6,240	5,335	10,482	15,817
2002	430.9	104.6	6,330	5,603	10,583	16,187
2003	441.0	104.4	6,180	5,548	10,749	16,297
2004	474.6	109.5	6,340	5,965	11,716	17,681
2005	513.3	118.0	6,600	6,858	12,505	19,362
2006	562.0	130.0	6,940	7,401	13,488	20,890
2007	580.5	140.7	7,300	7,936	14,164	22,099
2008	613.1	146.9	7,620	8,105	14,770	22,874
2009	580.8	132.7	6,800	7,338	13,324	20,662
2010	632.7	138.5	6,940	7,219	13,933	21,152
2011	659.0	150.6	7,310	7,778	16,309	24,087
2012	680.1	161.5	7,570	8,175	16,892	25,067
2013	695.1	169.7	7,810	8,923	17,322	26,244
2014p	727.4	180.7	8,020	9,776	17,844	27,620
Annual Percentage Change						
13-14p	4.6%	6.5%	2.7%	9.6%	3.0%	5.2%
91-14p	3.9%	4.0%	1.2%	6.8%	3.7%	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 Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	58.0	15.9	1,530	126	1,261	1,387
1992	60.2	16.5	1,470	137	1,329	1,466
1993	61.7	16.9	1,460	150	1,372	1,522
1994	64.6	17.7	1,500	171	1,438	1,609
1995	69.4	19.1	1,550	207	1,525	1,732
1996	72.1	20.0	1,560	235	1,555	1,790
1997	73.7	20.5	1,510	239	1,569	1,808
1998	75.8	21.2	1,510	246	1,604	1,850
1999	75.7	21.1	1,450	253	1,591	1,844
2000	75.2	20.8	1,330	262	1,578	1,840
2001	77.5	21.3	1,370	257	1,610	1,867
2002	80.1	22.1	1,390	264	1,632	1,896
2003	79.5	21.8	1,340	247	1,629	1,876
2004	83.7	22.8	1,380	277	1,767	2,044
2005	88.3	24.1	1,410	321	1,860	2,181
2006	92.3	25.7	1,440	347	1,958	2,305
2007	108.6	32.2	1,760	381	2,337	2,718
2008	103.9	31.1	1,670	352	2,243	2,595
2009	96.5	29.1	1,540	512	2,088	2,599
2010	100.2	29.4	1,530	601	2,123	2,723
2011	103.3	30.4	1,520	613	2,297	2,910
2012	106.7	31.6	1,530	585	2,350	2,935
2013	115.9	35.5	1,680	661	2,584	3,246
2014p	122.1	38.0	1,750	716	2,714	3,430
Annual Percentage Change						
13-14p	5.4%	6.9%	3.7%	8.2%	5.0%	5.7%
91-14p	3.3%	3.9%	0.6%	7.8%	3.4%	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.

**Lane County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	491.8	536.8	511.7	546.1	572.1	584.3	609.9
Other Travel*	162.5	180.2	221.1	216.2	214.7	226.8	239.6
Total Direct Spending	654.3	717.0	732.8	762.4	786.9	811.1	849.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	82.8	98.3	88.1	95.1	100.6	103.5	112.3
Food Service	135.1	145.4	147.2	154.2	164.0	170.5	179.5
Food Stores	49.3	56.3	54.8	58.3	60.6	62.2	65.2
Local Tran. & Gas	62.1	75.3	62.9	74.8	77.4	75.7	76.0
Arts, Ent. & Rec.	75.6	77.1	74.2	76.1	78.8	80.5	83.2
Retail Sales	86.9	84.4	84.5	87.7	90.7	91.8	93.7
Destination Spending	491.8	536.8	511.7	546.1	572.1	584.3	609.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	92.7	106.1	99.7	106.6	113.6	117.8	126.7
Arts, Ent. & Rec.	22.1	26.0	23.6	24.2	24.8	28.4	29.2
Retail**	16.8	17.9	17.4	18.2	18.8	19.3	20.2
Ground Tran.	3.5	3.6	3.4	3.4	3.4	3.4	3.8
Other Travel*	20.7	24.3	24.0	28.5	32.5	36.3	38.8
Total Direct Earnings	155.8	178.0	167.9	180.9	193.2	205.2	218.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,610	5,050	4,590	4,840	4,990	5,130	5,280
Arts, Ent. & Rec.	2,070	2,430	2,220	2,230	2,240	2,370	2,430
Retail**	780	810	760	790	810	830	840
Ground Tran.	140	130	120	120	120	110	120
Other Travel*	780	860	770	840	950	1,060	1,100
Total Direct Employment	8,380	9,290	8,460	8,830	9,100	9,500	9,770
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.7	8.5	7.8	8.4	8.8	9.6	10.5
State Tax Receipts	15.4	17.0	16.1	18.6	19.2	19.9	20.6
Total Local & State	23.2	25.5	23.9	27.0	28.0	29.5	31.0

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lane County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	352.0	405.1	381.7	407.9	428.7	435.9	456.5
Hotel, Motel	190.8	222.0	198.9	215.2	230.0	235.5	251.5
Private Home	129.2	141.5	142.7	151.9	156.8	156.3	160.2
Other Overnight	32.0	41.6	40.1	40.9	41.9	44.1	44.8
Campground	25.5	33.6	31.6	31.9	32.8	34.9	35.4
Vacation Home	6.5	7.9	8.6	9.0	9.1	9.2	9.4
Day Travel	139.8	131.7	129.9	138.2	143.4	148.3	153.4
Spending at Destination	491.8	536.8	511.7	546.1	572.1	584.3	609.9

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$328	\$620	\$140	\$260	2.4	1.9
Private Home	\$87	\$267	\$35	\$105	2.5	3.1
Other Overnight	\$114	\$355	\$34	\$106	3.4	3.1
All Overnight	\$152	\$404	\$59	\$157	2.6	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,696	1,731	1,802	717	735	766
Private Home	4,567	4,525	4,604	1,822	1,816	1,851
Other Overnight	1,265	1,312	1,320	376	389	392
All Overnight	7,528	7,568	7,727	2,916	2,941	3,008

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	909	930	969	380	389	406
Private Home	1,508	1,494	1,520	592	588	599
Other Overnight	406	421	424	121	125	126
All Overnight	2,823	2,845	2,913	1,093	1,103	1,131

LINCOLN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$84,470
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,365
Additional employment if each resident household encouraged one additional overnight visitor	52

Visitor Shares

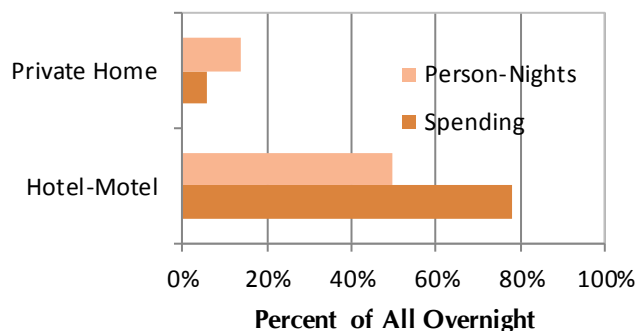
Travel Share of Total Employment (2013)*	22.1%
Overnight Visitor Day Share of Resident Population (2014p)**	26.4%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,184	2,239	\$306.7
Private Home	201	613	\$21.8
Other Overnight	503	1,662	\$65.5
All Overnight	1,888	4,514	\$394.0

Lincoln County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	171.3	47.4	3,810	2,727	4,098	6,825
1992	183.9	50.8	3,830	3,245	4,508	7,753
1993	198.3	55.0	4,000	3,641	4,911	8,552
1994	205.4	57.0	3,970	3,793	5,108	8,901
1995	222.2	61.6	4,130	4,140	5,438	9,578
1996	242.8	65.3	4,230	4,635	5,767	10,402
1997	259.8	69.8	4,350	5,005	6,075	11,080
1998	261.6	71.1	4,060	5,139	6,136	11,275
1999	271.4	73.1	4,280	5,248	6,265	11,513
2000	293.7	77.7	4,300	5,542	6,701	12,244
2001	313.5	83.1	4,640	5,985	7,078	13,064
2002	319.7	85.0	4,630	6,367	7,112	13,479
2003	324.6	85.5	4,690	6,399	7,240	13,639
2004	337.8	88.1	4,760	6,719	8,168	14,887
2005	349.9	90.2	4,690	7,008	8,408	15,417
2006	419.0	110.3	5,510	8,450	10,137	18,586
2007	426.6	115.7	5,680	8,098	10,494	18,592
2008	445.0	120.9	5,770	8,147	10,902	19,048
2009	425.1	119.5	5,640	9,028	10,583	19,611
2010	433.0	116.5	5,540	9,286	10,496	19,781
2011	434.1	115.3	5,370	9,159	11,094	20,253
2012	443.9	121.9	5,520	9,192	11,367	20,559
2013	470.7	125.6	5,630	10,076	11,751	21,828
2014p	507.3	133.9	5,920	10,987	12,423	23,410
Annual Percentage Change						
13-14p	7.8%	6.6%	5.1%	9.0%	5.7%	7.3%
91-14p	4.8%	4.6%	1.9%	6.2%	4.9%	5.5%

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.

**Lincoln County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	408.6	432.5	423.2	423.0	432.6	459.6	496.2
Other Travel*	10.5	12.5	9.8	11.0	11.3	11.0	11.1
Total Direct Spending	419.0	445.0	433.0	434.1	443.9	470.7	507.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	116.2	120.4	120.5	119.3	121.7	127.3	138.6
Food Service	92.9	102.7	105.1	102.3	105.9	116.3	129.0
Food Stores	37.1	39.6	38.2	39.0	40.4	43.0	46.1
Local Tran. & Gas	43.3	53.7	45.4	51.0	51.3	52.3	53.6
Arts, Ent. & Rec.	59.7	59.2	57.2	55.6	56.6	60.5	64.9
Retail Sales	59.4	57.0	56.8	55.8	56.7	60.3	64.0
Destination Spending	408.6	432.5	423.2	423.0	432.6	459.6	496.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	78.4	86.0	84.2	83.4	88.2	93.5	98.8
Arts, Ent. & Rec.	15.8	18.0	16.4	15.9	17.5	14.9	16.3
Retail**	12.6	13.0	12.6	12.6	12.8	13.8	14.9
Ground Tran.	1.5	1.6	1.6	1.6	1.6	1.7	2.0
Other Travel*	2.0	2.2	1.7	1.7	1.7	1.7	1.9
Total Direct Earnings	110.3	120.9	116.5	115.3	121.9	125.6	133.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,830	4,090	3,920	3,820	3,850	3,960	4,090
Arts, Ent. & Rec.	940	950	930	860	990	930	1,060
Retail**	640	640	600	600	600	630	670
Ground Tran.	60	60	50	50	50	60	60
Other Travel*	50	50	40	40	40	40	40
Total Direct Employment	5,510	5,770	5,540	5,370	5,520	5,630	5,920
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.4	8.1	9.3	9.2	9.2	10.1	11.0
State Tax Receipts	10.1	10.9	10.5	11.1	11.4	11.8	12.4
Total Local & State	18.6	19.0	19.8	20.3	20.6	21.8	23.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Lincoln County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	313.6	344.1	337.4	335.1	342.6	363.7	394.0
Hotel, Motel	238.2	264.1	259.6	255.6	260.1	277.9	306.7
Private Home	18.5	19.7	19.2	20.0	20.9	21.4	21.8
Other Overnight	57.0	60.2	58.5	59.5	61.6	64.4	65.5
Campground	36.9	38.6	37.2	37.3	38.9	41.6	42.2
Vacation Home	20.1	21.7	21.4	22.2	22.7	22.8	23.2
Day Travel	95.0	88.4	85.9	88.0	90.0	96.0	102.2
Spending at Destination	408.6	432.5	423.2	423.0	432.6	459.6	496.2

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$335	\$633	\$137	\$259	2.4	1.9
Private Home	\$93	\$283	\$36	\$108	2.6	3.0
Other Overnight	\$129	\$428	\$39	\$130	3.3	3.3
All Overnight	\$238	\$551	\$87	\$209	2.7	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,855	2,022	2,239	759	827	916
Private Home	589	605	613	226	232	235
Other Overnight	1,604	1,650	1,662	490	504	507
All Overnight	4,048	4,276	4,514	1,475	1,563	1,659

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	981	1,069	1,184	401	437	484
Private Home	194	199	201	74	76	77
Other Overnight	485	499	503	148	152	153
All Overnight	1,659	1,767	1,888	623	665	715

LINN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$74,250
Employee Earnings generated by \$100 Visitor Spending	\$25
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,747
Additional employment if each resident household encouraged one additional overnight visitor	64

Visitor Shares

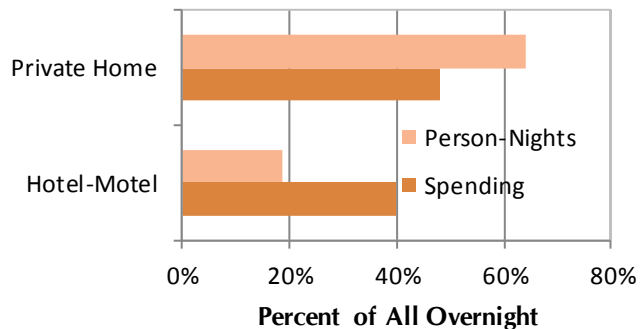
Travel Share of Total Employment (2013)*	3.1%
Overnight Visitor Day Share of Resident Population (2014p)**	4.3%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	213	354	\$32.1
Private Home	470	1,209	\$38.7
Other Overnight	105	324	\$9.7
All Overnight	789	1,887	\$80.5

Linn County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	57.7	13.2	1,380	151	1,884	2,035
1992	60.9	13.9	1,380	166	2,069	2,235
1993	63.8	14.6	1,400	174	2,205	2,379
1994	66.8	15.4	1,430	217	2,324	2,541
1995	70.8	16.3	1,460	273	2,420	2,692
1996	74.4	17.2	1,480	303	2,465	2,768
1997	77.2	18.0	1,470	331	2,516	2,846
1998	75.8	18.0	1,490	323	2,488	2,811
1999	77.3	18.1	1,380	329	2,498	2,826
2000	82.9	18.9	1,430	384	2,603	2,987
2001	85.4	19.7	1,460	451	2,664	3,115
2002	88.3	20.6	1,520	457	2,692	3,149
2003	92.0	21.1	1,510	459	2,794	3,254
2004	95.8	21.4	1,520	554	2,934	3,488
2005	103.9	22.7	1,570	614	3,113	3,727
2006	113.4	24.4	1,630	711	3,352	4,063
2007	116.0	25.8	1,670	777	3,465	4,242
2008	122.5	26.7	1,650	774	3,568	4,341
2009	108.2	25.3	1,550	691	3,303	3,994
2010	112.9	24.8	1,490	648	3,321	3,969
2011	124.7	26.6	1,550	743	3,966	4,710
2012	131.4	27.5	1,580	839	4,033	4,872
2013	134.4	28.5	1,620	851	4,119	4,970
2014p	136.6	29.7	1,630	927	4,159	5,086
Annual Percentage Change						
13-14p	1.7%	4.4%	0.9%	8.9%	1.0%	2.3%
91-14p	3.8%	3.6%	0.7%	8.2%	3.5%	4.1%

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.

Linn County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	96.5	101.6	96.1	104.4	110.7	114.3	117.2
Other Travel*	16.9	20.9	16.8	20.3	20.7	20.0	19.4
Total Direct Spending	113.4	122.5	112.9	124.7	131.4	134.4	136.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	11.5	12.6	10.8	11.6	12.8	14.0	15.3
Food Service	26.6	27.9	28.0	29.9	32.2	33.8	35.1
Food Stores	12.0	13.1	12.6	13.7	14.4	14.8	15.3
Local Tran. & Gas	12.1	14.7	12.1	14.7	15.5	15.2	14.7
Arts, Ent. & Rec.	15.4	15.2	14.6	15.3	16.0	16.4	16.7
Retail Sales	18.8	18.1	17.9	19.0	19.8	20.2	20.2
Destination Spending	96.5	101.6	96.1	104.4	110.7	114.3	117.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	14.4	15.8	14.8	16.0	16.8	17.5	18.0
Arts, Ent. & Rec.	4.6	5.3	4.8	5.0	4.9	5.1	5.6
Retail**	3.9	4.0	3.9	4.2	4.4	4.5	4.6
Ground Tran.	0.5	0.5	0.5	0.5	0.5	0.6	0.6
Other Travel*	1.1	1.0	0.9	0.9	0.9	0.9	1.0
Total Direct Earnings	24.4	26.7	24.8	26.6	27.5	28.5	29.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	950	990	870	940	950	990	990
Arts, Ent. & Rec.	400	390	360	350	350	350	360
Retail**	190	190	190	200	210	210	210
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	60	50	50	50	50	50
Total Direct Employment	1,630	1,650	1,490	1,550	1,580	1,620	1,630
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.7	0.8	0.6	0.7	0.8	0.9	0.9
State Tax Receipts	3.4	3.6	3.3	4.0	4.0	4.1	4.2
Total Local & State	4.1	4.3	4.0	4.7	4.9	5.0	5.1

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Linn County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	64.0	70.4	65.7	71.1	75.7	78.3	80.5
Hotel, Motel	24.3	27.0	22.9	25.1	28.0	30.2	32.1
Private Home	31.2	34.2	34.1	37.1	38.6	38.5	38.7
Other Overnight	8.6	9.2	8.6	8.8	9.1	9.6	9.7
Campground	7.4	7.8	7.3	7.4	7.7	8.1	8.2
Vacation Home	1.2	1.4	1.4	1.4	1.5	1.5	1.5
Day Travel	32.5	31.2	30.4	33.3	35.1	36.1	36.7
Spending at Destination	96.5	101.6	96.1	104.4	110.7	114.3	117.2

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$222	\$370	\$91	\$151	2.5	1.7
Private Home	\$82	\$211	\$32	\$82	2.6	2.6
Other Overnight	\$103	\$316	\$30	\$92	3.4	3.1
All Overnight	\$113	\$267	\$43	\$102	2.7	2.4

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	316	341	354	129	139	144
Private Home	1,211	1,208	1,209	473	472	473
Other Overnight	309	322	324	90	94	94
All Overnight	1,836	1,871	1,887	692	705	711

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	190	205	213	78	84	87
Private Home	471	470	470	184	184	184
Other Overnight	101	105	105	29	31	31
All Overnight	762	780	789	291	298	301

MALHEUR COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$63,360
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,043
Additional employment if each resident household encouraged one additional overnight visitor	16

Visitor Shares

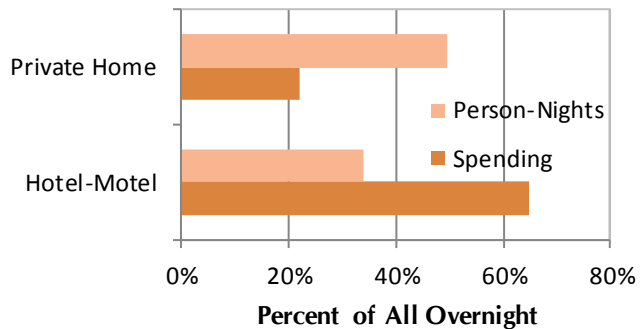
Travel Share of Total Employment (2013)*	3.4%
Overnight Visitor Day Share of Resident Population (2014p)**	5.5%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	127	211	\$18.4
Private Home	119	307	\$6.2
Other Overnight	33	102	\$3.8
All Overnight	280	620	\$28.5

Malheur County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	1,701
2008	36.5	9.4	530	585	1,023	1,607
2009	34.2	9.3	530	561	984	1,545
2010	37.6	9.8	550	626	1,040	1,666
2011	39.7	10.2	580	637	1,177	1,814
2012	41.1	10.9	590	682	1,206	1,888
2013	40.0	10.9	580	668	1,197	1,865
2014p	40.3	11.0	570	679	1,192	1,872
Annual Percentage Change						
13-14p	0.7%	0.9%	-1.7%	1.7%	-0.4%	0.4%
91-14p	2.5%	2.5%	-0.2%	6.1%	2.7%	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.

**Malheur County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	35.9	31.2	33.3	34.7	35.9	35.0	35.5
Other Travel*	4.4	5.3	4.3	5.1	5.2	5.0	4.8
Total Direct Spending	40.3	36.5	37.6	39.7	41.1	40.0	40.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	8.0	7.9	8.5	8.8	9.1	9.1	9.2
Food Service	9.2	7.8	8.6	8.9	9.3	9.1	9.4
Food Stores	4.1	3.6	3.9	4.1	4.2	4.2	4.3
Local Tran. & Gas	3.4	3.3	3.1	3.6	3.7	3.4	3.3
Arts, Ent. & Rec.	6.3	5.0	5.2	5.3	5.4	5.2	5.2
Retail Sales	4.9	3.6	3.9	4.0	4.1	4.0	4.0
Destination Spending	35.9	31.2	33.3	34.7	35.9	35.0	35.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	7.1	6.4	6.8	7.1	7.5	7.6	7.7
Arts, Ent. & Rec.	1.8	1.7	1.6	1.7	1.9	1.9	1.9
Retail**	1.1	0.9	1.0	1.0	1.0	1.0	1.1
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.2	0.2	0.2
Total Direct Earnings	10.4	9.4	9.8	10.2	10.9	10.9	11.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	410	360	370	380	380	380	370
Arts, Ent. & Rec.	150	120	120	130	150	140	130
Retail**	60	50	50	50	50	50	50
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	630	530	550	580	590	580	570
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.5	0.6	0.6	0.6	0.7	0.7	0.7
State Tax Receipts	1.1	1.0	1.0	1.2	1.2	1.2	1.2
Total Local & State	1.6	1.6	1.7	1.8	1.9	1.9	1.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Malheur County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	26.5	25.1	26.8	27.8	28.8	28.1	28.5
Hotel, Motel	17.6	16.6	17.5	18.2	19.0	18.3	18.4
Private Home	5.3	5.6	5.9	6.1	6.2	6.0	6.2
Other Overnight	3.5	2.9	3.4	3.5	3.6	3.8	3.8
Campground	3.3	2.6	3.1	3.2	3.3	3.5	3.5
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	9.4	6.1	6.5	6.9	7.1	6.9	7.0
Spending at Destination	35.9	31.2	33.3	34.7	35.9	35.0	35.5

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$214	\$355	\$87	\$145	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$129	\$395	\$38	\$116	3.4	3.1
All Overnight	\$121	\$263	\$46	\$102	2.6	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	228	213	211	93	87	86
Private Home	308	299	307	120	117	120
Other Overnight	97	101	102	28	30	30
All Overnight	633	614	620	242	233	236

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	137	128	127	56	52	52
Private Home	120	116	119	47	45	47
Other Overnight	32	33	33	9	10	10
All Overnight	289	278	280	112	107	108

MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$74,550
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$15,099
Additional employment if each resident household encouraged one additional overnight visitor	203

Visitor Shares

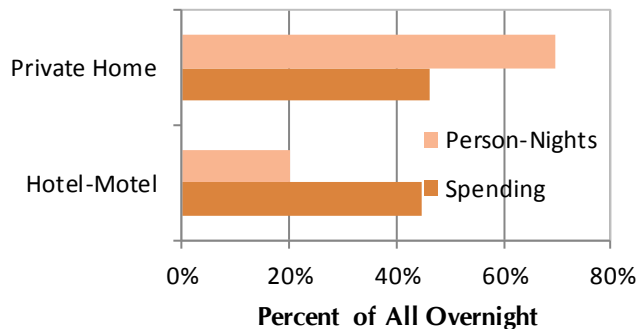
Travel Share of Total Employment (2013)*	2.5%
Overnight Visitor Day Share of Resident Population (2014p)**	4.3%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	549	1,038	\$109.2
Private Home	1,181	3,592	\$112.9
Other Overnight	163	530	\$21.9
All Overnight	1,893	5,161	\$244.0

Marion County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	155.0	38.0	3,300	646	4,992	5,639
1992	169.1	41.5	3,420	763	5,633	6,395
1993	178.5	44.0	3,510	828	6,045	6,873
1994	186.1	46.1	3,540	881	6,355	7,236
1995	197.7	49.2	3,620	963	6,625	7,588
1996	203.2	50.2	3,600	1,021	6,644	7,665
1997	209.2	52.0	3,550	1,054	6,725	7,779
1998	214.0	54.5	3,740	1,115	6,872	7,987
1999	222.1	55.9	3,580	1,422	7,006	8,428
2000	238.0	57.8	3,630	1,772	7,426	9,198
2001	241.0	58.6	3,650	1,793	7,462	9,254
2002	248.5	61.1	3,760	1,872	7,555	9,427
2003	255.8	61.5	3,730	1,877	7,765	9,641
2004	268.2	63.0	3,720	2,028	8,264	10,293
2005	293.6	67.6	3,850	2,225	8,811	11,036
2006	317.8	72.3	4,020	2,556	9,417	11,973
2007	326.7	76.7	4,210	2,776	9,737	12,513
2008	338.9	77.8	4,150	2,783	9,874	12,657
2009	309.6	76.5	4,000	2,585	9,400	11,985
2010	324.2	75.6	3,890	2,520	9,488	12,008
2011	345.8	78.0	3,980	2,711	10,978	13,689
2012	365.3	81.6	4,030	2,873	11,227	14,099
2013	376.8	86.1	4,240	3,121	11,588	14,709
2014p	383.6	92.1	4,540	3,398	11,830	15,228
Annual Percentage Change						
13-14p	1.8%	7.0%	7.1%	8.9%	2.1%	3.5%
91-14p	4.0%	3.9%	1.4%	7.5%	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.

**Marion County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	268.9	279.1	275.7	288.0	305.7	318.6	326.6
Other Travel*	48.9	59.8	48.6	57.8	59.5	58.2	57.0
Total Direct Spending	317.8	338.9	324.2	345.8	365.3	376.8	383.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	39.8	42.3	40.1	40.6	43.1	47.4	51.5
Food Service	73.5	75.8	79.4	81.6	88.0	93.1	96.5
Food Stores	31.2	34.1	33.8	35.7	37.9	39.1	40.4
Local Tran. & Gas	33.0	39.1	33.8	39.7	41.7	41.1	39.6
Arts, Ent. & Rec.	41.5	40.5	40.1	40.7	42.9	44.3	44.9
Retail Sales	49.9	47.2	48.4	49.6	52.2	53.6	53.7
Destination Spending	268.9	279.1	275.7	288.0	305.7	318.6	326.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	44.7	48.2	47.2	48.9	51.9	54.9	57.4
Arts, Ent. & Rec.	12.4	13.9	13.0	13.2	13.1	14.0	16.9
Retail**	10.1	10.4	10.3	10.7	11.3	11.7	12.0
Ground Tran.	1.3	1.3	1.3	1.4	1.5	1.5	1.7
Other Travel*	3.8	4.0	3.7	3.7	3.8	3.9	4.2
Total Direct Earnings	72.3	77.8	75.6	78.0	81.6	86.1	92.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,440	2,480	2,320	2,410	2,500	2,620	2,690
Arts, Ent. & Rec.	890	990	910	910	850	930	1,140
Retail**	480	470	460	470	480	490	500
Ground Tran.	50	50	40	50	50	50	50
Other Travel*	170	170	150	150	150	150	160
Total Direct Employment	4,020	4,150	3,890	3,980	4,030	4,240	4,540
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.6	2.8	2.5	2.7	2.9	3.1	3.4
State Tax Receipts	9.4	9.9	9.5	11.0	11.2	11.6	11.8
Total Local & State	12.0	12.7	12.0	13.7	14.1	14.7	15.2

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Marion County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	195.1	210.0	205.9	213.9	227.1	237.2	244.0
Hotel, Motel	85.7	91.6	87.1	89.2	95.6	103.4	109.2
Private Home	91.8	98.3	99.4	105.2	111.1	112.3	112.9
Other Overnight	17.6	20.2	19.4	19.5	20.4	21.5	21.9
Campground	14.4	16.6	15.8	15.8	16.5	17.7	17.9
Vacation Home	3.2	3.5	3.6	3.7	3.8	3.9	3.9
Day Travel	73.8	69.1	69.8	74.1	78.6	81.4	82.6
Spending at Destination	268.9	279.1	275.7	288.0	305.7	318.6	326.6

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$257	\$486	\$105	\$199	2.4	1.9
Private Home	\$82	\$249	\$31	\$96	2.6	3.0
Other Overnight	\$139	\$453	\$41	\$134	3.4	3.3
All Overnight	\$124	\$336	\$47	\$129	2.6	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	936	1,006	1,038	383	412	425
Private Home	3,555	3,592	3,592	1,364	1,378	1,378
Other Overnight	507	527	530	150	156	157
All Overnight	4,998	5,125	5,161	1,897	1,946	1,960

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	495	532	549	202	218	225
Private Home	1,169	1,181	1,181	449	453	453
Other Overnight	156	162	163	46	48	48
All Overnight	1,820	1,875	1,893	697	719	726

MORROW COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$73,230
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.40

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$352
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

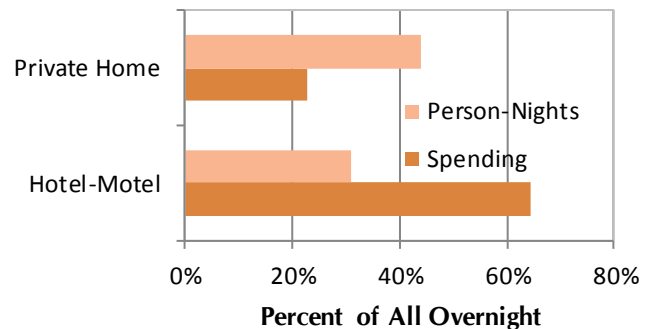
Travel Share of Total Employment (2013)*	2.5%
Overnight Visitor Day Share of Resident Population (2014p)**	6.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	48	80	\$6.5
Private Home	44	113	\$2.3
Other Overnight	22	64	\$1.3
All Overnight	115	258	\$10.0

Morrow County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	12.0	2.8	150	4	342	346
2011	13.7	3.1	170	4	416	420
2012	13.4	3.1	160	5	404	409
2013	14.7	3.4	170	5	436	440
2014p	14.5	3.4	180	5	428	433
Annual Percentage Change						
13-14p	-1.5%	-0.5%	1.3%	-1.1%	-1.7%	-1.7%
91-14p	2.6%	2.1%	-1.2%	0.0%	2.8%	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, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	10.6	11.5	10.4	11.9	11.5	12.9	12.7
Other Travel*	1.6	2.0	1.5	1.8	1.9	1.8	1.8
Total Direct Spending	12.2	13.5	12.0	13.7	13.4	14.7	14.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.1	2.7	2.4	2.8	2.7	3.2	3.2
Food Service	2.7	2.9	2.8	3.1	3.1	3.4	3.4
Food Stores	1.3	1.3	1.3	1.4	1.4	1.5	1.5
Local Tran. & Gas	1.1	1.4	1.1	1.4	1.3	1.4	1.3
Arts, Ent. & Rec.	1.7	1.8	1.6	1.7	1.7	1.9	1.8
Retail Sales	1.5	1.4	1.3	1.4	1.4	1.5	1.5
Destination Spending	10.6	11.5	10.4	11.9	11.5	12.9	12.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.7	1.9	1.6	1.9	1.8	2.1	2.1
Arts, Ent. & Rec.	0.6	0.7	0.6	0.6	0.6	0.6	0.6
Retail**	0.5	0.5	0.4	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	2.8	3.2	2.8	3.1	3.1	3.4	3.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	130	140	100	110	100	120	120
Arts, Ent. & Rec.	30	30	30	30	30	30	30
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	190	200	150	170	160	170	180
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.4	0.4	0.3	0.4	0.4	0.4	0.4
Total Local & State	0.4	0.4	0.3	0.4	0.4	0.4	0.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Morrow County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	7.8	9.1	8.2	9.3	9.0	10.2	10.0
Hotel, Motel	4.7	5.7	5.0	5.9	5.6	6.6	6.5
Private Home	2.0	2.2	2.1	2.3	2.2	2.3	2.3
Other Overnight	1.2	1.2	1.1	1.2	1.2	1.2	1.3
Campground	0.7	0.7	0.6	0.6	0.6	0.7	0.7
Vacation Home	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Day Travel	2.7	2.4	2.3	2.6	2.5	2.7	2.7
Spending at Destination	10.6	11.5	10.4	11.9	11.5	12.9	12.7

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$199	\$332	\$81	\$135	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$64	\$183	\$19	\$56	3.3	2.8
All Overnight	\$104	\$230	\$39	\$88	2.7	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	72	82	80	29	34	33
Private Home	110	116	113	43	45	44
Other Overnight	62	64	64	19	19	20
All Overnight	244	262	258	91	98	96

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	43	49	48	18	20	20
Private Home	43	45	44	17	18	17
Other Overnight	22	22	22	7	7	7
All Overnight	108	117	115	41	45	44

MULTNOMAH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$106,730
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$9.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$98,630
Additional employment if each resident household encouraged one additional overnight visitor	924

Visitor Shares

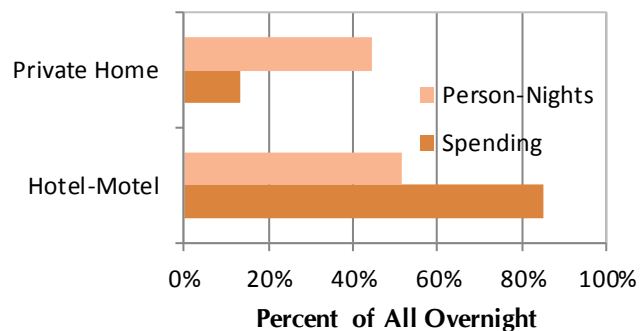
Travel Share of Total Employment (2013)*	3.4%
Overnight Visitor Day Share of Resident Population (2014p)**	4.2%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,002	6,107	\$1,033.6
Private Home	1,709	5,298	\$163.3
Other Overnight	137	457	\$15.9
All Overnight	4,848	11,862	\$1,212.8

Multnomah County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	1,117	285	13,630	10,150	22,580	32,730
1992	1,239	316	13,940	12,942	25,139	38,081
1993	1,341	338	14,380	20,573	26,714	47,287
1994	1,387	355	14,850	22,327	28,060	50,387
1995	1,474	381	15,660	24,868	29,938	54,806
1996	1,605	407	16,390	27,593	31,435	59,028
1997	1,772	434	17,000	30,344	33,133	63,478
1998	1,864	455	17,630	32,116	34,263	66,379
1999	1,977	492	17,960	33,774	36,619	70,393
2000	2,106	521	18,000	39,742	39,247	78,989
2001	2,030	523	18,210	41,499	39,324	80,823
2002	1,996	508	17,800	43,801	38,106	81,907
2003	1,988	482	16,930	44,221	36,737	80,958
2004	2,099	484	16,970	46,213	39,801	86,014
2005	2,310	516	17,380	50,492	42,263	92,756
2006	2,560	555	18,140	55,885	45,299	101,184
2007	2,680	591	18,860	60,503	48,323	108,826
2008	2,764	598	19,420	62,955	49,702	112,657
2009	2,629	568	17,960	61,027	46,267	107,294
2010	2,814	599	17,930	59,469	48,541	108,011
2011	2,969	651	19,030	66,691	54,954	121,645
2012	3,118	688	19,660	72,627	57,763	130,390
2013	3,232	718	20,380	83,841	59,939	143,780
2014p	3,410	761	20,950	92,900	62,602	155,502
Annual Percentage Change						
13-14p	5.5%	6.0%	2.8%	10.8%	4.4%	8.2%
91-14p	5.0%	4.4%	1.9%	10.1%	4.5%	7.0%

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.

East Multnomah County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	27.9	7.5	650	274	685	959
1992	29.7	7.9	640	299	745	1,043
1993	31.4	8.4	660	315	792	1,107
1994	34.0	9.1	680	347	861	1,208
1995	37.2	10.0	730	395	931	1,325
1996	40.0	10.7	760	439	979	1,419
1997	42.3	11.4	770	477	1,021	1,497
1998	43.8	12.1	790	500	1,053	1,553
1999	45.4	12.5	790	525	1,077	1,602
2000	48.7	13.2	810	636	1,145	1,782
2001	48.9	13.2	810	667	1,139	1,806
2002	46.8	12.7	760	628	1,075	1,703
2003	47.7	12.7	770	634	1,094	1,728
2004	49.6	13.1	770	682	1,187	1,869
2005	53.6	14.0	800	770	1,272	2,042
2006	58.4	15.2	850	867	1,379	2,246
2007	59.6	16.1	860	909	1,444	2,353
2008	60.7	16.2	850	942	1,465	2,407
2009	53.7	14.7	760	870	1,313	2,182
2010	57.4	15.1	760	902	1,368	2,271
2011	63.5	16.5	840	1,029	1,596	2,625
2012	68.4	18.1	870	1,089	1,708	2,797
2013	69.0	18.3	890	1,139	1,720	2,859
2014p	74.3	20.1	940	1,274	1,840	3,113
Annual Percentage Change						
13-14p	7.6%	9.3%	6.6%	11.8%	7.0%	8.9%
91-14p	4.3%	4.4%	1.7%	6.9%	4.4%	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.

West Multnomah County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	1,089	278	12,980	9,876	21,895	31,771
1992	1,209	308	13,300	12,643	24,395	37,038
1993	1,309	329	13,720	20,258	25,922	46,180
1994	1,353	346	14,170	21,980	27,199	49,179
1995	1,437	371	14,930	24,473	29,007	53,480
1996	1,565	397	15,630	27,154	30,456	57,610
1997	1,730	422	16,230	29,868	32,113	61,980
1998	1,820	443	16,840	31,616	33,209	64,825
1999	1,932	480	17,180	33,249	35,542	68,791
2000	2,058	508	17,190	39,106	38,102	77,208
2001	1,981	509	17,390	40,832	38,184	79,016
2002	1,949	495	17,040	43,173	37,031	80,205
2003	1,940	469	16,160	43,587	35,643	79,231
2004	2,049	471	16,190	45,532	38,614	84,145
2005	2,257	502	16,570	49,723	40,991	90,714
2006	2,502	539	17,290	55,018	43,919	98,938
2007	2,620	575	18,000	59,594	46,879	106,473
2008	2,704	582	18,560	62,013	48,238	110,250
2009	2,576	553	17,190	60,158	44,954	105,112
2010	2,756	584	17,160	58,567	47,173	105,740
2011	2,906	635	18,190	65,661	53,358	119,019
2012	3,049	670	18,790	71,538	56,055	127,592
2013	3,163	700	19,490	82,702	58,219	140,921
2014p	3,336	741	20,010	91,626	60,762	152,388
Annual Percentage Change						
13-14p	5.5%	5.9%	2.6%	10.8%	4.4%	8.1%
91-14p	5.0%	4.4%	1.9%	10.2%	4.5%	7.1%

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.

**Multnomah County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,167	1,302	1,292	1,418	1,537	1,608	1,709
Other Travel*	1,393	1,462	1,521	1,551	1,581	1,624	1,701
Total Direct Spending	2,560	2,764	2,814	2,969	3,118	3,232	3,410
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	342	398	371	430	477	504	562
Food Service	296	328	353	375	410	430	450
Food Stores	51	57	58	63	67	69	73
Local Tran. & Gas	208	245	227	252	266	280	293
Arts, Ent. & Rec.	102	105	107	112	119	122	126
Retail Sales	167	169	177	186	198	203	206
Destination Spending	1,167	1,302	1,292	1,418	1,537	1,608	1,709
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	219	252	248	276	297	317	336
Arts, Ent. & Rec.	28	34	32	34	40	38	40
Retail**	27	29	29	31	33	34	36
Ground Tran.	25	26	24	26	27	28	30
Other Travel*	256	258	266	284	290	301	319
Total Direct Earnings	555	598	599	651	688	718	761
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	9.8	10.8	10.4	11.3	11.8	12.3	12.7
Arts, Ent. & Rec.	1.0	1.0	0.9	1.1	1.1	1.1	1.1
Retail**	1.0	1.1	1.1	1.1	1.2	1.2	1.2
Ground Tran.	1.0	1.0	0.9	0.9	0.9	0.9	1.0
Other Travel*	5.3	5.5	4.7	4.6	4.7	4.8	4.9
Total Direct Employment	18.1	19.4	17.9	19.0	19.7	20.4	21.0
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	56	63	59	67	73	84	93
State Tax Receipts	45	50	49	55	58	60	63
Total Local & State	101	113	108	122	130	144	156

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Multnomah County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	985.1	1,119.3	1,104.4	1,212.8	1,318.3	1,382.0	1,476.2
Hotel, Motel	836.9	955.8	934.9	1,033.6	1,131.1	1,192.8	1,283.5
Private Home	133.3	147.6	153.9	163.3	170.7	171.8	175.0
Other Overnight	14.9	15.9	15.6	15.9	16.5	17.4	17.7
Campground	11.4	12.0	11.6	11.7	12.2	13.0	13.2
Vacation Home	3.5	3.9	4.0	4.2	4.3	4.4	4.5
Day Travel	182.2	182.7	188.0	205.0	218.7	226.3	233.0
Spending at Destination	1,167.3	1,302.0	1,292.4	1,417.8	1,537.1	1,608.3	1,709.3

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$447	\$931	\$210	\$427	2.1	2.1
Private Home	\$64	\$205	\$33	\$102	1.9	3.2
Other Overnight	\$120	\$403	\$39	\$129	3.1	3.4
All Overnight	\$257	\$649	\$124	\$304	2.1	2.5

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	5,816	5,993	6,107	2,715	2,803	2,870
Private Home	5,257	5,259	5,298	2,686	2,697	2,729
Other Overnight	439	454	457	142	147	148
All Overnight	11,512	11,705	11,862	5,543	5,646	5,747

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	2,859	2,946	3,002	1,305	1,347	1,378
Private Home	1,696	1,696	1,709	842	845	854
Other Overnight	132	136	137	42	44	44
All Overnight	4,686	4,778	4,848	2,190	2,235	2,276

POLK COUNTY TRAVEL IMPACTS

Travel Indicators

Visitor Spending Impacts (2014p)	
Amount of Visitor Spending that supports 1 Job	\$79,340
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.40
Visitor Shares	
Travel Share of Total Employment (2013)*	7.5%

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	36.3	39.5	38.4	39.2	40.7	41.5	41.9
Hotel, Motel	20.7	21.4	20.7	21.0	21.7	22.2	22.4
Private Home	12.3	14.3	14.1	14.6	15.2	15.3	15.4
Other Overnight	3.3	3.8	3.6	3.6	3.7	4.0	4.0
Campground	3.1	3.5	3.3	3.3	3.5	3.7	3.7
Vacation Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	111.4	105.8	103.9	108.3	108.2	110.3	110.8
Spending at Destination	147.6	145.2	142.3	147.5	148.9	151.7	152.7

Polk County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	17.1	3.7	340	0	693	693
1992	18.0	3.8	320	0	770	770
1993	19.6	4.2	340	0	839	839
1994	20.8	4.5	350	0	898	898
1995	29.5	7.1	490	0	1,070	1,070
1996	44.0	12.5	760	0	1,337	1,337
1997	64.5	19.2	1,070	0	1,739	1,739
1998	91.6	28.3	1,610	0	2,300	2,300
1999	102.6	31.6	1,680	0	2,514	2,514
2000	104.7	31.8	1,690	0	2,559	2,559
2001	105.5	32.1	1,730	0	2,574	2,574
2002	125.3	38.6	2,050	0	2,945	2,945
2003	128.5	39.2	2,010	0	3,022	3,022
2004	134.3	40.0	1,970	0	3,127	3,127
2005	154.9	45.9	2,260	0	3,535	3,535
2006	157.9	46.7	2,200	0	3,645	3,645
2007	156.7	49.4	2,150	0	3,795	3,795
2008	158.5	50.1	2,120	0	3,859	3,859
2009	148.9	48.0	2,000	0	3,662	3,662
2010	152.6	48.3	1,970	0	3,686	3,686
2011	160.1	45.9	1,930	0	3,897	3,897
2012	161.8	43.2	1,900	0	3,744	3,744
2013	164.2	41.8	1,890	0	3,686	3,686
2014p	164.8	42.2	1,950	0	3,676	3,676
Annual Percentage Change						
13-14p	0.3%	1.0%	3.4%	0.0%	-0.3%	-0.3%
91-14p	10.3%	11.2%	7.8%	0.0%	7.5%	7.5%

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.

**Polk County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	147.6	145.2	142.3	147.5	148.9	151.7	152.7
Other Travel*	10.3	13.2	10.3	12.5	12.9	12.5	12.1
Total Direct Spending	157.9	158.5	152.6	160.1	161.8	164.2	164.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.0	13.6	13.1	13.3	13.6	14.1	14.4
Food Service	25.2	25.7	26.6	27.5	28.3	29.3	29.9
Food Stores	10.4	11.3	11.1	11.7	11.9	12.2	12.5
Local Tran. & Gas	7.8	9.2	7.9	9.3	9.3	9.0	8.6
Arts, Ent. & Rec.	87.7	81.9	80.1	82.3	82.1	83.5	83.7
Retail Sales	3.4	3.5	3.5	3.5	3.6	3.7	3.6
Destination Spending	147.6	145.2	142.3	147.5	148.9	151.7	152.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	15.1	16.0	16.0	16.2	16.3	16.3	16.7
Arts, Ent. & Rec.	28.9	31.1	29.4	26.7	23.8	22.4	22.4
Retail**	2.0	2.2	2.1	2.2	2.2	2.3	2.3
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Total Direct Earnings	46.7	50.1	48.3	45.9	43.2	41.8	42.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,000	970	940	920	900	910	940
Arts, Ent. & Rec.	1,050	990	880	860	840	820	860
Retail**	110	110	110	110	110	110	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	30	30	20	20	20	30	30
Total Direct Employment	2,200	2,120	1,970	1,930	1,900	1,890	1,950
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	3.6	3.9	3.7	3.9	3.7	3.7	3.7
Total Local & State	3.6	3.9	3.7	3.9	3.7	3.7	3.7

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

TILLAMOOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$101,030
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.90

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,276
Additional employment if each resident household encouraged one additional overnight visitor	13

Visitor Shares

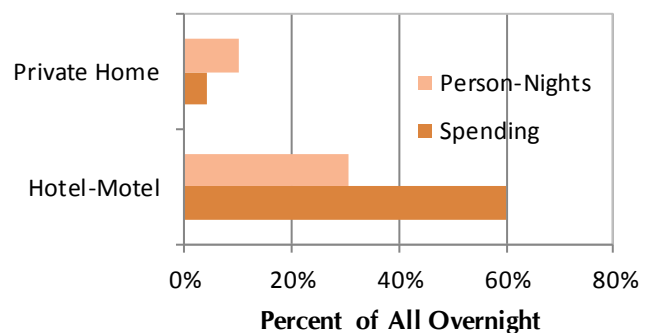
Travel Share of Total Employment (2013)*	15.9%
Overnight Visitor Day Share of Resident Population (2014p)**	27.1%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	467	777	\$76.0
Private Home	101	259	\$5.3
Other Overnight	522	1,498	\$45.4
All Overnight	1,090	2,535	\$126.6

Tillamook County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	75.1	20.7	1,410	260	1,694	1,954
1992	81.0	22.5	1,440	302	1,862	2,164
1993	86.2	24.0	1,490	336	1,996	2,332
1994	87.6	24.4	1,460	343	2,037	2,380
1995	90.5	25.1	1,460	362	2,084	2,446
1996	93.5	26.0	1,460	400	2,109	2,509
1997	97.6	27.3	1,460	423	2,168	2,591
1998	100.1	28.3	1,530	439	2,210	2,649
1999	103.0	29.0	1,510	461	2,250	2,711
2000	108.2	30.0	1,500	474	2,350	2,823
2001	118.5	33.0	1,630	581	2,535	3,115
2002	124.8	35.0	1,700	601	2,617	3,217
2003	129.0	36.1	1,720	604	2,716	3,320
2004	133.4	37.0	1,700	761	2,915	3,676
2005	138.2	38.1	1,680	796	3,006	3,802
2006	181.1	51.7	2,170	1,209	3,954	5,162
2007	179.6	53.6	2,120	1,021	4,034	5,055
2008	187.5	56.0	2,240	1,025	4,182	5,207
2009	179.5	54.9	2,140	983	4,039	5,022
2010	186.2	55.0	2,100	1,023	4,099	5,121
2011	187.8	54.9	1,980	1,055	4,349	5,404
2012	199.4	57.0	1,960	1,086	4,474	5,561
2013	212.8	60.2	2,060	1,222	4,682	5,904
2014p	221.1	65.7	2,160	1,310	4,931	6,241
Annual Percentage Change						
13-14p	3.9%	9.1%	4.7%	7.2%	5.3%	5.7%
91-14p	4.8%	5.1%	1.9%	7.3%	4.8%	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.

**Tillamook County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	177.5	183.2	182.8	183.6	195.1	208.7	217.1
Other Travel*	3.5	4.3	3.4	4.2	4.3	4.1	4.0
Total Direct Spending	181.1	187.5	186.2	187.8	199.4	212.8	221.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	32.7	34.3	35.3	34.6	37.5	40.2	42.1
Food Service	47.1	48.9	50.9	50.7	54.5	59.4	62.9
Food Stores	22.4	24.1	23.2	23.9	25.1	26.7	28.0
Local Tran. & Gas	14.8	17.5	15.2	17.2	18.0	18.2	17.8
Arts, Ent. & Rec.	30.7	30.5	30.0	29.2	30.8	33.2	34.6
Retail Sales	29.8	27.8	28.0	28.0	29.3	31.0	31.7
Destination Spending	177.5	183.2	182.8	183.6	195.1	208.7	217.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	35.5	38.3	38.3	38.4	40.0	43.2	47.9
Arts, Ent. & Rec.	8.4	9.7	9.0	8.7	8.7	8.2	8.5
Retail**	7.0	7.1	6.9	7.0	7.3	7.8	8.2
Ground Tran.	0.7	0.7	0.7	0.7	0.8	0.8	0.9
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	51.7	56.0	55.0	54.9	57.0	60.2	65.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,290	1,280	1,270	1,180	1,190	1,260	1,340
Arts, Ent. & Rec.	460	550	460	430	400	380	380
Retail**	390	370	340	340	350	380	400
Ground Tran.	30	20	20	20	20	30	30
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	2,170	2,240	2,100	1,980	1,960	2,060	2,160
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.2	1.0	1.0	1.1	1.1	1.2	1.3
State Tax Receipts	4.0	4.2	4.1	4.3	4.5	4.7	4.9
Total Local & State	5.2	5.2	5.1	5.4	5.6	5.9	6.2

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Tillamook County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	98.1	107.1	107.0	105.7	113.0	121.3	126.6
Hotel, Motel	53.9	59.9	62.2	59.7	65.2	71.5	76.0
Private Home	4.4	4.7	4.7	4.9	5.2	5.2	5.3
Other Overnight	39.8	42.5	40.1	41.1	42.6	44.6	45.4
Campground	28.3	30.1	27.9	28.3	29.6	31.6	32.0
Vacation Home	11.5	12.4	12.2	12.9	13.0	13.0	13.3
Day Travel	79.5	76.1	75.7	77.9	82.1	87.4	90.4
Spending at Destination	177.5	183.2	182.8	183.6	195.1	208.7	217.1

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$240	\$399	\$98	\$163	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$100	\$286	\$30	\$87	3.3	2.9
All Overnight	\$145	\$326	\$50	\$116	2.9	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	653	730	777	266	298	317
Private Home	257	259	259	101	101	101
Other Overnight	1,449	1,487	1,498	439	449	453
All Overnight	2,359	2,476	2,535	805	848	871

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	392	439	467	160	179	190
Private Home	100	101	101	39	39	39
Other Overnight	506	517	522	154	157	159
All Overnight	998	1,057	1,090	353	376	389

UMATILLA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$59,650
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,392
Additional employment if each resident household encouraged one additional overnight visitor	57

Visitor Shares

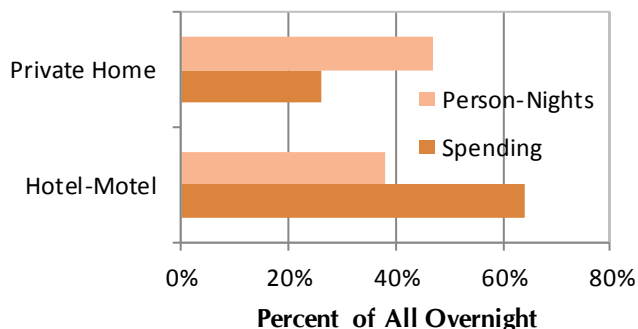
Travel Share of Total Employment (2013)*	5.8%
Overnight Visitor Day Share of Resident Population (2014p)**	5.8%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	378	629	\$60.6
Private Home	301	775	\$24.8
Other Overnight	87	251	\$9.2
All Overnight	766	1,655	\$94.6

Umatilla County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	55.8	14.8	1,400	356	1,699	2,055
1992	61.4	16.4	1,450	390	1,928	2,319
1993	64.5	17.3	1,480	427	2,059	2,486
1994	66.6	17.9	1,480	490	2,139	2,629
1995	73.2	19.8	1,630	558	2,266	2,824
1996	80.4	21.7	1,740	579	2,361	2,940
1997	82.4	22.3	1,710	578	2,378	2,955
1998	89.0	24.6	1,900	637	2,552	3,190
1999	94.9	26.0	1,910	688	2,666	3,354
2000	104.4	27.9	1,990	772	2,904	3,676
2001	101.8	27.3	1,940	743	2,823	3,566
2002	113.4	31.2	2,160	785	3,062	3,846
2003	114.9	31.3	2,060	787	3,117	3,905
2004	119.9	32.1	2,050	917	3,329	4,246
2005	127.9	33.7	2,090	986	3,496	4,481
2006	134.8	35.2	2,150	1,026	3,650	4,676
2007	136.1	36.7	2,160	1,195	3,754	4,949
2008	137.4	36.7	2,140	1,140	3,748	4,888
2009	125.6	35.7	2,050	1,118	3,560	4,679
2010	133.6	36.0	2,030	1,216	3,663	4,879
2011	147.7	38.9	2,160	1,228	4,343	5,571
2012	140.3	41.9	2,190	1,190	4,306	5,496
2013	146.8	42.4	2,220	1,352	4,375	5,727
2014p	147.9	45.1	2,310	1,386	4,467	5,854
Annual Percentage Change						
13-14p	0.8%	6.4%	3.7%	2.5%	2.1%	2.2%
91-14p	4.3%	5.0%	2.2%	6.1%	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.

**Umatilla County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	122.4	122.9	121.9	134.6	126.9	133.8	135.4
Other Travel*	12.4	14.5	11.7	13.1	13.4	12.9	12.5
Total Direct Spending	134.8	137.4	133.6	147.7	140.3	146.8	147.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	22.3	25.7	25.5	27.6	25.2	27.9	28.6
Food Service	30.7	30.2	31.6	34.4	33.0	35.2	36.2
Food Stores	11.6	11.6	11.5	12.6	12.3	13.0	13.4
Local Tran. & Gas	15.4	17.9	15.4	19.3	17.8	17.6	16.8
Arts, Ent. & Rec.	25.6	22.3	22.2	23.8	22.6	23.7	23.9
Retail Sales	16.9	15.1	15.6	16.7	15.9	16.5	16.5
Destination Spending	122.4	122.9	121.9	134.6	126.9	133.8	135.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	23.0	24.6	24.4	26.8	29.9	30.6	32.2
Arts, Ent. & Rec.	6.7	6.8	6.3	6.8	6.9	6.6	7.5
Retail**	3.8	3.7	3.7	4.0	3.9	4.0	4.1
Ground Tran.	0.6	0.6	0.6	0.6	0.6	0.6	0.7
Other Travel*	1.0	0.9	1.0	0.6	0.6	0.6	0.6
Total Direct Earnings	35.2	36.7	36.0	38.9	41.9	42.4	45.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,280	1,280	1,230	1,320	1,370	1,390	1,420
Arts, Ent. & Rec.	610	610	570	600	600	600	660
Retail**	180	180	170	180	170	170	180
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	50	50	30	30	30	40
Total Direct Employment	2,150	2,140	2,030	2,160	2,190	2,220	2,310
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.0	1.1	1.2	1.2	1.2	1.4	1.4
State Tax Receipts	3.6	3.7	3.7	4.3	4.3	4.4	4.5
Total Local & State	4.7	4.9	4.9	5.6	5.5	5.7	5.9

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Umatilla County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	79.0	87.0	85.8	94.4	88.5	93.5	94.6
Hotel, Motel	50.2	56.9	55.3	61.8	56.0	59.8	60.6
Private Home	20.3	21.5	22.4	24.3	23.8	24.7	24.8
Other Overnight	8.6	8.6	8.1	8.3	8.7	9.0	9.2
Campground	5.8	5.6	5.2	5.2	5.5	5.9	5.9
Vacation Home	2.7	3.0	3.0	3.1	3.2	3.2	3.2
Day Travel	43.4	35.9	36.1	40.2	38.4	40.3	40.8
Spending at Destination	122.4	122.9	121.9	134.6	126.9	133.8	135.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$236	\$393	\$96	\$160	2.5	1.7
Private Home	\$82	\$211	\$32	\$82	2.6	2.6
Other Overnight	\$121	\$349	\$37	\$106	3.3	2.9
All Overnight	\$149	\$317	\$57	\$123	2.6	2.1

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	597	625	629	243	255	257
Private Home	748	775	775	292	303	303
Other Overnight	243	249	251	73	75	76
All Overnight	1,587	1,649	1,655	609	633	635

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	359	376	378	146	153	154
Private Home	291	301	301	114	118	118
Other Overnight	84	86	87	25	26	26
All Overnight	734	763	766	285	297	298

UNION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$53,080
Employee Earnings generated by \$100 Visitor Spending	\$35
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,036
Additional employment if each resident household encouraged one additional overnight visitor	20

Visitor Shares

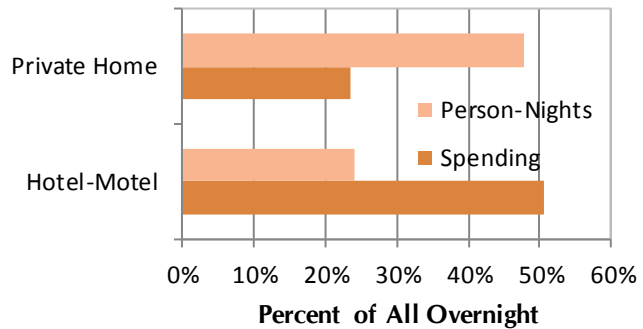
Travel Share of Total Employment (2013)*	3.9%
Overnight Visitor Day Share of Resident Population (2014p)**	5.9%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	80	133	\$11.6
Private Home	103	265	\$5.4
Other Overnight	51	156	\$6.0
All Overnight	234	554	\$22.9

Union County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	25.2	8.1	790	214	677	891
1992	26.1	8.3	740	274	724	997
1993	27.7	8.8	760	313	776	1,089
1994	28.7	9.2	780	340	809	1,150
1995	28.0	9.1	720	356	790	1,146
1996	29.3	9.5	730	383	802	1,184
1997	29.9	9.7	710	384	805	1,189
1998	28.8	9.4	690	367	781	1,148
1999	29.5	9.6	670	377	790	1,167
2000	29.2	9.4	650	377	782	1,159
2001	30.6	9.9	710	412	805	1,218
2002	28.7	9.3	620	364	757	1,121
2003	28.9	9.3	610	366	768	1,134
2004	32.2	10.1	640	382	875	1,257
2005	30.8	9.4	580	347	839	1,185
2006	32.4	9.8	600	407	877	1,284
2007	32.9	10.2	620	394	902	1,296
2008	32.1	9.7	570	423	875	1,298
2009	29.2	9.4	570	369	825	1,194
2010	29.3	9.3	540	350	825	1,175
2011	30.6	9.4	560	386	931	1,317
2012	31.8	9.5	550	422	931	1,352
2013	31.4	9.9	560	438	940	1,378
2014p	33.1	10.4	560	485	964	1,450
Annual Percentage Change						
13-14p	5.5%	5.1%	-1.1%	10.8%	2.6%	5.2%
91-14p	1.2%	1.1%	-1.5%	3.6%	1.6%	2.1%

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.

**Union County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	28.9	27.8	25.8	26.3	27.5	27.2	29.1
Other Travel*	3.5	4.3	3.5	4.3	4.4	4.2	4.0
Total Direct Spending	32.4	32.1	29.3	30.6	31.8	31.4	33.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.1	6.3	5.7	5.6	5.8	5.9	6.5
Food Service	7.3	6.8	6.7	6.8	7.2	7.2	7.8
Food Stores	3.9	4.0	3.8	3.9	4.1	4.2	4.4
Local Tran. & Gas	2.7	3.0	2.5	2.9	2.9	2.7	2.7
Arts, Ent. & Rec.	4.9	4.3	3.9	3.9	4.0	3.9	4.2
Retail Sales	4.0	3.3	3.2	3.3	3.4	3.3	3.5
Destination Spending	28.9	27.8	25.8	26.3	27.5	27.2	29.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.9	6.9	6.8	6.9	6.9	7.0	7.4
Arts, Ent. & Rec.	1.5	1.6	1.3	1.3	1.3	1.6	1.6
Retail**	1.0	1.0	0.9	1.0	1.0	1.0	1.1
Ground Tran.	0.2	0.1	0.1	0.1	0.1	0.1	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	9.8	9.7	9.3	9.4	9.5	9.9	10.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	350	350	340	350	330	320	320
Arts, Ent. & Rec.	190	160	140	150	160	180	170
Retail**	50	50	50	50	50	50	50
Ground Tran.	10	0	0	0	0	0	0
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	600	570	540	560	550	560	560
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.4	0.4	0.3	0.4	0.4	0.4	0.5
State Tax Receipts	0.9	0.9	0.8	0.9	0.9	0.9	1.0
Total Local & State	1.3	1.3	1.2	1.3	1.4	1.4	1.4

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Union County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	21.9	22.2	20.4	20.7	21.6	21.4	22.9
Hotel, Motel	12.1	11.9	10.6	10.3	10.8	10.4	11.6
Private Home	4.3	4.6	4.7	5.0	5.2	5.1	5.4
Other Overnight	5.5	5.7	5.2	5.3	5.5	5.9	6.0
Campground	5.1	5.2	4.8	4.9	5.1	5.4	5.5
Vacation Home	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Day Travel	7.1	5.6	5.4	5.7	5.9	5.8	6.2
Spending at Destination	28.9	27.8	25.8	26.3	27.5	27.2	29.1

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$213	\$354	\$87	\$144	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$132	\$404	\$38	\$118	3.4	3.1
All Overnight	\$113	\$261	\$41	\$98	2.7	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	130	122	133	53	50	54
Private Home	259	252	265	101	98	103
Other Overnight	149	155	156	43	45	45
All Overnight	538	529	554	198	193	203

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	78	73	80	32	30	33
Private Home	101	98	103	39	38	40
Other Overnight	48	50	51	14	15	15
All Overnight	227	222	234	85	83	88

WALLOWA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$49,530
Employee Earnings generated by \$100 Visitor Spending	\$38
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.80

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$345
Additional employment if each resident household encouraged one additional overnight visitor	7

Visitor Shares

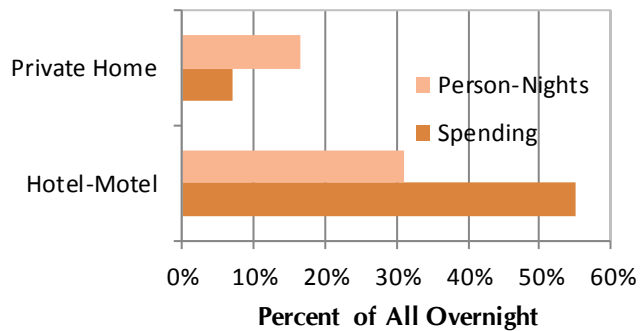
Travel Share of Total Employment (2013)*	11.7%
Overnight Visitor Day Share of Resident Population (2014p)**	17.0%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	80	133	\$11.3
Private Home	27	70	\$1.4
Other Overnight	76	225	\$7.8
All Overnight	183	428	\$20.5

Wallowa County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	8.9	2.6	250	0	229	229
1992	12.0	3.7	360	0	307	307
1993	14.4	4.6	430	0	366	366
1994	15.2	4.9	440	14	385	398
1995	16.1	5.1	450	94	398	492
1996	16.1	5.1	430	158	389	547
1997	16.4	5.2	420	161	392	553
1998	17.0	5.5	450	175	402	577
1999	17.8	5.7	450	189	414	603
2000	19.0	6.1	480	204	439	643
2001	19.7	6.3	480	217	448	665
2002	19.9	6.4	500	215	445	660
2003	20.4	6.5	500	216	458	674
2004	21.0	6.7	470	206	497	703
2005	21.7	6.9	440	229	510	739
2006	25.7	8.3	540	301	600	901
2007	25.2	8.3	500	278	600	878
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	601	892
2011	26.1	8.4	490	281	646	927
2012	26.7	9.1	520	284	665	949
2013	26.1	9.4	530	277	674	951
2014p	27.6	10.3	540	303	709	1,012
Annual Percentage Change						
13-14p	5.6%	8.6%	1.7%	9.4%	5.1%	6.3%
91-14p	5.0%	6.2%	3.3%	0.0%	5.0%	6.7%

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.

Wallowa County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	24.8	24.8	24.7	24.9	25.5	25.0	26.5
Other Travel*	1.0	1.2	1.0	1.2	1.2	1.1	1.1
Total Direct Spending	25.7	25.9	25.7	26.1	26.7	26.1	27.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	5.6	6.2	6.1	6.0	6.1	6.1	6.6
Food Service	6.1	5.9	6.2	6.2	6.4	6.4	6.8
Food Stores	3.2	3.3	3.4	3.5	3.6	3.6	3.8
Local Tran. & Gas	2.2	2.5	2.1	2.4	2.5	2.3	2.3
Arts, Ent. & Rec.	4.3	4.0	3.9	3.9	3.9	3.8	4.0
Retail Sales	3.3	2.9	2.9	2.9	3.0	2.9	3.0
Destination Spending	24.8	24.8	24.7	24.9	25.5	25.0	26.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	5.7	6.0	5.9	5.9	6.7	6.7	7.5
Arts, Ent. & Rec.	1.3	1.4	1.2	1.2	1.1	1.5	1.3
Retail**	1.1	1.1	1.1	1.1	1.2	1.2	1.2
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Total Direct Earnings	8.3	8.6	8.4	8.4	9.1	9.4	10.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	360	320	300	310	340	330	350
Arts, Ent. & Rec.	110	130	140	120	120	150	130
Retail**	60	50	50	50	50	50	50
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	540	510	490	490	520	530	540
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.3	0.3	0.3	0.3	0.3	0.3
State Tax Receipts	0.6	0.6	0.6	0.6	0.7	0.7	0.7
Total Local & State	0.9	0.9	0.9	0.9	0.9	1.0	1.0

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wallowa County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	18.2	19.3	19.2	19.2	19.7	19.3	20.5
Hotel, Motel	10.7	11.4	11.0	10.8	11.0	10.3	11.3
Private Home	1.2	1.3	1.3	1.4	1.4	1.3	1.4
Other Overnight	6.3	6.6	6.9	7.0	7.3	7.7	7.8
Campground	5.2	5.4	5.6	5.7	6.0	6.4	6.5
Vacation Home	1.2	1.3	1.3	1.3	1.3	1.3	1.3
Day Travel	6.6	5.5	5.5	5.7	5.8	5.7	6.0
Spending at Destination	24.8	24.8	24.7	24.9	25.5	25.0	26.5

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$208	\$346	\$85	\$141	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$117	\$345	\$35	\$103	3.4	3.0
All Overnight	\$138	\$311	\$48	\$112	2.9	2.3

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	136	123	133	55	50	54
Private Home	68	66	70	27	26	27
Other Overnight	216	223	225	64	66	67
All Overnight	420	413	428	146	142	148

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	82	74	80	33	30	33
Private Home	27	26	27	10	10	11
Other Overnight	73	75	76	22	22	23
All Overnight	181	175	183	65	63	66

WASCO COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$60,350
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,290
Additional employment if each resident household encouraged one additional overnight visitor	21

Visitor Shares

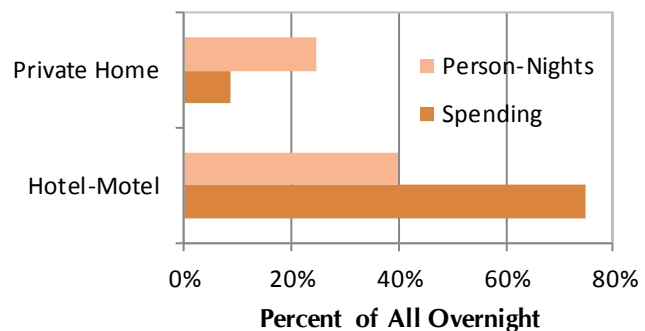
Travel Share of Total Employment (2013)*	10.9%
Overnight Visitor Day Share of Resident Population (2014p)**	11.4%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	258	429	\$43.0
Private Home	102	263	\$4.9
Other Overnight	128	382	\$9.6
All Overnight	488	1,075	\$57.5

Wasco County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	45.7	13.4	1,100	252	1,091	1,343
1992	48.4	14.2	1,130	293	1,178	1,471
1993	49.8	14.6	1,120	370	1,220	1,591
1994	52.4	15.5	1,140	317	1,288	1,605
1995	56.6	16.7	1,180	292	1,368	1,660
1996	55.1	16.2	1,110	320	1,311	1,631
1997	59.5	17.7	1,160	301	1,389	1,690
1998	61.2	18.5	1,240	312	1,419	1,732
1999	64.6	19.4	1,280	330	1,481	1,811
2000	66.6	19.8	1,290	349	1,524	1,873
2001	68.2	20.3	1,280	350	1,546	1,896
2002	68.8	20.6	1,310	385	1,535	1,921
2003	71.4	21.2	1,350	387	1,597	1,985
2004	73.8	21.8	1,290	407	1,696	2,103
2005	77.5	22.7	1,330	502	1,764	2,266
2006	83.1	24.2	1,370	526	1,878	2,405
2007	85.8	25.6	1,450	623	1,968	2,591
2008	89.6	26.9	1,480	546	2,052	2,597
2009	86.4	26.9	1,470	668	2,013	2,681
2010	90.0	26.8	1,400	660	2,037	2,698
2011	91.6	26.9	1,390	660	2,196	2,855
2012	91.1	27.1	1,430	656	2,176	2,833
2013	90.3	29.9	1,540	667	2,293	2,960
2014p	102.4	34.4	1,640	851	2,631	3,482
Annual Percentage Change						
13-14p	13.3%	15.2%	6.4%	27.6%	14.7%	17.6%
91-14p	3.6%	4.2%	1.8%	5.4%	3.9%	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.

North Wasco County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	30.1	8.3	750	252	757	1,010
1992	32.1	8.9	760	293	825	1,118
1993	32.8	9.0	750	370	851	1,221
1994	34.7	9.6	770	317	902	1,219
1995	37.5	10.4	800	292	954	1,246
1996	36.1	10.0	750	320	907	1,228
1997	39.7	11.1	790	301	972	1,273
1998	40.8	11.7	810	312	994	1,306
1999	42.9	12.2	810	330	1,029	1,359
2000	42.3	11.9	780	349	1,020	1,369
2001	42.8	12.0	770	350	1,021	1,371
2002	42.0	11.8	750	385	987	1,372
2003	43.6	12.2	770	387	1,025	1,413
2004	45.0	12.4	740	407	1,099	1,505
2005	47.7	13.1	770	502	1,152	1,654
2006	52.3	14.4	810	526	1,256	1,782
2007	53.6	15.4	870	623	1,315	1,939
2008	55.4	16.0	880	546	1,351	1,896
2009	54.5	16.3	890	668	1,344	2,012
2010	56.2	16.0	840	660	1,352	2,013
2011	57.7	16.2	830	660	1,479	2,139
2012	57.5	16.4	860	656	1,470	2,126
2013	56.4	17.8	920	667	1,527	2,194
2014p	64.9	21.0	1,000	851	1,780	2,631
Annual Percentage Change						
13-14p	15.2%	17.9%	8.8%	27.6%	16.6%	19.9%
91-14p	3.4%	4.1%	1.2%	5.4%	3.8%	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.

South Wasco County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	15.7	5.1	350	0	334	334
1992	16.3	5.4	370	0	353	353
1993	17.0	5.6	370	0	370	370
1994	17.7	5.8	370	0	386	386
1995	19.1	6.3	370	0	414	414
1996	19.0	6.3	360	0	404	404
1997	19.8	6.6	370	0	417	417
1998	20.3	6.8	440	0	426	426
1999	21.6	7.2	470	0	451	451
2000	24.2	7.9	510	0	504	504
2001	25.4	8.3	510	0	525	525
2002	26.8	8.8	560	0	549	549
2003	27.8	9.1	580	0	572	572
2004	28.8	9.4	540	0	598	598
2005	29.8	9.6	560	0	612	612
2006	30.8	9.8	560	0	623	623
2007	32.2	10.2	580	0	653	653
2008	34.2	11.0	600	0	701	701
2009	31.9	10.6	580	0	669	669
2010	33.8	10.8	560	0	685	685
2011	33.9	10.8	560	0	717	717
2012	33.6	10.7	570	0	707	707
2013	34.0	12.0	620	0	766	766
2014p	37.5	13.4	640	0	851	851
Annual Percentage Change						
13-14p	10.3%	11.3%	2.9%	0.0%	11.0%	11.0%
91-14p	3.9%	4.3%	2.7%	0.0%	4.2%	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.

Wasco County
Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	79.8	85.5	86.5	87.5	86.8	86.2	98.4
Other Travel*	3.3	4.1	3.4	4.2	4.3	4.2	4.0
Total Direct Spending	83.1	89.6	90.0	91.6	91.1	90.3	102.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	21.9	24.8	24.8	24.6	24.1	24.6	29.0
Food Service	19.4	20.5	21.9	22.0	22.1	22.0	25.4
Food Stores	7.6	8.5	8.4	8.8	8.9	9.0	9.9
Local Tran. & Gas	6.3	7.6	6.8	7.7	7.6	7.1	7.5
Arts, Ent. & Rec.	13.1	13.4	13.4	13.2	12.9	12.6	14.4
Retail Sales	11.5	10.8	11.2	11.2	11.2	10.9	12.1
Destination Spending	79.8	85.5	86.5	87.5	86.8	86.2	98.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	17.4	19.3	19.4	19.6	19.9	21.6	25.1
Arts, Ent. & Rec.	3.9	4.6	4.4	4.3	4.2	5.2	5.9
Retail**	2.4	2.5	2.5	2.5	2.5	2.5	2.8
Ground Tran.	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	24.2	26.9	26.8	26.9	27.1	29.9	34.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	930	960	920	930	950	1,020	1,090
Arts, Ent. & Rec.	310	400	360	330	350	400	410
Retail**	110	100	100	110	110	100	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,370	1,480	1,400	1,390	1,430	1,540	1,640
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.5	0.5	0.7	0.7	0.7	0.7	0.9
State Tax Receipts	1.9	2.1	2.0	2.2	2.2	2.3	2.6
Total Local & State	2.4	2.6	2.7	2.9	2.8	3.0	3.5

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wasco County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	49.5	57.4	57.7	57.5	56.7	56.5	65.2
Hotel, Motel	37.3	43.1	43.7	43.0	41.6	40.9	49.2
Private Home	4.1	4.5	4.6	4.9	5.0	5.0	5.3
Other Overnight	8.1	9.8	9.4	9.6	10.0	10.5	10.7
Campground	6.6	8.0	7.6	7.7	8.1	8.6	8.7
Vacation Home	1.5	1.8	1.8	1.9	1.9	2.0	2.0
Day Travel	30.2	28.1	28.8	30.0	30.1	29.7	33.2
Spending at Destination	79.8	85.5	86.5	87.5	86.8	86.2	98.4

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$281	\$468	\$115	\$191	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$95	\$282	\$28	\$84	3.4	3.0
All Overnight	\$167	\$356	\$61	\$134	2.8	2.1

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	380	359	429	155	146	175
Private Home	250	249	263	98	97	103
Other Overnight	367	380	382	108	112	113
All Overnight	997	987	1,075	361	356	391

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	228	216	258	93	88	105
Private Home	97	97	102	38	38	40
Other Overnight	123	127	128	36	38	38
All Overnight	448	439	488	168	163	183

WASHINGTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$83,540
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.50

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$31,295
Additional employment if each resident household encouraged one additional overnight visitor	375

Visitor Shares

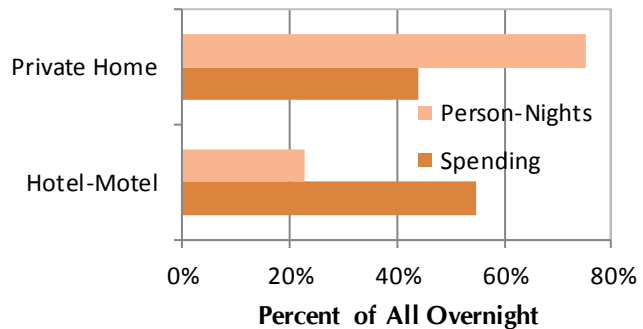
Travel Share of Total Employment (2013)*	2.2%
Overnight Visitor Day Share of Resident Population (2014p)**	3.7%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	855	1,746	\$221.3
Private Home	1,846	5,726	\$177.6
Other Overnight	46	158	\$5.2
All Overnight	2,747	7,629	\$404.1

Washington County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	229.9	62.8	4,200	2,008	7,055	9,062
1992	249.2	68.1	4,250	2,208	7,883	10,091
1993	266.1	72.7	4,430	2,385	8,519	10,905
1994	285.5	78.4	4,580	2,619	9,159	11,777
1995	313.1	86.2	4,830	3,084	9,809	12,893
1996	335.1	91.7	5,020	3,489	10,175	13,663
1997	344.0	94.0	5,000	3,712	10,323	14,035
1998	340.9	94.7	5,020	3,724	10,353	14,077
1999	364.9	100.4	5,080	3,839	10,880	14,719
2000	409.5	109.6	5,460	4,288	12,114	16,402
2001	404.7	107.7	5,340	3,790	12,075	15,864
2002	396.1	105.4	5,140	3,540	11,809	15,350
2003	427.6	113.4	5,390	3,709	12,607	16,316
2004	448.0	117.1	5,300	3,759	13,543	17,302
2005	488.8	124.8	5,560	4,143	14,450	18,593
2006	532.2	133.3	5,740	4,876	15,531	20,406
2007	557.6	143.3	6,000	6,849	16,247	23,097
2008	587.1	148.6	6,150	6,814	16,763	23,578
2009	509.2	136.3	5,670	5,662	15,275	20,937
2010	556.6	141.8	5,740	6,118	15,905	22,023
2011	637.7	159.8	6,400	7,678	19,381	27,059
2012	653.2	169.2	6,560	7,515	19,789	27,305
2013	666.1	172.9	6,740	8,811	20,231	29,041
2014p	671.2	182.5	7,020	9,084	20,521	29,605
Annual Percentage Change						
13-14p	0.8%	5.6%	4.1%	3.1%	1.4%	1.9%
91-14p	4.8%	4.7%	2.3%	6.8%	4.8%	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.

**Washington County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	417.1	448.1	438.7	503.1	512.0	536.4	540.1
Other Travel*	115.1	139.0	117.9	134.6	141.3	129.7	131.1
Total Direct Spending	532.2	587.1	556.6	637.7	653.2	666.1	671.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	70.9	81.3	70.7	90.7	93.4	100.1	103.2
Food Service	126.5	135.5	141.2	156.7	161.1	171.2	174.4
Food Stores	31.9	35.1	35.1	39.1	39.7	41.5	42.5
Local Tran. & Gas	57.2	67.2	61.5	75.2	75.3	75.8	73.1
Arts, Ent. & Rec.	50.1	50.0	49.5	53.7	54.1	56.3	56.3
Retail Sales	80.6	79.0	80.7	87.8	88.4	91.6	90.7
Destination Spending	417.1	448.1	438.7	503.1	512.0	536.4	540.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	78.8	88.5	84.6	98.6	105.9	112.2	118.9
Arts, Ent. & Rec.	14.3	16.5	15.3	16.7	17.2	17.5	18.3
Retail**	13.7	14.3	14.2	15.6	15.8	16.5	16.7
Ground Tran.	5.9	6.4	6.2	7.2	7.2	7.5	7.9
Other Travel*	20.6	22.9	21.5	21.7	23.2	19.2	20.7
Total Direct Earnings	133.3	148.6	141.8	159.8	169.2	172.9	182.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,570	3,840	3,560	4,080	4,250	4,440	4,660
Arts, Ent. & Rec.	800	900	860	950	940	940	980
Retail**	540	550	540	580	570	590	590
Ground Tran.	220	220	210	230	230	240	240
Other Travel*	610	650	580	560	570	530	560
Total Direct Employment	5,740	6,150	5,740	6,400	6,560	6,740	7,020
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	4.9	6.8	6.1	7.7	7.5	8.8	9.1
State Tax Receipts	15.5	16.8	15.9	19.4	19.8	20.2	20.5
Total Local & State	20.4	23.6	22.0	27.1	27.3	29.0	29.6

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Washington County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	303.6	335.1	324.3	375.1	382.1	400.8	404.1
Hotel, Motel	158.5	177.5	162.6	201.5	205.8	218.9	221.3
Private Home	141.0	153.0	157.2	168.9	171.4	176.8	177.6
Other Overnight	4.1	4.6	4.6	4.7	4.9	5.1	5.2
Campground	2.2	2.5	2.3	2.4	2.5	2.6	2.7
Vacation Home	1.9	2.2	2.2	2.3	2.4	2.5	2.5
Day Travel	113.6	112.9	114.4	128.0	129.9	135.6	136.0
Spending at Destination	417.1	448.1	438.7	503.1	512.0	536.4	540.1

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$270	\$563	\$127	\$259	2.1	2.1
Private Home	\$62	\$196	\$31	\$96	2.0	3.2
Other Overnight	\$93	\$324	\$33	\$113	2.8	3.5
All Overnight	\$108	\$307	\$53	\$147	2.0	2.8

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,687	1,775	1,746	788	831	821
Private Home	5,607	5,763	5,726	2,798	2,879	2,872
Other Overnight	152	156	158	54	55	55
All Overnight	7,446	7,694	7,629	3,639	3,765	3,749

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	827	870	855	378	398	393
Private Home	1,808	1,858	1,846	885	911	907
Other Overnight	44	45	46	15	16	16
All Overnight	2,678	2,773	2,747	1,278	1,325	1,316

WHEELER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$76,790
Employee Earnings generated by \$100 Visitor Spending	\$22
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.80

Visitor Volume (2014p)

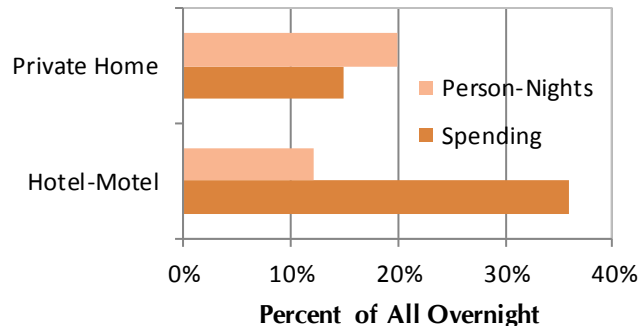
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$45
Additional employment if each resident household encouraged one additional overnight visitor	1

Visitor Shares

Travel Share of Total Employment (2013)*	3.1%
Overnight Visitor Day Share of Resident Population (2014p)**	13.8%

*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.

2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	5	8	\$0.7
Private Home	5	14	\$0.3
Other Overnight	16	48	\$0.9
All Overnight	27	70	\$1.9

Wheeler County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				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	2.8	0.6	40	0	73	73
2011	3.1	0.7	40	0	84	84
2012	2.8	0.6	40	0	78	78
2013	2.7	0.6	40	0	76	76
2014p	2.8	0.6	30	0	74	74
Annual Percentage Change						
13-14p	1.9%	-4.7%	-3.3%	0.0%	-2.8%	-2.8%
91-14p	3.6%	3.6%	0.1%	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.

Wheeler County Travel Impacts, 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	2.5	2.7	2.6	2.8	2.6	2.5	2.6
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Spending	2.7	2.9	2.8	3.1	2.8	2.7	2.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	0.5	0.5	0.5	0.6	0.5	0.4	0.5
Food Service	0.6	0.6	0.7	0.7	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	0.3	0.4	0.3	0.4	0.3	0.3	0.3
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.3	0.4
Retail Sales	0.4	0.3	0.3	0.4	0.3	0.3	0.3
Destination Spending	2.5	2.7	2.6	2.8	2.6	2.5	2.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Arts, Ent. & Rec.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Retail**	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	0.6	0.7	0.6	0.7	0.6	0.6	0.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	30	30	30	30	30	20	20
Arts, Ent. & Rec.	10	10	10	0	0	0	0
Retail**	10	10	10	10	10	10	10
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	40	40	40	40	40	40	30
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Local & State	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Wheeler County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	1.8	2.0	2.0	2.1	1.9	1.9	1.9
Hotel, Motel	0.8	0.9	0.9	1.0	0.8	0.7	0.7
Private Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Other Overnight	0.8	0.9	0.8	0.9	0.9	0.9	0.9
Campground	0.6	0.6	0.6	0.6	0.6	0.7	0.7
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	0.7	0.6	0.6	0.7	0.7	0.7	0.7
Spending at Destination	2.5	2.7	2.6	2.8	2.6	2.5	2.6

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$199	\$330	\$81	\$135	2.5	1.7
Private Home	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$66	\$195	\$20	\$58	3.4	3.0
All Overnight	\$82	\$212	\$27	\$72	3.0	2.6

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	10	8	8	4	3	3
Private Home	14	13	14	5	5	5
Other Overnight	46	48	48	14	14	14
All Overnight	70	69	70	23	23	23

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	6	5	5	2	2	2
Private Home	5	5	5	2	2	2
Other Overnight	16	16	16	5	5	5
All Overnight	27	26	27	9	9	9

YAMHILL COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$65,980
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.60

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,225
Additional employment if each resident household encouraged one additional overnight visitor	49

Visitor Shares

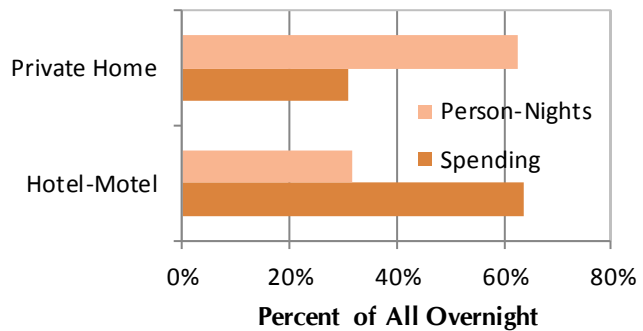
Travel Share of Total Employment (2013)*	3.4%
Overnight Visitor Day Share of Resident Population (2014p)**	4.3%

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

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

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

Overnight Visitor Spending and Volume



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	306	509	\$42.2
Private Home	393	1,011	\$20.5
Other Overnight	31	91	\$3.3
All Overnight	730	1,611	\$66.0

Yamhill County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	29.2	6.5	740	39	1,057	1,096
1992	31.3	7.0	730	39	1,177	1,217
1993	32.9	7.4	740	38	1,260	1,298
1994	33.7	7.6	740	41	1,317	1,359
1995	37.3	8.4	790	47	1,408	1,455
1996	37.3	8.3	750	52	1,393	1,445
1997	40.4	9.1	780	60	1,457	1,517
1998	48.0	11.5	980	68	1,637	1,705
1999	52.2	12.4	960	70	1,723	1,794
2000	56.7	13.2	1,020	78	1,834	1,913
2001	57.9	13.5	1,060	80	1,854	1,934
2002	59.1	13.9	1,050	82	1,860	1,942
2003	61.5	14.1	1,030	82	1,929	2,011
2004	64.7	14.5	1,040	104	2,053	2,158
2005	68.4	14.9	1,040	0	2,138	2,138
2006	75.0	16.1	1,090	0	2,308	2,308
2007	81.3	18.1	1,190	0	2,488	2,488
2008	87.7	19.3	1,190	0	2,607	2,607
2009	80.6	19.2	1,140	0	2,501	2,501
2010	94.2	21.6	1,250	0	2,747	2,747
2011	104.8	23.6	1,360	0	3,271	3,271
2012	113.1	25.8	1,460	0	3,426	3,426
2013	115.7	28.0	1,560	0	3,561	3,561
2014p	115.6	28.6	1,540	0	3,555	3,555
Annual Percentage Change						
13-14p	-0.2%	2.1%	-1.0%	0.0%	-0.2%	-0.2%
91-14p	6.2%	6.6%	3.3%	-100.0%	5.4%	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.

**Yamhill County
Travel Impacts, 2006-2014p**

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	61.0	69.9	80.0	87.7	95.4	98.3	98.6
Other Travel*	13.9	17.8	14.2	17.0	17.7	17.5	17.0
Total Direct Spending	75.0	87.7	94.2	104.8	113.1	115.7	115.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	8.6	11.2	14.5	16.4	18.4	19.4	20.1
Food Service	17.2	19.4	22.9	24.7	27.1	28.3	28.6
Food Stores	8.1	9.4	9.9	10.7	11.4	11.6	11.8
Local Tran. & Gas	6.4	8.2	8.1	9.8	10.5	10.2	9.6
Arts, Ent. & Rec.	9.8	10.7	12.3	13.2	14.3	14.8	14.7
Retail Sales	10.8	11.0	12.2	13.0	13.8	14.0	13.7
Destination Spending	61.0	69.9	80.0	87.7	95.4	98.3	98.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	9.6	11.7	13.7	15.1	16.3	18.2	19.0
Arts, Ent. & Rec.	3.0	3.7	4.1	4.3	5.1	5.1	4.8
Retail**	2.3	2.6	2.7	2.9	3.1	3.2	3.2
Ground Tran.	0.4	0.4	0.5	0.5	0.6	0.6	0.6
Other Travel*	0.8	0.8	0.7	0.7	0.8	1.0	1.0
Total Direct Earnings	16.1	19.3	21.6	23.6	25.8	28.0	28.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	590	680	730	800	830	910	910
Arts, Ent. & Rec.	330	330	340	380	430	450	420
Retail**	110	120	120	130	130	140	140
Ground Tran.	10	10	20	20	20	20	20
Other Travel*	50	50	40	40	40	50	50
Total Direct Employment	1,090	1,190	1,250	1,360	1,460	1,560	1,540
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	2.3	2.6	2.7	3.3	3.4	3.6	3.6
Total Local & State	2.3	2.6	2.7	3.3	3.4	3.6	3.6

Details may not add to totals due to rounding.

destinations, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Yamhill County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	36.8	44.9	52.7	57.8	63.4	65.6	66.0
Hotel, Motel	17.9	23.2	31.0	34.8	39.6	41.8	42.2
Private Home	16.2	18.6	18.7	20.0	20.7	20.5	20.5
Other Overnight	2.7	3.1	3.0	3.0	3.1	3.3	3.3
Campground	2.3	2.7	2.5	2.5	2.6	2.8	2.8
Vacation Home	0.4	0.5	0.5	0.5	0.5	0.5	0.5
Day Travel	24.2	25.0	27.3	29.9	32.0	32.7	32.6
Spending at Destination	61.0	69.9	80.0	87.7	95.4	98.3	98.6

Average Expenditures for Overnight Visitors, 2014p

	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	\$52	\$133	\$20	\$52	2.6	2.6
Other Overnight	\$123	\$367	\$37	\$109	3.4	3.0
All Overnight	\$105	\$230	\$41	\$90	2.6	2.2

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	493	519	509	201	212	207
Private Home	1,029	1,019	1,011	402	398	395
Other Overnight	88	91	91	26	27	27
All Overnight	1,610	1,629	1,611	629	637	629

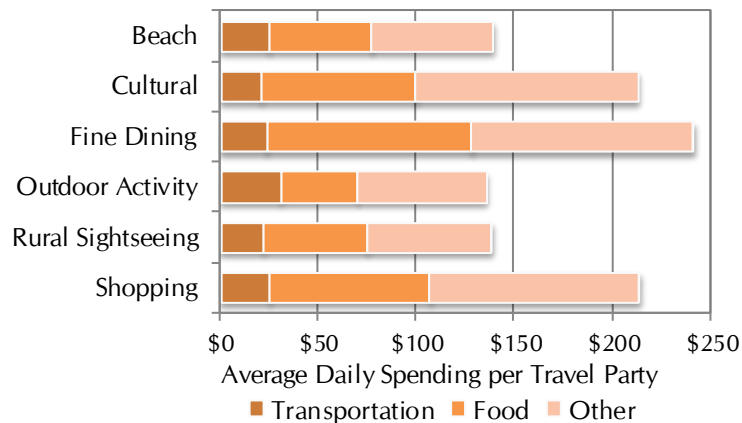
	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	296	312	306	121	127	125
Private Home	400	396	393	156	155	154
Other Overnight	29	30	31	9	9	9
All Overnight	726	739	730	286	291	287

V. OREGON DAY TRAVEL, 2014P

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.

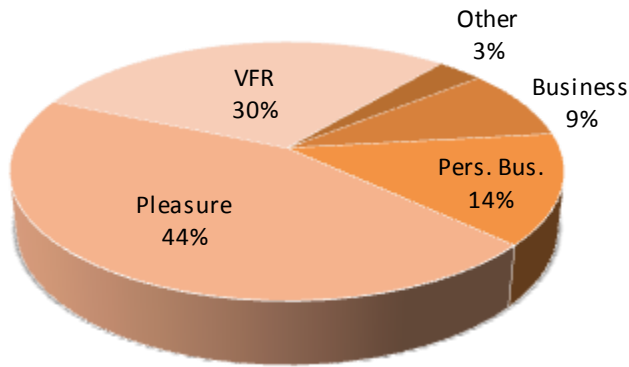
Day Trip Activity, 2014p



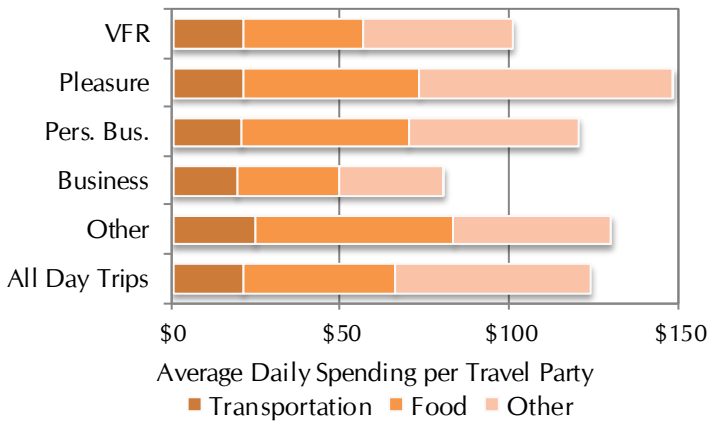
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
Beach	\$152.5	\$27.8	\$61.4	\$63.3	2.8
Cultural	\$231.6	\$23.5	\$92.0	\$116.1	2.8
Fine Dining	\$264.7	\$26.5	\$122.1	\$116.0	2.6
Outdoor Activity	\$147.6	\$34.5	\$46.0	\$67.1	2.8
Rural Sightseeing	\$151.6	\$24.5	\$62.1	\$65.0	2.7
Shopping	\$233.3	\$28.3	\$95.5	\$109.5	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

Purpose of Day Trip, 2014p



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	\$100.6	\$21.0	\$35.3	\$44.3	2.4
Pleasure	\$148.2	\$21.1	\$52.0	\$75.1	2.7
Personal Business	\$120.1	\$20.2	\$49.6	\$50.2	2.2
Business	\$80.2	\$18.9	\$30.1	\$31.2	1.6
Other	\$129.6	\$24.3	\$58.8	\$46.5	2.0
Total	\$123.6	\$20.8	\$45.0	\$57.7	2.4

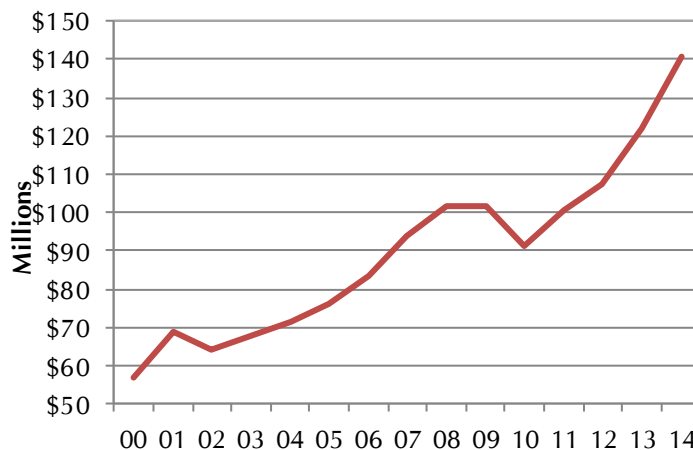
VI. LOCAL TRANSIENT LODGING TAX RECEIPTS

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 2014, eighty-five cities and fifteen counties in Oregon levied a locally administered transient lodging tax. This tax, ranging from 2 percent to 13.5 percent, is collected on the sale (i.e., rental) of a room at a lodging establishment such as a hotel, motel, bed & breakfast or at a campground site or RV park.

Local lodging tax receipts increased by 15.2 percent from the 2013 to 2014 fiscal years. (The large increase in revenues in the past two fiscal years is in part attributable to the establishment of the Tourism Improvement District in the City of Portland, which levies an additional 2 percent tax on lodging establishments with 50 or more rooms. TID collections began in October 1, 2012)

Oregon Local Lodging Tax Receipts
Fiscal Year ending June 30



Room tax collections for most taxing jurisdictions within Oregon are reported for the last eleven fiscal years in the following table. It should be noted that transient lodging tax data is subject to revision. The revisions can be a result of late payments, back taxes, interest or fees.¹

¹ See <http://www.oregon.gov/dor/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	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	
BAKER COUNTY												
County-wide	*	312	301	318	385	411	394	386	413	391	395	404
BENTON COUNTY												
Corvallis	9.0%	875	947	1,021	1,095	1,126	1,076	1,080	1,062	1,239	1,364	1,425
CLACKAMAS COUNTY												
Sandy	3.0%	15	12	17	18	15	21	21	20	24	26	26
Lake Oswego	6.0%	410	459	532	615	733	678	716	796	806	949	1,011
Oregon City	4.0%	32	37	42	52	57	54	52	52	55	63	77
Wilsonville	5.0%	263	190	207	268	275	219	193	214	209	242	273
County-wide	6.0%	2,030	2,225	2,454	2,777	3,071	2,661	2,432	2,683	2,894	3,198	3,421
CLATSOP COUNTY												
Astoria	9.0%	657	745	932	1,029	1,195	976	1,024	952	971	1,111	1,253
Cannon Beach	7.0%	1,663	1,750	1,867	1,997	2,110	2,049	2,074	2,336	2,465	2,631	
Gearhart	7.0%	123	112	112	119	120	130	135	129	118	163	167
Seaside	8.0%	2,084	2,183	2,356	2,596	2,979	2,960	2,982	2,854	2,922	3,350	3,548
Warrenton	12.0%	281	281	274	316	328	308	458	463	446	483	620
Unincorporated	7.0%	88	109	122	135	116	153	164	168	188	216	214
COLUMBIA COUNTY												
COOS COUNTY												
Bandon	6.0%	367	375	383	434	426	386	391	384	376	438	462
Coos Bay	7.0%	430	468	496	554	561	461	464	469	485	507	520
Coquille Indian Tribe	8.0%	0	0	0	0	0	0	108	274	281	296	295
Lakeside	7.5%	35	36	37	39	40	37	23	35	35	37	40
North Bend	7.0%	202	215	233	245	246	307	84	89	96	96	102
CROOK COUNTY												
Prineville	8.5%	124	146	163	197	194	164	149	176	180	207	191
CURRY COUNTY												
Brookings	6.0%	161	171	160	171	178	160	141	140	142	168	165
Gold Beach	6.0%	323	341	272	292	314	306	309	300	297	311	324
Port Orford	7.0%	30	23	44	45	47	42	46	49	51	54	59

Current Rate corresponds to the rate in effect at the end of the last reported fiscal year. Many tax rates have changed over the reported time period.

The Coquille Indian Tribe in Coos County began collecting its own tax on January 1, 2010. Prior to that date, receipts were included with North Bend.

*All jurisdictions in Baker County have a 5.0% rate from November through April, and a 7.0% rate from May through October.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
DESCHUTES COUNTY												
Bend	10.0%	2,502	2,799	3,107	3,303	3,427	2,938	2,960	3,280	3,524	3,888	4,660
Redmond	9.0%	388	406	463	493	509	436	458	504	503	533	587
Sisters	8.0%	146	184	213	224	267	280	275	288	308	331	362
Unincorporated	7.0%	3,017	3,056	3,231	3,304	3,511	3,270	2,960	3,139	3,258	3,691	4,266
DOUGLAS COUNTY												
Reedsport	5.0%-7.0%*	141	158	164	173	175	151	168	160	170	182	181
Roseburg	8.0%	752	799	835	881	892	826	775	785	806	801	904
Sutherlin	5.0%	62	67	60	73	68	55	64	79	84	82	91
Winston	5.0%	14	10	10	9	9	7	6	7	6	7	7
GILLIAM COUNTY												
GRANT COUNTY												
County-wide	8.0%	48	63	93	98	85	84	92	96	81	59	**63
HARNEY COUNTY												
Burns	9.0%	68	64	64	79	99	71	67	93	104	85	85
Hines	8.0%	100	104	117	129	150	143	130	135	141	144	153
HOOD RIVER COUNTY												
Cascade Locks	7.0%	96	100	110	117	129	119	129	135	127	144	153
Hood River	8.0%	466	465	538	578	630	694	738	787	828	971	1,202
Unincorporated	8.0%	226	211	219	224	236	176	180	224	234	237	109
JACKSON COUNTY												
Ashland	9.0%	1,390	1,414	1,558	1,551	1,537	1,854	1,923	1,897	1,978	2,081	2,081
Central Point	9.0%	0	0	0	293	343	299	298	304	362	452	373
Jacksonville	9.0%	61	64	57	64	70	79	81	87	96	103	104
Medford	9.0%	1,767	1,868	2,148	2,410	2,553	2,283	2,273	2,373	2,502	2,646	2,929
Phoenix		17	16	39	27	36	24	13	11			
Rogue River	6.0%	51	50	50	48	47	40	44	44	47	57	66
Shady Cove	6.0%	62	66	66	65	81	68	43	45	42	43	43
Talent	6.0%	7	7	7	5	2	4	4	5	5	6	5
JEFFERSON COUNTY												
Madras	9.0%	127	136	149	172	202	196	183	194	195	222	251
Metolius	6.0%	2	2	2	2	2	1	1	1	1	1	2
Unincorporated	6.0%	147	165	182	228	227	203	205	188	255	273	292

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. **Estimated from state lodging tax receipts.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
JOSEPHINE COUNTY												
Grants Pass	9.0%	914	928	1,003	1,047	1,024	970	941	939	951	1,062	1,111
KLAMATH COUNTY												
County-wide	8.0%	974	1,050	1,095	1,330	1,477	1,421	1,376	1,409	1,400	1,565	*1,541
LAKE COUNTY												
County-wide	6.0%	69	78	96	111	107	94	98	125	94	105	*104
LANE COUNTY												
Coburg	8.0%	34	41	45	48	50	47	38	39	38	36	39
Cottage Grove	9.0%	147	168	182	213	224	227	205	186	207	215	236
Creswell	8.0%	59	55	68	82	81	80	83	128	118	141	130
Dunes City	8.0%	22	23	25	24	24	20	21	26	33	31	30
Eugene	9.5%	2,676	2,872	3,114	3,470	3,686	3,611	3,175	3,458	3,404	3,751	3,999
Florence	9.0%	230	259	276	297	299	498	538	565	540	557	629
Junction City	8.0%	21	21	22	26	24	20	18	20	18	21	23
Lowell	8.0%	0	0	0	0	0	0	0	0	0	0	1
McKenzie	8.0%	130	137	173	173	241	387	205	220	212	228	248
Oakridge	8.0%	39	40	43	51	83	69	50	54	57	69	75
Springfield	9.5%	1,210	1,218	1,483	1,597	1,655	1,630	1,435	1,641	1,904	2,056	2,260
Veneta**	8.0%	0	0	0	1	0	0	0	0	0	1	0
Westfir	8.0%	5	8	7	10	9	1	1	1	0	1	0
Unincorporated	8.0%	470	497	512	546	571	475	416	470	462	510	540
LINCOLN COUNTY												
Depoe Bay	8.0%	348	390	441	403	401	378	457	453	473	505	519
Lincoln City	9.5%	2,796	3,138	3,083	3,438	3,704	4,417	4,352	4,260	4,234	4,514	4,983
Newport	9.5%	1,716	1,866	2,113	2,272	2,357	2,228	2,256	2,291	2,323	2,408	2,739
Waldport	7.0%	23	22	23	23	23	23	23	23	30	34	41
Yachats	7.0%	394	418	442	503	520	496	477	429	451	481	512
Unincorporated	9.0%	874	968	1,078	1,119	1,389	1,599	1,556	1,673	1,696	1,801	1,776
LINN COUNTY												
Albany	9.0%	510	550	611	701	741	675	595	656	716	755	804
Lebanon	9.0%	20	20	22	30	36	36	34	35	39	39	45
Sweet Home	6.0%	14	14	18	18	19	21	21	23	25	27	29

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.

*Estimated from state lodging tax receipts. **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	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
MALHEUR COUNTY												
Ontario	9.0%	440	453	520	607	618	578	583	634	659	672	712
MARION COUNTY												
Keizer	6.0%	63	57	66	76	80	69	61	63	57	49	54
Salem	9.0%	1,706	1,828	2,052	2,395	2,506	2,416	2,138	2,215	2,239	2,445	2,731
Silverton	9.0%	0	0	0	0	0	0	0	166	191	199	214
Stayton		0	0	0	0	0	0	0	0	0	0	0
Sublimity	7.0%	28	34	32	40	38	23	23	22	21	23	22
Woodburn	9.0%	228	210	218	224	239	271	215	256	274	276	353
MORROW COUNTY												
Heppner	5.0%	5	5	5	4	4	5	4	4	6	4	4
MULTNOMAH COUNTY												
Fairview	6.0%	51	40	39	39	43	38	37	38	39	45	49
Gresham	6.0%	427	442	469	556	616	563	455	460	495	605	664
Portland	8.0%*	13,325	14,170	15,964	17,527	19,647	23,572	16,512	19,143	21,359	28,747	35,063
Troutdale	6.95%	290	313	356	341	375	414	403	429	428	452	481
Wood Village	6.0%	68	84	84	98	105	100	85	89	97	105	110
County-Wide	5.5%	12,352	13,467	14,794	16,726	18,491	16,115	15,441	18,208	20,052	21,464	27,435
POLK COUNTY												
SHERMAN COUNTY												
Condon	6.0%	0	0	0	0	0	16	13	14	14		
TILLAMOOK COUNTY												
Garibaldi	8.0%	57	64	65	93	81	57	58	80	90	121	113
Manzanita	9.0%	239	262	289	313	355	378	384	374	388	466	599
Rockaway Beach	9.0%	210	221	230	226	257	255	224	257	254	309	373
Tillamook	10.0%	195	202	223	316	344	292	276	313	278	291	321
Wheeler	9.0%	18	18	19	20	22	23	17	25	23	27	24
UMATILLA COUNTY												
Hermiston	8.0%*	265	276	300	313	320	339	359	364	412	374	437
Milton-Freewater	7.0%	0	0	0	0	0	15	20	9	24	14	18
Pendleton	8.0%	594	633	649	768	791	777	778	805	799	836	862
Umatilla	3.5%	19	15	17	16	17	18	18	30	44	26	32

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.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

Current Rate	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	
UNION COUNTY												
LaGrande	5.0%	204	229	241	232	271	239	220	245	271	268	300
County-wide	3.0%	124	139	147	143	167	146	125	147	150	165	181
WALLOWA COUNTY												
Enterprise	3.0%	29	32	37	39	36	39	37	34	34		
County-wide	5.0%	172	181	209	232	244	253	248	240	251	252	244
WASCO COUNTY												
The Dalles	8.0%	428	477	490	562	524	688	652	671	672	648	726
WASHINGTON COUNTY												
County-wide	9.0%	3,968	3,941	4,537	6,480	7,014	6,332	5,673	6,869	7,604	8,269	9,053
WHEELER COUNTY												
YAMHILL COUNTY												
Newberg	6.0%	91	95	100	129	121	120	216	352	416	472	512

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	2014 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

2014 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 2014 REPORT

“Other travel” now includes travel arrangement services (NAICS 5615) and Convention and Trade Show Organizers (NAICS 56192). (Travel arrangement services includes travel agencies, which was also previously in “other travel”).

In addition, 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.

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 2014. 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

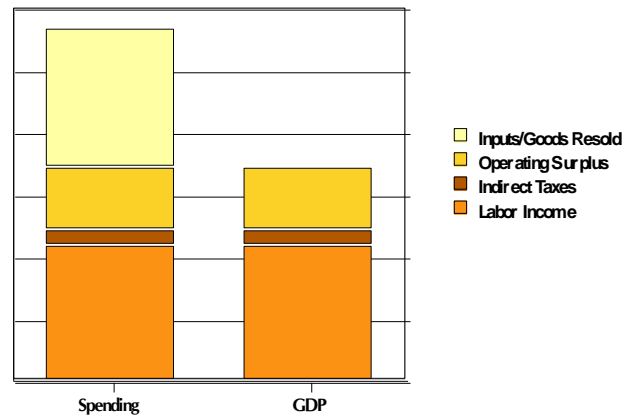
Preliminary estimates for 2014 were prepared at the state and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2014 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	$656,000 \times \$86 = \$56,100,000$ (calculated from person-trips)	56.1
Hotel, Motel	$160,000 \times \$200 = \$32,000,000$ (calculated from party-nights)	32.0
Private Home	$1,030,000 \times \$20 = \$20,600,000$ (calculated from person-nights)	20.6
Other Overnight	$10,000 \times \$350 = \$3,500,000$ (calculated from party-trips)	3.5
Campground		3.0
Vacation Home		0.5
Day Travel		30.0
Spending at Destination		86.1

Average Expenditures for Overnight Visitors, YEAR

	Travel Party		Visitor (Person)		Party Size	Length of Stay (nights)
	Nights	Trip	Nights	Trip		
Hotel, Motel	\$200	\$340	\$83	\$142	2.4	1.7
Private Home	\$50	\$130	\$20	\$52	2.5	2.6
Other Overnight	\$117	\$350	\$34	\$103	3.4	3.0
All Overnight	\$494	\$214	\$197	\$86	2.5	2.3

Overnight Visitor Volume, YEAR

	Visitor-Nights (000)		Party-Nights (000)	
		YEAR		YEAR
Hotel, Motel	$160 \times 2.4 =$	384		160
Private Home		1,030		412
Other Overnight		102		30
All Overnight		1,516		602

	Visitor-Trips (000)		Party-Trips (000)	
		YEAR		YEAR
Hotel, Motel		226		94
Private Home	$1,030 / 2.6 =$	396		158
Other Overnight		34		10
All Overnight		656		263

REGIONAL TRAVEL IMPACT MODEL

PRIMARY DATA SOURCES

Room Demand,
Visitor Surveys,
Population,
Inventory/Use
of Campsites &
Second Homes,
Visitor air
arrivals



Visitor Volume
(Travel Party Days by
Type of
Accommodation)



ECONOMIC IMPACTS OF TRAVEL

Accommodation
Sales,
Visitor Surveys,
Airlines



Visitor Spending
(Type of
Accommodation and
Type of Commodity)



Point of Sale Taxes
(Sales and Excise Taxes
associated with Visitor
Spending)



*Note: Receipts equals
Spending less
POS Taxes*

Business Receipts
(not reported)



Business Taxes
(Taxes on business
income or receipts)

Ratio of
Earnings to
Receipts for
relevant
Industry



Earnings
(By Industry)



Personal Taxes
(Local, state and
federal income and
payroll taxes)

Average
Annual
Earnings per
job for
relevant
industry



Employment
(By Industry)

*Note: Most estimates of taxes
are based on implicit tax rates
applied to visitor spending,
business receipts, and
employee earnings. Lodging
tax receipts reflect actual tax
collections.*

TRAVEL INDUSTRY ACCOUNTS: A COMPARISON OF THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS

An economic account is a method for displaying inter-related information about a set of economic activities. A travel industry account is a method to report different types of related information about the purchase of goods and services by visitors. The Bureau of Economic Analysis (BEA), which now provides annual and quarterly estimates of travel and tourism at the national level, describes a Travel and Tourism Satellite Account (TTSA) as “present(ing) a rearrangement of information from the National Income and Product Accounts, from the industry accounts, and from other sources so that travel and tourism activities can be analyzed more completely than is possible in the structure of the traditional national economic accounts.”¹ Similarly, the RTIM has been developed by Dean Runyan Associates to estimate travel spending, earnings, employment, and tax receipts at the state, county, and regional levels. These initial findings can, in turn, be used as input data for deriving estimates of other economic measures, such as value-added and indirect effects.

This appendix provides an overview of the Regional Travel Impact Model (RTIM) and travel and tourism satellite accounts (TTSAs). Although there is no single or absolute form of a TTSA, the one developed by the Bureau of Economic Analysis (BEA) will be the basis of the analysis here. The definitions, framework, and estimating methods used for the U.S. BEA TTSA follow, as closely as is practicable, the guidelines for similar travel satellite accounts that were developed by the World Tourism Organization (WTO) and the Organization for Economic Co-operation and Development (OECD).

The primary focus is on the direct impacts of visitor spending. Visitors are defined as persons that stay overnight away from home, or travel more than fifty miles one-way on a non-routine trip. Only the expenditures related to specific trips are counted as visitor spending. Other travel related expenditures such as the consumption of durable goods (e.g., recreational vehicles or sporting equipment) or the purchase of vacation homes are not considered.

While such a definition of the travel industry (i.e., the trip related expenditures of visitors) is conservative, it is also in keeping with the notion of the travel industry as being an export-oriented industry for specific local communities. That is, visitors are important to regions because they inject money into the local economy. This focus on the export-oriented nature of the travel industry for local communities becomes blurred if the industry is defined so as to include non-trip related expenditures.

¹ Peter D. Kuhbach, Mark A. Planting, and Erich H. Strassner, “U.S. Travel and Tourism Satellite Accounts for 1998-2003,” Survey of Current Business 84 (September 2004): 43-59.

PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

There are three primary types of information that are measured and/or estimated in a travel industry account. The first is a measure of the **travel industry** in terms of both the characteristics of the business firms that sell travel goods and services and the characteristics of consumers that purchase travel industry goods and services. The second is a measure of the **demand segments** that consume travel industry goods and services. For example, the distinction between business and leisure travel is a measure of demand segments. The third is a measure of the **components of economic output** associated with the travel industry. The employee earnings generated by visitor spending is one such component. Travel-generated tax receipts are another. These three categories of information represent different aspects of the accounting ledger – they represent different ways of viewing or analyzing the travel industry.

The bulk of this paper will discuss these three types of information in terms of their conceptual foundations, the data requirements, and some of the more salient issues that users of this information should be aware of. There will also be some discussion of **indirect and induced effects** in that these effects can be reasonably estimated from the direct travel industry accounts. These secondary (versus direct) effects describe the relationship of the travel industry to other sectors of the larger economy.

The intent of this discussion will be to provide a general overview of the process of constructing travel industry accounts and the underlying similarity between the RTIM and a TTSA. More technical issues are generally placed in footnotes.

TRAVEL INDUSTRY

Defining the travel industry is probably the most critical and data intensive effort involved in developing a travel industry account. It is an exercise in matching supply (sellers of goods and services) with demand (the travelers that purchase those particular goods and services). It is complicated by the fact that no single industrial classification scheme provides a valid measure of the travel industry.² There are only three significant industrial classifications (Accommodations [NAICS 721], Scheduled Passenger Air Transportation [NAICS 481111] and Travel Arrangement and Reservation Services [NAICS 5615]) that *primarily* sell travel industry goods and services.³ Firms in other industries (retail, recreation, transportation) provide goods and services to both travelers and other types of consumers.

Because of this, most satellite accounts, as well as the RTIM, incorporate at least some information about the expenditures of visitors in order to define the supply of

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

³ Even these industries are not purely travel. For example, the accommodations industry provides services to local residents (food service and meeting rooms). Passenger airlines also ship cargo on the same planes that carry passengers. Fortunately, it is usually possible to make adjustments for these non-travel components through the use of additional data.

visitor industry firms. For example, if there is an estimate of visitor-days and an estimate of how much the average visitor spends on food services per day, then an estimate of visitor spending on food services can be calculated. In most cases, this will be only a fraction of all food service sales in that residents are a larger market for most restaurants.⁴

The industry sectors that are usually matched to visitor spending in this way are: accommodations (NAICS 721), food service (722), arts, entertainment and recreation (71), and retail trade (44-45). A portion of transportation business is also part of the travel industry for obvious reasons.

In the case of the transportation sector, the definition and measurement of the travel industry component is more complicated because most transportation spending by visitors involves travel to and from the destination, rather than travel at or within the destination market. This is not an issue if the geographic scope of the travel industry market includes the origin and destination of travel. National travel industry accounts thus include all domestic passenger air transportation in the travel industry. The issue is more complicated at the state or regional level, however. Suppose, for example, that the focus of a travel industry account is the state of Arizona. How should the purchase of a round trip airline ticket by a Chicago resident traveling to Phoenix be treated in that only some of the economic impact of this spending will occur in Arizona? A reasonable approach would be to allocate only a portion of this spending (and related payroll, taxes, etc.) to Arizona and ignore the remainder for the purpose of creating a travel industry account for Arizona. However, if this procedure were followed for every state, the sum of the state accounts would be less than the national travel account. The state accounts would be additive if outbound air travel from each state were included. However, this is methodologically inconsistent with the construction of a national account, which does not include outbound travel as a component of domestic tourism demand. The approach used in the RTIM is to make a distinction between the *visitor industry*, that includes only visitor demand, and the *travel industry*, which includes visitor demand and that portion of outbound travel that can be attributed to the resident economy. For example, the passenger air transportation employment in Arizona can be divided between three groups of travelers: inbound, outbound, and pass-through. Only that employment attributable to inbound travel is part of the Arizona *visitor industry*. Employment attributable to outbound and pass-through travelers is included with the larger *travel industry*.⁵

⁴ The proportion can vary enormously among regions and localities, however. In many popular visitor destinations, the primary market for food service will be visitors. It should also be noted that even with reliable visitor survey data, there is still the issue of how to translate spending on food service *commodities* to the supply of food service by *industry*. As indicated in the footnote above, food service is also supplied by the accommodation industry.

⁵ The same issue arises with travel agencies and reservation services (NAICS 5615). Most of these services are probably related to outbound travel and are treated as such in the RTIM.

The following two tables display the specific industries that are included in the travel industry for the BEA's national TTSA and the RTIM. Although not identical, the industries are equivalent with only a few exceptions.⁶

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

Accommodation & Food Services	38.1%
Traveler accommodations	21.5%
Food services and drinking places	16.6%
Transportation	23.3%
Air transportation	15.4%
Rail transportation	0.4%
Water transportation	1.2%
Interurban bus transportation	0.3%
Interurban charter bus transportation	0.2%
Urban transit systems & other tran.	1.7%
Taxi service	1.0%
Automotive equipment rental & leasing	2.0%
Automotive repair services	0.8%
Parking lots and garages	0.2%
Toll highways	0.1%
Recreation	11.2%
Scenic and sightseeing transportation	0.4%
Motion pictures and performing arts	1.1%
Spectator sports	2.3%
Participant sports	2.4%
Gambling	3.0%
All other recreation and entertainment	2.0%
Retail & Nondurable Goods Production	16.2%
Petroleum refineries	0.6%
Industries producing nondurable PCE commodities, excluding petroleum refineries	4.4%
Wholesale trade & tran. services	4.2%
Gasoline service stations	1.3%
Retail trade services, excluding gasoline service stations	5.8%
Travel Arrangement	7.3%
All other industries	2.2%
Total Tourism Compensation	100.0%

Source: Adapted from Eric S. Griffith and Steven L. Zemanek, "U.S. Travel and Tourism Satellite Accounts for 2005-2008," Survey of Current Business (June 2009): 37, table 6.

⁶ The major exception is that the BEA includes the production of consumer non-durables that are sold through retail outlets. This is not a major component and would be even less so at the level of the state.

RTIM Travel Impact Industries Matched to NAICS

Travel Impact Industry	NAICS Industry (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and Rural Bus Transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Arrangement Services	Travel Agencies (56151) Tour Operators (56152)

Source: Dean Runyan Associates

DEMAND SEGMENTS

The distinction between inbound and outbound travel has already been discussed in the previous section and in terms of the concepts of the *visitor industry* and the *travel industry*. Three other types of demand segments that are related exclusively to the *visitor industry* will be discussed here. The first two demand categories are reported by the BEA in their national TTSA. They are: ***leisure versus business travel***, and ***resident versus non-resident travel***. The third demand category is typically reported in the RTIM: ***type of traveler accommodation***. These three demand categories will be discussed in turn.

The distinction between ***leisure versus business travel*** is useful for several reasons. Economists like to distinguish between personal consumption expenditures on the one hand and business expenditures on the other. Indeed, this distinction is central for the National Income and Product Accounts (NIPAs). Those in the travel industry are more likely to be interested in this distinction because leisure travelers represent a more “marketable” segment because their travel choices are less determined by economic and business factors. Furthermore, business and leisure travelers tend to have different spending profiles. The availability of this information in either a state or regional TTSA or RTIM is essentially dependent on the availability of survey data (as it is at the national level). It should be noted, however, that such estimates are considerably less reliable for smaller geographic areas because of the limitations of survey data. Even at the state level, year-to-year changes in the composition of this demand segment should be interpreted in conjunction with other data.

The distinction between ***resident versus non-resident travel*** is fundamental to a national TTSA because it mirrors the distinction between the domestic economy and international transactions. Non-resident travel in the United States is considered an export in the official international transaction accounts.⁷ The distinction is obviously also important because it is based on different political, legal, and currency regimes – factors that in themselves influence travel behavior. At the level of the state or region, the distinction between resident and nonresident travel is less important, although it is often reported.⁸ There are at least two reasons why this distinction is less useful at state and regional levels.

First, there is considerably less of an economic rationale for distinguishing resident and non-resident travel at the level of the state, or any other political jurisdiction within the United States, than there is at the national level. States do not maintain interstate trade balance sheets that chart the flow of goods and services across state boundaries. From an economic point of view, the administration of the tax system is the primary, if only, reason for this distinction. In the case of travel and tourism,

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

⁸ The issues discussed with regard to the reliability of survey data for leisure versus business travel also applies to this category

the evaluation of the tax impacts of resident versus nonresident travel might also be important.⁹

Second, travel is behaviorally defined by length of distance from home (usually at least 50 miles one-way), trip purpose (non-routine), and/or the use of an overnight accommodation away from home. Rarely is domestic travel defined by virtue of crossing a geographic boundary.¹⁰ The operators of tourist attractions in local communities are generally less interested in the origin of visitors than in the revenue that they generate for their businesses. In terms of the economic impacts at the *local* level, the distinction between in-state residents, out-of-state residents and international visitors may not be relevant other than for the purpose of marketing. However, other geographic characteristics of the visitor (e.g., distance traveled, the specific area of origin) are generally more useful measures of the visitor market than whether the visitor is a resident or nonresident.

Finally, the distinction among different ***types of traveler accommodations*** is generally reported in the RTIM. Typically, these categories are:

- Visitors who stay in hotels, motels, B&Bs., and similar lodging facilities
- Visitors who stay at campsites
- Visitors who stay in the private homes of friends or relatives
- Visitors who stay in vacation or second homes
- Visitors who do not stay in overnight accommodations on their trip away from home (day visitors).

These distinctions can be useful because estimates of economic impacts are often used for different purposes. The total of all accommodation types, of course, is an estimate of the total magnitude of the visitor industry. Visitors who stay in commercial lodging such as hotels and motels are most likely to have the greatest economic impact on a person-day basis. These visitors are also more likely to be influenced by marketing efforts. In urban areas, a large proportion will represent business travel. In other words, the type of accommodation category can be used in conjunction with other types of data to analyze the market characteristics of visitors.

⁹ Nonresident visitors who pay taxes in their destination state represent an unambiguous gain for the state. This effect is less clear for resident travelers within the state.

¹⁰ In essence, state level travel impact estimates really represent an aggregation of smaller geographic units, such as counties or regions. Populous states with large landmasses (e.g., California or Texas) will have a higher proportion of resident travel than small states (e.g., Rhode Island or Delaware).

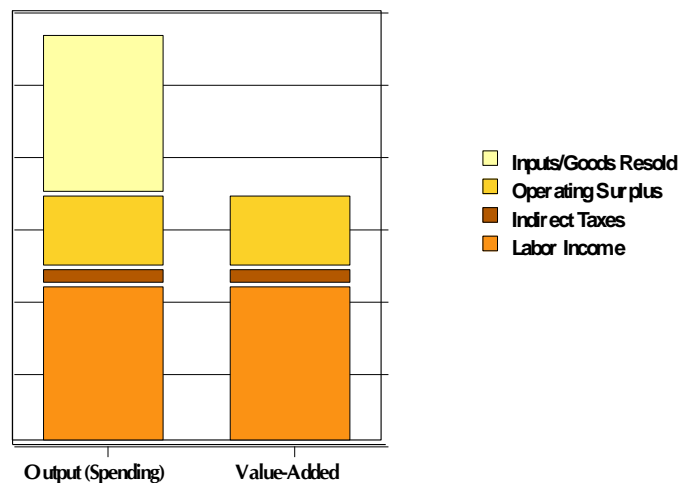
COMPONENTS OF INDUSTRY OUTPUT

Because both the RTIM and the TTSA are empirically linked to NAICS industry accounts, it is possible to provide estimates of different components of economic output. The major economic components most often estimated are:¹¹

- Travel spending (Gross Output)
- Value-added (Gross Product)
- Earnings (labor income)
- Indirect business taxes (sales, excise, property taxes & fees).

The relationship of these components is shown below. As indicated, the value-added of a particular industry (the bar on the right) is equal to gross output (travel spending) minus the intermediate inputs used by travel industry businesses to produce the good or service. Restaurants, for example, prepare and serve the food products that are purchased from suppliers. Airlines purchase or lease airplanes from other firms. These intermediate inputs are not counted as part of the value-added of the travel industry. They are counted as value-added in other industries (e.g., agriculture, aerospace manufacturing).

Components of Industry Output



The distinction between gross output and value-added is probably even more important at the state or regional level. This is because the intermediate inputs that are purchased from other industries are even more likely to be purchased from businesses located in different regions or states. For example, the economic impact

¹¹ There are some small differences between the BEA TTSA and the RTIM in what these components include. The BEA allocates proprietor income to Operating Surplus, the RTIM allocates it to Labor Income. The RTIM does not have an estimate of property taxes in indirect taxes. Overall, property taxes on businesses are a relatively small proportion of indirect taxes.

of air passenger travel in the state of Hawaii should not include the purchase of airplanes manufactured in other parts of the world. Travel industry value-added is a more meaningful measure of the true economic impact of visitor spending in Hawaii because a portion of the economic impact of visitor spending in the state will actually occur elsewhere.¹²

Value-added can also be viewed in terms of the distribution or payout of industry receipts, exclusive of those paid to other firms for intermediate inputs. Some of the receipts are distributed to labor as wages, benefits, and proprietor income. Some receipts are paid to government as indirect taxes. These taxes are called “indirect” because most of them are actually paid by consumers in the form of sales or excise taxes.¹³ The remainder leaves gross operating surplus. Out of gross operating surplus various payments are made in the form of dividends, interest, and other payments, or retained by the firm. The sum of these three broad categories of payments is equal to travel industry value-added. To summarize:

Value-added = Spending *less* intermediate goods & services, or

Value-added = Labor Income *plus* indirect business taxes *plus* gross operating surplus.

The RTIM is similar to the TTSA in that it also provides estimates of these components of economic output. Travel spending, earnings, and tax impacts are generally provided at the state or regional level. Value-added is generally reported at the state-level only (sometimes referred to as Travel Industry Gross State Product). At the level of the state, travel industry value-added or GSP is an important measure – more economically meaningful than travel spending.¹⁴ For smaller geographic areas, however, the rationale for reporting value-added is less clear. First, there are real data limitations and data costs in deriving these estimates. Second, ***the most important components of value added for the travel industry are earnings and tax receipts***. Because the travel industry is relatively labor intensive and because a large proportion of travel industry goods and services are subject to excise and sales taxes, these two components of value-added (labor income and indirect taxes) are relatively high for the travel industry. The local effects of gross operating surplus are generally less important and certainly much more difficult to assess than are earnings and tax impacts. The relevance of earnings and tax receipts is also in keeping the export-oriented emphasis of the travel industry: earnings and tax receipts are more likely to stay in the local economy than is operating surplus.

¹² It should also be noted the value of the intermediate inputs used by travel industry firms will not necessarily disappear if the travel industry stops buying them. Aerospace firms will shift their production to other users (e.g., military). Agriculture will seek new markets for their products.

¹³ Other taxes included here are property taxes, business franchise taxes, and other fees. Income taxes are not included, because they are paid out of operating surplus.

¹⁴ It is also possible to compare different industries with respect to their value-added. It is more difficult and less useful to compare industries on the basis of sales.

INDIRECT, INDUCED AND SECONDARY EFFECTS

To this point, the discussion of travel industry accounts has referred only to the direct output components. That is, the ripple effects of the re-spending of travel industry receipts throughout the larger economy have not been analyzed. The structure of both the TTSA and the RTIM permit such analysis.

- **Indirect** effects refer to the intermediate inputs used to produce the final product or service, providing that those inputs are themselves produced within the designated geographic area.
- **Induced** effects refer to the purchase of goods and services by *employees* that are attributable to direct and indirect impacts. These induced impacts are derived from economic data that describe the purchasing patterns of households. For example, employees of all the designated export-oriented industries will spend their income on food, household durables, health care, and so on.
- The sum of indirect and induced impacts is sometimes referred to as the **secondary** effect. These secondary impacts may be as great or greater than the direct impact alone.
- The ratio of the total effects (direct plus either indirect, induced, or secondary) to the direct effects is the **multiplier**.

The BEA reports the **indirect** components of economic output. This is equivalent to domestic travel spending less the goods and services imported from abroad to meet domestic demand. For travel, these imports would include souvenirs manufactured in China and petroleum extracted in Saudi Arabia. The indirect output multiplier for 2002 was 1.76. The ratio of domestic travel spending to travel industry value-added was 1.88. The difference reflects the intermediate inputs for travel imported from abroad.

At the state level, these indirect output multipliers are typically lower because relatively more of the intermediate inputs are purchased from outside of the state. At the county or metropolitan level, the multipliers are generally even lower for the same reason. Furthermore, the estimates are usually less reliable because of the data limitations of the regional input-output model used to estimate the indirect effects.

The BEA does not report **induced** effects – the effect of household spending of the direct and indirect labor income. Typically, these induced effects will be larger than the indirect effects at the state or regional level, in part because they are based on both the direct and indirect components.¹⁵ As with indirect effects, the induced effects will also tend to be lower for smaller economic areas and the reliability of the estimates will be less.

¹⁵ The induced effects can be estimated with the Implan model maintained by the Minnesota Implan Group.

Secondary effects should be interpreted cautiously. These effects describe the relationship of economic transactions at a point in time. These relationships will not necessarily remain constant with a change in direct economic output. This is because all economic resources have alternative uses. Because of this, it is often difficult to determine the effect of an increase or decrease in visitor spending on the larger economic system over time.

THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS COMPARED

This appendix has provided an overview of Dean Runyan Associates RTIM and the Bureau of Economic Analysis' domestic TTSA. These travel industry accounts are similar in terms of how they define the travel industry and the measures of the industry that are reported. The differences stem largely from their different levels of analysis – the BEA provides estimates at the national level only, while the RTIM's are typically constructed on a state or regional level. Because of this geographic focus, the RTIM provides a distinction between the visitor industry and the travel industry. The RTIM also provides measures of all of the components of economic output and secondary effects at the state or large region level. At smaller units of analysis, however, the emphasis is on earnings and tax receipts generated by travel spending as these are the most reliable and meaningful measures of the economic impact of travel at the local level.

Oregon Earnings and Employment by Industry Sector, 2013

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	17,253	15.4%	296	13.1%
Agriculture, Forestry, Fishing and related	2,897	2.6%	99	4.4%
Mining	175	0.2%	6	0.3%
Manufacturing	14,181	12.7%	191	8.4%
**Travel	2,441	2.2%	98	4.3%
Primarily Non Export-Oriented	54,541	48.8%	1,084	47.9%
Construction	6,492	5.8%	109	4.8%
Utilities	670	0.6%	5	0.2%
Wholesale trade	5,969	5.3%	79	3.5%
Retail trade	7,573	6.8%	238	10.5%
Real estate and rental and leasing	1,688	1.5%	99	4.4%
Management of companies and enterprises	4,784	4.3%	39	1.7%
Administrative and waste services	4,036	3.6%	120	5.3%
Other services, except public administration	4,205	3.8%	119	5.3%
Government and government enterprises	19,124	17.1%	277	12.2%
Mixed	40,073	35.8%	884	39.0%
Transportation and warehousing	3,438	3.1%	65	2.9%
Information	2,980	2.7%	41	1.8%
Finance and insurance	5,246	4.7%	95	4.2%
Professional and technical services	8,242	7.4%	142	6.3%
Educational services	1,548	1.4%	55	2.4%
Health care and social assistance	13,882	12.4%	262	11.6%
Leisure and Hospitality	4,737	4.2%	224	9.9%
Oregon Total**	111,867	100.0%	2,265	100.0%

**Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).

Industry Groups

Accommodation & Food Services

- Food services and drinking places
- Hotels and motels, including casino hotels
- Other accommodations

Arts, Entertainment & Recreation

- Amusement parks, arcades, and gambling industries
- Bowling centers
- Fitness and recreational sports centers
- Independent artists, writers, and performers
- Museums, historical sites, zoos, and parks
- Other amusement and recreation industries
- Performing arts companies
- Promoters of performing arts and sports and agents for public figures
- Spectator sports companies

Construction

- Construction of new nonresidential commercial and health care structures
- Construction of new nonresidential manufacturing structures
- Construction of new residential permanent site single- and multi-family structures
- Construction of other new nonresidential structures
- Construction of other new residential structures
- Maintenance and repair construction of nonresidential structures
- Maintenance and repair construction of residential structures

Education and Health Services

- Child day care services
- Community food, housing, and other relief services, including rehabilitation services
- Home health care services
- Individual and family services
- Medical and diagnostic labs and outpatient and other ambulatory care services
- Nursing and residential care facilities
- Offices of physicians, dentists, and other health practitioners
- Other private educational services
- Private elementary and secondary schools
- Private hospitals
- Private junior colleges, colleges, universities, and professional schools

Financial Activities

- Commercial and industrial machinery and equipment rental and leasing
- Funds, trusts, and other financial vehicles
- General and consumer goods rental except video tapes and discs
- Imputed rental activity for owner-occupied dwellings
- Insurance agencies, brokerages, and related activities
- Insurance carriers
- Lessors of nonfinancial intangible assets
- Monetary authorities and depository credit intermediation activities
- Nondepository credit intermediation and related activities
- Real estate establishments
- Securities, commodity contracts, investments, and related activities
- Video tape and disc rental

Information

- Book publishers
- Cable and other subscription programming
- Data processing, hosting, ISP, web search portals and related services
- Directory, mailing list, and other publishers
- Internet publishing and broadcasting
- Motion picture and video industries
- Newspaper publishers
- Other information services
- Periodical publishers
- Radio and television broadcasting
- Software publishers
- Sound recording industries
- Telecommunications

Manufacturing & Utilities

(280 industries)

Natural Resources and Mining

- All other crop farming
- Animal production, except cattle and poultry and eggs
- Cattle ranching and farming
- Commercial Fishing
- Commercial hunting and trapping
- Commercial logging
- Cotton farming
- Dairy cattle and milk production
- Drilling oil and gas wells
- Extraction of oil and natural gas
- Forestry, forest products, and timber tract production
- Fruit farming
- Grain farming
- Greenhouse, nursery, and floriculture production
- Mining and quarrying other nonmetallic minerals
- Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals
- Mining and quarrying stone
- Mining coal
- Mining copper, nickel, lead, and zinc
- Mining gold, silver, and other metal ore
- Mining iron ore
- Oilseed farming
- Poultry and egg production
- Sugarcane and sugar beet farming
- Support activities for agriculture and forestry
- Support activities for oil and gas operations
- Support activities for other mining
- Tobacco farming
- Tree nut farming
- Vegetable and melon farming

Other Services

- Automotive repair and maintenance, except car washes
- Car washes
- Civic, social, professional, and similar organizations
- Commercial and industrial machinery and equipment repair and maintenance
- Death care services
- Dry-cleaning and laundry services
- Electronic and precision equipment repair and maintenance
- Grantmaking, giving, and social advocacy organizations
- Other personal services
- Personal and household goods repair and maintenance
- Personal care services
- Private household operations
- Religious organizations

Professional and Business Services

- Accounting, tax preparation, bookkeeping, and payroll services
- Advertising and related services
- All other miscellaneous professional, scientific, and technical services
- Architectural, engineering, and related services
- Business support services
- Computer systems design services
- Custom computer programming services
- Employment services
- Environmental and other technical consulting services
- Facilities support services
- Investigation and security services
- Legal services
- Management of companies and enterprises
- Management, scientific, and technical consulting services
- Office administrative services
- Other computer related services, including facilities management
- Other support services
- Photographic services
- Scientific research and development services
- Services to buildings and dwellings
- Specialized design services
- Travel arrangement and reservation services
- Veterinary services
- Waste management and remediation services

Public Administration

- Federal electric utilities
- Other Federal Government enterprises
- Other state and local government enterprises
- State and local government electric utilities
- State and local government passenger transit
- US Postal Service

Trade

- Retail Nonstores - Direct and electronic sales
- Retail Stores - Building material and garden supply
- Retail Stores - Clothing and clothing accessories
- Retail Stores - Electronics and appliances
- Retail Stores - Food and beverage
- Retail Stores - Furniture and home furnishings
- Retail Stores - Gasoline stations
- Retail Stores - General merchandise
- Retail Stores - Health and personal care
- Retail Stores - Miscellaneous
- Retail Stores - Motor vehicle and parts
- Retail Stores - Sporting goods, hobby, book and music
- Wholesale trade businesses

Transport

- Automotive equipment rental and leasing
- Couriers and messengers
- Scenic and sightseeing transportation and support activities for transportation
- Transit and ground passenger transportation
- Transport by air
- Transport by pipeline
- Transport by rail
- Transport by truck
- Transport by water
- Warehousing and storage