

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 fourth consecutive year. In real dollars (adjusted for inflation), the growth in spending was the strongest since 2006. The growth in travel-generated employment growth was also the greatest since the recession.
- Travel spending increased by 4.1 percent in current dollars from 2012 to 2013 to \$9.6 billion. In real dollars, spending increased by 3.6 percent. An estimated 26.1 million overnight visitors traveled to Oregon destinations in 2013 (preliminary). This represents a 2.5 percent increase over 2011. Visitor air arrivals to Oregon increased by 4.8 percent for the year (preliminary).
- Total travel generated employment was 93,900 in 2013p. This represents a 2.9 percent increase over 2012, the third consecutive year of employment growth following the steep decline from 2008 to 2010. Employment growth has accelerated in each of the past three years.
- The Gross Domestic Product of the travel industry was \$3.5 billion in 2013. 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 2013, these secondary impacts were equivalent to 42,300 jobs with earnings of \$1.5 billion.

ANNUAL TRAVEL TRENDS

Total direct travel spending in Oregon was \$9.6 billion in 2013. The increase from 2012 to 2013 (4.1 percent) followed a 3.9 percent increase in the preceding year. This is the fourth consecutive year of growth in travel spending, following the recession. Travel-generated employment increased for the third consecutive year (93,900 jobs in 2013). The increase from 2012 to 2013 (2.9 percent) was the greatest since the recession.¹

Oregon Travel Trends, 1991-2013p

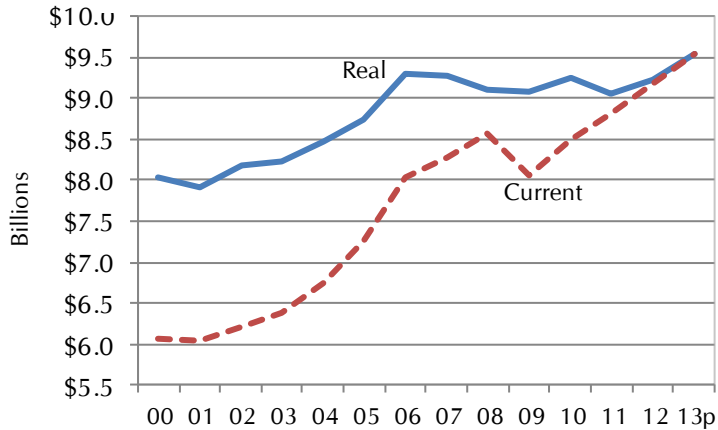
	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Billion)	(\$Billion)	(Thousand)	Local	State	Federal
1991	3.7	1.0	70.5	31	93	200
1992	3.9	1.0	70.4	36	102	218
1993	4.2	1.1	71.8	47	109	231
1994	4.4	1.1	73.0	51	115	242
1995	4.6	1.2	74.8	55	120	256
1996	4.9	1.3	76.2	60	123	269
1997	5.2	1.3	76.7	64	127	284
1998	5.4	1.4	79.5	67	130	297
1999	5.7	1.5	80.6	71	136	312
2000	6.1	1.6	82.2	81	145	332
2001	6.1	1.6	83.7	82	146	332
2002	6.2	1.6	85.4	88	147	345
2003	6.4	1.6	84.5	89	150	348
2004	6.8	1.7	84.9	95	163	365
2005	7.3	1.8	85.8	103	171	385
2006	8.0	1.9	90.5	116	187	416
2007	8.3	2.0	93.5	124	195	440
2008	8.6	2.1	94.8	126	200	450
2009	8.1	2.0	89.0	124	187	438
2010	8.5	2.0	88.0	124	193	445
2011	8.8	2.1	89.4	134	230	424
2012	9.2	2.2	91.3	143	237	441
2013p	9.6	2.3	93.9	158	246	496
<i>Annual Percentage Change</i>						
12-13p	4.1	4.5	2.9	10.5	3.9	12.5
91-13p	4.5	4.1	1.3	7.7	4.5	4.2

Estimates for 2013p are preliminary. The percentage change for 1991-2013p 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.

Note: The large revenue increase for federal taxes reflects the expiration of the temporary two year reduction in payroll taxes. The larger revenue increase for local taxes reflects the 2 percent Tourism Improvement District tax for the City of Portland.

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

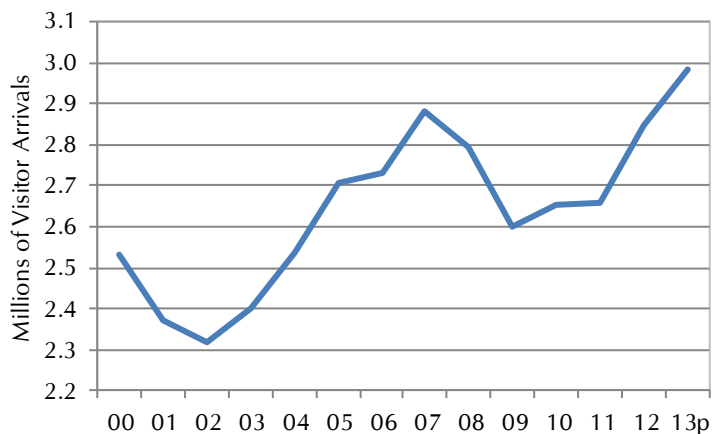
Oregon Direct Travel Spending Real and Current Dollars



Real travel spending (adjusted for inflation) increased by 3.6 percent from 2012 to 2013p, compared to the 4.1 percent increase in current dollars. In contrast, to previous years, gas prices declined in 2013.

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

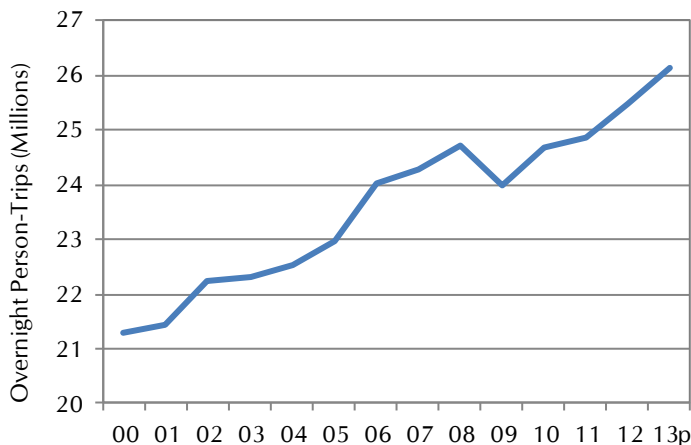
Air Passenger Visitor Arrivals to Oregon U.S. Air Carriers



Visitor air arrivals to Oregon increased by 4.8 percent from 2012 to 2013(p), following a 7 percent increase the preceding year.

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

Oregon Overnight Person-Trips



There were 26.1 million overnight person-trips to Oregon destinations in 2013, an increase of 2.5 percent from 2012, following a similar increase the preceding year.

Source: See table notes on following page.

OVERNIGHT VISITOR VOLUME AND AVERAGE SPENDING

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

Average Expenditures for Overnight Visitors, 2013p

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	\$363	\$903	\$153	\$378	2.4	2.5
Air	\$388	\$1,353	\$208	\$727	1.9	3.5
Other	\$347	\$835	\$143	\$344	2.4	2.4
Private Homes						
All Modes	\$103	\$403	\$44	\$169	2.4	3.9
Air	\$124	\$783	\$70	\$445	1.8	6.3
Other	\$83	\$312	\$34	\$129	2.4	3.8
Other Overnight	\$123	\$459	\$37	\$138	3.3	3.7
All Overnight	\$194	\$631	\$78	\$252	2.5	3.3

Oregon Overnight Visitor Volume, 2010-2013p

	Person-Nights (Millions)			Party-Nights (Millions)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	25.1	26.0	27.3	10.6	11.0	11.5
Private Home	40.7	41.3	41.6	17.3	17.5	17.7
Other Overnight	15.7	16.0	16.2	4.7	4.8	4.9
All Overnight	81.4	83.3	85.1	32.6	33.3	34.1

	Person-Trips (Millions)			Party-Trips (Millions)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	10.2	10.6	11.1	4.3	4.4	4.6
Private Home	10.5	10.6	10.7	4.4	4.5	4.5
Other Overnight	4.2	4.3	4.3	1.3	1.3	1.3
All Overnight	24.9	25.5	26.1	9.9	10.2	10.4

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

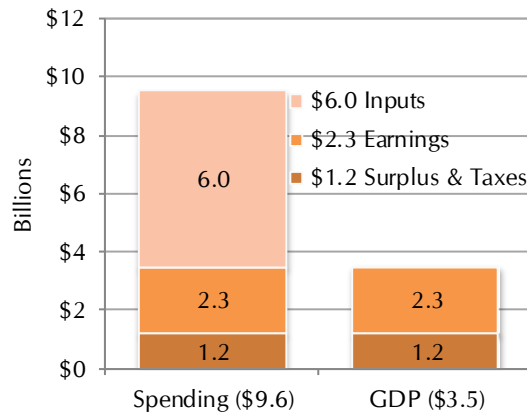
OREGON TRAVEL INDUSTRY GROSS DOMESTIC PRODUCT

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

Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits, dividends, interest and other payments). Estimates of travel spending and travel industry GDP are shown in the chart below. Oregon travel industry GDP amounted to \$3.5 billion in 2013.

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, 2013p



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

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

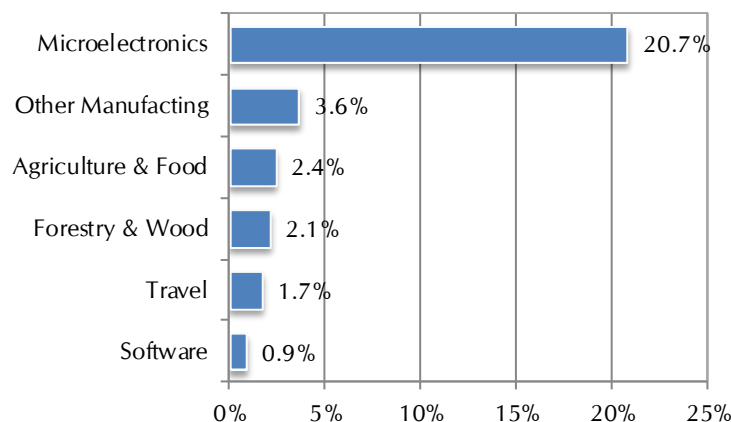
A COMPARISON OF OREGON EXPORT-ORIENTED INDUSTRIES

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

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

A comparison of the GDP’s of the leading export-oriented industries in Oregon is shown below for 2012. 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, 2012
Share of Selected Export-Oriented Industries

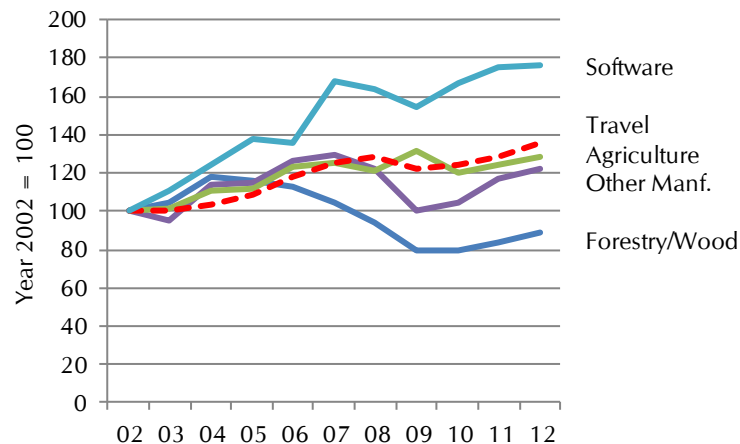


Source: Dean Runyan Associates and Bureau of Economic Analysis. *Note: The “other manufacturing” category is not a distinct industry. It is shown for comparative purposes only. The most current data is for 2012. GDP estimates by Dean Runyan Associates.

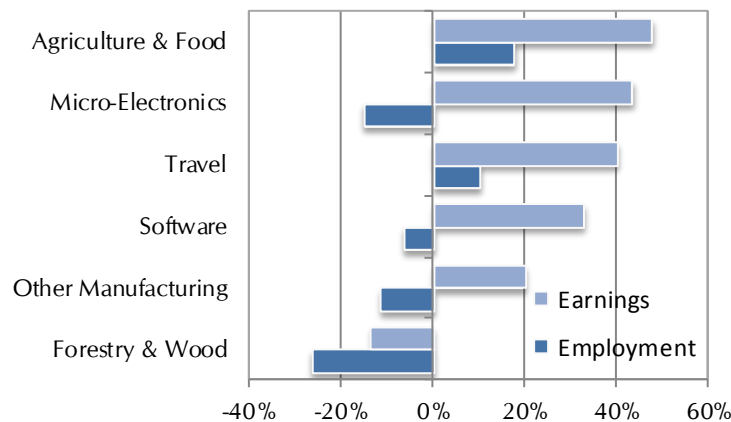
³ See also Appendices A and E.

The following two graphs provide additional comparisons of these export-oriented industries. The first chart shows the change in GDP from 2002 through 2012. The second chart shows changes in employment and earnings for the same period. Micro-electronics is not included in the GDP graph because of its extraordinary growth.⁴ The travel industry compares favorably to the other export industries for all measures (excluding the GDP of micro-electronics).

Change in Oregon Gross Domestic Product, 2002-2012
Selected Export-Oriented Industries



Change in Earnings and Employment, 2002-2012
Selected Export-Oriented Industries



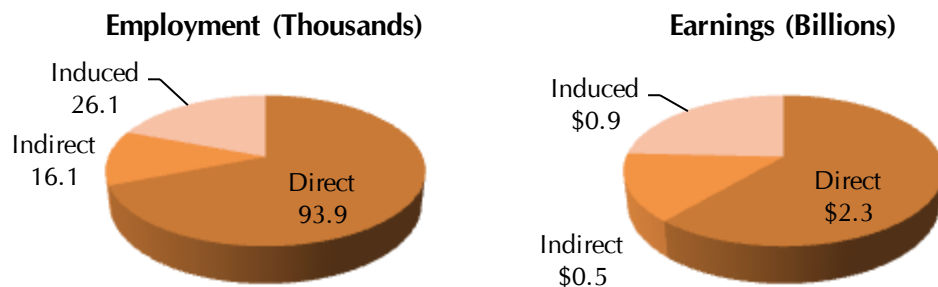
⁴ Micro-electronics value in 2012 was 545 – an increase of 545 percent. However, most of this growth was due extraordinary gains in operating surplus, rather than employee compensation (see bottom graph). In recent years, employee compensation has accounted for less than 15 percent of micro-electronics 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, 2013p



Note: Indirect and induced impacts estimated by Dean Runyan Associates with Minnesota IMPLAN model. Percentages may not add to 100% due to rounding. Total direct and secondary employment was 136,200 jobs. The employment multiplier is 1.45 (136.2/93.9). Total direct and secondary earnings were \$3.8 billion. The earnings multiplier is 1.63 (\$3.74/\$2.29).

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

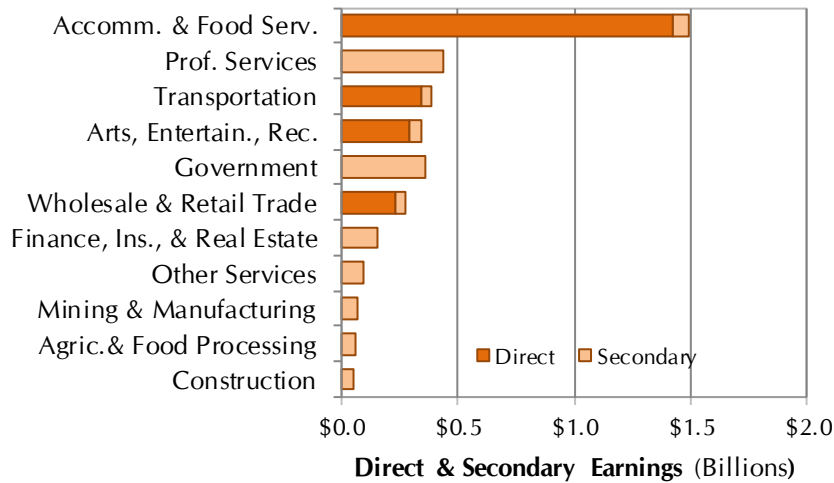
- **Accommodations & Food Services**
- **Arts, Entertainment and Recreation**
- **Retail Trade**
- **Transportation**

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

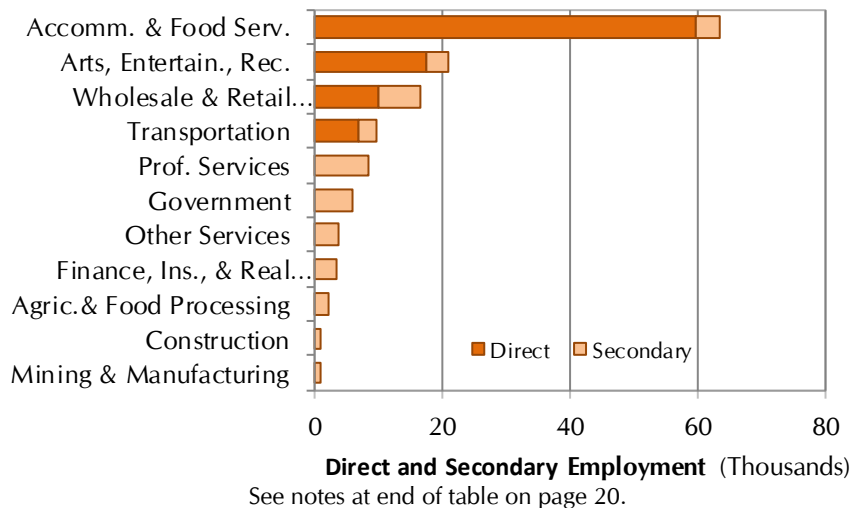
The indirect and induced impacts of travel spending are found in all eleven-industry groupings shown in the following tables and graphs. To summarize the primary secondary impacts:

- **Professional Services** (8,500 jobs and \$442 million earnings). Legal, medical, educational and other professional services are utilized by travel businesses (indirect effect) and by employees of these firms (induced effect).
- **Other Services** (3,700 jobs and \$96 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops. Similarly, travel businesses utilize a number of service providers, such as laundry, maintenance and business services.
- **Government** (6,000 jobs and \$361 million earnings). Employees of travel-related businesses pay fees to attend public educational institutions and to operate motor vehicles.
- **Finance, Insurance and Real Estate** (3,300 jobs and \$156 million earnings). Employees and businesses use the services of financial institutions, insurers and real estate businesses.

Direct and Secondary Earnings Generated by Travel Spending in Oregon, 2013p



Direct and Secondary Employment Generated by Travel Spending in Oregon, 2013p



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

Direct & Secondary Travel-Generated Earnings in Oregon, 2013p

(\$ Million)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	1,422.1	23.0	46.9	69.9	1,492.0
Professional Services	0.0	161.1	280.7	441.7	441.7
Transportation	344.5	37.8	4.5	42.3	386.8
Arts, Entertainment & Recreation	290.9	42.3	13.6	55.9	346.8
Government	0	38.0	322.9	360.8	360.8
Retail Trade	233	4.4	37.3	41.7	275.0
Finance, Ins., & Real Estate	0	72.2	83.9	156.1	156.1
Other Services	0	54.3	41.2	95.5	95.5
Mining & Manufacturing	0	40.9	29.7	70.6	70.6
Agriculture & Food Processing	0	43.6	15.1	58.7	58.7
Construction	0	23.8	31.5	55.4	55.4
All Industries	2,290.8	541.4	907.2	1,448.6	3,739.4

Direct & Secondary Travel-Generated Employment in Oregon, 2013p

(thousand jobs)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	59.8	1.3	2.6	3.8	63.7
Arts, Entertainment & Recreation	17.4	2.6	0.8	3.4	20.8
Wholesale & Retail Trade	10.0	1.3	5.2	6.5	16.4
Transportation	6.7	1.9	1.0	2.9	9.6
Professional Services	0	2.7	5.9	8.5	8.5
Government	0	0.4	5.5	6.0	6.0
Other Services	0	1.8	1.9	3.7	3.7
Finance, Ins., & Real Estate	0	1.6	1.7	3.3	3.3
Agriculture & Food Processing	0	1.6	0.5	2.1	2.1
Construction	0	0.4	0.6	1.0	1.0
Mining & Manufacturing	0	0.5	0.4	1.0	1.0
All Industries	93.9	16.1	26.1	42.3	136.2

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 2004 through 2013p are shown on the following page.

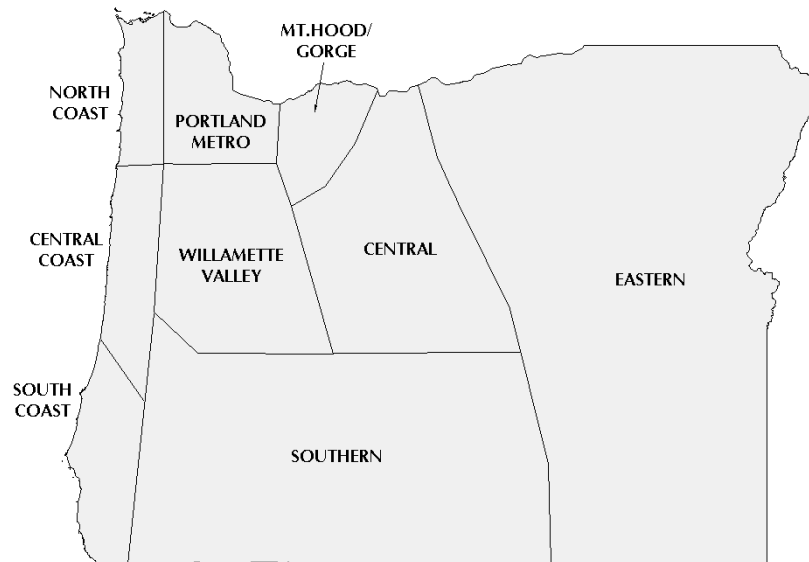
Oregon Travel Impacts, 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	6,025	7,131	7,661	7,511	7,861	8,211	8,552
Other Travel*	726	892	911	982	962	960	1,000
Total Direct Spending	6,751	8,024	8,572	8,493	8,823	9,171	9,551
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel	2,620	3,291	3,689	3,563	3,733	3,945	4,180
Private Home	1,305	1,500	1,635	1,670	1,729	1,782	1,813
Campground	367	379	422	391	401	417	424
Vacation Home	132	149	167	164	174	177	177
Day Travel	1,601	1,813	1,747	1,723	1,824	1,890	1,957
Destination Spending	6,025	7,131	7,661	7,511	7,861	8,211	8,552
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1,043	1,307	1,431	1,360	1,440	1,531	1,647
Food Service	1,381	1,591	1,697	1,764	1,801	1,911	2,017
Food Stores	493	525	574	563	589	613	633
Local Tran. & Gas	922	1,260	1,536	1,331	1,543	1,591	1,591
Arts, Ent. & Rec.	825	899	886	869	876	904	933
Retail Sales	896	968	935	950	964	999	1,025
Visitor Air Tran.	465	581	602	675	648	663	705
Destination Spending	6,025	7,131	7,661	7,511	7,861	8,211	8,552
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	961	1,134	1,252	1,219	1,271	1,347	1,422
Arts, Ent. & Rec.	238	265	301	279	278	288	291
Retail**	193	208	217	213	219	227	233
Ground Tran.	43	48	52	49	52	54	56
Visitor Air Tran.	82	92	93	99	106	103	110
Other Travel*	164	178	180	166	179	174	179
Total Direct Earnings	1,682	1,925	2,095	2,024	2,104	2,192	2,291
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	51.3	55.8	58.6	55.2	56.4	57.9	59.8
Arts, Ent. & Rec.	16.3	17.1	18.4	16.9	17.0	17.1	17.4
Retail**	9.5	9.9	9.9	9.4	9.5	9.7	10.0
Ground Tran.	1.8	1.8	1.9	1.7	1.7	1.8	1.8
Visitor Air Tran.	1.9	1.9	2.0	1.7	1.7	1.7	1.7
Other Travel*	4.1	4.0	4.1	3.1	3.1	3.2	3.1
Total Direct Employment	84.9	90.5	94.8	88.0	89.4	91.3	93.9
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	95	116	126	124	134	143	158
State Tax Receipts	163	187	200	193	230	237	246
Federal Tax Receipts	365	416	450	445	424	441	496
Total Direct Tax Receipts	623	719	776	762	788	821	900

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agencies. **Retail includes gasoline.

III. REGIONAL TRAVEL IMPACTS



North Coast

Clatsop
Tillamook

Central Coast

Douglas (West)
Lincoln
Lane (West)

South Coast

Coos
Curry

Willamette Valley

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

Portland Metro

Clackamas (West)
Columbia
Multnomah (West)
Washington

Southern

Douglas (East)
Jackson
Josephine
Klamath
Lake

Central

Crook
Deschutes
Jefferson
Wasco (South)

Mt. Hood/Gorge

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

Eastern

Baker
Gilliam
Grant
Harney
Malheur
Morrow
Sherman
Umatilla
Union
Wallowa
Wheeler

2013p Regional Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment (thousand)	Tax Revenue (\$Million)		
	All Travel	Destination			Local	State	Total
Willamette Valley	1,597	1,438	367	18.3	15	48	63
North Coast	673	667	195	7.4	9	17	26
Central Coast	621	614	168	7.8	10	16	26
South Coast	363	354	103	4.7	2	10	12
Oregon Coast	1,657	1,653	466	20.0	21	43	64
Portland	4,007	3,030	874	28.1	94	90	183
Southern	935	850	231	10.5	11	27	38
Central	703	651	173	7.8	10	19	29
Eastern	340	324	97	5.3	3	11	14
Mt. Hood/Gorge	313	303	85	4.0	4	9	13

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).

2013p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	18.8	7.3	6.2	2.4
North Coast	5.9	2.1	2.2	0.8
Central Coast	5.6	2.0	2.0	0.7
South Coast	3.9	1.4	1.4	0.5
Oregon Coast	15.4	5.5	5.3	1.9
Portland	24.0	11.2	7.7	3.6
Southern	11.1	4.2	3.6	1.4
Central	8.0	2.9	2.7	1.0
Eastern	4.8	1.8	1.8	0.7
Mt. Hood/Gorge	3.0	1.1	1.0	0.4

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

WILLAMETTE VALLEY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2013p)

Amount of Visitor Spending that supports 1 Job	\$79,920
Employee Earnings generated by \$100 Visitor Spending	\$25
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2013p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$72,251
Additional employment if each resident household encouraged one additional overnight visitor	900

Visitor Shares

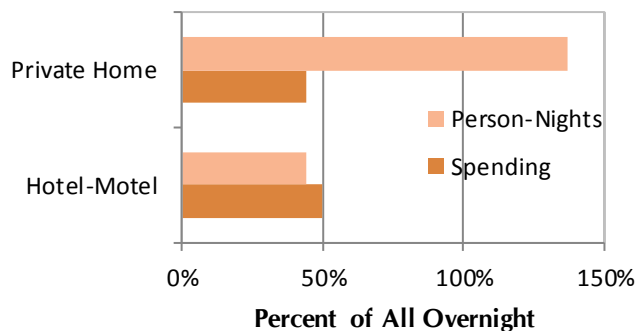
Travel Share of Total Employment (2012)*	3.1%
Overnight Visitor Day Share of Resident Population (2013p)**	4.6%

*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



2013p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,889	8,255	\$513
Private Home	7,562	25,657	\$452
Other Overnight	483	1,812	\$68
All Overnight	6,209	18,768	\$1,033

Willamette Valley Travel Trends, 1991-2013p

	Spending	Earnings	Employment	Tax Receipts (\$Millions)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	631	151	13,580	3.4	18.8	22.2
1992	672	159	13,440	3.8	20.7	24.4
1993	719	169	13,770	5.0	22.1	27.2
1994	743	176	13,930	5.9	23.2	29.1
1995	783	188	14,210	6.3	24.2	30.4
1996	829	200	14,520	6.7	24.6	31.3
1997	874	214	14,660	6.9	25.4	32.3
1998	910	230	15,680	7.1	26.3	33.4
1999	950	238	15,260	7.6	26.9	34.5
2000	1,006	247	15,700	8.2	28.3	36.5
2001	1,016	251	15,950	8.4	28.5	36.9
2002	1,061	267	16,560	8.8	29.1	37.9
2003	1,093	269	16,340	8.7	29.8	38.6
2004	1,165	280	16,660	9.5	32.1	41.7
2005	1,267	300	17,340	10.7	34.2	44.9
2006	1,355	317	17,770	11.8	36.2	48.1
2007	1,385	337	18,340	12.7	37.6	50.3
2008	1,453	349	18,590	13.0	38.8	51.7
2009	1,346	328	17,220	11.9	35.9	47.8
2010	1,440	332	17,150	12.0	37.0	49.0
2011	1,510	343	17,650	12.8	45.8	58.6
2012	1,564	356	17,940	13.7	46.9	60.6
2013p	1,597	367	18,350	14.6	48.1	62.7
Annual Percentage Change						
12-13p	2.1	3.0	2.3	6.7	2.6	3.5
91-13p	4.3	4.1	1.4	6.9	4.4	4.8

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

Willamette Valley Travel Impacts, 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,057	1,215	1,296	1,278	1,347	1,406	1,438
Other Travel*	108	140	156	162	163	158	158
Total Direct Spending	1,165	1,355	1,453	1,440	1,510	1,564	1,597
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	132	165	183	171	181	193	204
Food Service	257	289	306	318	330	353	366
Food Stores	108	113	127	126	133	139	142
Local Tran. & Gas	150	205	251	213	252	260	257
Arts, Ent. & Rec.	216	234	228	225	231	238	241
Retail Sales	169	178	173	176	182	189	191
Visitor Air Tran.	26	30	28	49	38	34	37
Destination Spending	1,057	1,215	1,296	1,278	1,347	1,406	1,438
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	159.1	184.1	204.1	198.3	209.0	220.7	228.5
Arts, Ent. & Rec.	66.0	72.7	81.8	76.7	75.2	73.9	75.6
Retail**	36.9	39.2	41.4	40.9	42.5	44.3	45.0
Ground Tran.	5.5	6.1	6.5	6.0	6.5	6.8	7.0
Visitor Air Tran.	1.5	2.2	1.6	1.3	1.3	1.3	1.4
Other Travel*	11.5	13.2	13.3	8.5	8.6	9.2	9.2
Total Direct Earnings	280.5	317.4	348.6	331.7	343.3	356.1	366.7
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	9.4	10.1	10.5	9.8	10.2	10.5	10.8
Arts, Ent. & Rec.	4.5	4.9	5.3	4.9	4.9	4.9	5.0
Retail**	1.9	1.9	2.0	1.9	1.9	2.0	2.0
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Other Travel*	0.5	0.5	0.5	0.3	0.3	0.3	0.4
Total Direct Employment	16.7	17.8	18.6	17.1	17.6	17.9	18.3
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.5	11.8	13.0	12.0	12.8	13.7	14.6
State Tax Receipts	32.1	36.2	38.8	37.0	45.8	46.9	48.1
Total Local & State	41.7	48.1	51.7	49.0	58.6	60.6	62.7

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

Willamette Valley Visitor Volume and Visitor Spending

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

	2004	2006	2008	2010	2011	2012	2013p
All Overnight	718	837	934	917	962	1,008	1,033
Hotel, Motel	331	410	458	435	461	492	513
Private Home	336	374	410	419	437	450	452
Other Overnight	51	53	67	62	64	66	68
Campground	42	42	54	49	50	52	54
Vacation Home	10	11	13	13	14	14	14
Day Travel	340	378	362	361	385	398	405
Spending at Destination	1,057	1,215	1,296	1,278	1,347	1,406	1,438

Willamette Valley Visitor Volume and Visitor Spending

Average Expenditures for Overnight Visitors, 2013p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$151	\$321	\$62	\$132	2.4	2.1
Private Home	\$45	\$154	\$18	\$60	2.6	3.4
Other Overnight	\$127	\$476	\$38	\$141	3.4	3.8
All Overnight	\$142	\$428	\$55	\$166	2.6	3.0

Overnight Visitor Volume, 2011-2013p

	Person-Nights (000)			Party-Nights (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	3,741	3,994	4,127	1,543	1,647	1,703
Private Home	12,579	12,854	12,828	4,907	5,017	5,013
Other Overnight	1,732	1,767	1,812	513	523	536
All Overnight	18,052	18,615	18,768	6,963	7,188	7,252

	Person-Trips (000)			Party-Trips (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	1,762	1,883	1,945	724	774	799
Private Home	3,710	3,790	3,781	1,441	1,473	1,470
Other Overnight	462	471	483	137	139	143
All Overnight	5,934	6,145	6,209	2,302	2,386	2,412

MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2013p)

Amount of Visitor Spending that supports 1 Job	\$78,010
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.90

Visitor Volume (2013p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,697
Additional employment if each resident household encouraged one additional overnight visitor	188

Visitor Shares

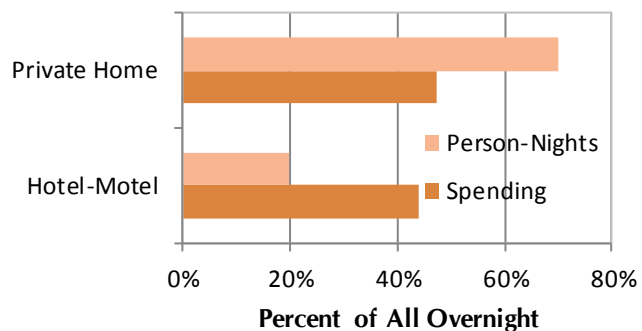
Travel Share of Total Employment (2012)*	2.3%
Overnight Visitor Day Share of Resident Population (2013p)**	4.4%

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

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

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

Overnight Visitor Spending and Volume



2013p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	532	1,007	\$103.8
Private Home	1,174	3,572	\$111.9
Other Overnight	161	524	\$21.2
All Overnight	1,868	5,103	\$236.8

Marion County Travel Trends, 1991-2013p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	152.0	37.1	3,280	646	4,949	5,596
1992	165.6	40.5	3,400	763	5,579	6,342
1993	174.1	42.7	3,470	828	5,974	6,801
1994	181.1	44.5	3,500	881	6,268	7,149
1995	192.1	47.4	3,570	963	6,527	7,490
1996	198.9	49.0	3,580	1,021	6,579	7,600
1997	204.5	50.7	3,520	1,054	6,654	7,708
1998	209.1	53.2	3,700	1,115	6,801	7,915
1999	216.7	54.3	3,530	1,422	6,922	8,345
2000	233.5	56.6	3,580	1,772	7,365	9,137
2001	237.2	57.7	3,610	1,793	7,416	9,209
2002	244.9	60.2	3,730	1,872	7,511	9,383
2003	254.1	61.4	3,730	1,877	7,762	9,639
2004	267.5	63.4	3,740	2,028	8,289	10,318
2005	292.3	67.7	3,860	2,225	8,823	11,048
2006	316.6	72.5	4,040	2,556	9,434	11,990
2007	325.3	76.9	4,230	2,776	9,752	12,528
2008	337.6	77.9	4,160	2,783	9,887	12,671
2009	306.8	75.8	4,000	2,585	9,361	11,946
2010	321.0	74.5	3,880	2,520	9,431	11,951
2011	341.7	76.8	3,960	2,711	11,770	14,481
2012	359.3	79.9	3,980	2,861	12,083	14,944
2013p	372.4	84.5	4,200	3,125	12,596	15,721
Annual Percentage Change						
12-13p	3.6%	5.7%	5.4%	9.2%	4.2%	5.2%
91-13p	4.2%	3.8%	1.1%	7.4%	4.3%	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.

**Marion County
Travel Impacts, 2004-2013p**

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	233.0	268.9	279.1	275.7	288.0	304.3	318.0
Other Travel*	34.6	47.7	58.5	45.3	53.7	55.0	54.3
Total Direct Spending	267.5	316.6	337.6	321.0	341.7	359.3	372.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	30.8	39.8	42.3	40.1	40.6	42.9	47.2
Food Service	64.1	73.5	75.8	79.4	81.6	87.6	92.8
Food Stores	29.3	31.2	34.1	33.8	35.7	37.7	39.0
Local Tran. & Gas	23.8	33.0	39.1	33.8	39.7	41.5	41.6
Arts, Ent. & Rec.	38.4	41.5	40.5	40.1	40.7	42.7	44.1
Retail Sales	46.5	49.9	47.2	48.4	49.6	52.0	53.3
Destination Spending	233.0	268.9	279.1	275.7	288.0	304.3	318.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	37.8	44.7	48.2	47.2	48.9	51.6	55.0
Arts, Ent. & Rec.	11.3	12.4	13.9	13.0	13.2	13.1	13.9
Retail**	9.4	10.1	10.4	10.3	10.7	11.2	11.5
Ground Tran.	1.1	1.3	1.3	1.3	1.4	1.5	1.6
Other Travel*	3.8	4.0	4.1	2.7	2.6	2.5	2.6
Total Direct Earnings	63.4	72.5	77.9	74.5	76.8	79.9	84.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,220	2,440	2,480	2,320	2,410	2,490	2,610
Arts, Ent. & Rec.	830	890	990	910	910	840	930
Retail**	460	480	470	460	470	480	490
Ground Tran.	50	50	50	40	50	50	50
Other Travel*	190	190	180	140	130	120	120
Total Direct Employment	3,740	4,040	4,160	3,880	3,960	3,980	4,200
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.0	2.6	2.8	2.5	2.7	2.9	3.1
State Tax Receipts	8.3	9.4	9.9	9.4	11.8	12.1	12.6
Total Local & State	10.3	12.0	12.7	12.0	14.5	14.9	15.7

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

Marion County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
All Overnight	166.7	195.1	210.0	205.9	213.9	226.0	236.8
Hotel, Motel	66.3	85.7	91.6	87.1	89.2	95.2	103.8
Private Home	83.4	91.8	98.3	99.4	105.2	110.5	111.9
Other Overnight	16.9	17.6	20.2	19.4	19.5	20.4	21.2
Campground	14.0	14.4	16.6	15.8	15.8	16.5	17.4
Vacation Home	2.9	3.2	3.5	3.6	3.7	3.8	3.8
Day Travel	66.3	73.8	69.1	69.8	74.1	78.2	81.2
Spending at Destination	233.0	268.9	279.1	275.7	288.0	304.3	318.0

Average Expenditures for Overnight Visitors, 2013p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$252	\$477	\$103	\$195	2.4	1.9
Private Home	\$82	\$248	\$31	\$95	2.6	3.0
Other Overnight	\$137	\$445	\$40	\$131	3.4	3.3
All Overnight	\$122	\$331	\$46	\$127	2.6	2.7

Overnight Visitor Volume, 2011-2013p

	Person-Nights (000)			Party-Nights (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	882	932	1,007	361	381	412
Private Home	3,418	3,535	3,572	1,312	1,357	1,371
Other Overnight	494	506	524	146	150	155
All Overnight	4,794	4,973	5,103	1,819	1,888	1,938

	Person-Trips (000)			Party-Trips (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	466	493	532	191	201	218
Private Home	1,124	1,162	1,174	431	446	451
Other Overnight	152	156	161	45	46	48
All Overnight	1,742	1,811	1,868	667	694	716

POLK COUNTY TRAVEL IMPACTS

Travel Indicators

Visitor Spending Impacts (2013p)

Amount of Visitor Spending that supports 1 Job	\$80,870
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.60

Visitor Shares

Travel Share of Total Employment (2012)*	7.3%
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Visitor Spending by Type of Traveler Accommodation (\$Million), 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
All Overnight	28.7	36.3	39.5	38.4	39.2	40.7	41.5
Hotel, Motel	14.6	20.7	21.4	20.7	21.0	21.7	22.3
Private Home	10.9	12.3	14.3	14.1	14.6	15.2	15.3
Other Overnight	3.2	3.3	3.8	3.6	3.6	3.7	3.8
Campground	3.0	3.1	3.5	3.3	3.3	3.5	3.5
Vacation Home	0.2	0.2	0.3	0.3	0.3	0.3	0.3
Day Travel	98.8	111.4	105.8	103.9	108.3	108.2	110.4
Spending at Destination	127.4	147.6	145.2	142.3	147.5	148.9	151.9

Polk County Travel Trends, 1991-2013p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	17.5	3.9	360	0	704	704
1992	18.4	4.0	330	0	781	781
1993	19.9	4.4	360	0	851	851
1994	21.2	4.7	360	0	911	911
1995	29.9	7.4	500	0	1,085	1,085
1996	44.4	12.8	770	0	1,351	1,351
1997	65.0	19.5	1,090	0	1,755	1,755
1998	92.1	28.6	1,630	0	2,318	2,318
1999	103.2	32.0	1,690	0	2,532	2,532
2000	105.2	32.1	1,700	0	2,577	2,577
2001	106.0	32.4	1,750	0	2,592	2,592
2002	125.9	39.0	2,060	0	2,964	2,964
2003	129.0	39.5	2,020	0	3,036	3,036
2004	134.8	40.3	1,980	0	3,143	3,143
2005	155.3	46.1	2,270	0	3,551	3,551
2006	158.4	47.0	2,210	0	3,661	3,661
2007	157.3	49.7	2,160	0	3,812	3,812
2008	159.0	50.3	2,130	0	3,875	3,875
2009	149.2	48.2	2,010	0	3,672	3,672
2010	152.8	48.4	1,970	0	3,693	3,693
2011	160.1	46.0	1,940	0	4,103	4,103
2012	162.0	43.4	1,900	0	3,976	3,976
2013p	164.8	42.0	1,910	0	3,949	3,949
Annual Percentage Change						
12-13p	1.7%	-3.1%	0.4%	0.0%	-0.7%	-0.7%
91-13p	10.7%	11.4%	7.9%	0.0%	8.2%	8.2%

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

**Polk County
Travel Impacts, 2004-2013p**

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	127.4	147.6	145.2	142.3	147.5	148.9	151.9
Other Travel*	7.3	10.8	13.7	10.5	12.6	13.1	12.9
Total Direct Spending	134.8	158.4	159.0	152.8	160.1	162.0	164.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	9.0	13.0	13.6	13.1	13.3	13.6	14.0
Food Service	21.5	25.2	25.7	26.6	27.5	28.3	29.4
Food Stores	9.5	10.4	11.3	11.1	11.7	11.9	12.2
Local Tran. & Gas	5.6	7.8	9.2	7.9	9.3	9.3	9.1
Arts, Ent. & Rec.	78.8	87.7	81.9	80.1	82.3	82.1	83.5
Retail Sales	3.1	3.4	3.5	3.5	3.5	3.6	3.7
Destination Spending	127.4	147.6	145.2	142.3	147.5	148.9	151.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	12.2	15.1	16.0	16.0	16.2	16.3	16.3
Arts, Ent. & Rec.	25.4	28.9	31.1	29.4	26.7	23.8	22.4
Retail**	1.8	2.0	2.2	2.1	2.2	2.2	2.3
Ground Tran.	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Other Travel*	0.6	0.6	0.7	0.5	0.5	0.6	0.6
Total Direct Earnings	40.3	47.0	50.3	48.4	46.0	43.4	42.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	890	1,000	970	940	920	900	910
Arts, Ent. & Rec.	940	1,050	990	880	860	840	840
Retail**	110	110	110	110	110	110	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	40	40	40	30	30	30	30
Total Direct Employment	1,980	2,210	2,130	1,970	1,940	1,900	1,910
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	3.1	3.7	3.9	3.7	4.1	4.0	3.9
Total Local & State	3.1	3.7	3.9	3.7	4.1	4.0	3.9

Details may not add to totals due to rounding.

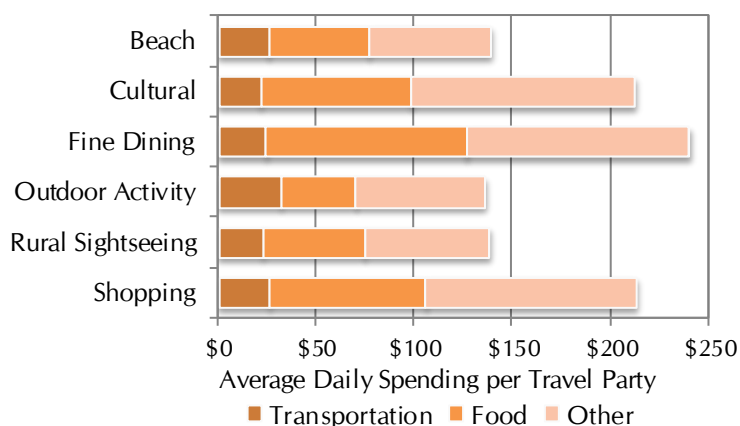
*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

V. OREGON DAY TRAVEL, 2013P

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.

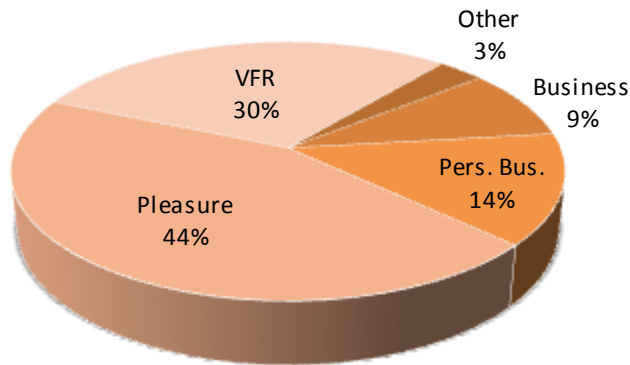
Day Trip Activity, 2013p



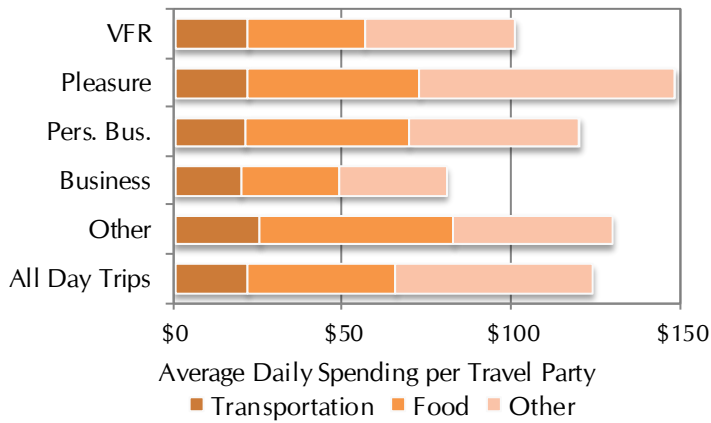
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
Beach	\$152.1	\$29.8	\$58.4	\$63.9	2.8
Cultural	\$230.0	\$25.2	\$87.6	\$117.2	2.8
Fine Dining	\$261.9	\$28.4	\$116.3	\$117.2	2.6
Outdoor Activity	\$148.5	\$37.0	\$43.8	\$67.7	2.8
Rural Sightseeing	\$151.0	\$26.3	\$59.1	\$65.6	2.7
Shopping	\$231.8	\$30.3	\$90.9	\$110.6	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

Purpose of Day Trip, 2013p



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	\$100.7	\$21.7	\$34.5	\$44.5	2.4
Pleasure	\$148.0	\$21.8	\$50.7	\$75.5	2.7
Personal Business	\$119.8	\$20.9	\$48.4	\$50.5	2.2
Business	\$80.3	\$19.6	\$29.4	\$31.4	1.6
Other	\$129.3	\$25.1	\$57.4	\$46.7	2.0
Total	\$123.5	\$21.6	\$43.9	\$58.0	2.4

Oregon Earnings and Employment by Industry Sector, 2012

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	16,727	15.4%	285	12.8%
Agriculture, Forestry, Fishing and related	2,444	2.2%	94	4.2%
Mining	181	0.2%	5	0.2%
Manufacturing	14,102	13.0%	186	8.3%
<i>**Travel</i>	2,192	2.0%	91	4.1%
Primarily Non Export-Oriented	52,846	48.6%	1,077	48.2%
Construction	5,939	5.5%	103	4.6%
Utilities	706	0.6%	5	0.2%
Wholesale trade	6,935	6.4%	84	3.8%
Retail trade	7,300	6.7%	234	10.5%
Real estate and rental and leasing	1,763	1.6%	102	4.6%
Management of companies and enterprises	3,154	2.9%	32	1.4%
Administrative and waste services	3,969	3.6%	118	5.3%
Other services, except public administration	4,012	3.7%	119	5.3%
Government and government enterprises	19,068	17.5%	280	12.5%
Mixed	39,234	36.1%	872	39.0%
Transportation and warehousing	3,479	3.2%	64	2.9%
Information	3,001	2.8%	41	1.9%
Finance and insurance	5,040	4.6%	97	4.3%
Professional and technical services	7,989	7.3%	139	6.2%
Educational services	1,511	1.4%	54	2.4%
Health care and social assistance	13,627	12.5%	259	11.6%
Leisure and Hospitality	4,587	4.2%	218	9.7%
Oregon Total**	108,807	100.0%	2,235	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).