

# The Economic Impact of Travel

City of Bend

2022

April 2023

**PREPARED FOR**

Visit Bend



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# The Economic Impact of Travel in the City of Bend

2022

Visit Bend

4/11/2023

## PRIMARY RESEARCH CONDUCTED BY

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*Photo: Whitney Whitehouse & Jasper / Visit Bend cropped by DRA*

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**City of Bend**  
**2022**

# Bend / Summary

## Travel Impacts 2022

The Oregon travel economy reached new highs across most categories in 2022. Continued demand for overnight accommodations and increased price inflation led to large gains in visitor spending. This increased spending and a tight labor market contributed to an increase in employee earnings, with both having a cumulative effect on increased tax revenue. Employment has recovered to 99% of peak employment reached in 2019.

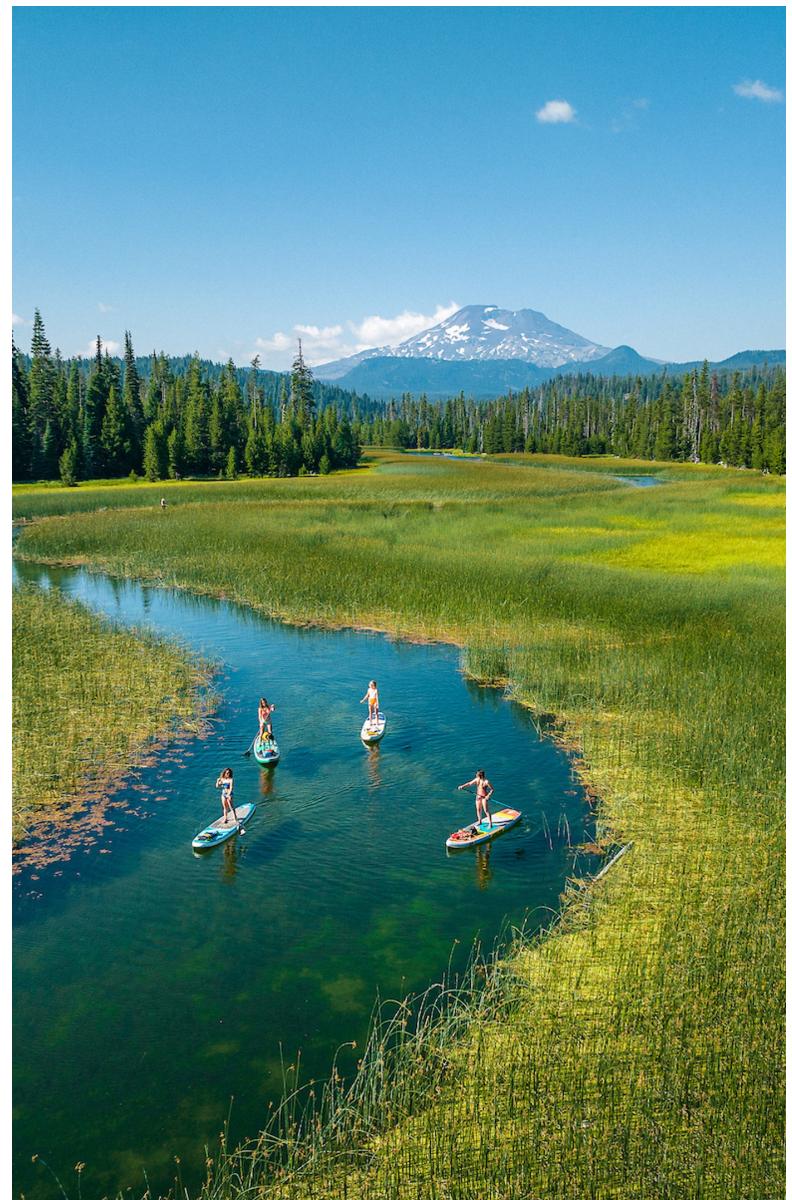
Bend grew less year over year as the decline in travel spending due to the COVID-19 pandemic was less drastic than the state-wide decline.

- Travel spending in Bend increased 13.6%, from \$336.3 million in 2021 to \$382.2 million in 2022.
- Direct travel-generated employment grew to 3,120 jobs, a 10% increase over 2021.
- Direct travel-generated earnings increased to \$101.5 million, a gain of 20.9% compared to 2021.
- Tax receipts generated by travel spending increased to \$25.4 million, up 13.5% compared to 2021.

Bend's travel economy **increased 13.6%** in **2022 to \$382.2 million.**

Note: Current year data are preliminary and subject to change as new source data becomes available.

*Photo: Nate Wyeth Photography / Visit Bend*



# Central Oregon / Regional Impacts

## Oregon Regional Comparison

To further understand the importance and size of the travel economy in the City of Bend our economic impact estimates can be compared to the larger region.

The table highlights the size of the travel industry in the city compared to the larger region. The city is 32% of all the direct travel spending in the region and 31% of all direct travel employment. In terms of local tax revenue the city is 53% of all local revenue generated by travel activity. The primary difference between cities will be the various tax rates applied to the available commodities and the availability of paid lodging opportunities.

Deschutes County accounts for approximately 86% of the region's travel spend.

The Central Oregon region encompassing the counties of Crook, Deschutes, Jefferson, and Wasco (Partial) accounted for approximately 10% of all travel spending in the state for calendar year 2022. In Oregon most of the travel activity is concentrated along the population centers in the I-5 corridor running through Portland, the Willamette Valley, and Southern Oregon.

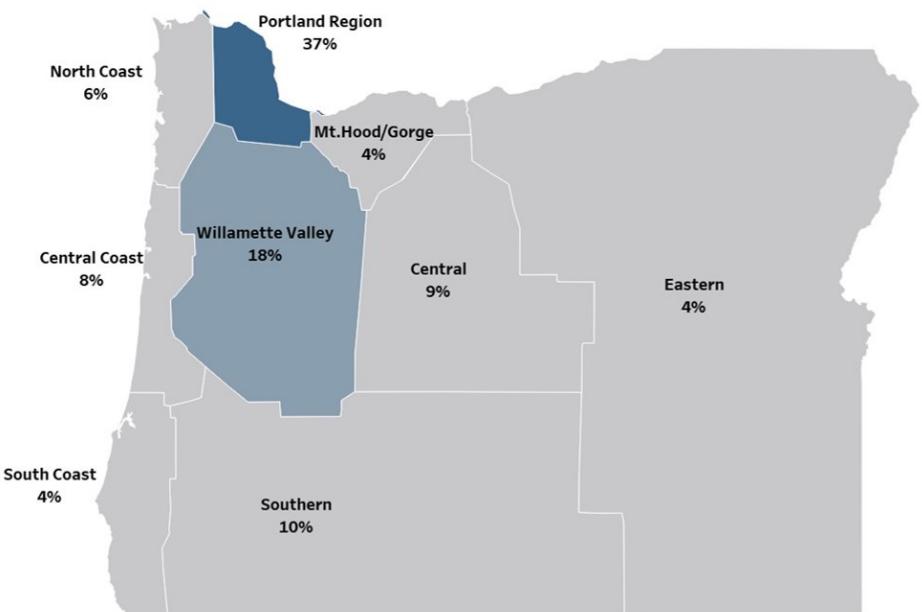
Additional information detailing the travel impacts produced for Travel Oregon is available at [www.travelstats.com/oregon](http://www.travelstats.com/oregon).

## Direct Travel Impacts, 2022

	Central Oregon	City of Bend	Share of Region
Spending (\$M)	\$1,310.1	\$382.2	29%
Earnings (\$M)	\$360.0	\$101.5	28%
Employment (Jobs)	10,270	3,120	30%
State Tax Revenue (\$M)	\$35.1	\$10.4	30%
Local Tax Revenue (\$M)	\$28.5	\$15.0	52%
Visitor Volume* (Thousands)	3,127	1,393	45%

**Sources:** Dean Runyan Associates

\*Visitor volume calculated as overnight person trips. Total region volume will be less than the sum of the individual cities within the region due to cross-city visitation patterns. Visitor volume estimates based primarily on underlying economic data, this may result in differences in estimates compared to other travel research methodologies. Economic activity is a more reliable gauge of visitor activity than visitor volume.



# Bend / Impacts, Summary

## Direct Travel Impacts 2016-2022p

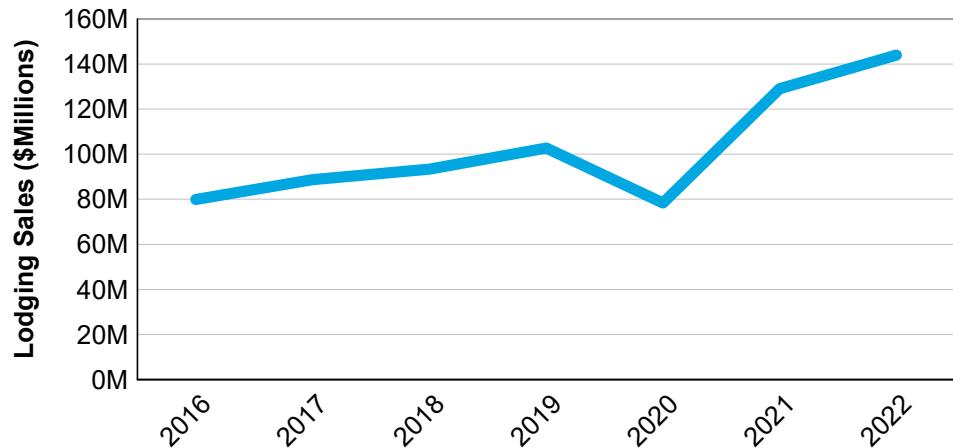
	2016	2017	2018	2019	2020	2021	2022	Avg. Annual % Chg.	2021-22	2016-22
<b>Spending (\$Millions)</b>										
Total (Current \$)	266.7	290.4	287.8	306.4	231.6	336.6	382.2	▲ 13.6%	▲ 6.2%	
Other	27.1	28.9	10.6	11.4	8.6	9.6	17.2	▲ 79.4%	▼ -7.3%	
Visitor	239.6	261.5	277.2	295.0	222.9	327.0	365.0	▲ 11.6%	▲ 7.3%	
Non-transportation	221.0	240.3	253.1	270.5	206.9	301.5	333.1	▲ 10.5%	▲ 7.1%	
Transportation	18.6	21.1	24.1	24.5	16.1	25.4	31.9	▲ 25.4%	▲ 9.4%	
<b>Earnings (\$Millions)</b>										
Earnings (Current \$)	70.2	75.8	73.6	80.5	71.1	84.0	101.5	▲ 20.9%	▲ 6.4%	
<b>Employment (Jobs)</b>										
Employment	3,180	3,270	3,120	3,200	2,690	2,840	3,120	▲ 10.0%	▼ -0.3%	
<b>Tax Revenue (\$Millions)</b>										
Total (Current \$)	15.0	17.3	17.8	19.4	15.1	22.4	25.4	▲ 13.5%	▲ 9.1%	
Local	8.3	9.2	9.7	10.7	8.1	13.4	15.0	▲ 11.6%	▲ 10.3%	
State	6.7	8.1	8.0	8.7	7.0	8.9	10.4	▲ 16.4%	▲ 7.6%	

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

Employment and earnings include fiscal stimulus support.

# Bend / Travel Activity Trends

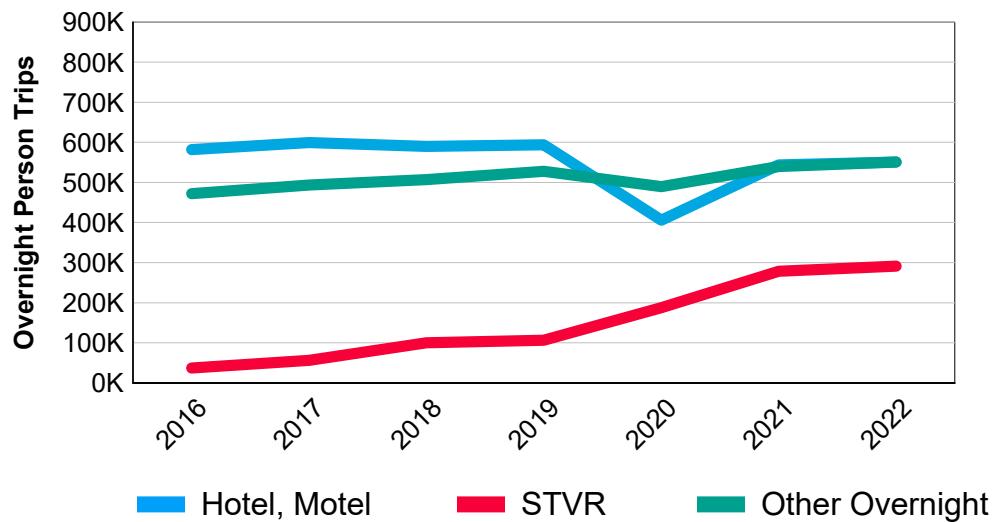
## Lodging Sales



Lodging sales grew to \$144 million in 2022, an increase of 11.6% compared to 2021.

Sources: City of Bend, Dean Runyan Associates

## Overnight Volume

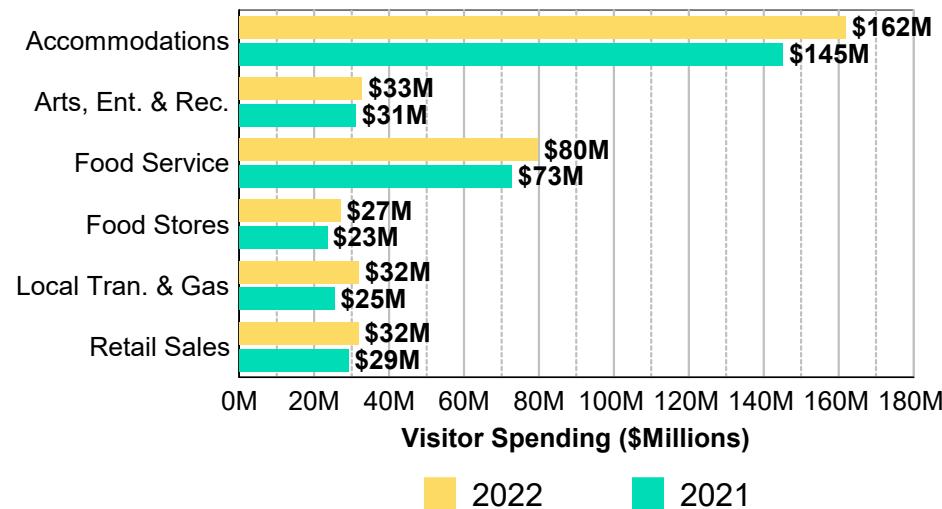


Overnight visitor volume grew to 1.4 million person-trips in 2022, an increase of nearly 2.2% compared to 2021. Visitors who chose to stay in short term vacation rentals grew 4.5% year over year.

Sources: City of Bend, Census Bureau, AirDNA, STR LLC., Dean Runyan Associates, Omnitrak Group LLC.

# Bend / Spending

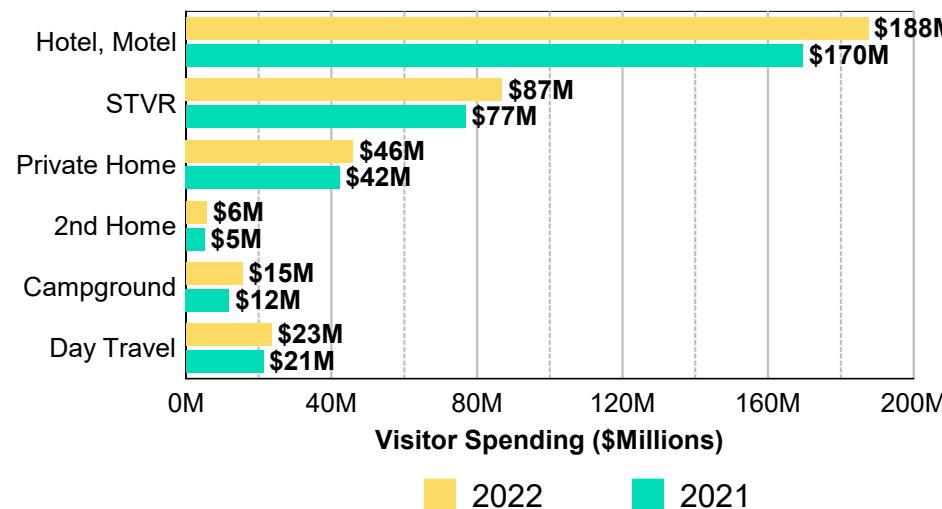
## Visitor Spending by Commodity Purchased



Spending on Accommodations grew to \$162 million in 2022, an increase of 11.6% compared to 2021.

Sources: City of Bend, Dean Runyan Associates, Omnitrak Group

## Visitor Spending by Accommodation Type



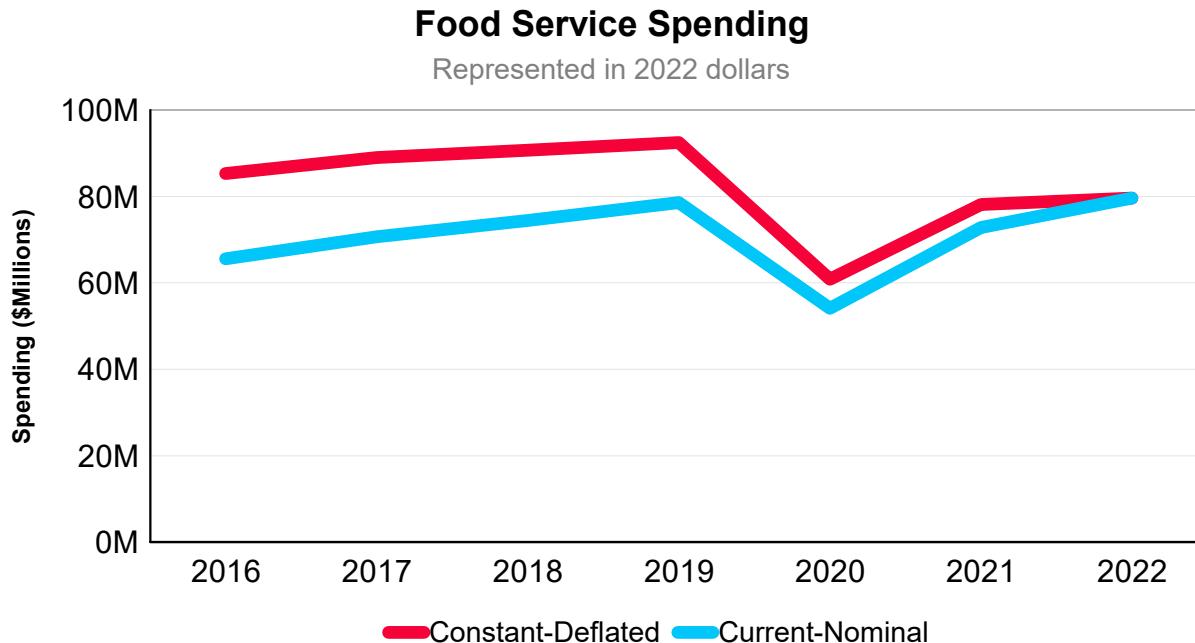
Visitors who stay in a Hotel, Motel, or Short Term Vacation Rental (STVR) spent a combined \$274 million in 2022, an increase of 11.4%.

Sources: City of Bend, AirDNA, Dean Runyan Associates, Omnitrak Group, STR LLC.

Note: Private Home represents visitors staying with friends or family. (Glossary on page 17)

# Bend / Spending

## Inflation Effects



Visitor spending on commodities are affected by more than just the volume of visitors. Inflationary pressure related to each commodity can cause spending to rise too. Compared above is visitor spending on Food Service (restaurants, bars, etc.). In current dollars (not adjusted for inflation) Food Service spending in 2022 reached a new peak. In contrast, constant dollars (adjusted for inflation) Food Service spending is approximately 14% less than 2019 levels of activity.

Sources: Bureau of Labor Statistics CPI, Dean Runyan Associates

## How does inflation affect the travel industry?

Inflation is the rate of increase in prices of goods and services. An increase in the rate of inflation translates into reduced purchasing power for consumers. To track the quantity of goods and services that consumers purchase when they travel, we report the "Inflation Adjusted" travel spending in the chart to the left. This is also known as "real" spending, as it shows the quantity of goods and services that were purchased while keeping the purchasing power constant across time.

### U.S. CPI (annual % chg.)

2021: 4.7%

2022: 8.0%

Target: 2% Annually



### Oregon 2022 Selected Prices (% Chg.)

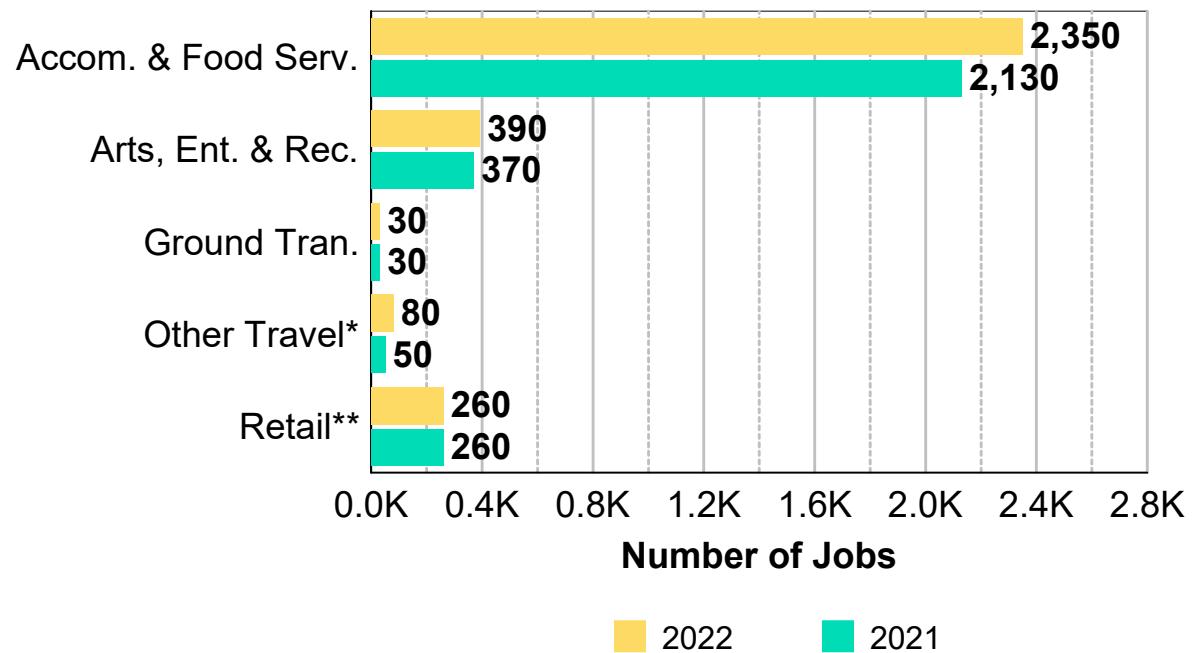
Hotel & STVR Room Rates: 7%

Gasoline Prices: 33%

Air Fares: 32%

# Bend / Employment

## Travel Industry Employment



\*Other Travel includes travel arrangement services and convention services

\*\*Retail includes gasoline station employment.

Travel spending generated 3,120 direct jobs in 2022.  
Overall, travel industry employment grew by 10%.

Sources: Dean Runyan Associates, Bureau of Labor Statistics, Bureau of Economic Analysis

Photo: Rich Bacon / Visit Bend cropped by DRA



# Bend / Impacts, Detailed

## Direct Travel Impacts 2016-2022p

	2016	2017	2018	2019	2020	2021	2022	2021-22	2019-22
<b>Direct Travel Spending (\$Millions)</b>									
Destination Spending	239.6	261.5	277.2	295.0	222.9	327.0	365.0	11.6%	23.7%
Other Travel*	27.1	28.9	10.6	11.4	8.6	9.6	17.2	79.4%	50.8%
<b>TOTAL</b>	<b>266.7</b>	<b>290.4</b>	<b>287.8</b>	<b>306.4</b>	<b>231.6</b>	<b>336.6</b>	<b>382.2</b>	<b>13.6%</b>	<b>24.8%</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b>									
Hotel, Motel, STVR	169.8	186.9	198.2	212.0	154.9	246.4	274.4	11.4%	29.4%
Hotel, Motel	161.1	173.4	174.0	184.7	109.8	169.5	187.5	10.6%	1.5%
Short Term Vacation Rental	8.6	13.4	24.2	27.3	45.1	76.9	86.9	13.0%	218.5%
Private Home	36.2	38.1	40.1	42.5	34.5	42.3	45.9	8.6%	8.0%
Campground	11.6	12.5	13.5	13.3	13.2	11.9	15.5	30.5%	16.8%
Vacation Home	4.3	4.9	4.9	5.7	4.3	5.2	5.7	9.5%	-0.7%
Day Travel	17.8	19.1	20.5	21.5	16.1	21.2	23.5	10.7%	9.4%
<b>TOTAL</b>	<b>239.6</b>	<b>261.5</b>	<b>277.2</b>	<b>295.0</b>	<b>222.9</b>	<b>327.0</b>	<b>365.0</b>	<b>11.6%</b>	<b>23.7%</b>
<b>Visitor Spending by Commodity Purchased (\$Millions)</b>									
Accommodations	89.6	100.1	105.3	116.0	88.3	145.1	161.9	11.6%	39.6%
Food Service	65.6	70.7	74.4	78.6	54.1	72.8	79.6	9.4%	1.3%
Food Stores	16.6	17.6	18.9	19.8	18.6	23.4	27.1	15.4%	36.9%
Local Tran. & Gas	18.6	21.1	24.1	24.5	16.1	25.4	31.9	25.4%	30.2%
Arts, Ent. & Rec.	24.7	26.3	27.9	28.8	23.9	31.1	32.8	5.4%	13.8%
Retail Sales	24.5	25.7	26.5	27.4	21.9	29.1	31.8	9.2%	16.0%
<b>TOTAL</b>	<b>239.6</b>	<b>261.5</b>	<b>277.2</b>	<b>295.0</b>	<b>222.9</b>	<b>327.0</b>	<b>365.0</b>	<b>11.6%</b>	<b>23.7%</b>

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other Travel includes travel arrangement and convention/ trade shows.

# Bend / Impacts, Detailed

## Direct Travel Impacts 2016-2022p

	2016	2017	2018	2019	2020	2021	2022	2021-22	2019-22
<b>Travel Industry Earnings (\$Millions)</b>									
Accom. & Food Serv.	48.5	52.6	55.4	62.1	53.8	65.1	79.1	21.4%	27.4%
Arts, Ent. & Rec.	6.7	7.2	7.3	6.9	6.2	7.2	7.6	5.7%	10.1%
Retail**	5.4	5.8	6.1	6.4	7.0	7.5	8.4	11.6%	31.3%
Ground Tran.	1.1	1.2	1.4	1.5	1.3	1.1	1.3	11.4%	-17.8%
Other Travel*	8.5	9.0	3.3	3.6	2.7	3.0	5.2	72.7%	45.2%
<b>TOTAL</b>	<b>70.2</b>	<b>75.8</b>	<b>73.6</b>	<b>80.5</b>	<b>71.1</b>	<b>84.0</b>	<b>101.5</b>	<b>20.9%</b>	<b>26.1%</b>
<b>Travel Industry Employment (Jobs)</b>									
Accom. & Food Serv.	2,210	2,250	2,230	2,340	1,960	2,130	2,350	10.3%	0.4%
Arts, Ent. & Rec.	500	530	520	480	370	370	390	7.6%	-17.8%
Retail**	250	260	270	260	260	260	260	1.4%	1.3%
Ground Tran.	50	50	50	50	40	30	30	-6.5%	-49.6%
Other Travel*	190	190	60	70	60	50	80	68.4%	27.0%
<b>TOTAL</b>	<b>3,180</b>	<b>3,270</b>	<b>3,120</b>	<b>3,200</b>	<b>2,690</b>	<b>2,840</b>	<b>3,120</b>	<b>10.0%</b>	<b>-2.5%</b>
<b>Tax Receipts Generated by Travel Spending (\$Millions)</b>									
Local Tax Receipts	8.3	9.2	9.7	10.7	8.1	13.4	15.0	11.6%	40.2%
State Tax Receipts	6.7	8.1	8.0	8.7	7.0	8.9	10.4	16.4%	20.0%
<b>TOTAL</b>	<b>15.0</b>	<b>17.3</b>	<b>17.8</b>	<b>19.4</b>	<b>15.1</b>	<b>22.4</b>	<b>25.4</b>	<b>13.5%</b>	<b>31.2%</b>

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other Travel includes travel arrangement and convention/ trade shows.

\*\*Retail includes gasoline station employment and earnings.

# Deschutes County / Secondary Effects

Travel spending brings money into the community in the form of business receipts. Portions of these receipts are spent within the area for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. Spending on intermediate goods and re-spending of travel-related revenues creates indirect and induced impacts.

**Direct** impacts represent effects attributable to traveler expenditures.

**Indirect** impacts represent effects associated with industries that supply goods and services to the direct businesses.

**Induced** impacts represent effects of purchases made by employees in both the direct and indirect businesses.

The impacts in this section are presented in thirteen major industry groups. These industry groups are similar but not identical to the business categories presented elsewhere in this report.

It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire Deschutes County area and do not necessarily reflect economic patterns for individual cities within. In general, geographic areas with lower levels of economic activity will have smaller secondary impacts within those same geographic boundaries.

## Largest Secondary Industries 2022

**Professional Services** (420 jobs and \$17.2 million in earnings) A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses. Employees of these businesses also purchase professional services.

**Education & Health Services** (160 jobs and \$11.8 million in earnings) The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services.

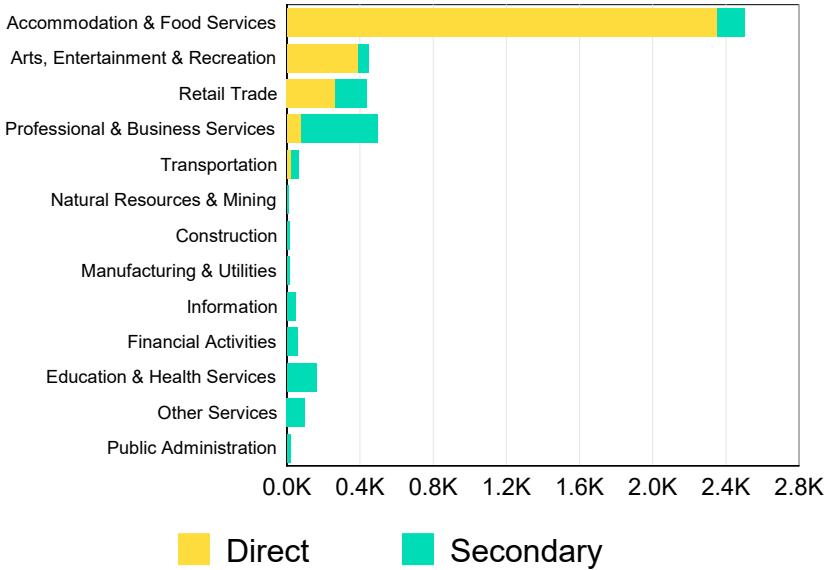
**Financial Activities** (60 jobs and \$3.8 million in earnings) Both businesses and individuals make use of banking and insurance institutions.

**Other Services** (100 jobs and \$3.5 million in earnings) Employees and travel businesses utilize a number of service providers such as repair shops, laundry, maintenance, and business services.

# Deschutes County / Secondary Effects

## Total Employment 2022

### Direct & Secondary Employment

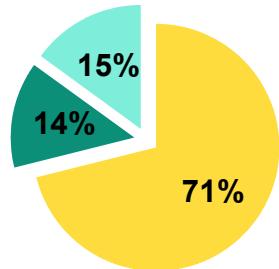


Industry Group	Secondary				Grand Total
	Direct	Indirect	Induced	Total	
Accommodation & Food Services	2,350	70	80	150	2,500
Arts, Entertainment & Recreation	390	30	20	60	450
Trade	260	40	130	170	440
Professional & Business Services	80	310	110	420	500
Transportation	30	20	20	40	70
Natural Resources & Mining	0	10	0	10	10
Construction	0	10	10	10	10
Manufacturing & Utilities	0	10	0	10	10
Information	0	30	20	50	50
Financial Activities	0	30	30	60	60
Education and Health Services	0	0	160	160	160
Other Services	0	30	70	100	100
Public Administration	0	10	10	20	20
All Industries	3,120	590	670	1,270	4,380

Values may not add to totals due to rounding.

Employment and Earnings include CARES Act support.

### Share of Total Employment



■ Direct ■ Indirect ■ Induced



**MOST DIRECT JOBS**  
Accommodation & Food Services

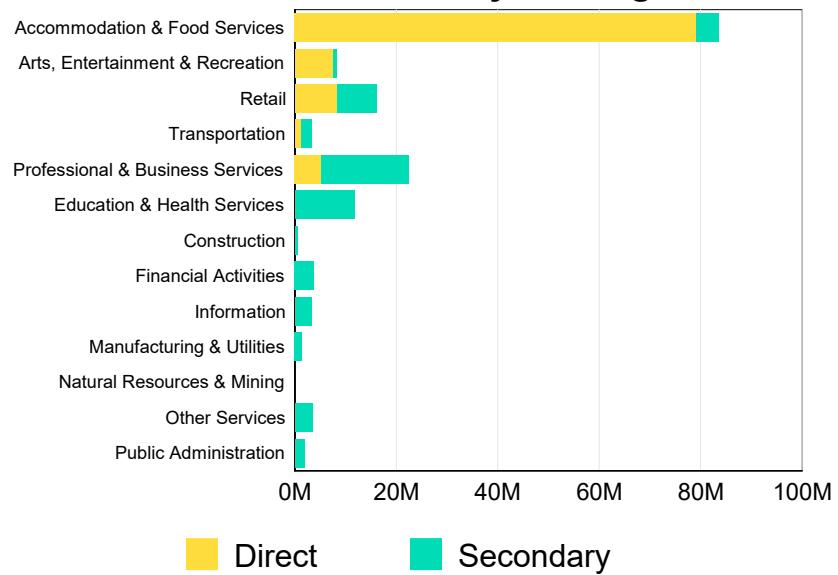


**MOST SECONDARY JOBS**  
Professional & Business Services

# Deschutes County / Secondary Effects

## Total Earnings 2022

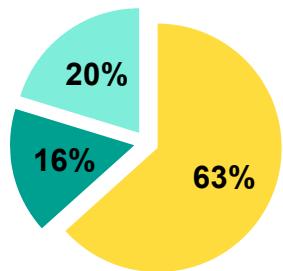
### Direct & Secondary Earnings



Industry Group	Secondary				Grand Total
	Direct	Indirect	Induced	Total	
Accommodation & Food Services	79.1	2.2	2.3	4.5	83.6
Trade	8.4	2.3	5.5	7.8	16.1
Arts, Entertainment & Recreation	7.6	0.2	0.5	0.7	8.3
Professional & Business Services	5.2	13.1	4.1	17.2	22.4
Transportation	1.3	1.1	0.9	2.0	3.3
Natural Resources & Mining	0.0	0.0	0.0	0.1	0.1
Construction	0.0	0.4	0.2	0.6	0.6
Manufacturing & Utilities	0.0	1.0	0.4	1.4	1.4
Information	0.0	1.8	1.4	3.2	3.2
Financial Activities	0.0	1.7	2.1	3.8	3.8
Education and Health Services	0.0	0.1	11.7	11.8	11.8
Other Services	0.0	1.0	2.5	3.5	3.5
Public Administration	0.0	1.4	0.6	2.0	2.0
All Industries	101.5	26.3	32.2	58.5	160.1

Values may not add to totals due to rounding. (\$Millions)  
Employment and Earnings include fiscal stimulus support.

### Share of Total Earnings



**MOST DIRECT**  
Earnings  
Accommodation &  
Food Services



**MOST SECONDARY**  
Earnings  
Professional &  
Business Services

# Bend / Overnight Visitor Details

## Overnight Visitor Volume and Average Spending

Overnight visitor volume for Bend is based on cross-referencing visitor surveys and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor Spending is a more reliable metric to Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.



**40%**

Hotel, Motel, STVR share of overnight person-trips

### Average Expenditure for Overnight Visitors, 2022

	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel	\$180	\$340	\$440	\$832	2.4	1.9
STVR	\$114	\$299	\$322	\$845	2.8	2.6
Private Home	\$36	\$110	\$94	\$287	2.6	3.0
Other Overnight	\$48	\$158	\$159	\$524	3.3	3.3
All Overnight	\$97	\$245	\$260	\$646	2.7	2.5

### Overnight Visitor Volume, 2020-2022

	Person-Trips			Party-Trips		
	2020	2021	2022	2020	2021	2022
Hotel, Motel	405,700	543,900	551,100	166,000	222,500	225,500
STVR	187,700	278,500	290,900	66,300	98,400	102,800
Private Home	363,800	419,500	416,800	139,600	161,000	159,900
Other Overnight	125,800	120,500	133,900	37,900	36,600	40,400
<b>Overnight Volume</b>	<b>1,083,000</b>	<b>1,362,400</b>	<b>1,392,800</b>	<b>409,700</b>	<b>518,500</b>	<b>528,600</b>

	Person-Days			Party-Days		
	2020	2021	2022	2020	2021	2022
Hotel, Motel	767,400	1,028,800	1,042,500	313,900	420,900	426,500
STVR	492,400	730,800	763,400	174,000	258,200	269,700
Private Home	1,106,400	1,275,800	1,267,500	424,600	489,600	486,400
Other Overnight	413,100	397,600	440,400	124,600	121,000	133,200
<b>Overnight Volume</b>	<b>2,779,300</b>	<b>3,433,000</b>	<b>3,513,800</b>	<b>1,037,200</b>	<b>1,289,700</b>	<b>1,315,800</b>

Note: Private Home represents visitors staying with friends or family. (Glossary on page 17). Other Overnight represents all camping and private vacation homes.

# Bend / Industry Comparison

Economic Census 2017

NAICS		Establishments	Sales (\$1,000)	Payroll (\$1,000)	Employees
42	Wholesale trade	141	891,206	64,910	1,204
44-45	Retail trade	597	2,596,591	250,402	8,285
48-49	Transportation and warehousing (106)	74	106,108	31,923	776
51	Information	119	N/D	103,831	1,718
52	Finance and insurance	251	N/D	119,503	1,817
53	Real estate and rental and leasing	323	212,057	34,350	808
54	Professional, scientific, and technical services	638	383,849	151,939	2,520
56	Administrative and support and waste management	239	294,919	136,949	3,959
61	Educational services	51	18,516	7,252	399
62	Health care and social assistance	533	1,387,573	551,473	9,929
71	Arts, entertainment, and recreation	87	86,375	24,526	1,770
72	Accommodation and food services	382	434,804	139,367	6,525
81	Other services (except public administration)	260	163,531	44,796	1,326
<b>2017 Travel Industry*</b>			<b>277,907</b>	<b>66,324</b>	<b>2,680</b>

N/D fields are non-disclosed due to size.

\*Travel Industry is a combination of sectors and is estimated by Dean Runyan Associates. Payroll and employees are less than earnings/employment presented in other report tables. For comparison purposes we removed the additional benefits and sole proprietorships that are included in our analysis.  
Source: U.S. Census Bureau

# Glossary

Term	Definition
2nd Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected. Only includes spending during trip.
Day Travel	Greater than 50 miles traveled non-routine to the destination.
Destination Spending	Interchangeable with Visitor Spending. Direct spending made by visitors in a destination.
STVR	Short Term Vacation Rental, private and semi-private lodging rented by owners or property management companies (e.g. Airbnb, VRBO).
State Taxes	State taxes generated by travel spending.
Local Taxes	City and county taxes generated by travel spending.
Direct Employment	Employment generated by direct spending; includes full time, part time, seasonal, and proprietors.
Direct Earnings	Total after-tax net income for travel. It includes wages and salary disbursements, proprietor income, and other earned income or benefits.
Other Spending	Spending by residents on travel arrangement services, or spending for convention activity.
Visitor Spending	Direct spending made by visitors in a destination.
Hotel, Motel, STVR	Accommodation types that house transient lodging activity.
Direct Spending	Expenditures made by consumers, combination of Visitor Spending and Other Spending.
Other Overnight	Combination of other overnight visitors who stay in campgrounds or 2nd homes.
Private Home	Personal residences used to host visiting friends and family overnight.
NAICS	North American Industry Classification System.
Seasonal Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected. Only includes spending during trip.
Person Trips	Individual trips to the destination for all age groups.
Vacation Home Rental	Accommodation types that house transient lodging activity.

# Methodology

## Travel Impacts Methodology

Primary travel impact analysis will make use of the Regional Travel Impact Model (RTIM), prepared and maintained by Dean Runyan Associates and used for most of our travel impact analysis since 1985. This model was developed to provide robust impact findings at small geography without reliance on annual survey research. This is a “bottom up” approach whereby analysis is conducted at the county level, then aggregated to regions and the state, allowing us to use the most detailed tax, employment, wages, and other data that are available. Our clients have selected this approach to provide particularly detailed and defendable findings for all parts of their constituency.

Because the model does not rely on annual survey research for its primary inputs, we work in other states with a variety of other visitor profile providers, including national panel managers or those making use of intercept or regional web methodology. Analysis is conducted separately by type of visitor lodging, making use of data and modeling appropriate to each. Impact analysis associated with visitors staying in commercial lodging makes use of lodging tax data to calculate lodging sales, then employs expenditure distribution data for these types of visitors to calculate total sales and the distribution among expenditure categories. We maintain our own expenditure distribution database for each state we work in, but also make use of historic and current expenditure data, as available. Rental cabins, condos and other property are included in this category if lodging tax has been applied to sales.

Earnings, employment, and tax receipts are calculated using employment and wage data by business category, for each county, plus the applicable taxes on each type of expenditure. Tax impacts, such as for restaurant, fuel, and retail purchases, are calculated from spending amounts; totals will be checked against data from state sources.

Sales attributed to campers are calculated from campground inventory (separately for public and commercial campgrounds), camping occupancy data and average expenditures for camping parties. Expenditure data will be from expenditure databases that we maintain, augmented by visitor survey data available for Oregon, as available.

Other impacts are calculated in a manner like those for commercial accommodation travelers. Sales attributable to travelers staying in their own second homes, or in rented condo, cabin, and other accommodations, are calculated from inventories of these types of lodging and the associated utilization and expenditure data. Findings are made consistent if some of these sales have been subject to lodging tax. Second home inventories are from US Census sources and any local/regional data available. Other impacts are calculated in a manner like those for commercial accommodation travelers.

(Continued on next page)

# Methodology / Continued

## Travel Impacts Methodology

Day travel spending is calculated as a factor of overnight spending, with the proportions based on visitor data for Oregon travelers. This analysis will rely the most on visitor profile data provided by the profile contractor. Other impacts are calculated in a similar way as those for commercial accommodation travelers.

All spending estimates are summed for each county and separately for each business category with applicable data then used to calculate earnings, employment, and tax receipts. County totals will be mapped to regions using address and other location data for lodging, camping, and other rental accommodations using separate methods for each type of lodging.

In all cases, our data and methodology are transparent, allowing for reliable error trapping and effective review of findings. All findings are also checked against available comparable data, such as county-level employment data by industry from the US Bureau of Labor Statistics and lodging sales data from STR and Key Data.

# Methodology / Continued

## RTIM Industries mapped to NAICS

The following categorization is intended as a high level overview of how our reported industries map to the North American Industry Classification System. It should be noted the NAICS codes are based on responses from individual organizations and are not always a perfect 1:1 alignment with our analysis.

Travel Impact Industry	NAICS Industry Code
Accommodation & Food Service	Accommodation (721) Food Services and Drinking Places (722) Residential Property Managers (531311) Breweries, Wineries, Distilleries (312120, 312130, 312140)**Notes on next page
Arts, Entertainment & Recreation	Arts, Ent., Recreation (71) Scenic and Sightseeing Transportation (487) Motion picture and video exhibition (51213) Recreational goods rental (532292) Tour operators (56152)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories (448) Sporting Goods, Hobby, Book and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Transportation	Rail Transportation (482114) Water Transportation (4831) Urban transit systems (4851) Interurban and rural bus transportation (4852) Taxi and limousine service (4853) Charter bus industry (4855) Passenger car rental (532111) Truck, trailer, and RV rental and leasing (53212) Parking Lots and Garages (812930)
Air Transportation	Scheduled passenger air transportation (481111) Support activities for air transportation (4881)
Others	Travel agencies (56151) Convention and Trade Show Organizers (56192)

\*\*Travel spending on breweries (312120), wineries (312130) and distilleries (312140) are included within the Food Service, Retail, Food Stores, and Recreation industries. It is likely that the bulk of travel-related spending on these alcohol-related NAICS codes occurs within the Food Service category. However, because experiences at breweries, wineries, and distilleries often include a significant experiential component, as well as opportunities for retail purchases, we are unable to allocate exact percentages to the above travel impact categories.