

# MARION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

## Travel Indicators

### Visitor Spending Impacts (2014p)

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

### Visitor Volume (2014p)

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

### Visitor Shares

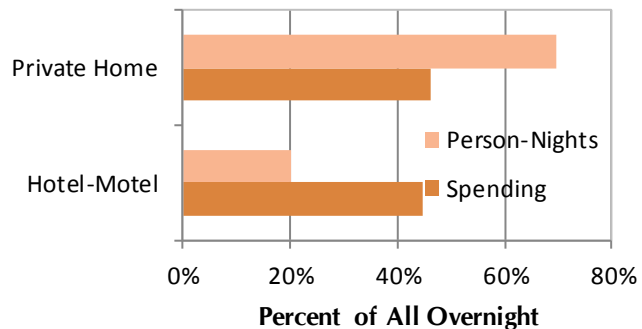
Travel Share of Total Employment (2013)*	2.5%
Overnight Visitor Day Share of Resident Population (2014p)**	4.3%

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

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

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

### Overnight Visitor Spending and Volume



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

### Marion County Travel Trends, 1991-2014p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	155.0	38.0	3,300	646	4,992	5,639
1992	169.1	41.5	3,420	763	5,633	6,395
1993	178.5	44.0	3,510	828	6,045	6,873
1994	186.1	46.1	3,540	881	6,355	7,236
1995	197.7	49.2	3,620	963	6,625	7,588
1996	203.2	50.2	3,600	1,021	6,644	7,665
1997	209.2	52.0	3,550	1,054	6,725	7,779
1998	214.0	54.5	3,740	1,115	6,872	7,987
1999	222.1	55.9	3,580	1,422	7,006	8,428
2000	238.0	57.8	3,630	1,772	7,426	9,198
2001	241.0	58.6	3,650	1,793	7,462	9,254
2002	248.5	61.1	3,760	1,872	7,555	9,427
2003	255.8	61.5	3,730	1,877	7,765	9,641
2004	268.2	63.0	3,720	2,028	8,264	10,293
2005	293.6	67.6	3,850	2,225	8,811	11,036
2006	317.8	72.3	4,020	2,556	9,417	11,973
2007	326.7	76.7	4,210	2,776	9,737	12,513
2008	338.9	77.8	4,150	2,783	9,874	12,657
2009	309.6	76.5	4,000	2,585	9,400	11,985
2010	324.2	75.6	3,890	2,520	9,488	12,008
2011	345.8	78.0	3,980	2,711	10,978	13,689
2012	365.3	81.6	4,030	2,873	11,227	14,099
2013	376.8	86.1	4,240	3,121	11,588	14,709
<b>2014p</b>	<b>383.6</b>	<b>92.1</b>	<b>4,540</b>	<b>3,398</b>	<b>11,830</b>	<b>15,228</b>
Annual Percentage Change						
<b>13-14p</b>	<b>1.8%</b>	<b>7.0%</b>	<b>7.1%</b>	<b>8.9%</b>	<b>2.1%</b>	<b>3.5%</b>
<b>91-14p</b>	<b>4.0%</b>	<b>3.9%</b>	<b>1.4%</b>	<b>7.5%</b>	<b>3.8%</b>	<b>4.4%</b>

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

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

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

Details may not add to totals due to rounding.

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

## Marion County Visitor Spending and Visitor Volume

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

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

### Average Expenditures for Overnight Visitors, 2014p

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

### Overnight Visitor Volume, 2012-2014p

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

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

# POLK COUNTY TRAVEL IMPACTS

## Travel Indicators

### Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$79,340
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.40

### Visitor Shares

Travel Share of Total Employment (2013)*	7.5%
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### Visitor Spending by Type of Traveler Accommodation (\$Million), 2006-2014p

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

### Polk County Travel Trends, 1991-2014p

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

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

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

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

Details may not add to totals due to rounding.

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