

Oregon Travel Impacts ***1992-2015p***

May 2016

Prepared for

Oregon Tourism Commission
Salem, Oregon

OREGON TRAVEL IMPACTS, 1992-2015P

STATEWIDE PRELIMINARY ESTIMATES

DETAILED COUNTY ESTIMATES

OVERNIGHT VISITOR VOLUME

May 2016

Prepared for

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EXECUTIVE SUMMARY

This report provides detailed statewide, regional and county travel impact estimates for Oregon from 1992 to 2015. The report also provides average spending and volume estimates for overnight visitors for most counties. The estimates for 2015 are preliminary. Secondary impacts and travel industry GDP are provided at the state level.

TRAVEL SPENDING, EMPLOYMENT AND EARNINGS CONTINUE TO EXPAND

The Oregon travel industry continued to grow at an accelerating rate in 2015. Most measures of travel activity were up over 2014 which was itself an exceptionally strong year.

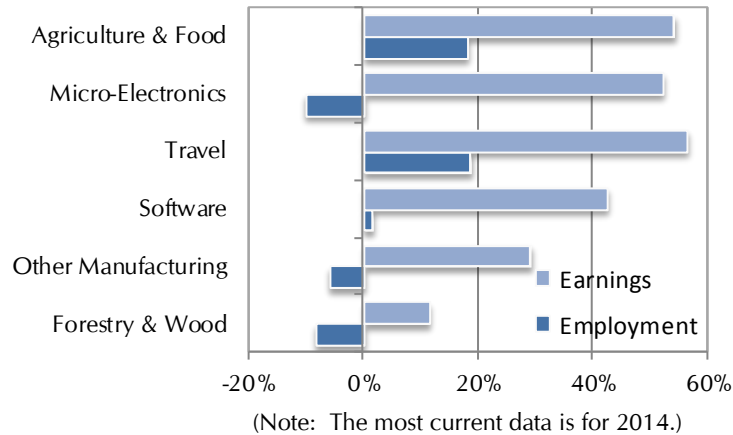
- **Spending.** Total direct travel spending in Oregon was \$10.8 billion in 2015. The annual increase from 2014 was 4.5 percent in current dollars. In real, inflation-adjusted, dollars travel spending increased by 6.6 percent due to the decline in motor fuel prices. (Visitor spending, excluding transportation, increased by 7.3 percent in current dollars.) This is the sixth consecutive year of growth in travel spending following the recession.
- **Travel Activity.** An estimated 27.7 million overnight visitors traveled to Oregon destinations in 2015 (preliminary). This represents a 3.4 percent increase over 2014. Domestic visitor air arrivals to Oregon (3.5 million) increased by 8.9 percent for the year. Room demand, as measured by STR, Inc., increased by 4.8 percent for the year.¹ The increase in room demand was substantial in all of Oregon's tourism regions.
- **Employment.** Total travel generated employment was 105,500 in 2015p. This represents a 4.1 percent increase over 2014, the fifth consecutive year of employment growth following the steep decline from 2008 to 2010. Employment has increased by 3.2 percent per year since 2010.
- **Secondary Impacts.** The re-spending of travel-generated revenues by businesses and employees generates additional impacts. In 2015, these secondary impacts were equivalent to 54,800 jobs with earnings of \$2.4 billion. Most of these jobs were in various professional and business services.
- **GDP.** The Gross Domestic Product of the travel industry was \$4.3 billion in 2015. Overall, the travel industry is one of the three largest export-oriented industries in rural Oregon counties (the other two being agriculture/food processing and logging/wood products).

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

THE OREGON TRAVEL INDUSTRY IS A LEADING EXPORT-ORIENTED INDUSTRY

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

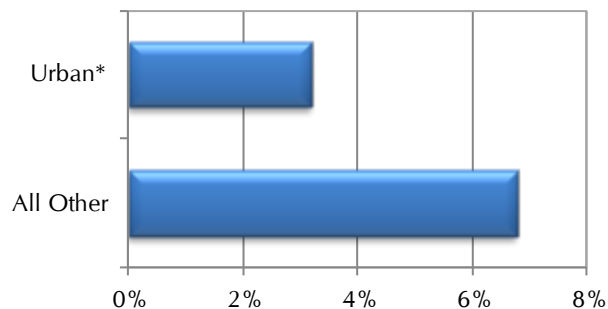
Change in Earnings and Employment (2003-2014)
Selected Export-Oriented Industries



THE TRAVEL INDUSTRY BENEFITS ALL REGIONS OF OREGON

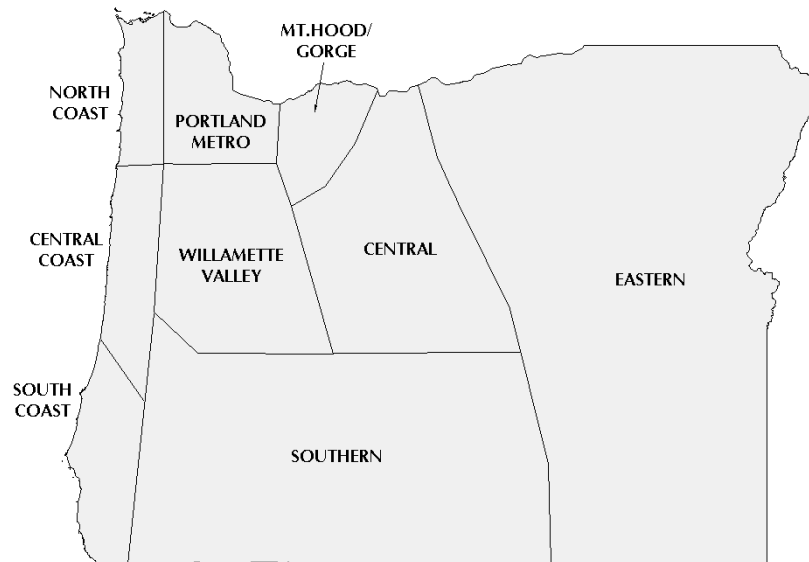
Although most travel spending and related economic impacts occur within Oregon’s urban areas, the travel industry is important throughout the state. In general, travel-generated employment is relatively more important in rural counties.

Travel-Generated Employment as a Percent of Total Employment (2014)



*The urban counties are Clackamas, Lane, Marion, Multnomah and Washington. The most current data is for 2014.

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

2015p Regional Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment (thousand)	Tax Revenue (\$Million)		
	All Travel	Destination			Local	State	Total
Willamette Valley	1,745	1,525	455	20.6	18	49	68
North Coast	769	764	225	8.0	12	18	30
Central Coast	717	693	204	8.5	13	18	31
South Coast	388	381	117	5.0	2	10	12
Oregon Coast	1,875	1,852	548	21.6	27	46	73
Portland	4,686	3,505	1,125	32.8	124	100	224
Southern	980	892	267	11.4	12	27	39
Central	791	732	214	8.9	12	20	32
Eastern	352	339	112	5.7	4	11	14
Mt. Hood/Gorge	369	353	106	4.6	5	10	15

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).

2015p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	19.6	7.7	6.5	2.6
North Coast	6.5	2.4	2.4	0.9
Central Coast	6.2	2.2	2.2	0.8
South Coast	4.2	1.5	1.4	0.5
Oregon Coast	16.8	6.1	6.0	2.2
Portland	25.0	12.2	8.1	3.9
Southern	11.5	4.4	3.8	1.5
Central	8.5	3.2	2.9	1.1
Eastern	5.0	1.8	1.8	0.7
Mt. Hood/Gorge	3.3	1.3	1.2	0.5

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

WILLAMETTE VALLEY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$78,590
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.40

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$85,325
Additional employment if each resident household encouraged one additional overnight visitor	1,090

Visitor Shares

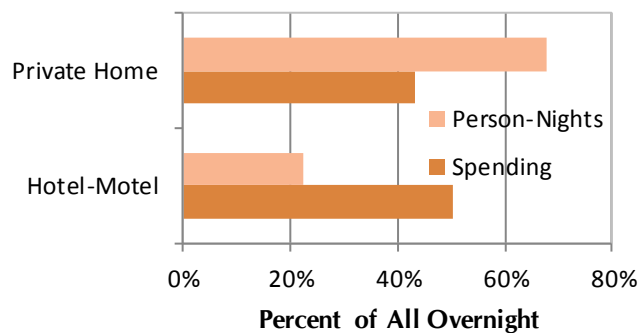
Travel Share of Total Employment (2014)*	3.4%
Overnight Visitor Day Share of Resident Population (2015p)**	4.6%

*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



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	2,112	4,484	\$569
Private Home	3,901	13,233	\$462
Other Overnight	502	1,883	\$71
All Overnight	6,515	19,600	\$1,102

Willamette Valley Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	1,020	1,278	1,481	1,715	1,745	1.8%	3.6%
Other	104	130	204	226	220	-2.8%	5.1%
Visitor	916	1,148	1,277	1,488	1,525	2.4%	3.5%
Non-transportation	777	938	1,017	1,199	1,271	6.0%	3.3%
Transportation	139	210	260	289	254	-12.4%	4.1%
Earnings (\$Millions)							
Earnings	251	304	349	421	455	8.1%	4.0%
Employment (Thousands)							
Employment	15.8	17.5	17.7	19.9	20.6	3.8%	1.8%
Tax Revenue (\$Millions)							
Total	36.7	45.2	49.8	63.1	67.6	7.1%	4.2%
Local	8.2	10.8	11.7	16.1	18.2	13.2%	5.5%
State	28.5	34.4	38.0	47.0	49.4	5.0%	3.7%

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

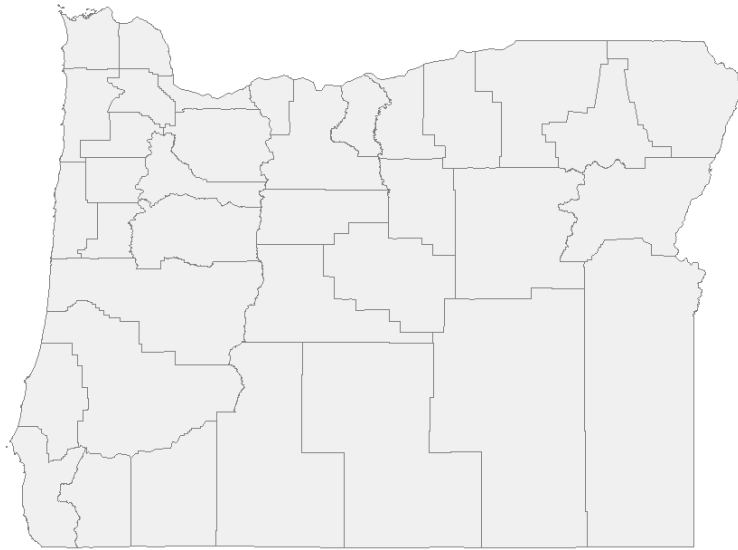
Earnings include wages & salaries, earned benefits and proprietor income.

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

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

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

IV. COUNTY TRAVEL IMPACTS AND VISITOR VOLUME



2015p County Travel Impacts

	Spending (\$Million)		Earnings (\$Million)	Employment	Tax Revenue (\$000)		
	All Travel	Destination			Local	State	Total
Baker	44.3	42.3	12.9	710	440	1,220	1,660
Benton	117.2	104.1	31.2	1,650	1,640	3,660	5,300
Clackamas	560.9	482.9	154.6	6,050	5,420	16,610	22,030
Clatsop	539.6	533.8	155.8	5,800	10,500	13,120	23,630
Columbia	37.5	31.2	10.7	610	0	1,410	1,410
Coos	260.9	247.4	71.2	3,120	1,370	7,000	8,370
Crook	41.9	39.3	11.8	540	250	1,100	1,350
Curry	127.3	124.5	46.0	1,890	610	3,320	3,930
Deschutes	660.2	563.9	171.9	6,680	11,620	16,470	28,090
Douglas	232.6	218.1	64.5	3,050	1,280	6,380	7,660
East Douglas	172.2	158.7	47.2	2,240	1,070	4,950	6,020
West Douglas	60.4	59.4	17.3	810	220	1,430	1,640
Gilliam	4.3	4.1	1.0	50	0	110	110
Grant	10.7	9.7	2.7	170	70	310	380
Harney	17.2	16.3	5.8	320	260	470	740
Hood River	92.5	89.4	24.7	1,050	1,710	2,530	4,240
Jackson	528.3	406.8	132.3	5,290	8,340	13,120	21,460
Jefferson	48.7	46.0	15.6	970	580	1,550	2,130
Josephine	124.7	112.8	38.8	1,750	1,200	3,940	5,140
Klamath	140.7	131.9	45.6	1,900	1,690	4,330	6,020
Lake	13.7	12.7	3.1	210	120	380	490
Lane	871.1	633.1	237.5	10,120	11,910	21,730	33,650
East Lane	744.0	522.9	196.3	8,320	11,090	18,840	29,930
West Lane	127.2	110.1	41.2	1,800	820	2,890	3,710
Lincoln	529.6	519.6	145.4	5,860	12,290	13,260	25,550
Linn	136.0	120.1	33.7	1,810	1,040	4,420	5,460
Malheur	41.0	37.1	11.8	580	740	1,250	1,990
Marion	384.1	336.5	99.5	4,550	3,820	12,360	16,170
Morrow	14.7	13.3	3.5	170	0	440	440
Multnomah	3,688.2	1,867.6	837.6	21,880	110,580	67,900	178,470
East Multnomah	79.1	74.5	22.1	990	1,410	1,990	3,400
West Multnomah	3,609.0	1,793.1	815.5	20,890	109,170	65,910	175,070
Polk	169.1	159.4	42.7	1,900	0	3,730	3,730
Sherman	4.9	4.7	1.3	60	20	140	150
Tillamook	229.4	226.2	69.5	2,190	1,480	5,180	6,660
Umatilla	150.2	139.8	48.7	2,410	1,480	4,680	6,170
Union	33.3	30.0	11.3	580	520	1,010	1,530
Wallowa	28.4	27.6	12.4	590	320	810	1,140
Wasco	108.6	105.3	37.0	1,790	940	2,790	3,730
North Wasco	68.0	64.9	22.3	1,080	940	1,870	2,810
South Wasco	40.6	40.4	14.7	710	0	920	920
Washington	684.5	569.2	200.4	7,490	10,860	21,780	32,640
Wheeler	2.8	2.6	0.6	40	0	80	80
Yamhill	118.1	104.2	31.7	1,610	630	3,780	4,410

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).

2015p County Overnight Visitor Volume

	Nights (000)		Trips (000)	
	Persons	Parties	Persons	Parties
Baker	649	230	239	87
Benton	1,440	562	652	257
Clackamas	7,170	3,315	2,566	1,157
Clatsop	3,871	1,467	1,720	668
Columbia	666	296	222	99
Coos	2,576	965	1,053	402
Crook	662	237	283	104
Curry	1,578	535	652	230
Deschutes	6,497	2,486	2,545	983
Douglas	2,485	900	939	347
Gilliam/Sherman	152	53	64	23
Grant	223	78	89	32
Harney	265	95	117	43
Hood River	927	350	389	150
Jackson	5,291	2,101	2,066	816
Jefferson	883	297	342	118
Josephine	1,884	709	710	271
Klamath	2,112	780	814	307
Lake	263	93	109	39
Lane	7,935	3,089	3,002	1,166
Lincoln	4,664	1,717	1,960	743
Linn	1,934	729	810	310
Malheur	640	243	289	112
Marion	5,296	2,013	1,949	748
Morrow	266	100	119	45
Multnomah	12,264	5,969	5,026	2,367
Polk	1,103	424	467	181
Sherman (see Gilliam)				
Tillamook	2,605	897	1,125	402
Umatilla	1,706	655	792	308
Union	563	207	238	90
Wallowa	438	152	188	68
Wasco	1,117	407	511	192
Washington	7,882	3,886	2,842	1,365
Wheeler	72	24	27	9
Yamhill	1,673	654	759	299

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.

MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$76,720
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$15,363
Additional employment if each resident household encouraged one additional overnight visitor	200

Visitor Shares

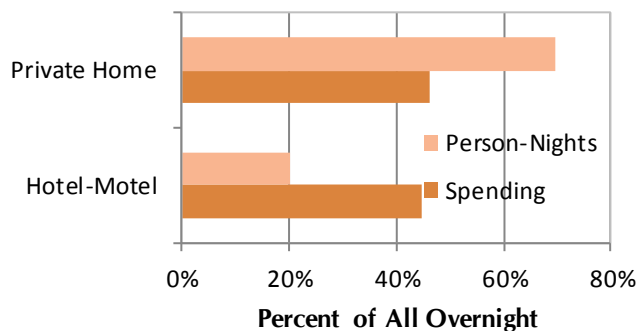
Travel Share of Total Employment (2014)*	2.6%
Overnight Visitor Day Share of Resident Population (2015p)**	4.4%

*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



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	578	1,093	\$115.8
Private Home	1,204	3,663	\$113.7
Other Overnight	166	540	\$22.3
All Overnight	1,949	5,296	\$251.8

Marion County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	238.0	293.6	324.3	383.4	384.1	0.2%	3.2%
Other	32.1	42.1	48.6	56.8	47.6	-16.2%	2.7%
Visitor	205.9	251.5	275.7	326.6	336.5	3.0%	3.3%
Non-transportation	187.1	222.7	241.8	287.0	303.1	5.6%	3.3%
Transportation	18.8	28.7	33.8	39.6	33.4	-15.7%	3.9%
Earnings (\$Millions)							
Earnings	57.8	67.6	75.6	89.9	99.5	10.8%	3.7%
Employment							
Employment	3,630	3,850	3,890	4,360	4,550	4.4%	1.5%
Tax Revenue (\$Millions)							
Total	9.2	11.0	12.0	15.1	16.2	7.1%	3.8%
Local	1.8	2.2	2.5	3.4	3.8	12.4%	5.3%
State	7.4	8.8	9.5	11.7	12.4	5.5%	3.5%

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

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

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

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

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

**Marion County
Travel Impacts, 2006-2015p**

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	268.9	279.1	275.7	305.7	318.6	326.6	336.5
Other Travel*	48.9	59.8	48.6	59.5	58.2	56.8	47.6
Total Direct Spending	317.8	338.9	324.3	365.3	376.8	383.4	384.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	39.8	42.3	40.1	43.1	47.4	51.5	57.2
Food Service	73.5	75.8	79.4	88.0	93.1	96.5	102.4
Food Stores	31.2	34.1	33.8	37.9	39.1	40.4	42.1
Local Tran. & Gas	33.0	39.1	33.8	41.7	41.1	39.6	33.4
Arts, Ent. & Rec.	41.5	40.5	40.1	42.9	44.3	44.9	46.4
Retail Sales	49.9	47.2	48.4	52.2	53.6	53.7	55.0
Destination Spending	268.9	279.1	275.7	305.7	318.6	326.6	336.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	44.7	48.2	47.2	51.9	54.9	57.9	64.6
Arts, Ent. & Rec.	12.4	13.9	13.0	13.1	14.0	14.1	16.0
Retail**	10.1	10.4	10.3	11.3	11.7	12.0	12.6
Ground Tran.	1.3	1.3	1.3	1.5	1.5	1.6	1.7
Other Travel*	3.8	4.0	3.7	3.8	3.9	4.2	4.5
Total Direct Earnings	72.3	77.8	75.6	81.6	86.1	89.9	99.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,440	2,480	2,320	2,500	2,620	2,700	2,840
Arts, Ent. & Rec.	890	990	910	850	930	950	970
Retail**	480	470	460	480	490	500	520
Ground Tran.	50	50	40	50	50	50	50
Other Travel*	170	170	150	150	150	160	160
Total Direct Employment	4,020	4,150	3,890	4,030	4,240	4,360	4,550
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.6	2.8	2.5	2.9	3.1	3.4	3.8
State Tax Receipts	9.4	9.9	9.5	11.2	11.6	11.7	12.4
Total Local & State	12.0	12.7	12.0	14.1	14.7	15.1	16.2

Details may not add to totals due to rounding.

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

Marion County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	195.1	210.0	205.9	227.1	237.2	244.0	251.8
Hotel, Motel*	85.7	91.6	87.1	95.6	103.4	109.2	115.8
Private Home	91.8	98.3	99.4	111.1	112.3	112.9	113.7
Other Overnight	17.6	20.2	19.4	20.4	21.5	21.9	22.3
Campground	14.4	16.6	15.8	16.5	17.7	17.9	18.3
Vacation Home	3.2	3.5	3.6	3.8	3.9	3.9	4.0
Day Travel	73.8	69.1	69.8	78.6	81.4	82.6	84.6
Spending at Destination	268.9	279.1	275.7	305.7	318.6	326.6	336.5

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$259	\$490	\$106	\$200	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$139	\$453	\$41	\$134	3.4	3.3
All Overnight	\$125	\$337	\$48	\$129	2.6	2.7

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,006	1,038	1,093	412	425	447
Private Home	3,592	3,592	3,663	1,378	1,378	1,406
Other Overnight	527	530	540	156	157	160
All Overnight	5,125	5,161	5,296	1,946	1,960	2,013

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	532	549	578	218	225	236
Private Home	1,181	1,181	1,204	453	453	462
Other Overnight	162	163	166	48	48	49
All Overnight	1,875	1,893	1,949	719	726	748

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

POLK COUNTY TRAVEL IMPACTS

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$85,210
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.30

Visitor Shares

Travel Share of Total Employment (2014)*	7.4%
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Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	36.3	39.5	38.4	40.7	41.5	41.9	44.2
Hotel, Motel	20.7	21.4	20.7	21.7	22.2	22.4	24.4
Private Home	12.3	14.3	14.1	15.2	15.3	15.4	15.7
Other Overnight	3.3	3.8	3.6	3.7	4.0	4.0	4.1
Campground	3.1	3.5	3.3	3.5	3.7	3.7	3.8
Vacation Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	111.4	105.8	103.9	108.2	110.3	110.8	115.2
Spending at Destination	147.6	145.2	142.3	148.9	151.7	152.7	159.4

Polk County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	104.7	154.9	152.6	164.8	169.1	2.6%	3.3%
Other	4.9	8.5	10.3	12.1	9.7	-19.3%	4.6%
Visitor	99.7	146.4	142.3	152.7	159.4	4.4%	3.2%
Non-transportation	95.8	139.2	134.4	144.1	152.0	5.5%	3.1%
Transportation	4.0	7.2	7.9	8.6	7.3	-14.2%	4.2%
Earnings (\$Millions)							
Earnings	31.8	45.9	48.3	41.7	42.7	2.6%	2.0%
Employment							
Employment	1,690	2,260	1,970	1,890	1,900	0.2%	0.8%
Tax Revenue (\$Millions)							
Total	2.6	3.5	3.7	3.6	3.7	2.3%	2.6%
State	2.6	3.5	3.7	3.6	3.7	2.3%	2.6%

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

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

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

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

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

**Polk County
Travel Impacts, 2006-2015p**

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	147.6	145.2	142.3	148.9	151.7	152.7	159.4
Other Travel*	10.3	13.2	10.3	12.9	12.5	12.1	9.7
Total Direct Spending	157.9	158.5	152.6	161.8	164.2	164.8	169.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.0	13.6	13.1	13.6	14.1	14.4	16.0
Food Service	25.2	25.7	26.6	28.3	29.3	29.9	32.0
Food Stores	10.4	11.3	11.1	11.9	12.2	12.5	13.2
Local Tran. & Gas	7.8	9.2	7.9	9.3	9.0	8.6	7.3
Arts, Ent. & Rec.	87.7	81.9	80.1	82.1	83.5	83.7	87.2
Retail Sales	3.4	3.5	3.5	3.6	3.7	3.6	3.8
Destination Spending	147.6	145.2	142.3	148.9	151.7	152.7	159.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	15.1	16.0	16.0	16.3	16.3	16.7	18.0
Arts, Ent. & Rec.	28.9	31.1	29.4	23.8	22.4	21.8	21.6
Retail**	2.0	2.2	2.1	2.2	2.3	2.3	2.4
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.4	0.5
Other Travel*	0.4	0.4	0.4	0.4	0.4	0.4	0.3
Total Direct Earnings	46.7	50.1	48.3	43.2	41.8	41.7	42.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,000	970	940	900	910	920	920
Arts, Ent. & Rec.	1,050	990	880	840	820	820	820
Retail**	110	110	110	110	110	110	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	30	30	20	20	30	30	30
Total Direct Employment	2,200	2,120	1,970	1,900	1,890	1,890	1,900
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	3.7	3.7	3.6	3.7
Total Local & State	3.6	3.9	3.7	3.7	3.7	3.6	3.7

Details may not add to totals due to rounding.

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