



PUBLIC NOTICE

For informational purposes only:

On Tuesday, July 19, 2016, at 10:00 A.M. in the Board of Commissioners' Hearing Room, Courthouse Annex, located at 94235 Moore Street, Gold Beach Oregon 97444, the Board of Commissioners will have a Workshop. The purpose of this meeting is to discuss the future of the Economic Development Department. Other topics may be addressed at the discretion of the Chair.

The public is welcome to attend.

For questions, please contact BOC_Office@co.curry.or.us or 541-247-3296.

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Curry County does not discriminate against individuals with disabilities and all public meetings are held in accessible locations. Auxiliary aids will be provided upon request with 48 hours advance notification. Please call 541-247-3296 if you have questions regarding this notice.

CURRY COUNTY, OREGON
REVENUES AND EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE {MONTH} ENDING MAY 31, 2016

ECONOMIC DEVELOPMENT FUND-1.27

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	BALANCE	PCNT
<u>ECONOMIC DEVELOPMENT</u>					
<u>REVENUE</u>					
1.27-465.20-321.10-000-00 PERMITS - OLCC	1,030.00	2,700.00	.00	(2,700.00)	.0
1.27-465.20-332.50-000-50 GR-FED-ST-REHOME CDBG ADMINIST	.00	1,600.00	.00	(1,600.00)	.0
1.27-465.20-335.00-000-00 OTHER - ST - LOTTERY	21,398.00	88,092.00	76,000.00	(12,092.00)	115.9
1.27-465.20-364.00-000-10 FUNDRAISING EVENTS	2,165.32	2,165.32	.00	(2,165.32)	.0
1.27-465.20-380.00-000-00 MISC REVENUE	5,000.00	8,000.00	.00	(8,000.00)	.0
1.27-465.20-391.99-000-00 ALLOCATED INTEREST	.00	14.06	40.00	25.94	35.2
1.27-465.20-399.03-000-00 RESTRICTED FUND BALANCE	.00	(6,128.92)	21,250.00	27,378.92	(28.8)
TOTAL ECONOMIC DEVELOPMENT REVENUE	29,593.32	96,442.46	97,290.00	847.54	99.1
<u>EXPENDITURES</u>					
1.27-465.20-490.00-110-00 SAL - REGULAR	6,150.68	59,824.62	59,601.00	(223.62)	100.4
1.27-465.20-490.00-213-00 BEN - HEALTH INSURANCE	1,000.00	12,200.00	12,000.00	(200.00)	101.7
1.27-465.20-490.00-214-00 BEN - LIFE INSURANCE	4.20	68.83	72.00	3.17	95.6
1.27-465.20-490.00-220-00 BEN - FICA	463.70	4,509.69	4,559.00	49.31	98.9
1.27-465.20-490.00-230-00 BEN - PERS - COUNTY PORTION	465.00	4,522.80	4,506.00	(16.80)	100.4
1.27-465.20-490.00-260-00 BEN - WORKER'S COMPENSATION	41.58	565.63	716.00	150.37	79.0
1.27-465.20-490.00-290-00 BEN - OR W/C ASSESSMENT	8.01	64.70	68.00	3.30	95.2
1.27-465.20-490.00-295-00 IGS - 3.10 UNEMP SELF INS RSRV	111.00	447.00	447.00	.00	100.0
TOTAL PERSONAL SERVICES EXPENDITURES	8,244.17	82,203.27	81,969.00	(234.27)	100.3

CURRY COUNTY, OREGON
REVENUES AND EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE {MONTH} ENDING MAY 31, 2016

ECONOMIC DEVELOPMENT FUND-1.27

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	BALANCE	PCNT
1.27-465.20-490.00-310-15 COMMUNITY EDUCATION	.00	(50.00)	.00	50.00	.0
1.27-465.20-490.00-315-00 CONFERENCE FEES	22.38	146.38	500.00	353.62	29.3
1.27-465.20-490.00-330-00 PRO SVCS - GENERAL	.00	1,000.00	.00	(1,000.00)	.0
1.27-465.20-490.00-416-00 UTIL - CELLULAR TELEPHONE	.00	.00	269.00	269.00	.0
1.27-465.20-490.00-521-00 GEN LIAB INS - ECON DEVEL	.00	614.00	853.00	239.00	72.0
1.27-465.20-490.00-524-00 PROPERTY INS - ECON DEVEL	.00	71.00	69.00	(2.00)	102.9
1.27-465.20-490.00-542-00 ADVERTISING - OTHER	3,017.00	5,795.00	200.00	(5,595.00)	2897.5
1.27-465.20-490.00-550-00 COPYING & PRINTING	86.16	1,213.76	500.00	(713.76)	242.8
1.27-465.20-490.00-580-00 TRAVEL - MEALS & LODGING	350.11	800.13	560.00	(240.13)	142.9
1.27-465.20-490.00-581-00 IGS - 2.21 ASSIGNED VEHICLES	1,627.29	1,627.29	.00	(1,627.29)	.0
1.27-465.20-490.00-583-00 TRAVEL - MILEAGE ALLOWANCE	.00	.00	500.00	500.00	.0
1.27-465.20-490.00-595-00 POSTAGE	.00	.00	200.00	200.00	.0
1.27-465.20-490.00-600-00 SUP - OFFICE	33.52	645.65	500.00	(145.65)	129.1
1.27-465.20-490.00-606-00 EVENT FOOD SUPPLIES	.00	.00	200.00	200.00	.0
1.27-465.20-490.00-606-10 FUNDRAISING EVENT EXPENSES	.00	1,844.62	.00	(1,844.62)	.0
1.27-465.20-490.00-610-00 SUP - NON-CAP EQUIPMENT	.00	.00	500.00	500.00	.0
1.27-465.20-490.00-615-00 OTHER MATERIALS & SERVICES	157.43	1,181.76	930.00	(251.76)	127.1
1.27-465.20-490.00-640-00 BOOKS & PERIODICALS	109.36	119.74	.00	(119.74)	.0
1.27-465.20-490.00-650-00 DUES - MEMBERSHIP	.00	785.00	485.00	(300.00)	161.9
1.27-465.20-490.00-820-00 IGS - 2.20 FINANCE	343.00	1,375.00	1,375.00	.00	100.0
1.27-465.20-490.00-821-00 IGS - 2.20 PAYROLL/HR	198.00	795.00	795.00	.00	100.0
1.27-465.20-490.00-822-00 IGS - 2.20 COUNSEL	125.00	500.00	500.00	.00	100.0
1.27-465.20-490.00-824-00 IGS - 2.20 OCCUPANCY	151.00	604.00	604.00	.00	100.0
1.27-465.20-490.00-826-00 IGS - 2.20 IT/TELECOM	274.00	1,096.00	1,096.00	.00	100.0
1.27-465.20-490.00-828-00 IGS - 2.20 BOC OFFICE	236.00	950.00	950.00	.00	100.0
1.27-465.20-490.00-830-00 IGS - 1.11 COMMISSIONERS	201.00	804.00	804.00	.00	100.0
TOTAL MATERIALS & SERVICES EXPENDITURES	6,931.25	21,918.33	12,390.00	(9,528.33)	176.9
1.27-465.20-496.00-000-00 OPERATING CONTINGENCY	.00	.00	2,931.00	2,931.00	.0
TOTAL CONTINGENCY	.00	.00	2,931.00	2,931.00	.0
TOTAL ECONOMIC DEVELOPMENT EXPENDITUR	15,175.42	104,121.60	97,290.00	(6,831.60)	107.0
NET ECONOMIC DEVELOPMENT	14,417.90	(7,679.14)	.00	7,679.14	.0
FUND NET REVENUE OVER EXPENDITURES	14,417.90	(7,679.14)	.00	7,679.14	.0

L I N E #	HISTORICAL DATA			Account Number	Account Description	Budget for Next Year 2016-2017			L I N E #	
	Actual					2016-2017 Proposed by Budget Officer	Approved by Budget Committee	Adopted by Governing Body		L I N E #
	Second Preceding Year 06/30/14	First Preceding Year 06/30/15	Adopted Budget This Year 06/30/16							
Tab 15										
FUND - Economic Development										
1				1.27-465.20-321.10-000-17	Permits - OLCC	1,822	1,822		1	
2	9,544	-	-	1.27-465.20-331.00-000-17	Grants - Fed-USDOJ CFDA 16.745				2	
3	-	12,500	-	1.27-465.20-331.01-000-00	GR-FED-USDA				3	
4	-	6,250	-	1.27-465.20-331.02-000-00	Match - 3DT Biomass USDA				4	
5	10,000	-	-	1.27-465.20-334.01-000-00	GR - ST - HIA Grant for HSUI				5	
6	75,364	74,024	76,000	1.27-465.20-335.00-000-00	Other - St - Lottery		78,711		6	
7	11,000	-	-	1.27-465.20-364.00-000-00	D & G Public Safety Summit				7	
8	-	5,500	-	1.27-465.20-380.00-000-00	Misc Revenue		3,000		8	
9	-	-	-	1.27-465.20-391.15-000-00	Tran In - 1.10 Trans in GF				9	
10	322	202	40	1.27-465.20-391.99-000-00	Allocated Interest				10	
11	-	-	-	1.27-465.20-399.02-000-00	Committed Fund Balance				11	
12	58,706	33,267	21,250	1.27-465.20-399.03-000-00	Restricted Fund Balance				12	
13	164,937	131,743	97,290		TOTAL RESOURCES	83,533	83,533		13	
14	49,411	71,324	59,601	1.27-465.20-490.00-110-00	Sal - Regular	40,320	40,320		14	
15	-	506	-	1.27-465.20-490.00-120-00	Sal-Irregular				15	
16	13,500	17,250	12,000	1.27-465.20-490.00-213-00	Ben - Health Insurance	12,000	12,000		16	
17	83	96	72	1.27-465.20-490.00-214-00	Ben - Life Insurance	50	50		17	
18	3,814	5,310	4,559	1.27-465.20-490.00-220-00	Ben - FICA	3,084	3,084		18	
19	3,385	4,042	4,506	1.27-465.20-490.00-230-00	Ben - PERS - County Portion	3,048	3,048		19	
20	1,742	-	-	1.27-465.20-490.00-235-00	Ben - PERS - Employee Portion				20	
21	522	576	716	1.27-465.20-490.00-260-00	Ben - Worker's Compensation	62	62		21	
22	72	89	68	1.27-465.20-490.00-290-00	Ben - OR W/C Assessment	64	64		22	
23	801	1,027	447	1.27-465.20-490.00-295-00	IGS - 3.10 Unemp Self Ins Reserve	605	605		23	
24	73,330	100,220	81,969		TOTAL PERSONAL SERVICES	59,233	59,233		24	
25	-	36	-	1.27-465.20-490.00-310-00	Pro Svcs - Training/Education				25	
26	-	-	-	1.27-465.20-490.00-310-15	Community Education				26	
27	50	1,286	500	1.27-465.20-490.00-315-00	Conference Fees	500	500		27	
28	33,050	18,263	-	1.27-465.20-490.00-330-00	Pro Svcs - General	510	510		28	
29	315	-	-	1.27-465.20-490.00-330-17	Pro Svcs - CCH - MH Court				29	
30	1,600	-	-	1.27-465.20-490.00-330-50	Rehome Oregon				30	
31	541	195	269	1.27-465.20-490.00-416-00	Ufil - Cellular Telephone				31	
32	1,418	793	853	1.27-465.20-490.00-521-00	Gen Liab Ins	661	661		32	
33	61	66	69	1.27-465.20-490.00-524-00	Property Insurance	75	75		33	
34	-	-	-	1.27-465.20-490.00-541-00	Advertising - Legal	400	400		34	
35	486	158	200	1.27-465.20-490.00-542-00	Advertising - Other	5,500	5,500		35	
36	100	1,640	500	1.27-465.20-490.00-550-00	Copying & Printing	1,200	1,200		36	
37	256	463	560	1.27-465.20-490.00-580-00	Travel - Meals & Lodging	600	600		37	

L I N E #	HISTORICAL DATA				L I N E #	RESOURCE/REQUIREMENT DESCRIPTION APPROVED	Account Number	Account Description	Budget for Next Year 2016-2017			L I N E #
	Actual		Adopted Budget This Year 06/30/16	Proposed by Budget Officer					Approved by Budget Committee	Adopted by Governing Body		
	Second Preceding Year 06/30/14	First Preceding Year 06/30/15									2016-2017	
1	-	-	-	-	1	1.27-465.20-490.00-580-17	Travel - Meals & Lodging MH Ct	-	-	-	1	
2	-	-	-	-	2	1.27-465.20-490.00-581-00	IGS-Assigned Vehicles	-	-	-	2	
3	-	-	-	-	3	1.27-465.20-490.00-582-00	IGS- Motor Pool	-	-	-	3	
4	53	43	500	500	4	1.27-465.20-490.00-583-00	Travel-Mileage Allowance	100	100	100	4	
5	-	-	-	-	5	1.27-465.20-490.00-584-00	Travel- Transportation	-	-	-	5	
6	-	-	-	-	6	1.27-465.20-490.00-584-17	Travel - Transportation MH Ct	-	-	-	6	
7	259	53	200	200	7	1.27-465.20-490.00-595-00	Postage	100	100	100	7	
8	399	651	500	500	8	1.27-465.20-490.00-600-00	Sup-Office	500	500	500	8	
9	1,149	202	200	200	9	1.27-465.20-490.00-606-00	Event Food Supplies	-	-	-	9	
10	9,290	-	-	-	10	1.27-465.20-490.00-606-64	Event Supplies - Safety Summit	-	-	-	10	
11	227	76	500	500	11	1.27-465.20-490.00-610-00	Sup-Non-Cap Furn/Equip	250	250	250	11	
12	411	1,833	930	930	12	1.27-465.20-490.00-615-00	Other Materials & Services	300	300	300	12	
13	-	15	-	-	13	1.27-465.20-490.00-615-20	Other M&S - Forest Collaborative	-	-	-	13	
14	-	119	-	-	14	1.27-465.20-490.00-640-00	Books & Periodicals	-	-	-	14	
15	100	1,727	485	485	15	1.27-465.20-490.00-650-00	Dues - Membership	1,905	1,905	1,905	15	
16	4,346	2,224	1,375	1,375	16	1.27-465.20-490.00-820-00	IGS - 2.20 Finance	1,269	1,269	1,269	16	
17	1,023	1,078	795	795	17	1.27-465.20-490.00-821-00	IGS - 2.20 Payroll/HR	549	549	549	17	
18	1,202	1,749	500	500	18	1.27-465.20-490.00-822-00	IGS - 2.20 Counsel	456	456	456	18	
19	537	630	604	604	19	1.27-465.20-490.00-824-00	IGS - 2.20 Occupancy	651	651	651	19	
20	1,367	1,432	1,096	1,096	20	1.27-465.20-490.00-826-00	IGS - 2.20 Info Tech	939	939	939	20	
21	-	1,067	950	950	21	1.27-465.20-490.00-828-00	IGS - 2.20 BOC Office	587	587	587	21	
22	-	1,856	804	804	22	1.27-465.20-490.00-830-00	IGS - 1.11 Commissioners	748	748	748	22	
23	58,239	37,652	12,390	12,390	23		TOTAL MATERIALS & SERVICES	17,800	17,800	17,800	23	
24	-	-	-	-	24	1.27-465.20-490.00-742-00	Capital Outlay-Vehicle	-	-	-	24	
25	-	-	-	-	25		TOTAL CAPITAL OUTLAY	-	-	-	25	
26	-	-	-	-	26	TBD	Tran To-General Fund - Repayment of Loan	6,500	6,500	6,500	26	
27	-	-	-	-	27	1.27-465.20-491.09-000-00	Tran To-Enter. GIS Ops	-	-	-	27	
28	-	-	-	-	28		TOTAL INTER-FUND TRANSFERS	6,500	6,500	6,500	28	
29	-	-	-	-	29	TBD	Reserve for Future Expenditure	-	-	-	29	
30	-	-	-	-	30		TOTAL RESERVE FOR FUTURE EXPENDITURE	-	-	-	30	
31	131,569	137,872	94,359	94,359	31		TOTAL REQUIREMENTS	83,533	83,533	83,533	31	
32	33,367	(6,129)	2,931	2,931	32		CONTRIBUTION TO/(FROM) FUND	-	-	-	32	

The Economic Significance of Cycling on Oregon Scenic Bikeways, 2014



June 2015

Prepared for
Travel Oregon and
State Parks and Recreation Department



Nature

HISTORY

Discovery

The Economic Significance of Cycling on Oregon Scenic Bikeways, 2014

June 2015

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Travel Oregon and
Oregon State Parks and Recreation Department

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Preface

The Oregon Scenic Bikeways program is a result of a partnership between the Oregon Parks and Recreation Department, Travel Oregon, Oregon Department of Transportation and Cycle Oregon. In 2014, the state Scenic Bikeways Committee, apprised of these founding partners and others determined by the direction of Oregon State Parks and Recreation Dept. and its Oregon Administrative Rules (OAR) 736-009-0015 through 736-009-0030, identified a key strategic goal to: **Conduct and report economic impacts resulting from Scenic Bikeways**. As a result, Travel Oregon and Oregon Parks and Recreation Dept. commissioned Dean Runyan Associates to prepare this study to document the economic significance of bicycle recreation for Oregon's twelve designated Scenic Bikeways, in 2014.

Dean Runyan Associates has specialized in research and planning services for the travel, tourism, and recreation industry since 1984. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research, and travel and recreation planning.

In preparing this report, we have received essential guidance and assistance from numerous Travel Oregon staff, whom we thankfully acknowledge, especially Nastassja Pace, *Destination Development Specialist*, for serving as project lead and liaison. Alexandra Phillips, *Bicycle Recreation Coordinator*, with Oregon Parks & Recreation Department who provided valuable assistance. Sheila Lyons, *Pedestrian and Bicycle Program Manager*, with Oregon Department of Transportation, was instrumental in supporting this study. Ride with GPS, shared their bicycle rider volume data with us, and many others provided information and advice for this report.

With gratitude, we want to express our thanks for the cooperation to the many participating bicycle-related and regional destination travel organizations throughout the state. Also, individually, as well, to the over 1,000 participants who voluntarily provided detailed information about their bicycle recreation activity on Oregon's Scenic Bikeways.

Finally, special thanks are due to Todd Davidson, *Chief Executive Officer*, of Travel Oregon, and Scott West, *Chief Strategy Officer*, without their guidance and support, this project would not have been possible.

I. Introduction

The Oregon Scenic Bikeway program is a superb collection of cycling routes that inspires people to experience Oregon's natural beauty and cultural heritage by bicycle, and that offers economic and social benefits to the state's communities and residents. Bikeway routes are proposed by local cyclists and selected for their scenic quality, road conditions and general riding enjoyment. Proposed routes are carefully reviewed and ridden, with only about half meeting the criteria for designation. Once designated, directional signs are installed along the route and printable maps showing the route and elevation profiles, services and points of interest are posted online along with lots of information needed to plan a trip on the Bikeways.

The state's Scenic Bikeways contribute to significant expenditures made within the local areas for lodging, dining, groceries, and other retail goods. This report describes the economic significance of Oregon Scenic Bikeways, documenting the magnitude and distribution of economic impacts throughout the state.

Based on the results reported from a detailed online survey, our findings show that in 2014 cyclists rode all twelve of the Oregon Scenic Bikeways, making both overnight and day trips. Cyclists who rode Oregon Scenic Bikeways spent nearly \$12.4 million in 2014 - representing about 3 percent of all bicycle-related travel in the state (reference to *The Economic Significance of Bicycle-Related Travel in Oregon, 2012*).

Detailed trip characteristics and demographics for the Scenic Bikeway riders is also included, providing information such as the purpose and length of the trips, distance traveled, travel party size, as well as other demographic and associated trip-related characteristics are shown in Appendices.

Objectives

This study represents a comprehensive effort by Travel Oregon and Oregon State Parks and Recreation Department to document the economic significance of Oregon Scenic Bikeways, providing a detailed description of the volume rides taken, characteristics of cyclists, and the economic significance of cycling activity along each of Oregon's twelve Scenic Bikeways, in 2014.

Survey findings were used to characterize cycling activity on each Scenic Bikeway route, including the volume of rides taken, participant breakouts with respect to travel party characteristics and accommodations, visitor origin and other trip-related data. Economic impacts are based on expenditure data collected as part of the study: *The Economic Significance of Bicycle-Related Travel in Oregon, 2012*. These data are reliable and their use allowed for a simpler survey data collection process.

The findings describe the primary Oregon Scenic Bikeway related economic impacts, including:

- Expenditures made by cyclists while riding Oregon Scenic Bikeways, and the associated earnings, employment and tax receipts.
- Distribution of these impacts throughout the state (by Oregon Scenic Bikeway).

Oregon Scenic Bikeway Estimates of Number of Rides Taken

This study estimates the number of rides taken on each of Oregon's twelve Scenic Bikeways in 2014. Estimates are based on a variety of data gathered, including:

- Oregon Dept. of Transportation Line Strip Counts
- Oregon Dept. of Transportation Strava Volumes
- Oregon Dept. of Transportation Video Counts
- Ride with GPS Volumes
- Volunteer Counts

In addition, survey results provide a distribution of total rides taken by Scenic Bikeway. The distribution of rides for this sample of cyclists, weighted by the population distribution of Oregon residents, was used to estimate the number of rides for each Scenic Bikeway. In terms of the distribution of rides, the survey results were geographically consistent with the overall volume data gathered by the Oregon Dept. of Transportation, Ride with GPS volumes, and volunteer counts.

Survey Outreach

An online survey was distributed through a variety of sources in order to accurately assess the incidence and economic significance of Oregon Scenic Bikeways related impact during 2014.

The survey link was accessible from these websites:

- OregonScenicBikeways.org
- RideOregonRide.com
- TravelOregon.com (cycling page)
- Industry.TravelOregon.com
- Adventure Cycling Association Bike Bits
- Statesman Journal
- Portland Tribune

The survey announcement was sent directly to:

- 300 businesses recognized in Oregon's Bike Friendly Business program
- 3000 travelers who ordered Scenic Bikeway Maps via Travel Oregon in past year
- 75 local Scenic Bikeway Proponents
- 200 past Oregon Bicycle Tourism Studio workshop attendees
- 284 members of the Oregon Bicycle Tourism Partnership
- Travel Oregon's Industry eNewsletter (2500 statewide email contacts)
- Oregon's 7 Regional Destination Marketing organizations
- OPRD Twitter (22.6K followers)
- Industry Travel Oregon Twitter (2300 followers)

Other organizations that sent the survey through their communication channels:

- Bicycle Rides Northwest
- Adventure Cycling Association
- BikePortland.org
- Bicycle Transportation Alliance
- Clackamas County Bike Tourism Initiative
- Co-Motion
- Cycle Oregon
- Dark 30 Sports
- Gresham Area Chamber of Commerce Bike Tourism Initiative
- Heppner Chamber
- Intertwine Alliance
- Oakshire Brewing
- Oregon Bicycle Racing Association
- ODOT
- OR Bike
- PathlessPedaled
- Pedal Bike Tours
- Portland Bike Tours
- Velo Cult
- Washington County Visitors Association

Survey postcards (approximately 5000) were mailed to the following places to be distributed to travel consumers:

- 150 Businesses along and near the Scenic Bikeways
- 21 Chambers and Visitors Associations on and near Scenic Bikeways
- 9 Oregon Welcome Centers

Overall, more than 1,000 participants provided information about their Scenic Bikeway activity and recreation experience in Oregon.

Average Trip Expenditures

The scope of the economic impact analysis includes all expenditures made while cycling on Oregon Scenic Bikeways - rides made on overnight and day trips. Expenditures include lodging accommodations, campground fees, restaurant and bars, groceries, fuel and other transportation costs, bicycle repairs and related clothing and gear, event fees, all types of recreation, and other retail. Travel expenditures, based on average expenditures per travel party per trip, are shown in Table I-1 below.

Table I-1. Average Trip Expenditures while Cycling on Oregon Scenic Bikeways, 2014

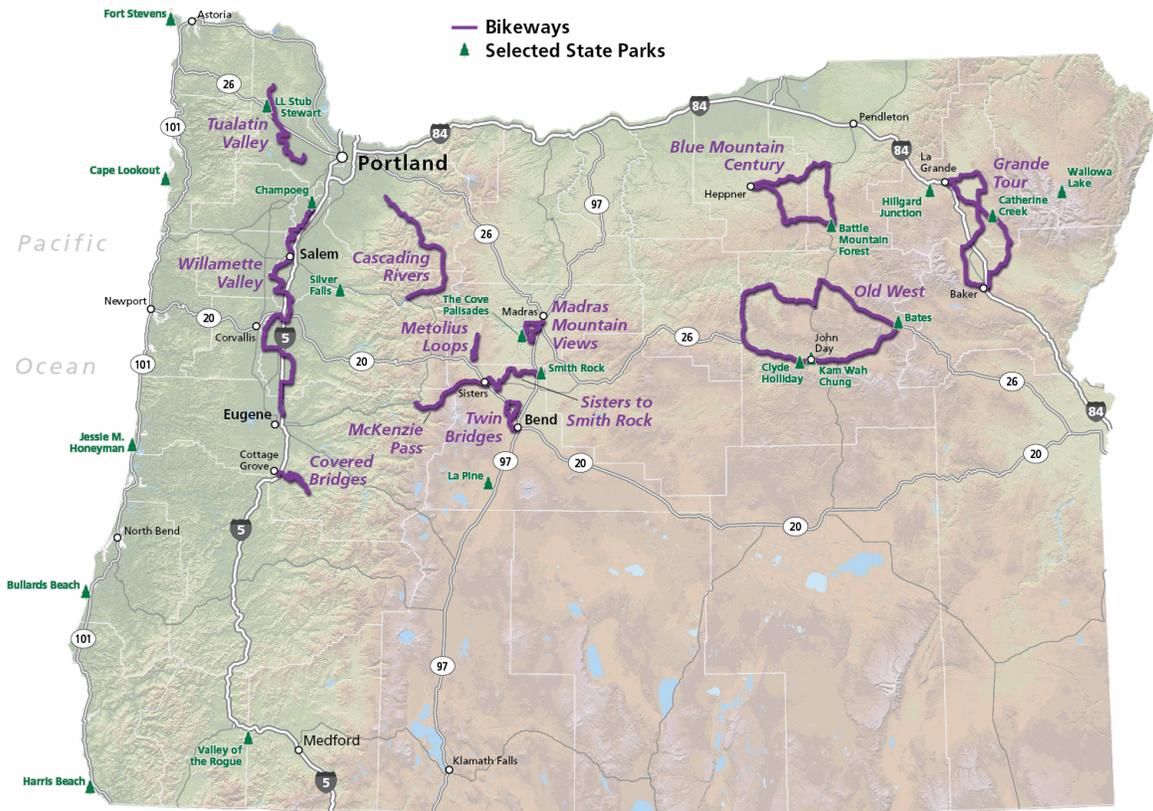
Type of Expenditure	Average Per Party for Overnight Trip	Average Per Party for Day Trip	
	Overnight (\$/Trip)	Day (50+ mi) \$/Trip	Local (< 50 mi) \$/Trip
Accommodations	\$225	\$0	\$0
Restaurants/Bars/Lounges	\$193	\$32	\$0
Groceries/Snacks	\$107	\$15	\$15
Fuel/Gas/Transportation/Parking	\$109	\$26	\$0
Bicycle Related Repairs/Clothing/Gear	\$17	\$10	\$2
Recreation and Entertainment	\$9	\$1	\$1
All Other Retail	\$32	\$3	\$2
Overall Bicycle Trip Average	\$693	\$98	\$19
All Oregon Travel*	\$644	NA	NA

* All Oregon Travel expenditures based on Oregon Travel Impacts, 1998-2014p (statewide preliminary estimates).

Notes: Day trips include travel to the Scenic Bikeway 50 miles or more from home (one way) or local trips often made completely on bike.

Source: Dean Runyan Associates.

II. Oregon Scenic Bikeways: Statewide Summary, 2014



Map Source: Oregon State Parks and Recreation Dept.

Oregon Scenic Bikeway Rides

In 2014, cyclists made approximately 79,000 rides on Oregon Scenic Bikeways. These rides taken on Oregon Scenic Bikeways were made while on overnight trips, and while on day excursions. Survey respondents reported cycling activity for each of Oregon's twelve Scenic Bikeways, highlighting the geographic range and diversity of bicycle recreation throughout the state.

Scenic Bikeway rides generate economic impacts – spending, earnings, employment, and tax receipts - all of which supports local communities. Tables II-1 and II-2 show the number of rides for each Scenic Bikeway and by trip type.

Economic Impacts of Oregon Scenic Bikeway Rides: A Summary

- Cyclists who rode Oregon Scenic Bikeways made expenditures of approximately \$12.4 million in 2014.
- More specifically, cyclists who rode on Oregon Scenic Bikeways spent \$6.9 million on accommodation and food services, \$5.3 million on retail, including snacks and groceries and trip-related motor fuel, and about \$182,000 on arts, entertainment, and recreation, including bicycle/cycling event fees.
- In addition, this spending by cyclists who rode on Oregon Scenic Bikeways directly supported over 150 jobs with earnings of approximately \$3.4 million.
- This spending also generated local and state tax receipts (lodging taxes, motor fuel, and travel-generated business and personal income tax) of approximately \$450,000.

Detailed economic impacts by Oregon Scenic Bikeway are provided in Table III-3 that

Table II-1. Number of Rides Taken on Oregon Scenic Bikeways, 2014

Oregon Scenic Bikeway	Total	on Overnight Trips	Day Rides
Willamette Valley	18,700	9,800	8,900
Tualatin Valley	12,200	2,600	9,600
McKenzie Pass	11,300	6,000	5,300
Covered Bridges	8,400	3,700	4,700
Twin Bridges Loop	7,300	3,200	4,100
Sisters to Smith Rock	6,600	4,700	1,900
Metolius River Loops	4,500	2,900	1,600
Cascading Rivers	2,900	1,500	1,400
Madras Mountain Views	2,400	1,200	1,200
Old West	2,300	2,200	*
Grande Tour	1,800	1,500	*
Blue Mountain Century	800	600	*
Total	79,200	39,900	39,300

* Number of rides taken are fewer than 500.

Source: Dean Runyan Associates.

Figure II-1. Number of Rides Taken on Oregon Scenic Bikeways, 2014

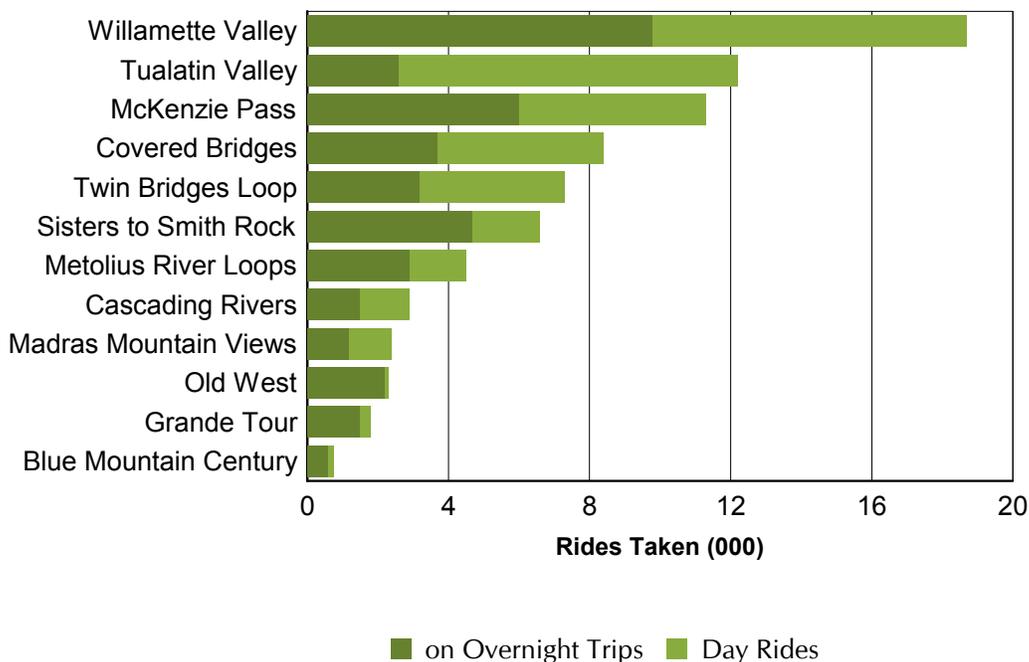


Table II-2. Number of Rides Taken on Oregon Scenic Bikeways by Trip Type, 2014

Type of Bicycle Activity	Total	on Overnight Trips	Day Rides
Independent bicycling (solo or with family/friends)	67,100	33,300	33,776
Organized non-competitive group ride	8,300	4,000	4,390
Other cycling event	1,900	1,100	775
Organized group tour	1,800	1,500	*
Total	79,100	39,900	39,200

* Number of rides taken are fewer than 500.

Source: Dean Runyan Associates.

Figure II-2. Number of Rides Taken on Oregon Scenic Bikeways by Trip Type, 2014

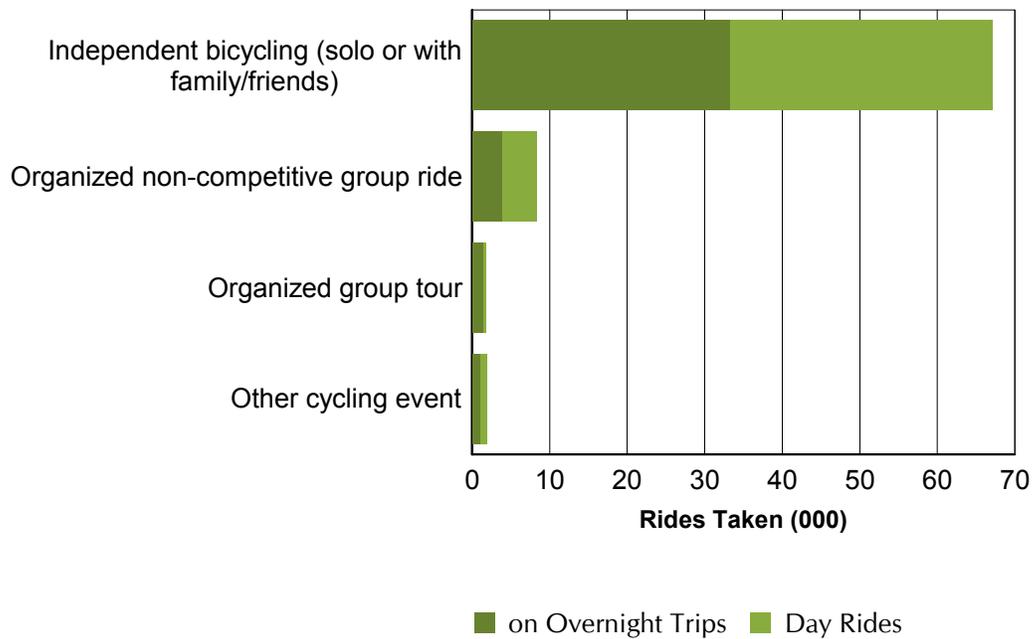


Table II-3. Oregon Scenic Bikeway Detailed Economic Impacts, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$10,765
Day Rides	\$1,622
Total	\$12,387
Bicycle-Related Travel Expenditures By Type of Activity	(\$000)
Independent bicycling (solo or with family/friends)	\$10,385
Organized non-competitive group ride	\$1,247
Organized group tour	\$422
Other cycling event	\$333
Total	\$12,387
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$6,918
Arts, Entertainment & Recreation	\$182
Retail	\$5,287
Total	\$12,387
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$2,892
Arts, Entertainment & Recreation	\$66
Retail	\$435
Total	\$3,394
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Accommodation & Food Services	133
Arts, Entertainment & Recreation	4
Retail	19
Total	156
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$219
State Tax Receipts	\$235
Total	\$454

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Figure II-3. Oregon Scenic Bikeway Expenditures by Type of Activity, 2014

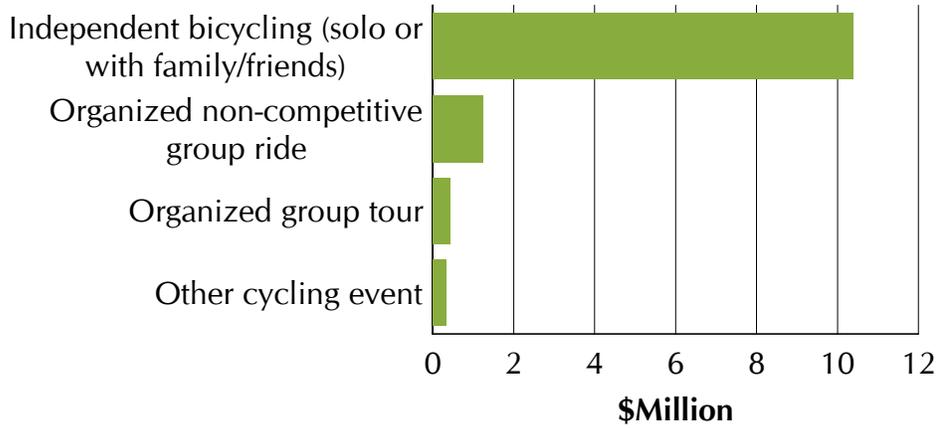
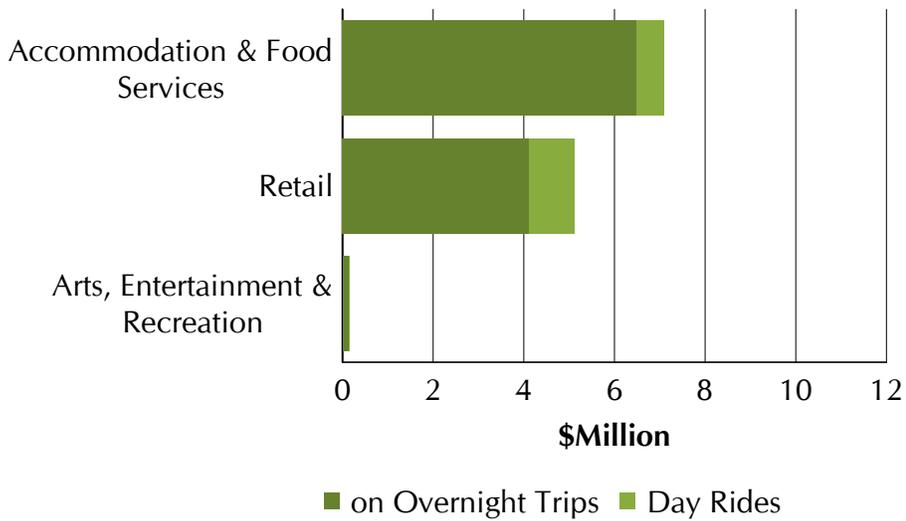
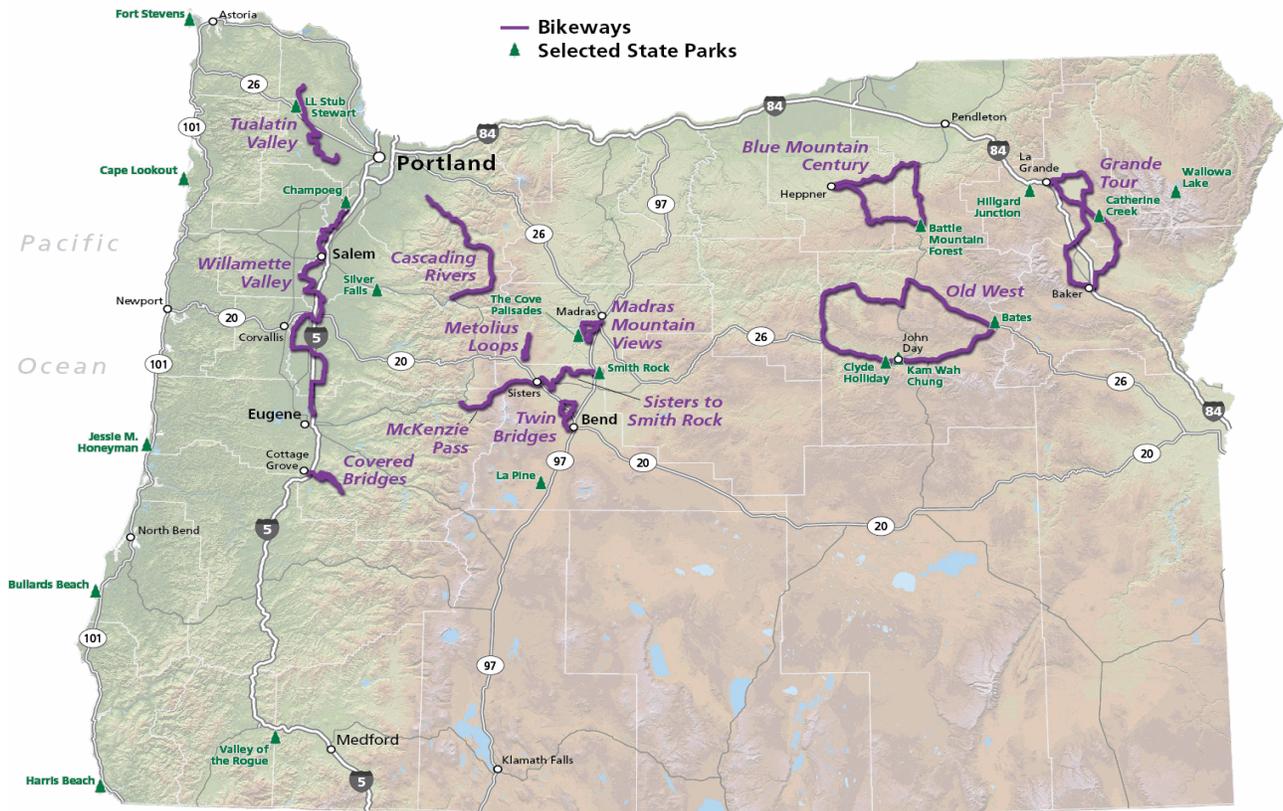


Figure II-4. Oregon Scenic Bikeway Expenditures by Commodity Purchased, 2014



III. Oregon Scenic Bikeways: Detailed Economic Impacts, 2014



Source: Oregon State Parks and Recreation Dept.

Blue Mountain Century

Distance: 109.4 mi (loop)
Season: summer & fall

Cascading Rivers

Distance: 69.6 mi
Season: summer

Covered Bridges

Distance: 37.8 mi (loop)
Season: year round

Grande Tour

Distance: 134.5 mi (loop)
Season: spring thru fall

Madras Mountain Views

Distance: 29.3 mi (loop)
Season: year round

McKenzie Pass

Distance: 36.1 mi
Season: summer & fall

Metolius River Loops

Distance: various
3.3-20 mi (loops)
Season: spring thru fall

Old West

Distance: 174.7 mi (loop)
Season: late spring thru fall

Sisters to Smith Rock

Distance: 36.9 mi
Season: spring thru fall

Tualatin Valley

Distance: 50.4 mi
Season: year round

Twin Bridges

Distance: 36.3 mi (loop)
Season: spring thru fall

Willamette Valley

Distance: 132 mi
Season: year round

Oregon Scenic Bikeway Expenditures

While bicycling on Oregon Scenic Bikeways, cyclists made expenditures for both overnight and day trips. Figure III-1 below shows the composition of overnight and day and expenditures within each Oregon Scenic Bikeway during 2014. Overall, the Willamette Valley, Tualatin Valley, and McKenzie Pass Scenic Bikeways had the highest amount of travel spending. It is also notable that travel spending for day trips is more significant as compared to the others, as well. For the Scenic Bikeways located in the Eastern region - Blue Mountain Century, Grande Tour, and Old West – travel spending was largely driven by overnight trips.

Figure III-1. Oregon Scenic Bikeway Expenditures by Trip Type, 2014

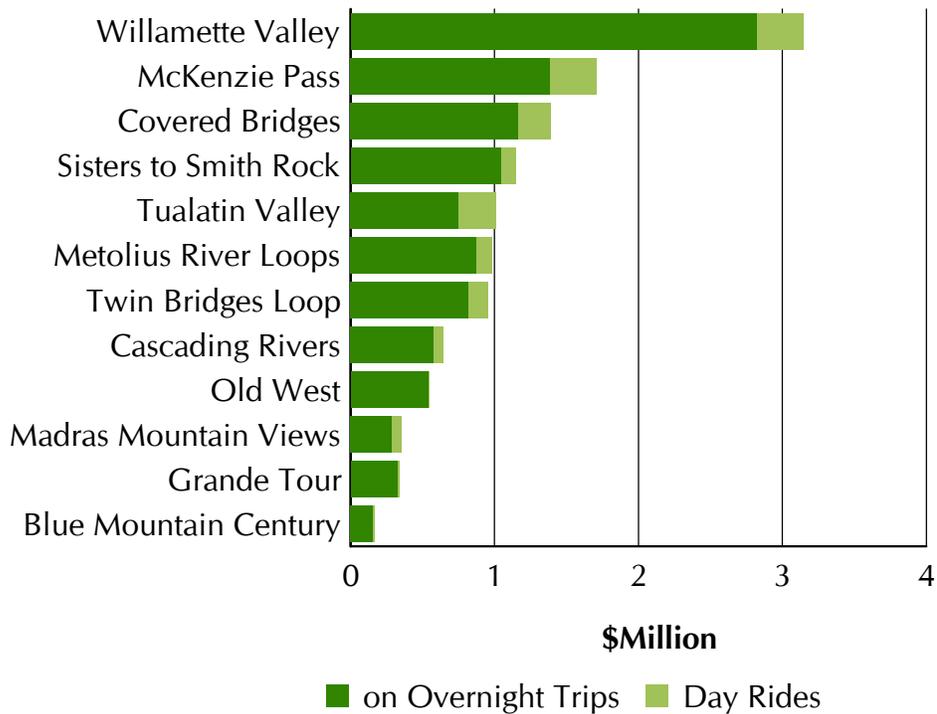


Table III-1. Oregon Scenic Bikeway Summary: Economic Impact, 2014

All Scenic Bikeways		Metolius River Loops	
Expenditures (\$000)	\$12,387	Expenditures (\$000)	\$981
Earnings (\$000)	\$3,394	Earnings (\$000)	\$270
Employment (Jobs)	156	Employment (Jobs)	12
State & Local Tax Receipts (\$000)	\$454	State & Local Tax Receipts (\$000)	\$34
Blue Mountain Century		Old West	
Expenditures (\$000)	\$169	Expenditures (\$000)	\$550
Earnings (\$000)	\$50	Earnings (\$000)	\$165
Employment (Jobs)	3	Employment (Jobs)	8
State & Local Tax Receipts (\$000)	\$8	State & Local Tax Receipts (\$000)	\$20
Cascading Rivers		Sisters to Smith Rock	
Expenditures (\$000)	\$641	Expenditures (\$000)	\$1,153
Earnings (\$000)	\$173	Earnings (\$000)	\$318
Employment (Jobs)	8	Employment (Jobs)	14
State & Local Tax Receipts (\$000)	\$31	State & Local Tax Receipts (\$000)	\$41
Covered Bridges		Tualatin Valley	
Expenditures (\$000)	\$1,390	Expenditures (\$000)	\$1,008
Earnings (\$000)	\$382	Earnings (\$000)	\$255
Employment (Jobs)	18	Employment (Jobs)	12
State & Local Tax Receipts (\$000)	\$52	State & Local Tax Receipts (\$000)	\$34
Grande Tour		Twin Bridges Loop	
Expenditures (\$000)	\$339	Expenditures (\$000)	\$954
Earnings (\$000)	\$100	Earnings (\$000)	\$254
Employment (Jobs)	5	Employment (Jobs)	11
State & Local Tax Receipts (\$000)	\$12	State & Local Tax Receipts (\$000)	\$32
Madras Mountain Views		Willamette Valley	
Expenditures (\$000)	\$354	Expenditures (\$000)	\$3,145
Earnings (\$000)	\$94	Earnings (\$000)	\$878
Employment (Jobs)	4	Employment (Jobs)	42
State & Local Tax Receipts (\$000)	\$12	State & Local Tax Receipts (\$000)	\$124
McKenzie Pass			
Expenditures (\$000)	\$1,704		
Earnings (\$000)	\$455		
Employment (Jobs)	20		
State & Local Tax Receipts (\$000)	\$55		

Source: Dean Runyan Associates.

Table III-2. Blue Mountain Century Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$160
Day Rides	\$9
Total	\$169
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$99
Arts, Entertainment & Recreation	\$2
Retail	\$67
Total	\$169
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$43
Arts, Entertainment & Recreation	\$1
Retail	\$6
Total	\$50
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	3
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$3
State Tax Receipts	\$6
Total	\$8

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-3. Cascading Rivers Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$577
Day Rides	\$64
Total	\$641
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$366
Arts, Entertainment & Recreation	\$9
Retail	\$266
Total	\$641
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$147
Arts, Entertainment & Recreation	\$3
Retail	\$23
Total	\$173
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	8
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$13
State Tax Receipts	\$19
Total	\$31

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-4. Covered Bridges Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$1,165
Day Rides	\$225
Total	\$1,390
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$768
Arts, Entertainment & Recreation	\$20
Retail	\$602
Total	\$1,390
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$327
Arts, Entertainment & Recreation	\$8
Retail	\$47
Total	\$382
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	18
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$27
State Tax Receipts	\$25
Total	\$52

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-5. Grande Tour Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$325
Day Rides	\$14
Total	\$339
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$200
Arts, Entertainment & Recreation	\$5
Retail	\$134
Total	\$339
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$87
Arts, Entertainment & Recreation	\$1
Retail	\$12
Total	\$100
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	5
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$5
State Tax Receipts	\$7
Total	\$12

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-6. Madras Mountain Views Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$287
Day Rides	\$68
Total	\$354
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$194
Arts, Entertainment & Recreation	\$5
Retail	\$155
Total	\$354
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$79
Arts, Entertainment & Recreation	\$2
Retail	\$13
Total	\$94
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	4
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$6
State Tax Receipts	\$6
Total	\$12

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-7. McKenzie Pass Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$1,385
Day Rides	\$319
Total	\$1,704
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$941
Arts, Entertainment & Recreation	\$24
Retail	\$740
Total	\$1,704
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$384
Arts, Entertainment & Recreation	\$9
Retail	\$63
Total	\$455
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	20
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$27
State Tax Receipts	\$29
Total	\$55

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-8. Metolius River Loops Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$873
Day Rides	\$108
Total	\$981
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$564
Arts, Entertainment & Recreation	\$13
Retail	\$404
Total	\$981
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$231
Arts, Entertainment & Recreation	\$5
Retail	\$34
Total	\$270
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	12
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$17
State Tax Receipts	\$17
Total	\$34

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-9. Old West Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$544
Day Rides	\$6
Total	\$550
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$331
Arts, Entertainment & Recreation	\$7
Retail	\$212
Total	\$550
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$144
Arts, Entertainment & Recreation	\$2
Retail	\$19
Total	\$165
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	8
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$9
State Tax Receipts	\$11
Total	\$20

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-10. Sisters to Smith Rock Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$1,050
Day Rides	\$102
Total	\$1,153
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$666
Arts, Entertainment & Recreation	\$16
Retail	\$471
Total	\$1,153
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$272
Arts, Entertainment & Recreation	\$6
Retail	\$40
Total	\$318
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	14
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$20
State Tax Receipts	\$20
Total	\$41

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-11. Tualatin Valley Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$750
Day Rides	\$258
Total	\$1,008
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$488
Arts, Entertainment & Recreation	\$19
Retail	\$500
Total	\$1,008
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$208
Arts, Entertainment & Recreation	\$7
Retail	\$39
Total	\$255
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	12
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$16
State Tax Receipts	\$17
Total	\$34

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-12. Twin Bridges Loop Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$821
Day Rides	\$133
Total	\$954
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$522
Arts, Entertainment & Recreation	\$15
Retail	\$417
Total	\$954
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$213
Arts, Entertainment & Recreation	\$5
Retail	\$35
Total	\$254
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	11
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$16
State Tax Receipts	\$16
Total	\$32

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

Table III-13. Willamette Valley Scenic Bikeway Economic Impact, 2014

Total Bicycle-Related Travel Expenditures	(\$000)
on Overnight Trips	\$2,828
Day Rides	\$317
Total	\$3,145
Bicycle-Related Travel Expenditures By Commodity Purchased	(\$000)
Accommodation & Food Services	\$1,778
Arts, Entertainment & Recreation	\$46
Retail	\$1,320
Total	\$3,145
Earnings Generated by Bicycle-Related Travel Expenditures	(\$000)
Accommodation & Food Services	\$757
Arts, Entertainment & Recreation	\$17
Retail	\$104
Total	\$878
Employment Generated by Bicycle-Related Travel Expenditures	Number of Jobs
Total	42
Tax Receipts Generated by Bicycle-Related Travel Expenditures	(\$000)
Local Tax Receipts	\$61
State Tax Receipts	\$63
Total	\$124

Details may not add to totals due to rounding.

Source: Dean Runyan Associates.

APPENDIX A

Trip Characteristics by Oregon Scenic Bikeway

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**Table A-1. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
ALL OREGON SCENIC BIKEWAYS**

Purpose of Trip	Overnight	Day
Primary reason for trip	69.3%	83.6%
One of several reasons for this trip	27.2%	11.9%
An unplanned activity while on this trip	3.4%	4.5%
Total	100.0%	100.0%
Sample Size (n)	812	776
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	83.3%	86.0%
Organized non-competitive group ride	9.9%	11.2%
Organized group tour	4.0%	0.8%
Other cycling event	2.8%	2.0%
Total	100.0%	100.0%
Sample Size (n)	819	767
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	18.2%	65.2%
50-99 miles	16.9%	18.3%
100-199 miles	33.6%	12.1%
200 miles or more	31.3%	4.4%
Total	100.0%	100.0%
Sample Size (n)	806	767
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	49.6%	NA
Campgrounds/RV Park	36.5%	NA
Friends/Relatives	9.7%	NA
Second Home	1.6%	NA
Other (event accommodations, etc)	2.6%	NA
Total	100.0%	NA
Sample Size (n)	812	NA
Number of Nights	Overnight	Day
1 Night	29.3%	NA
2 Nights	32.4%	NA
3-4 Nights	24.7%	NA
5-6 Nights	6.8%	NA
7+ Nights	6.8%	NA
Total	100.0%	NA
Mean	2.6	NA
Sample Size (n)	819	NA
Average Party Size	Overnight	Day
Number of Adults	2.7	2.5
Number of Children	0.2	0.2
Sample Size (n)	804	763

Table A-1. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
ALL OREGON SCENIC BIKEWAYS (continued)

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	23.9%	32.2%
Motorized vehicle	66.9%	61.5%
Train	4.0%	1.0%
MAX Light Rail Service	2.1%	2.2%
Bus	1.0%	1.7%
Other	2.1%	1.3%
Total	100.0%	100.0%
Sample Size (n)	806	767
When did you take a trip	Overnight	Day
January	0.2%	0.9%
February	0.0%	0.4%
March	0.7%	1.0%
April	2.5%	4.0%
May	12.6%	13.9%
June	24.1%	26.8%
July	16.3%	21.6%
August	20.1%	15.2%
September	18.3%	11.3%
October	4.3%	4.0%
November	0.5%	0.5%
December	0.2%	0.4%
Total	100.0%	100.0%
Sample Size (n)	809	772

Source: Dean Runyan Associates.

**Table A-2. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
BLUE MOUNTAIN CENTURY**

Purpose of Trip	Overnight	Day
Primary reason for trip	82.6%	78.6%
One of several reasons for this trip	15.2%	21.4%
An unplanned activity while on this trip	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	65.2%	92.9%
Organized non-competitive group ride	26.1%	0.0%
Organized group tour	8.7%	7.1%
Other cycling event	0.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	0.0%	42.9%
50-99 miles	11.1%	28.6%
100-199 miles	48.9%	21.4%
200 miles or more	40.0%	7.1%
Total	100.0%	100.0%
Sample Size (n)	45	14
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	43.5%	NA
Campgrounds/RV Park	38.7%	NA
Friends/Relatives	8.1%	NA
Second Home	3.2%	NA
Other (event accommodations, etc)	6.5%	NA
Total	100.0%	NA
Sample Size (n)	46	NA
Number of Nights	Overnight	Day
1 Night	28.3%	NA
2 Nights	32.6%	NA
3-4 Nights	23.9%	NA
5-6 Nights	6.5%	NA
7+ Nights	8.7%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	46	NA
Average Party Size	Overnight	Day
Number of Adults	2.6	1.9
Number of Children	0.2	0.4
Sample Size (n)	45	14

**Table A-2. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
BLUE MOUNTAIN CENTURY (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	8.9%	35.7%
Motorized vehicle	91.1%	64.3%
Total	100.0%	100.0%
Sample Size (n)	45	14

When did you take a trip	Overnight	Day
March	0.0%	7.1%
April	0.0%	0.0%
May	17.4%	28.6%
June	28.3%	14.3%
July	4.3%	21.4%
August	21.7%	21.4%
September	26.1%	7.1%
October	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	14

Locations stayed/visited during a trip	Overnight	Day
Heppner	45.0%	26.3%
Ukiah	18.3%	21.1%
Pendleton	20.0%	47.4%
Other	16.7%	5.3%
Total	100.0%	100.0%
Sample Size (n)	46	14

Source: Dean Runyan Associates.

**Table A-3. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
CASCADING RIVERS**

Purpose of Trip	Overnight	Day
Primary reason for trip	68.4%	78.3%
One of several reasons for this trip	31.6%	13.0%
An unplanned activity while on this trip	0.0%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	89.5%	87.0%
Organized non-competitive group ride	5.3%	13.0%
Organized group tour	5.3%	0.0%
Other cycling event	0.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	19	23
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	52.6%	60.9%
50-99 miles	10.5%	26.1%
100-199 miles	0.0%	4.3%
200 miles or more	36.8%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	43.5%	NA
Campgrounds/RV Park	34.8%	NA
Friends/Relatives	17.4%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	4.3%	NA
Total	100.0%	NA
Sample Size (n)	19	NA
Number of Nights	Overnight	Day
1 Night	68.4%	NA
2 Nights	21.1%	NA
3-4 Nights	10.5%	NA
5-6 Nights	0.0%	NA
7+ Nights	0.0%	NA
Total	100.0%	NA
Mean	1.5	NA
Sample Size (n)	19	NA
Average Party Size	Overnight	Day
Number of Adults	1.8	2.0
Number of Children	0.1	0.3
Sample Size (n)	19	23

**Table A-3. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
CASCADING RIVERS (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	68.4%	21.7%
Motorized vehicle	21.1%	73.9%
Train	5.3%	4.3%
MAX Light Rail	5.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	19	23

When did you take a trip	Overnight	Day
April	0.0%	4.3%
May	5.3%	0.0%
June	15.8%	17.4%
July	26.3%	21.7%
August	31.6%	30.4%
September	21.1%	17.4%
October	0.0%	8.7%
Total	100.0%	100.0%
Sample Size (n)	19	23

Locations stayed/visited during a trip	Overnight	Day
Clackamas	0.0%	2.4%
Bend	6.7%	7.1%
Detroit	26.7%	19.0%
Estacada	0.0%	28.6%
Gresham	0.0%	4.8%
Portland	6.7%	16.7%
Salem	0.0%	4.8%
Sandy	0.0%	7.1%
Sisters	0.0%	2.4%
Troutdale	0.0%	2.4%
Mt Hood National Forest Campgrounds	46.7%	0.0%
Other	13.3%	4.8%
Total	100.0%	100.0%
Sample Size (n)	15	23

Source: Dean Runyan Associates.

**Table A-4. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
COVERED BRIDGES**

Purpose of Trip	Overnight	Day
Primary reason for trip	56.9%	79.3%
One of several reasons for this trip	38.5%	14.1%
An unplanned activity while on this trip	4.6%	6.5%
Total	100.0%	100.0%
Sample Size (n)	65	92
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	89.4%	88.0%
Organized non-competitive group ride	3.0%	10.9%
Organized group tour	3.0%	0.0%
Other cycling event	4.5%	1.1%
Total	100.0%	100.0%
Sample Size (n)	66	92
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	4.6%	57.6%
50-99 miles	24.6%	29.3%
100-199 miles	40.0%	8.7%
200 miles or more	30.8%	4.3%
Total	100.0%	100.0%
Sample Size (n)	65	92
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	56.5%	NA
Campgrounds/RV Park	37.7%	NA
Friends/Relatives	5.8%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	65	NA
Number of Nights	Overnight	Day
1 Night	47.0%	NA
2 Nights	36.4%	NA
3-4 Nights	9.1%	NA
5-6 Nights	3.0%	NA
7+ Nights	4.5%	NA
Total	100.0%	NA
Mean	2.0	NA
Sample Size (n)	66	NA
Average Party Size	Overnight	Day
Number of Adults	2.2	2.3
Number of Children	0.2	0.3
Sample Size (n)	65	92

**Table A-4. Oregon Scenic Bikeway Travel Characteristics by Type of Trip, 2014:
COVERED BRIDGES (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	12.3%	17.4%
Motorized vehicle	83.1%	76.1%
Train	1.5%	1.1%
Bus	3.1%	5.4%
Total	100.0%	100.0%
Sample Size (n)	65	92

When did you take a trip	Overnight	Day
March	1.5%	2.2%
April	1.5%	4.4%
May	6.2%	6.6%
June	18.5%	19.8%
July	23.1%	18.7%
August	23.1%	17.6%
September	13.8%	22.0%
October	7.7%	7.7%
November	3.1%	0.0%
December	1.5%	1.1%
Total	100.0%	100.0%
Sample Size (n)	65	91

Locations stayed/visited during a trip	Overnight	Day
Cottage Grove	58.8%	73.6%
Eugene	25.0%	37.4%
Other	16.2%	5.5%
Total	100.0%	116.5%
Sample Size (n)	66	91

Source: Dean Runyan Associates.

**Table A-5. Oregon Scenic Bikeway Travel Characteristics by Type of Trip, 2014:
GRANDE TOUR**

Purpose of Trip	Overnight	Day
Primary reason for trip	80.0%	73.3%
One of several reasons for this trip	15.6%	6.7%
An unplanned activity while on this trip	4.4%	20.0%
Total	100.0%	100.0%
Sample Size (n)	45	15
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	60.9%	80.0%
Organized non-competitive group ride	21.7%	13.3%
Organized group tour	6.5%	6.7%
Other cycling event	10.9%	0.0%
Total	100.0%	100.0%
Sample Size (n)	46	15
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	11.4%	60.0%
50-99 miles	6.8%	26.7%
100-199 miles	25.0%	0.0%
200 miles or more	56.8%	13.3%
Total	100.0%	100.0%
Sample Size (n)	44	15
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	70.4%	NA
Campgrounds/RV Park	24.1%	NA
Friends/Relatives	5.6%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total*	100.0%	NA
Sample Size (n)	45	NA
Number of Nights	Overnight	Day
1 Night	15.2%	NA
2 Nights	30.4%	NA
3-4 Nights	41.3%	NA
5-6 Nights	10.9%	NA
7+ Nights	2.2%	NA
Total	100.0%	NA
Mean	2.9	NA
Sample Size (n)	46	NA
Average Party Size	Overnight	Day
Number of Adults	3.2	2.2
Number of Children	0.1	0.2
Sample Size (n)	44	14

**Table A-5. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
GRANDE TOUR (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	15.9%	66.7%
Motorized vehicle	81.8%	33.3%
Other	2.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	44	15

When did you take a trip	Overnight	Day
April	0.0%	6.7%
May	20.5%	0.0%
June	34.1%	46.7%
July	6.8%	13.3%
August	20.5%	13.3%
September	15.9%	13.3%
October	2.3%	6.7%
Total	100.0%	100.0%
Sample Size (n)	44	15

Locations stayed/visited during a trip	Overnight	Day
Island City	0.0%	13.8%
La Grande	26.3%	41.4%
Union	19.7%	24.1%
North Powder	5.3%	0.0%
Baker City	38.2%	10.3%
Other	10.5%	10.3%
Total	100.0%	100.0%
Sample Size (n)	47	16

Source: Dean Runyan Associates.

**Table A-6. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MADRAS MOUNTAIN VIEWS**

Purpose of Trip	Overnight	Day
Primary reason for trip	68.2%	90.0%
One of several reasons for this trip	27.3%	5.0%
An unplanned activity while on this trip	4.5%	5.0%
Total	100.0%	100.0%
Sample Size (n)	22	20
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	52.2%	95.0%
Organized non-competitive group ride	39.1%	0.0%
Organized group tour	8.7%	0.0%
Other cycling event	0.0%	5.0%
Total	100.0%	100.0%
Sample Size (n)	23	20
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	13.6%	45.0%
50-99 miles	13.6%	15.0%
100-199 miles	50.0%	30.0%
200 miles or more	22.7%	10.0%
Total	100.0%	100.0%
Sample Size (n)	22	20
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	29.2%	NA
Campgrounds/RV Park	70.8%	NA
Friends/Relatives	0.0%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	22	NA
Number of Nights	Overnight	Day
1 Night	21.7%	NA
2 Nights	43.5%	NA
3-4 Nights	17.4%	NA
5-6 Nights	8.7%	NA
7+ Nights	8.7%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	23	NA
Average Party Size	Overnight	Day
Number of Adults	2.9	2.4
Number of Children	0.6	0.1
Sample Size (n)	22	18

**Table A-6. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MADRAS MOUNTAIN VIEWS (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	31.8%	15.0%
Motorized vehicle	59.1%	75.0%
Train	4.5%	0.0%
Bus	4.5%	0.0%
Other	0.0%	10.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

When did you take a trip	Overnight	Day
March	9.1%	5.0%
April	4.5%	5.0%
May	9.1%	20.0%
June	18.2%	5.0%
July	13.6%	25.0%
August	4.5%	5.0%
September	40.9%	20.0%
October	0.0%	15.0%
Total	100.0%	100.0%
Sample Size (n)	22	20

Locations stayed/visited during a trip	Overnight	Day
Bend	10.0%	21.3%
Culver	10.0%	12.8%
Madras	46.7%	31.9%
Metolius	3.3%	8.5%
Redmond	10.0%	8.5%
Sisters	10.0%	8.5%
Sunriver	0.0%	4.3%
Other	10.0%	4.3%
Total	100.0%	100.0%
Sample Size (n)	23	22

Source: Dean Runyan Associates.

**Table A-7. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MCKENZIE PASS**

Purpose of Trip	Overnight	Day
Primary reason for trip	66.4%	90.3%
One of several reasons for this trip	31.4%	8.3%
An unplanned activity while on this trip	2.1%	1.4%
Total	100.0%	100.0%
Sample Size (n)	140	144
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	84.3%	89.4%
Organized non-competitive group ride	7.9%	8.5%
Organized group tour	2.9%	0.7%
Other cycling event	5.0%	1.4%
Total	100.0%	100.0%
Sample Size (n)	140	142
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	7.9%	39.4%
50-99 miles	26.4%	31.0%
100-199 miles	45.7%	26.1%
200 miles or more	20.0%	3.5%
Total	100.0%	100.0%
Sample Size (n)	140	142
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.4%	NA
Campgrounds/RV Park	35.3%	NA
Friends/Relatives	8.7%	NA
Second Home	4.0%	NA
Other (event accommodations, etc)	0.6%	NA
Total	100.0%	NA
Sample Size (n)	140	NA
Number of Nights	Overnight	Day
1 Night	25.7%	NA
2 Nights	37.1%	NA
3-4 Nights	22.9%	NA
5-6 Nights	7.9%	NA
7+ Nights	6.4%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	140	NA
Average Party Size	Overnight	Day
Number of Adults	3.0	2.6
Number of Children	0.3	0.1
Sample Size (n)	140	142

**Table A-7. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
MCKENZIE PASS (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	18.6%	12.7%
Motorized vehicle	77.9%	83.8%
Train	1.4%	1.4%
Bus	2.1%	2.1%
Total	100.0%	100.0%
Sample Size (n)	140	142
When did you take a trip	Overnight	Day
April	0.7%	3.5%
May	22.1%	22.2%
June	32.1%	54.2%
July	20.0%	9.0%
August	16.4%	5.6%
September	7.9%	5.6%
October	0.7%	0.0%
Total	100.0%	100.0%
Sample Size (n)	140	142
Locations stayed/visited during a trip	Overnight	Day
Bend	21.2%	12.7%
Eugene	9.8%	21.3%
Redmond	4.3%	2.7%
Sisters	35.3%	48.0%
Sunriver	3.8%	1.8%
Other	25.5%	13.6%
Total	100.0%	100.0%
Sample Size (n)	141	146

Source: Dean Runyan Associates.

**Table A-8. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
METOLIUS RIVER LOOPS**

Purpose of Trip	Overnight	Day
Primary reason for trip	34.2%	66.7%
One of several reasons for this trip	57.9%	28.6%
An unplanned activity while on this trip	7.9%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	92.1%	85.7%
Organized non-competitive group ride	5.3%	4.8%
Organized group tour	2.6%	4.8%
Other cycling event	0.0%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	10.8%	28.6%
50-99 miles	37.8%	19.0%
100-199 miles	37.8%	38.1%
200 miles or more	13.5%	14.3%
Total	100.0%	100.0%
Sample Size (n)	37	21
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	47.7%	NA
Campgrounds/RV Park	36.4%	NA
Friends/Relatives	11.4%	NA
Second Home	2.3%	NA
Other (event accommodations, etc)	2.3%	NA
Total	100.0%	NA
Sample Size (n)	38	NA
Number of Nights	Overnight	Day
1 Night	28.9%	NA
2 Nights	42.1%	NA
3-4 Nights	26.3%	NA
5-6 Nights	0.0%	NA
7+ Nights	2.6%	NA
Total	100.0%	NA
Mean	2.2	NA
Sample Size (n)	38	NA
Average Party Size	Overnight	Day
Number of Adults	2.3	2.4
Number of Children	0.4	0.1
Sample Size (n)	37	21

**Table A-8. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
METOLIUS RIVER LOOPS (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	8.1%	14.3%
Motorized vehicle	91.9%	81.0%
Bus	0.0%	4.8%
Total	100.0%	100.0%
Sample Size (n)	38	21
When did you take a trip	Overnight	Day
March	0.0%	4.8%
April	0.0%	0.0%
May	2.6%	19.0%
June	23.7%	28.6%
July	10.5%	14.3%
August	26.3%	19.0%
September	26.3%	4.8%
October	7.9%	9.5%
November	2.6%	0.0%
Total	100.0%	100.0%
Sample Size (n)	38	21
Locations stayed/visited during a trip	Overnight	Day
Sisters	38.3%	58.3%
Bend	21.3%	25.0%
Madras	2.1%	4.2%
Redmond	6.4%	0.0%
Sunriver	8.5%	4.2%
Other	23.4%	8.3%
Total	100.0%	100.0%
Sample Size (n)	38	21

Source: Dean Runyan Associates.

**Table A-9. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
OLD WEST**

Purpose of Trip	Overnight	Day
Primary reason for trip	87.9%	100.0%
One of several reasons for this trip	11.0%	0.0%
An unplanned activity while on this trip	1.1%	0.0%
Total	100.0%	100.0%
Sample Size (n)	94	5
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	82.6%	100.0%
Organized non-competitive group ride	4.3%	0.0%
Organized group tour	10.9%	0.0%
Other cycling event	2.2%	0.0%
Total	100.0%	100.0%
Sample Size (n)	92	5
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	5.5%	40.0%
50-99 miles	7.7%	20.0%
100-199 miles	35.2%	20.0%
200 miles or more	51.6%	20.0%
Total	100.0%	100.0%
Sample Size (n)	91	5
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	45.4%	NA
Campgrounds/RV Park	43.1%	NA
Friends/Relatives	3.8%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	7.7%	NA
Total	100.0%	NA
Sample Size (n)	91	NA
Number of Nights	Overnight	Day
1 Night	13.0%	NA
2 Nights	28.3%	NA
3-4 Nights	37.0%	NA
5-6 Nights	12.0%	NA
7+ Nights	9.8%	NA
Total	100.0%	NA
Mean	3.3	NA
Sample Size (n)	92	NA
Average Party Size	Overnight	Day
Number of Adults	2.8	2.0
Number of Children	0.2	0.8
Sample Size (n)	90	5

**Table A-9. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
OLD WEST (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	14.3%	40.0%
Motorized vehicle	85.7%	60.0%
Total	100.0%	100.0%
Sample Size (n)	91	5

When did you take a trip	Overnight	Day
January	1.1%	0.0%
February	0.0%	20.0%
March	2.2%	0.0%
April	3.3%	0.0%
May	15.4%	0.0%
June	24.2%	40.0%
July	12.1%	20.0%
August	18.7%	20.0%
September	14.3%	0.0%
October	8.8%	0.0%
Total	100.0%	100.0%
Sample Size (n)	91	5

Locations stayed/visited during a trip	Overnight	Day
Baker City	12.0%	16.7%
Bend	7.6%	0.0%
Canyon City	1.1%	0.0%
Dayville	21.7%	0.0%
John Day	51.1%	50.0%
Long Creek	37.0%	0.0%
Monument	20.7%	16.7%
Mt. Vernon	10.9%	0.0%
Prairie City	31.5%	16.7%
Other	23.9%	0.0%
Total	217.5%	100.0%
Sample Size (n)	92	5

Source: Dean Runyan Associates.

**Table A-10. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
SISTERS TO SMITH ROCK**

Purpose of Trip	Overnight	Day
Primary reason for trip	74.1%	66.7%
One of several reasons for this trip	25.9%	25.6%
An unplanned activity while on this trip	0.0%	7.7%
Total	100.0%	100.0%
Sample Size (n)	81	39
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	76.5%	87.2%
Organized non-competitive group ride	18.5%	7.7%
Organized group tour	1.2%	2.6%
Other cycling event	3.7%	2.6%
Total	100.0%	100.0%
Sample Size (n)	81	39
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	3.8%	48.7%
50-99 miles	10.0%	15.4%
100-199 miles	61.3%	30.8%
200 miles or more	25.0%	5.1%
Total	100.0%	100.0%
Sample Size (n)	80	39
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.0%	NA
Campgrounds/RV Park	35.4%	NA
Friends/Relatives	10.4%	NA
Second Home	3.1%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	81	NA
Number of Nights	Overnight	Day
1 Night	25.9%	NA
2 Nights	29.6%	NA
3-4 Nights	29.6%	NA
5-6 Nights	3.7%	NA
7+ Nights	11.1%	NA
Total	100.0%	NA
Mean	2.8	NA
Sample Size (n)	81	NA
Average Party Size	Overnight	Day
Number of Adults	3.1	2.2
Number of Children	0.3	0.0
Sample Size (n)	79	39

**Table A-10. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
SISTERS TO SMITH ROCK (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	12.5%	25.6%
Motorized vehicle	86.3%	74.4%
Bus	1.3%	0.0%
Total	100.0%	100.0%
Sample Size (n)	80	39
When did you take a trip	Overnight	Day
January	0.0%	2.6%
February	0.0%	0.0%
March	0.0%	0.0%
April	1.2%	0.0%
May	9.9%	10.3%
June	22.2%	25.6%
July	18.5%	35.9%
August	19.8%	10.3%
September	27.2%	7.7%
October	1.2%	5.1%
November	0.0%	2.6%
Total	100.0%	100.0%
Sample Size (n)	81	39
Locations stayed/visited during a trip	Overnight	Day
Bend	26.0%	17.1%
Madras	6.0%	10.0%
Redmond	8.0%	11.4%
Sisters	38.0%	40.0%
Terrebone	7.0%	21.4%
Other	15.0%	0.0%
Total	100.0%	100.0%
Sample Size (n)	81	39

Source: Dean Runyan Associates.

**Table A-11. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TUALATIN VALLEY**

Purpose of Trip	Overnight	Day
Primary reason for trip	71.4%	89.7%
One of several reasons for this trip	22.4%	7.6%
An unplanned activity while on this trip	6.1%	2.7%
Total	100.0%	100.0%
Sample Size (n)	49	185
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	92.0%	83.8%
Organized non-competitive group ride	4.0%	14.1%
Organized group tour	0.0%	0.5%
Other cycling event	4.0%	1.6%
Total	100.0%	100.0%
Sample Size (n)	50	185
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	57.1%	88.6%
50-99 miles	12.2%	6.5%
100-199 miles	8.2%	3.2%
200 miles or more	22.4%	1.6%
Total	100.0%	100.0%
Sample Size (n)	49	185
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	26.9%	NA
Campgrounds/RV Park	61.5%	NA
Friends/Relatives	9.6%	NA
Second Home	1.9%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	49	NA
Number of Nights	Overnight	Day
1 Night	58.0%	NA
2 Nights	22.0%	NA
3-4 Nights	12.0%	NA
5-6 Nights	2.0%	NA
7+ Nights	6.0%	NA
Total	100.0%	NA
Mean	1.9	NA
Sample Size (n)	50	NA
Average Party Size	Overnight	Day
Number of Adults	2.4	2.7
Number of Children	0.4	0.2
Sample Size (n)	49	181

**Table A-11. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TUALATIN VALLEY (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	36.7%	29.2%
Motorized vehicle	34.7%	60.0%
Train	4.1%	0.5%
MAX Light Rail	24.5%	9.2%
Bus	0.0%	1.1%
Total	100.0%	100.0%
Sample Size (n)	49	185

When did you take a trip	Overnight	Day
January	0.0%	1.1%
February	0.0%	0.5%
March	0.0%	0.5%
April	10.2%	4.9%
May	14.3%	10.4%
June	14.3%	17.0%
July	16.3%	26.4%
August	14.3%	20.9%
September	26.5%	12.1%
October	4.1%	4.9%
November	0.0%	0.5%
December	0.0%	0.5%
Total	100.0%	100.0%
Sample Size (n)	49	182

Locations stayed/visited during a trip	Overnight	Day
Banks	3.6%	24.7%
Beaverton	0.0%	8.0%
Forest Grove	9.1%	13.5%
Hillsboro	3.6%	12.5%
Portland	7.3%	7.2%
Tualatin	3.6%	4.7%
Vernonia	25.5%	27.7%
Other	47.3%	1.7%
Total	100.0%	100.0%
Sample Size (n)	50	186

Source: Dean Runyan Associates.

**Table A-12. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TWIN BRIDGES LOOP**

Purpose of Trip	Overnight	Day
Primary reason for trip	30.8%	77.1%
One of several reasons for this trip	61.5%	12.5%
An unplanned activity while on this trip	7.7%	10.4%
Total	100.0%	100.0%
Sample Size (n)	27	48
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	96.3%	89.1%
Organized non-competitive group ride	3.7%	8.7%
Organized group tour	0.0%	0.0%
Other cycling event	0.0%	2.2%
Total	100.0%	100.0%
Sample Size (n)	27	46
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	7.7%	80.4%
50-99 miles	3.8%	6.5%
100-199 miles	42.3%	8.7%
200 miles or more	46.2%	4.3%
Total	100.0%	100.0%
Sample Size (n)	26	46
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	57.1%	NA
Campgrounds/RV Park	17.9%	NA
Friends/Relatives	17.9%	NA
Second Home	7.1%	NA
Other (event accommodations, etc)	0.0%	NA
Total	100.0%	NA
Sample Size (n)	28	NA
Number of Nights	Overnight	Day
1 Night	14.8%	NA
2 Nights	55.6%	NA
3-4 Nights	11.1%	NA
5-6 Nights	7.4%	NA
7+ Nights	11.1%	NA
Total	100.0%	NA
Mean	2.9	NA
Sample Size (n)	27	NA
Average Party Size	Overnight	Day
Number of Adults	2.7	2.4
Number of Children	0.5	0.2
Sample Size (n)	26	47

**Table A-12. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
TWIN BRIDGES LOOP (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	34.6%	69.6%
Motorized vehicle	65.4%	30.4%
Total	100.0%	100.0%
Sample Size (n)	26	46
When did you take a trip	Overnight	Day
January	0.0%	2.1%
February	0.0%	2.1%
March	0.0%	2.1%
April	0.0%	2.1%
May	3.8%	6.3%
June	19.2%	18.8%
July	23.1%	37.5%
August	23.1%	16.7%
September	19.2%	8.3%
October	3.8%	2.1%
November	3.8%	0.0%
December	3.8%	2.1%
Total	100.0%	100.0%
Sample Size (n)	26	48
Locations stayed/visited during a trip	Overnight	Day
Bend	72.4%	53.8%
Madras	0.0%	3.8%
Redmond	10.3%	9.0%
Sunriver	6.9%	2.6%
Tumalo	0.0%	26.9%
Other	10.3%	3.8%
Total	100.0%	100.0%
Sample Size (n)	28	52

Source: Dean Runyan Associates.

**Table A-13. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
WILLAMETTE VALLEY**

Purpose of Trip	Overnight	Day
Primary reason for trip	70.3%	82.4%
One of several reasons for this trip	24.9%	13.5%
An unplanned activity while on this trip	4.9%	4.1%
Total	100.0%	100.0%
Sample Size (n)	185	170
Type of Bicycling Activity	Overnight	Day
Independent bicycling (solo or with family/friends)	90.9%	81.8%
Organized non-competitive group ride	6.5%	15.2%
Organized group tour	2.2%	0.0%
Other cycling event	0.5%	3.0%
Total	100.0%	100.0%
Sample Size (n)	186	165
Average Miles Traveled to get to the Scenic Bikeway	Overnight	Day
Under 50 miles	39.3%	75.8%
50-99 miles	18.6%	15.8%
100-199 miles	14.8%	4.2%
200 miles or more	27.3%	4.2%
Total	100.0%	100.0%
Sample Size (n)	183	165
Type(s) of Accommodation	Overnight	Day
Commercial Lodging	51.2%	NA
Campgrounds/RV Park	30.2%	NA
Friends/Relatives	14.9%	NA
Second Home	0.0%	NA
Other (event accommodations, etc)	3.7%	NA
Total	100.0%	NA
Sample Size (n)	185	NA
Number of Nights	Overnight	Day
1 Night	31.2%	NA
2 Nights	26.3%	NA
3-4 Nights	27.4%	NA
5-6 Nights	8.6%	NA
7+ Nights	6.5%	NA
Total	100.0%	NA
Mean	2.7	NA
Sample Size (n)	186	NA
Average Party Size	Overnight	Day
Number of Adults	2.4	2.4
Number of Children	0.1	0.1
Sample Size (n)	183	167

**Table A-13. Oregon Scenic Bikeway Characteristics by Type of Trip, 2014:
WILLAMETTE VALLEY (continued)**

How did you get to the Bikeway's start?	Overnight	Day
Bicycle	38.8%	55.2%
Motorized vehicle	41.5%	39.4%
Train	14.2%	1.8%
MAX Light Rail Service	2.2%	0.0%
Bus	1.1%	1.2%
Other	2.2%	2.4%
Total	100.0%	100.0%
Sample Size (n)	183	165

When did you take a trip	Overnight	Day
January	0.5%	1.8%
February	0.0%	0.0%
March	0.5%	0.6%
April	4.3%	5.3%
May	8.7%	18.2%
June	20.7%	22.9%
July	17.4%	22.4%
August	23.4%	14.7%
September	17.9%	10.6%
October	6.5%	2.4%
November	0.0%	1.2%
Total	100.0%	100.0%
Sample Size (n)	184	170

Locations stayed/visited during a trip	Overnight	Day
Albany	16.1%	9.9%
Brownsville	5.9%	9.2%
Corvallis	11.6%	9.9%
Eugene	19.8%	9.6%
Gervais	0.3%	2.7%
Independence	5.1%	9.9%
Jefferson	0.8%	4.9%
Keizer	0.6%	6.3%
Monmouth	5.1%	7.0%
Salem	15.3%	14.3%
St. Paul	2.8%	5.8%
Woodburn	2.0%	4.9%
Other	14.7%	5.6%
Total	100.0%	100.0%
Sample Size (n)	188	169

Source: Dean Runyan Associates.

APPENDIX B

Demographics

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Table B-1. Demographic Characteristics of Oregon Scenic Bikeway Travelers, 2014

Comfortable level as a bicycle rider		<i>n = 1,035</i>
Comfortable riding only on paths away from cars		2.4%
Comfortable riding on paths and very low traffic roads with a wide shoulder		19.1%
Comfortable riding on roads with heavy traffic if there is a bike lane		28.5%
Comfortable riding anywhere (in traffic and without bike lanes or shoulders)		50.0%
Total		100.0%
Gender		<i>n = 1,035</i>
Male		65.3%
Female		34.7%
Total		100.0%
Age		<i>n = 1,015</i>
17 or younger		0.1%
18-20		0.2%
21-29		5.5%
30-39		13.3%
40-49		17.1%
50-59		28.2%
60 or older		35.6%
Total		100.0%
Education		<i>n = 1,009</i>
Some high school or high school diploma		3.1%
Some college or two-year degree		15.3%
Bachelor's degree		36.6%
Graduate degree		45.1%
Total		100.0%
Household Income		<i>n = 857</i>
Under \$25,000		5.8%
\$25,000 - \$49,999		12.3%
\$50,000 - \$74,999		18.1%
\$75,000 - \$99,999		24.9%
\$100,000 - \$199,999		30.6%
\$200,000 or more		8.4%
Total		100.0%
Origin of Residence		<i>n = 1,017</i>
Oregon		81.3%
Washington		6.0%
California		4.4%
Idaho		1.0%
Other US States		5.0%
Other Countries		2.3%

Source: Dean Runyan Associates.

APPENDIX C

Planning a Ride and Experiences on Oregon Scenic Bikeways

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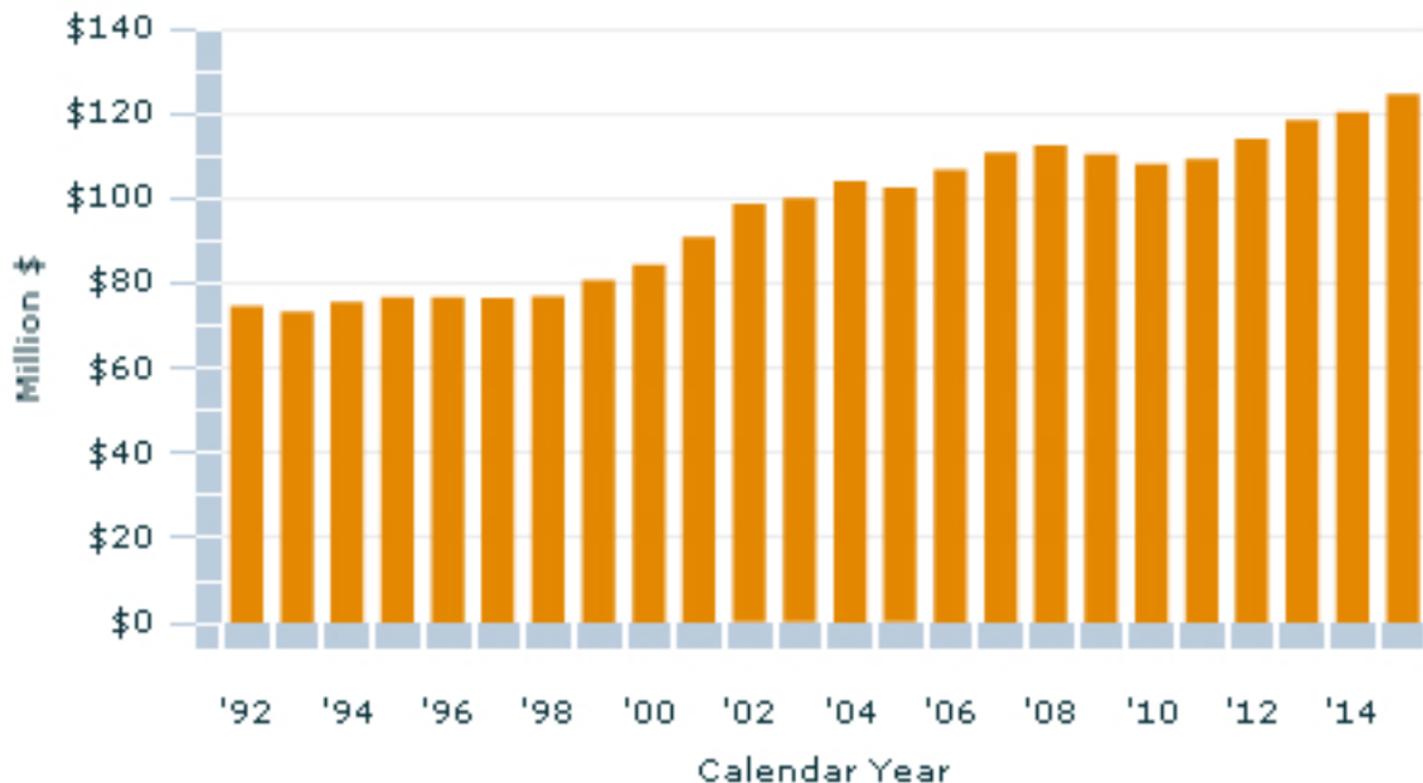
Table C-1. Planning a Ride and Experiences on Oregon Scenic Bikeways, 2014

How did you hear about Oregon Scenic Bikeways?		<i>n</i> = 1,091
Scenic Bikeway Map Guide		16.2%
Ride Oregon website (RideOregonRide.com)		15.1%
While out riding and saw one of the Oregon Scenic Bikeway signs		13.1%
From a friend or relative		12.0%
Oregon State Parks and Recreation website		9.2%
Travel Oregon website (TravelOregon.com)		9.2%
Other (please specify)		8.0%
On social media (Facebook, Twitter)		5.2%
Oregon Visitor or Welcome Center		4.0%
Oregon Scenic Bikeway video on YouTube		3.5%
From a local business (at a restaurant or hotel, etc.)		2.7%
This survey is the first I've heard about Oregon's Scenic Bikeways		1.5%
From Trail Count volunteers while riding one of the Scenic Bikeways		0.3%
Total		100.0%
Did you use any of the Bikeway detailed printable PDF maps*?		<i>n</i> = 1,089
Yes		56.4%
No		43.6%
Total		100.0%
Did you find the maps to be useful?		<i>n</i> = 615
Yes		99.0%
No		1.0%
Total		100.0%
Did you use any of the Bikeway detailed printable PDF cue sheets*?		<i>n</i> = 1,083
Yes		36.3%
No		63.7%
Total		100.0%
Did you find the cue sheets to be useful?		<i>n</i> = 393
Yes		98.0%
No		2.0%
Total		100.0%
Did you use the directional Scenic Bikeway road signs along the route?		<i>n</i> = 1,082
Yes		77.8%
No		22.2%
Total		100.0%
Was there any point on the route where you felt a directional sign was missing?		<i>n</i> = 842
Yes		19.3%
No		80.7%
Total		100.0%

* Printable PDF maps and PDF cue sheets are found on Oregon State Parks and Recreation website or on RideOregonRide.com

Source: Dean Runyan Associates.

Curry County Visitor Spending at Destination



Curry County Juvenile/Parks Department

94235 Moore Street, Suite 231
Gold Beach, Oregon 97444

Jonathan J. Trost, Director



Commissioner Smith

Re: Economic Development

In light of recent discussion regarding the Economic Development Department and its effectiveness I would like to add a few things to the discussion. Over the past 20 months Econ Dev has worked alongside the Parks department and this has been instrumental in the growth and exposure of the parks. We all acknowledge that tourism is one of our greatest assets here in Curry County, and our county parks are a great indicator to growth that has been generated over the past two years by our Economic Development Department staff. In 2014 the County Parks generated \$34,062.86, in 2015 after several improvements, events and advertising it jumped to \$51,880.47 and with those efforts continued we closed 2016 at \$88,433.23.

The Economic Development Department has been instrumental in a multitude of ways, from event organizing, marketing, advertising, and promoting all of our successes, as they are a team effort.

It should be known that the Economic Development Department is an invaluable asset to this county and I hope it remains intact.

Respectfully,

Jay Trost

Economic Development – Tourism

Immediately upon hire staff saw Brookings was left off Wild Rivers Coast promotions, as were 'non-oceanfront' communities. Soon learned Gold Beach was claiming to promote 'all'. A view of their website revealed a lot in the county was not promoted, and, beyond the greater Gold Beach area, promotion was almost non-existent. Developed a 'coastal' logo to align with state marketing, and a countywide website that promoted ALL areas of the county, as well as all tourism related businesses. Followed up with a Facebook page. The website and Facebook page are given daily attention. Occasionally the department would Tweet as well.

Also realized only a select few events were promoted to Travel Oregon, and, beyond Travel Oregon, and private ads, there was no joint effort to promote all events in the county. Developed a calendar of events and then started promoting via Facebook, posters, radio, travel sites, etc.

Upon noticing the lack of events on the state tourism website, and the typographical errors on the state website, county became a Destination Marketing Organization (DMO). Staff corrected the errors, updated old information, and started submitting events.

Staff also reviewed the Travel Oregon guides and had them add Curry Coast attractions. For example, in the beer guide other breweries were added to ensure ALL our breweries were listed, as well as our beer related events.

Curry County gets many visitors from the Valley. To increase our presence in valley marketing pieces, county joined Travel Southern Oregon, and actively sat on the Board. This allowed the county to have a voice, follow trends, and make sure Curry's data was added to the Travel Southern Oregon website. Staff requested, and was successful, in getting many changes on that website.

Other DMOs don't share tourism information with our partners, so staff became the voice to let attractions, etc. know what was going on with Travel Oregon, and Southern Travel Oregon.

Staff wrote, and edited other, itineraries for the Wild Rivers Coast and Travel southern Oregon.

Several times collected items for 'giveaway' baskets and conferences.

Created events to build community, awareness, and fund projects. Created, marketed, and worked these events without volunteers.

Created a county video that could, and has been shared and used as a promotional piece.

Press releases often written and sent to local, state, and sometimes NaCo, to bring awareness to the uniqueness, beauty, and opportunities along the Curry Coast.

Press Release to urge more businesses in the county to become 'bike friendly' and get on the state's list of bike friendly businesses.

Placed ads in National Parks magazine, wine magazine (encouraging them to try the coastal brews), and another magazine with distribution in Oregon.

Was working with 101 on a series of articles on the Curry Coast. After placing ad, and before stories were finalized, editor/owner passed away.

Aggressively advocated for year 'round welcome center at the county line.

Provided some assistance to the Port Orford Chamber on the Air and Ag Show.

Worked with Cape Blanco Country Music Festival on trying to locate other sites, and, efforts to also bring a log rolling competition to the county.

Assistance to Parks in visioning, promoting, etc.

Economic Development – Business Assistance

Promoted Industrially Significant Sites program to landowners (SCDC project).

Served as a resource for those wanting to do business in the county that were unable to get progress on applications (i.e. Dave Allen, Terry Mock, Pacific Gales).

Counseling/advice to citizens who had ideas they wanted to move forward (i.e. Joe Ross, Brookings bookstore, Veterans', tourism/bike store in Harbor).

When notified an individual wanted to manage a Forest Service Campground, arranged meetings and follow up (ultimately chose not to pursue the project).

Assistance to the Ports (help market buildings, idea sharing, propose a bike repair station, events).

Offered social media workshop.

Found a program to help businesses affected by the sinkhole. Met with those businesses, and followed up with them on proper filing.

Catalogued all commercial and industrial 'for sale' or vacant 'for sale' or 'for rent' lots and buildings. Added to website. Maintained list by reviewing monthly title company data to determine which properties were sold. On-going project. Periodically shared the updated list with SCDC, who in turn entered our data into Business Oregon's Prospector program.

Answered site selection inquiries from Biz Oregon and/or SCDC.

Did all the county work (paperwork, meetings) to help Port Orford renew their Enterprise Zone (actually it would expand Gold Beach's EZ to include PO). GB had also approved it. After the Port had approved it, at a meeting we were not aware of, the city decided to terminate it. It wasn't just Econ Dev with many hours invested in the project, but the Surveyor's office as well (they took the legals staff gathered and made a compiled 'legal description').

Initial meetings with state and Port of Harbor to create a southern EZ. (Schmelzer left before completed.)

Staff was working on parties who were discussing partnering on a seaweed processing facility.

Assistance to the Marijuana store in Gold Beach—contrary to rumors, and verified by owners, staff NEVER gave zoning advice.

Researched east/west road, wrote agencies, got federal conceptual support, got agreement with neighboring county.

Worked with Road Department to improve cell service to Agness.

Was working with a smaller provider to try and provide service to Langlois.

Aggressively wrote federal agencies and politicians to try and keep the Harbor Post office open.

Grant administration for several grants (Forest Collaborative, Airport, Head Start, etc.)

Worked with counsel so woman could continue running a farm stand on county property during the Gold Beach Farmers Market.

Many, many speaking engagements on economic development and need to work together.

Suggested countywide Chamber in fall of 2014. Continue(d) to promote the idea. When current Chamber reps declined the partnership, developed the Econ Dev portion of the website.

Participated in economic organizations, conferences, webinars, and a SCDC planning retreat. Unlike some who join organizations just to say they belong, county staff attended and actively participated in those organizations.

Would step in to businesses that appeared 'struggling' to offer help. (Example, Gold Beach restaurant that wasn't opening. Staff contacted them, found out they were waiting on a liquor license. Staff called OLCC, found the 'problem', and coordinated with the owner to resolve the issue. They were then open by that weekend.)

Actively participated in meetings to help improve skills, make use of the library expansion, and a member of the initial STEM group (trying to get STEM to Gold Beach).

Met monthly with partners to have our first GEAR UP job fair in April. Contacted businesses to be vendors.

Met with both Port Orford and Langlois on community development, suggest ideas, offer help.

Wrote several letters supporting grant initiatives by others.

Developed a pilot project, 'the Civility Project' to try and improve attitudes and culture so businesses would be more attracted to the area, existing businesses have confidence, and gain community pride. Involved smile pins and buckets out of pocket (later funded by ED), radio, and Rotary/Soroptomist presentations.

Worked with business and other partners to enhance community spirit by lighting the historic bridge.

Was working on a business contest (businesses partner to offer a package to the best business plan).

Took the 1 ½ year old stale Strategic Technology and Economic Development (STED) Task Force and brought to life and had a summary plan in place within six months. Some items above reflect outcomes recommended by that plan.

Recommended and then served a Real Property Task Force to come up with definitive recommendations on the counties 900 parcels, some of which benefit housing, business and community.

Worked with DEQ for 9 months on reuse possibilities/brownfield matters on the Old Mill site.

Airport

Completed the first ever compliance check on the hangars, followed up with enforcement and gained compliance. Worked with consultant, grants, contractors, pilots. Reviewed leases to find misrepresentations on leases (e.g reporting a plane in the hangar, when in fact the hangar showed up as being in another hangar). Was working on a donation program to repair the unwelcoming, run-down terminal. Was working on getting abandoned plane in county ownership so it could be donated to a school.

NeighboWorks Umpquaco-inspection, ADA compliance checks, assistance on paperwork, grants.

Co-organized a tsunami preparedness workshop for local businesses.

Admin Highlights

Improved office processes, culture, and efficiency.

Updated policies.

Catalogued policies and got the list of policies on the S Drive.

Copied all codes and put on S drive so there was an electronic copy available to all employees.

Quarterly newsletters.

Press Releases to make the county look good/a positive light.

Liasion to other departments.

Budget prep.

Interim Planning Help

When no one from Planning agreed to sit on the Chetco planning process, ED staff did. Same with County Hazard Mitigation Plan, and early stages of resilience planning process.

Drafted a draft plan for a county Purchase of Agricultural Conservation Easement program. Draft given to Planning.

Reviewed zoning text amendments and made suggestions (at D. Pratt's request).

Wrote two staff reports (at D. Pratt's request).

J. Schmelzer

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.

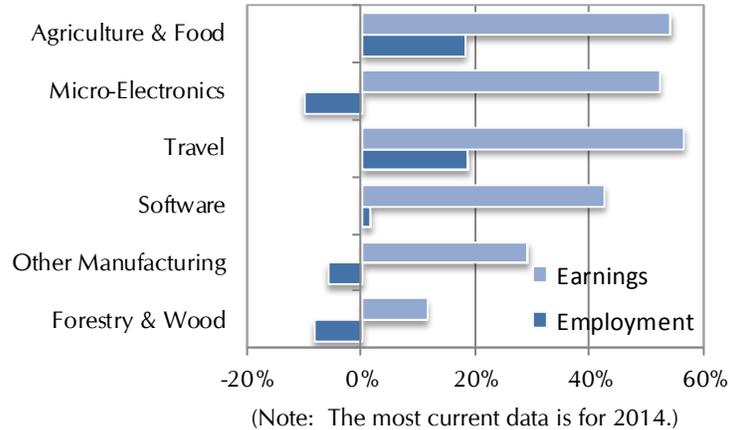
- **Spending.** Total direct travel spending in Oregon was \$10.8 billion in 2015. The annual increase from 2014 was 4.5 percent in current dollars. In real, inflation-adjusted, dollars travel spending increased by 6.6 percent due to the decline in motor fuel prices. (Visitor spending, excluding transportation, 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.

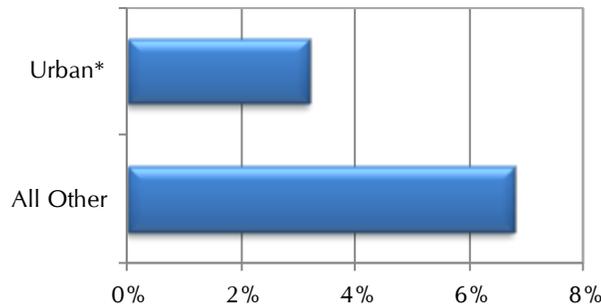
Change in Earnings and Employment (2003-2014)
Selected Export-Oriented Industries



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.

Oregon Travel Impacts, 1992-2015p

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PREFACE

The purpose of this study is to document the economic significance of the travel industry in Oregon and its thirty-six counties and seven tourism regions from 1992 to 2015. These findings show the level of travel spending by visitors traveling to and within the state, and the impact this spending had on the economy in terms of earnings, employment and tax revenue. Estimates of overnight visitor volume and average spending are also provided for all tourism regions and most counties. The estimates for 2015 are preliminary.

Dean Runyan Associates prepared this study for the Travel Oregon. Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984. With respect to economic impact analysis, the firm developed and currently maintains the Regional Travel Impact Model (RTIM), a proprietary model for analyzing travel economic impacts at the state, regional and local level. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research and travel and tourism planning.

Many individuals and agencies provided information and advice for this report. The state agencies that provided essential information were the Parks and Recreation Department and the Department of Revenue. At the federal level, data was obtained from the U.S. Forest Service, the Department of Labor and the Bureau of Economic Analysis. Additionally, numerous local governments and visitor bureaus throughout Oregon provided information.

Finally, special thanks are due to Michael Sturdevant, Director of Global Marketing Services, and Todd Davidson, Chief Executive Officer of Travel Oregon, for their support and assistance.

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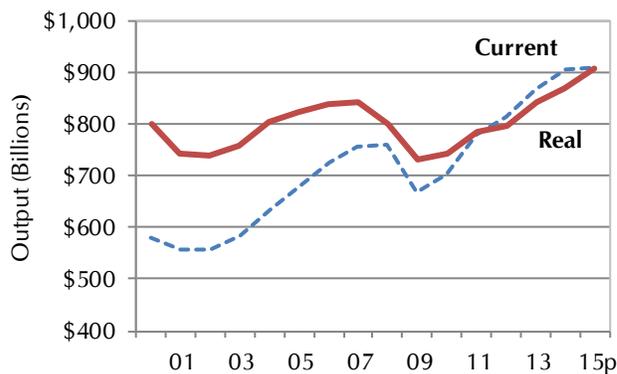
I. U.S. TRAVEL



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

The following two graphs are derived from the Bureau of Economic Analysis Travel and Tourism Satellite Accounts.¹ Both graphs show direct tourism output for the United States – spending by resident and foreign visitors. The 2015 values are preliminary.

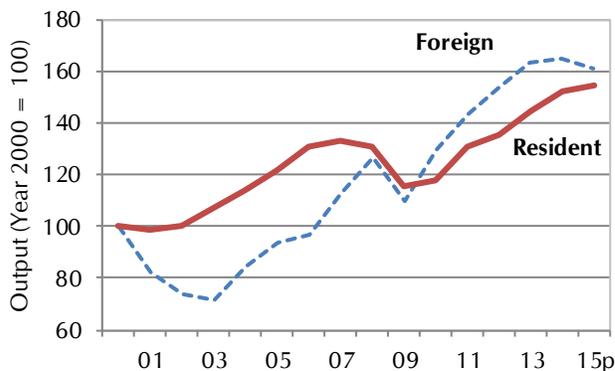
Annual Direct Travel Spending in U.S., 2000-15p



Spending by resident and foreign visitors was \$909 billion in 2015 in current dollars. This reflects virtually no increase over 2014, largely due to lower prices for motor fuel. When adjusted for changes in prices (real dollars), spending increased by 4.4 percent from 2014 to 2015 – compared to a 3.1 for the preceding year.

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

(Current Dollars; Year 2000 = 100)



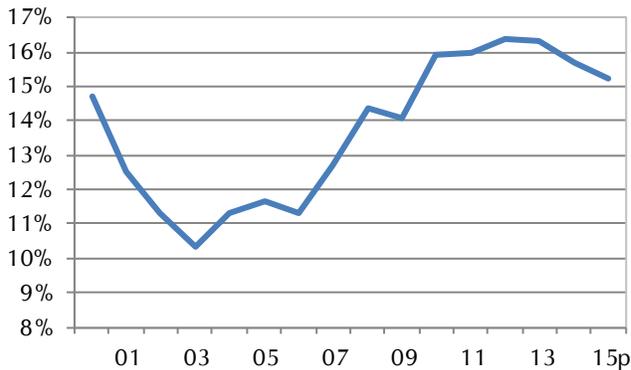
*Note: Foreign visitor spending does not include expenditures on health and educational services or expenditures by short term seasonal workers.

The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2015, the increase in spending by resident visitors (1.4 percent) exceeded the increase in foreign visitor spending (-2.2 percent). This is the second consecutive year that resident spending growth was greater than foreign.

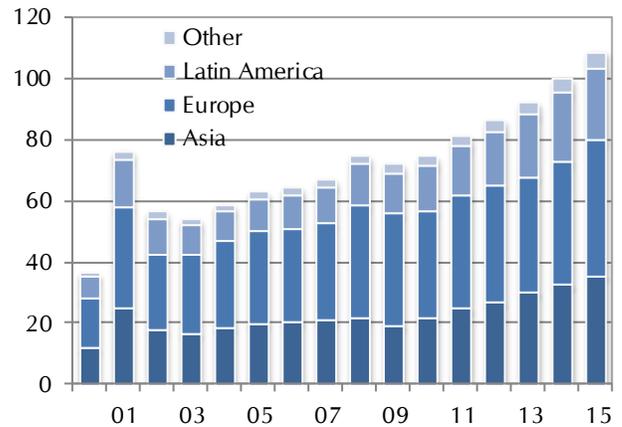
¹ See <http://www.bea.gov/industry/index.htm#satellite>.

The top left chart shows that the foreign share of U.S. internal travel spending has declined over the past two years because of the lower rate of growth of foreign visitor spending (shown in preceding chart).² However, as the graph on the right indicates, overseas arrivals to the U.S. have been increasing, at least through June of 2015. Much of the explanation for the declining foreign share of internal travel in the U.S. is due to the increasing value of U.S. currency (see bottom left chart). As the value of foreign currencies fall relative to the U.S. dollar, foreign visitors have less money to spend on U.S. goods and services.

Foreign Share of U.S. Internal Travel Spending

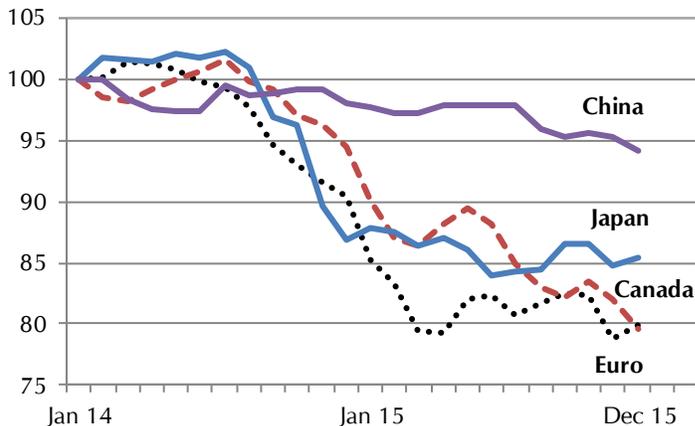


Overseas Arrivals (Millions) July-June FY



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

Monthly Averages, 2014 through 2015



Sources:

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

Overseas Arrivals: Office of Travel and Tourism Industries, U.S. Department of Commerce. Note: Arrivals for 2014 and 2015 are somewhat greater than preceding years due to a change in processing methodology.

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

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

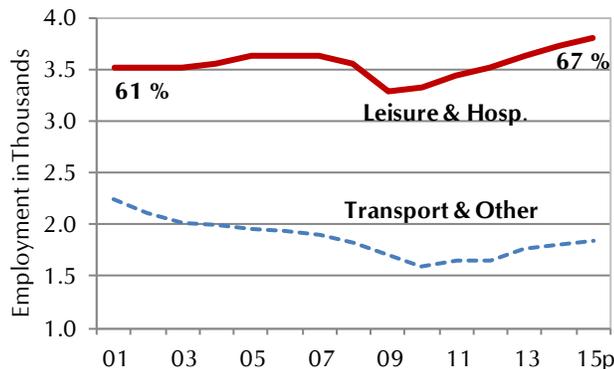
The following two graphs show employment trends since 2000. The first graph shows that travel-generated employment has increased at a steady rate since 2010. Travel industry employment has now recovered to the level immediately preceding the 2008-09 recession, although it is still below its peak earlier in that decade. Part of the reason for this is shown in the second graph. Leisure and hospitality employment was 3.8 million in 2015 or 67 percent of total travel industry employment, compared to 3.6 million in 2000 or 61 percent of the total. Most of this growth was due to food services employment. However, employment in transportation and other industries declined over the same period from 2.3 million to 1.8 million, mostly due to decreased employment in the airline and related transportation industries.

U.S. Travel Industry Employment



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

Components of U.S. Travel Industry Employment



Source: See above graph. Leisure & hospitality includes accommodations, food services, and arts, entertainment & recreation. Transportation and other includes retail and all other industries.

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 sixth consecutive year. In real dollars (adjusted for inflation), spending has increased by 3.0 percent per year since 2010.
- Direct travel spending in 2015 was \$10.8 billion, an increase of 4.5 percent in current dollars. In real dollars, spending increased by 6.6 percent due to the decline in motor fuel prices.¹ 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.
- 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.
- 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 (with agriculture/food processing and logging/wood products).
- 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.

¹ All spending estimates in this report are expressed in current dollars unless otherwise noted.

ANNUAL TRAVEL TRENDS

Total direct travel spending in Oregon was \$10.8 billion in 2015. The annual increase from 2014 was 4.5 percent in current dollars and 6.6 percent in real, inflation-adjusted dollars. 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-generated employment increased for the fifth consecutive year (105,500 jobs in 2014). Employment has increased by 3.2 percent per year since 2010.

Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Billions)							
Total (Real 2015\$)	8.0	8.7	9.3	10.1	10.8	6.6%	2.0%
Total	6.2	7.4	8.7	10.3	10.8	4.5%	3.7%
Other	0.9	0.9	1.2	1.3	1.4	6.9%	2.7%
Visitor	5.3	6.5	7.5	9.1	9.4	4.1%	3.9%
Non-transportation	4.1	4.9	5.5	6.7	7.2	7.3%	3.8%
Transportation	1.2	1.6	2.0	2.3	2.2	-4.9%	4.1%
Earnings (\$Billions)							
Earnings	1.6	1.8	2.1	2.6	2.8	8.2%	3.8%
Employment (Thousands)							
Employment	83.5	86.9	90.0	101.3	105.5	4.1%	1.6%
Tax Revenue (\$Millions)							
Total	570	670	779	962	1,047	8.9%	4.1%
Local	82	103	122	175	204	16.3%	6.3%
State	148	174	198	247	262	6.1%	3.9%
Federal	340	392	460	539	581	7.8%	3.6%

Other spending includes resident air travel, travel arrangement and reservation services, and convention and 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.

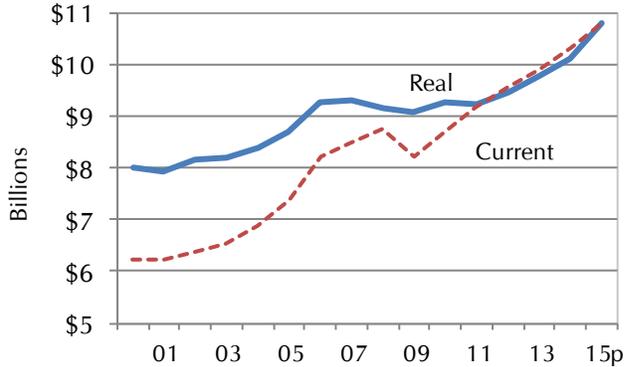
Employment includes all full- and part-time employment of payroll employees and proprietors.

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

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

Federal tax revenue includes motor fuel excise taxes and airline ticket taxes paid by visitors, and the payroll and income taxes attributable to the travel industry income of employees and businesses.

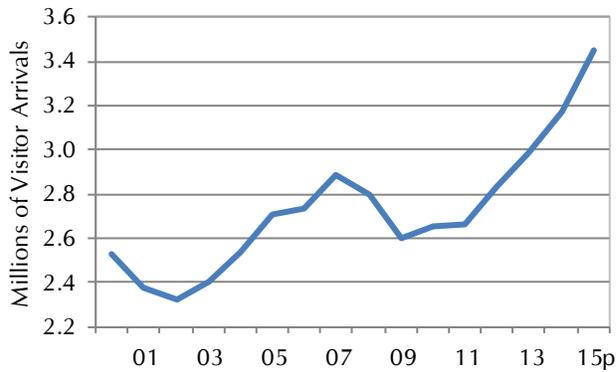
Oregon Direct Travel Spending Real and Current Dollars



Real travel spending (adjusted for inflation) increased by 6.6 percent from 2014 to 2015p, compared to the 4.5 percent increase in current dollars. Room rates were the only item that showed significant increase, while motor fuel prices declined by 25 percent.

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

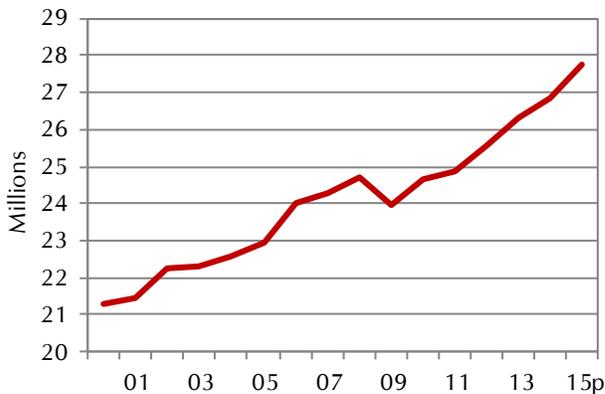
Air Passenger Visitor Arrivals to Oregon U.S. Air Carriers



Domestic visitor air arrivals to Oregon increased by 8.9 percent from 2014 to 2015(p). Domestic visitor air travel to Oregon has increased at a greater rate than U.S. air travel for the past four years.

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

Oregon Overnight Person-Trips



There were 27.7 million overnight person-trips to Oregon destinations in 2015, an increase of 3.4 percent from 2014.

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, 2015p

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	\$373	\$931	\$161	\$396	2.3	2.5
Air	\$402	\$1,403	\$216	\$754	1.9	3.5
Other	\$364	\$850	\$150	\$350	2.4	2.3
Private Homes						
All Modes	\$102	\$404	\$44	\$173	2.3	4.0
Air	\$124	\$782	\$70	\$444	1.8	6.3
Other	\$83	\$297	\$34	\$122	2.4	3.6
Other Overnight	\$122	\$455	\$37	\$137	3.3	3.7
All Overnight	\$200	\$653	\$82	\$265	2.4	3.3

Oregon Overnight Visitor Volume, 2013-2015p

	Person-Nights (Millions)			Party-Nights (Millions)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	27.4	28.5	30.0	11.8	12.3	12.9
Private Home	41.7	41.9	42.8	18.1	18.2	18.7
Other Overnight	16.5	16.6	16.9	5.0	5.0	5.1
All Overnight	85.6	87.1	89.8	34.9	35.5	36.7

	Person-Trips (Millions)			Party-Trips (Millions)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	11.1	11.6	12.2	4.7	4.9	5.2
Private Home	10.7	10.8	11.0	4.6	4.6	4.7
Other Overnight	4.4	4.5	4.5	1.3	1.3	1.4
All Overnight	26.3	26.8	27.7	10.6	10.9	11.3

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

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

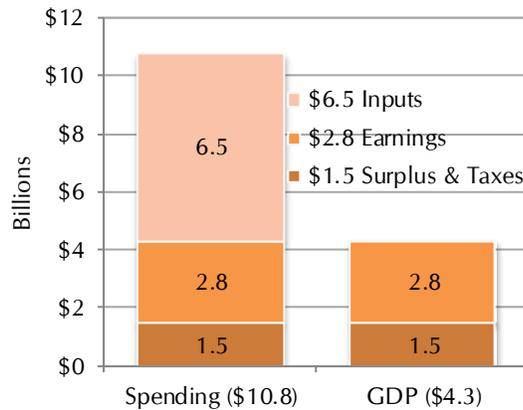
OREGON TRAVEL INDUSTRY GROSS DOMESTIC PRODUCT

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

Alternatively, GDP can be thought of as the sum of earnings, indirect business taxes (primarily excise and property taxes) and other operating surplus (including profits, dividends, interest and other payments). Estimates of travel spending and travel industry GDP are shown in the chart below. Oregon travel industry GDP amounted to \$4.3 billion in 2015.

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, 2015p



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.

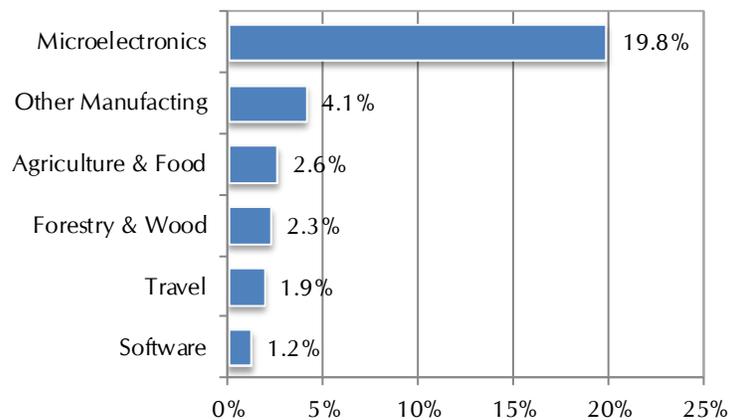
A COMPARISON OF OREGON EXPORT-ORIENTED INDUSTRIES

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 2014. 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, 2014
Share of Selected Export-Oriented Industries

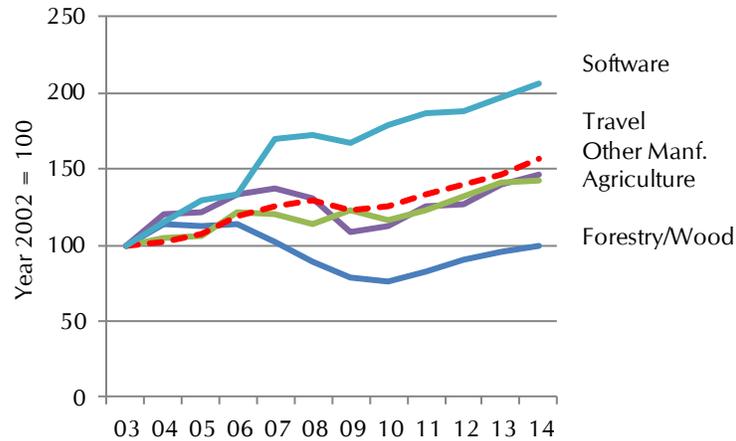


Source: Dean Runyan Associates and Bureau of Economic Analysis. *Note: The “other manufacturing” category is not a distinct industry. It is shown for comparative purposes only. The most current data is for 2014. GDP estimates by Dean Runyan Associates.

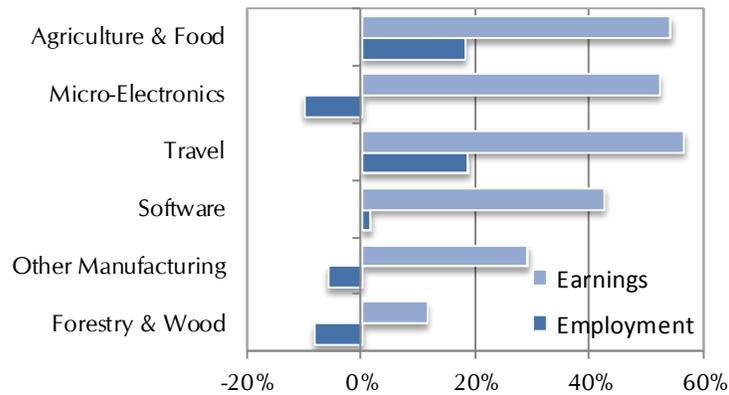
³ See also Appendices A and E.

The following two graphs provide additions comparisons of these export-oriented industries. The first chart shows the change in GDP from 2003 through 2014. 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, 2003-2014
Selected Export-Oriented Industries



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



⁴ Micro-electronics value in 2014 was 359 – an increase of 359 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.)

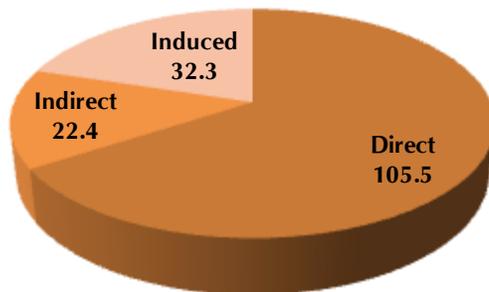
SECONDARY IMPACTS

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:

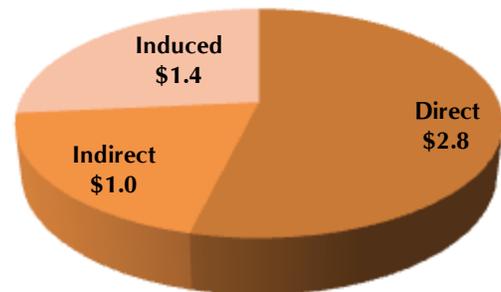
- **Direct** impacts represent the employment and earnings attributable to travel expenditures made directly by travelers at businesses throughout the state.
- **Indirect** impacts represent the employment and earnings associated with industries that supply goods and services to the direct businesses (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, 2015p

Employment (Thousands)



Earnings (Billions)



Note: Indirect and induced impacts estimated by Dean Runyan Associates with IMPLAN model (Implan Group, LLC.). Percentages may not add to 100% due to rounding. Total direct and secondary employment was 160,200 jobs. The employment multiplier is 1.52 (160.2/105.5). Total direct and secondary earnings were \$5.3 billion. The earnings multiplier is 1.85 (\$5.3/\$2.8).

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

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

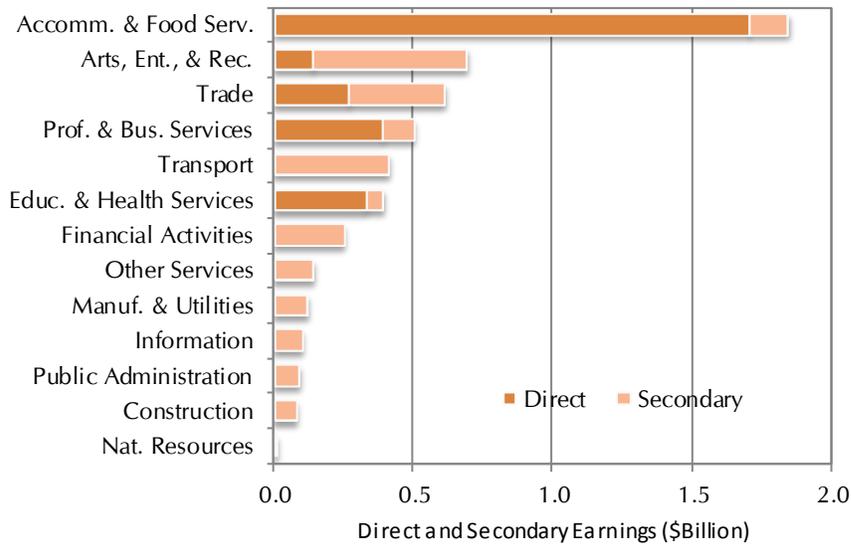
As is indicated in the following tables and graphs, the total direct employment and earnings of these four industry groups is identical to the total direct employment and earnings shown in the first part of this section. The only difference is that these industry groups represent industry groupings (firms)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

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

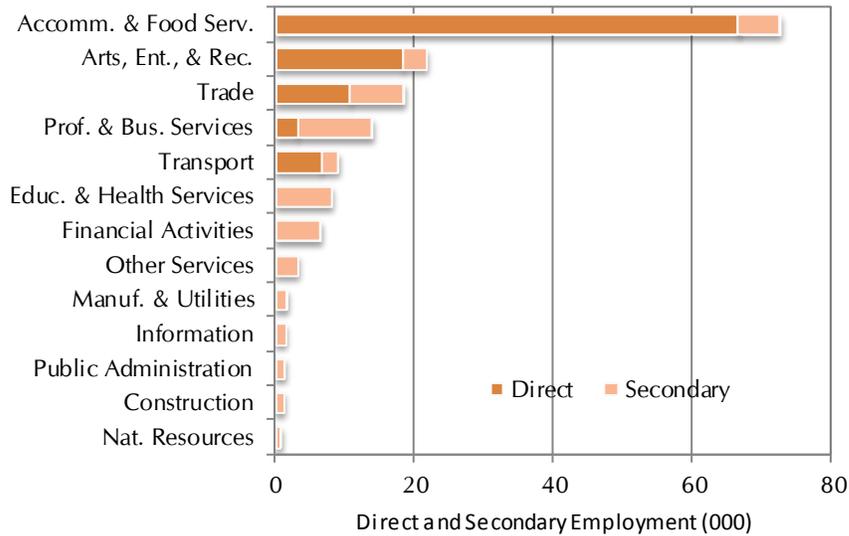
- **Professional & Business Services** (10,800 jobs and \$550 million earnings). A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses (indirect effect). Employees of these firms also purchase professional services (induced effect).
- **Education and Health Services** (8,100 jobs and \$410 million earnings). The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services
- **Financial Activities** (6,500 jobs and \$250 million earnings). Both businesses and individuals make use of banking and insurance institutions.
- **Other Services** (3,300 jobs and \$140 million earnings). Employees of travel-related businesses purchase services from various providers, such as dry cleaners and repair shops.

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

Direct and Secondary Earnings Generated by Travel Spending in Oregon, 2015p



Direct and Secondary Employment Generated by Travel Spending in Oregon, 2015p



See notes at end of table on page 16.

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

Direct and Secondary Travel-Generated Earnings in Oregon, 2015p

(Million)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	\$1,700	\$60	\$90	\$140	\$1,850
Professional & Business Services	\$140	\$390	\$160	\$550	\$690
Trade	\$270	\$60	\$280	\$340	\$610
Transportation	\$390	\$70	\$40	\$110	\$500
Education and Health Services		\$0	\$410	\$410	\$410
Arts, Entertainment & Recreation	\$330	\$40	\$20	\$60	\$390
Financial Activities		\$110	\$140	\$250	\$250
Other Services		\$50	\$90	\$140	\$140
Manufacturing & Utilities		\$70	\$40	\$120	\$120
Public Administration		\$60	\$40	\$100	\$100
Information		\$60	\$30	\$90	\$90
Construction		\$40	\$40	\$80	\$80
Natural Resources & Mining		\$10	\$10	\$10	\$10
All Industries	\$2,830	\$1,030	\$1,390	\$2,420	\$5,240

Direct and Secondary Travel-Generated Employment in Oregon, 2015p

(thousand jobs)

Industry Group	Direct	Secondary		Total	Grand Total
		Indirect	Induced		
Accommodation & Food Services	66.5	2.4	3.7	6.1	72.6
Arts, Entertainment & Recreation	18.3	2.3	1.2	3.4	21.7
Trade	10.8	0.8	6.9	7.7	18.5
Professional & Business Services	3.2	7.6	3.2	10.8	13.9
Transportation	6.6	1.5	0.8	2.4	9.0
Education and Health Services		0.2	8.0	8.1	8.1
Financial Activities		3.0	3.5	6.5	6.5
Other Services		0.9	2.4	3.3	3.3
Manufacturing & Utilities		1.0	0.7	1.7	1.7
Information		0.9	0.5	1.4	1.4
Construction		0.7	0.7	1.4	1.4
Public Administration		0.7	0.4	1.2	1.2
Natural Resources & Mining		0.5	0.4	0.8	0.8
All Industries	105.5	22.4	32.3	54.8	160.2

Sources: Dean Runyan Associates and Implan Group, LLC.

Note: These industry groups are not equivalent to the categories used in the direct impact tables used in this report. See Appendix D.

Detailed direct travel impacts for 2002 through 2015p follow.

Oregon Travel Impacts, 1992-2004

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

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. Hotel, motel includes all lodging where a lodging tax is collected, except campgrounds. **Retail includes gasoline.

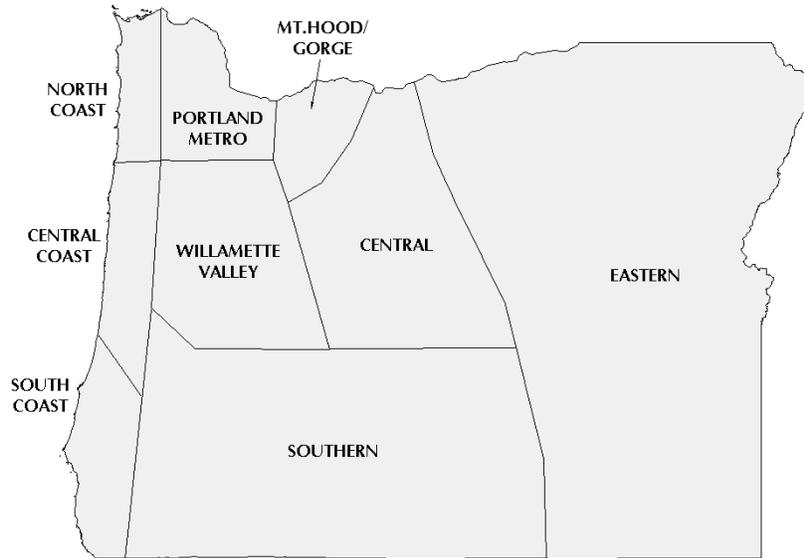
Oregon Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	7,151	7,686	7,531	8,377	8,698	9,060	9,434
Other Travel*	1,056	1,087	1,187	1,192	1,201	1,275	1,364
Total Direct Spending	8,207	8,774	8,719	9,568	9,899	10,335	10,797
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel*	3,310	3,715	3,571	4,057	4,258	4,516	4,823
Private Home	1,500	1,636	1,679	1,809	1,833	1,873	1,904
Campground	379	422	391	417	441	445	445
Vacation Home	149	167	164	177	177	180	178
Day Travel	1,813	1,747	1,727	1,917	1,988	2,047	2,084
Destination Spending	7,151	7,686	7,531	8,377	8,698	9,060	9,434
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1,307	1,431	1,361	1,573	1,664	1,806	2,037
Food Service	1,590	1,697	1,768	1,953	2,068	2,179	2,330
Food Stores	525	574	564	621	646	676	708
Local Tran. & Gas	1,281	1,561	1,339	1,632	1,622	1,601	1,412
Arts, Ent. & Rec.	899	886	870	918	951	979	1,020
Retail Sales	968	935	953	1,020	1,050	1,070	1,105
Visitor Air Tran.	581	602	675	659	695	748	821
Destination Spending	7,151	7,686	7,531	8,377	8,698	9,060	9,434
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1,134	1,252	1,221	1,379	1,459	1,564	1,704
Arts, Ent. & Rec.	265	301	279	292	298	311	329
Retail**	208	217	214	231	241	252	266
Ground Tran.	54	57	54	60	62	67	73
Visitor Air Tran.	92	93	99	108	115	127	141
Other Travel*	232	237	242	268	267	289	312
Total Direct Earnings	1,984	2,157	2,109	2,339	2,441	2,610	2,825
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	55.8	58.6	55.3	59.2	61.3	63.4	66.5
Arts, Ent. & Rec.	17.1	18.4	16.9	17.3	17.7	18.1	18.3
Retail**	9.9	9.9	9.4	9.9	10.2	10.5	10.8
Ground Tran.	2.1	2.1	1.9	2.0	2.0	2.1	2.2
Visitor Air Tran.	1.9	2.0	1.7	1.7	1.8	1.9	2.0
Other Travel*	5.3	5.5	4.8	5.0	5.1	5.3	5.6
Total Direct Employment	92.0	96.4	90.0	95.1	98.1	101.3	105.5
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	117	127	122	142	160	175	204
State Tax Receipts	190	204	198	231	239	247	262
Federal Tax Receipts	426	460	460	453	509	539	581
Total Direct Tax Receipts	733	791	779	826	907	962	1,047

Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement & reservation services, and convention & trade show organizers. Hotel, motel includes all lodging where a lodging tax is collected, except campgrounds. **Retail includes gasoline.

III. REGIONAL TRAVEL IMPACTS



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

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

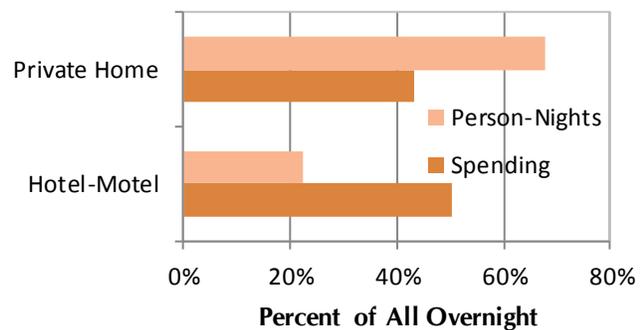
Travel Share of Total Employment (2014)*	3.4%
Overnight Visitor Day Share of Resident Population (2015p)**	4.6%

*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.

Willamette Valley Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,215	1,296	1,277	1,424	1,456	1,488	1,525
Other Travel*	165	190	204	217	222	226	220
Total Direct Spending	1,380	1,486	1,481	1,641	1,678	1,715	1,745
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	165	183	171	197	207	222	248
Food Service	289	306	318	358	372	386	411
Food Stores	113	127	126	141	144	149	156
Local Tran. & Gas	205	251	211	263	257	250	211
Arts, Ent. & Rec.	234	228	225	240	244	247	257
Retail Sales	178	173	177	192	194	195	200
Visitor Air Tran.	30	28	49	34	38	40	42
Destination Spending	1,215	1,296	1,277	1,424	1,456	1,488	1,525
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	184.0	204.0	198.3	224.3	233.3	248.4	272.1
Arts, Ent. & Rec.	72.7	81.8	76.8	74.6	76.5	78.2	81.2
Retail**	39.2	41.4	41.0	45.0	46.1	47.6	50.0
Ground Tran.	6.5	6.7	6.4	7.0	7.1	7.6	8.0
Visitor Air Tran.	2.2	1.6	1.3	1.4	1.5	1.7	1.8
Other Travel*	22.1	25.5	25.2	32.5	35.3	37.8	42.0
Total Direct Earnings	326.6	360.9	349.0	384.8	399.7	421.2	455.2
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	10.1	10.5	9.8	10.6	11.0	11.3	11.9
Arts, Ent. & Rec.	4.9	5.3	4.9	4.9	5.0	5.1	5.1
Retail**	1.9	2.0	1.9	2.0	2.1	2.1	2.1
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.9	0.9	0.9	1.0	1.1	1.1	1.2
Total Direct Employment	18.1	19.0	17.7	18.8	19.4	19.9	20.6
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	11.9	13.0	11.7	13.6	14.8	16.1	18.2
State Tax Receipts	36.7	39.4	38.0	45.2	46.2	47.0	49.4
Total Local & State	48.6	52.4	49.8	58.8	61.0	63.1	67.6

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.

Willamette Valley Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	837	934	916	1,023	1,047	1,075	1,102
Hotel, Motel*	410	457	433	500	519	542	569
Private Home	374	410	420	457	458	463	462
Other Overnight	53	67	62	66	69	70	71
Campground	42	54	49	52	55	56	56
Vacation Home	11	13	13	14	14	14	14
Day Travel	378	362	361	401	409	414	423
Spending at Destination	1,215	1,296	1,277	1,424	1,456	1,488	1,525

Willamette Valley Visitor Volume and Visitor Spending

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$305	\$652	\$127	\$270	2.4	2.1
Private Home	\$88	\$302	\$35	\$118	2.5	3.4
Other Overnight	\$127	\$475	\$37	\$140	3.4	3.8
All Overnight	\$144	\$432	\$56	\$169	2.6	3.0

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	4,184	4,259	4,484	1,744	1,776	1,869
Private Home	12,871	12,942	13,233	5,093	5,125	5,244
Other Overnight	1,837	1,848	1,883	543	547	557
All Overnight	18,892	19,049	19,600	7,380	7,447	7,670

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,973	2,006	2,112	816	830	873
Private Home	3,795	3,814	3,901	1,485	1,493	1,528
Other Overnight	490	493	502	145	146	148
All Overnight	6,257	6,313	6,515	2,446	2,469	2,550

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

NORTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$95,900
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.00

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$5,407
Additional employment if each resident household encouraged one additional overnight visitor	60

Visitor Shares

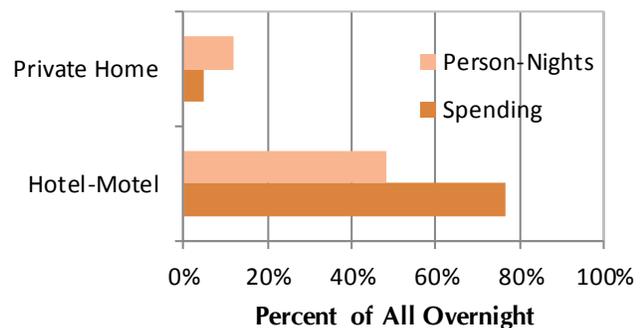
Travel Share of Total Employment (2014)*	20.8%
Overnight Visitor Day Share of Resident Population (2015p)**	27.7%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,484	3,189	\$372
Private Home	225	756	\$21
Other Overnight	710	2,531	\$85
All Overnight	2,418	6,476	\$478

North Coast Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	391	485	591	738	769	4.2%	4.6%
Other	3	13	17	6	5	-15.9%	3.3%
Visitor	388	472	574	732	764	4.4%	4.6%
Non-transportation	357	425	513	654	698	6.8%	4.6%
Transportation	31	47	61	78	66	-15.3%	5.1%
Earnings (\$Millions)							
Earnings	111	137	174	209	225	8.0%	4.8%
Employment (Thousands)							
Employment	6.0	6.5	7.1	7.6	8.0	4.8%	2.0%
Tax Revenue (\$Millions)							
Total	13.7	17.5	21.6	27.8	30.3	8.8%	5.5%
Local	4.9	6.2	7.8	10.6	12.0	12.7%	6.2%
State	8.8	11.2	13.8	17.2	18.3	6.4%	5.0%

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.

North Coast Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	552	586	574	620	674	732	764
Other Travel*	17	15	17	19	6	6	5
Total Direct Spending	569	600	591	639	680	738	769
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	119	129	129	138	150	165	182
Food Service	149	159	164	176	196	218	233
Food Stores	53	57	55	60	65	70	73
Local Tran. & Gas	58	72	61	73	75	78	66
Arts, Ent. & Rec.	82	82	80	83	90	97	102
Retail Sales	91	86	86	90	98	104	108
Destination Spending	552	586	574	620	674	732	764
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	111.8	123.6	121.3	130.4	143.7	153.8	167.1
Arts, Ent. & Rec.	24.4	28.1	25.7	26.0	26.1	27.7	29.5
Retail**	18.8	19.3	18.7	19.9	21.6	23.5	24.9
Ground Tran.	2.1	2.3	2.2	2.4	2.6	3.0	3.2
Other Travel*	5.7	4.1	5.8	6.1	0.6	0.7	0.7
Total Direct Earnings	162.8	177.5	173.7	184.8	194.6	208.6	225.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,910	5,020	4,790	4,790	5,080	5,250	5,550
Arts, Ent. & Rec.	1,300	1,510	1,290	1,190	1,190	1,220	1,250
Retail**	950	940	880	910	970	1,030	1,070
Ground Tran.	80	80	70	80	80	90	90
Other Travel*	70	70	70	90	20	20	30
Total Direct Employment	7,310	7,620	7,110	7,050	7,340	7,620	7,990
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.5	7.8	7.8	8.5	9.5	10.6	12.0
State Tax Receipts	13.1	14.1	13.8	15.3	16.2	17.2	18.3
Total Local & State	20.6	21.9	21.6	23.9	25.7	27.8	30.3

Details may not add to totals due to rounding.

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

North Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	322	365	357	382	416	454	478
Hotel, Motel*	231	268	263	283	313	349	372
Private Home	18	19	18	20	21	21	21
Other Overnight	73	78	75	79	83	84	85
Campground	49	52	50	52	56	57	58
Vacation Home	24	26	25	27	27	28	28
Day Travel	231	221	217	237	258	277	286
Spending at Destination	552	586	574	620	674	732	764

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$285	\$613	\$117	\$250	2.4	2.1
Private Home	\$71	\$239	\$27	\$92	2.6	3.4
Other Overnight	\$111	\$395	\$34	\$120	3.3	3.6
All Overnight	\$202	\$525	\$74	\$198	2.7	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,707	3,029	3,189	1,106	1,238	1,303
Private Home	746	752	756	288	290	292
Other Overnight	2,469	2,487	2,531	749	755	768
All Overnight	5,922	6,268	6,476	2,144	2,283	2,364

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,262	1,409	1,484	516	576	606
Private Home	222	223	225	86	86	87
Other Overnight	692	697	710	211	212	216
All Overnight	2,175	2,330	2,418	812	874	909

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

CENTRAL COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$83,990
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$7,580
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

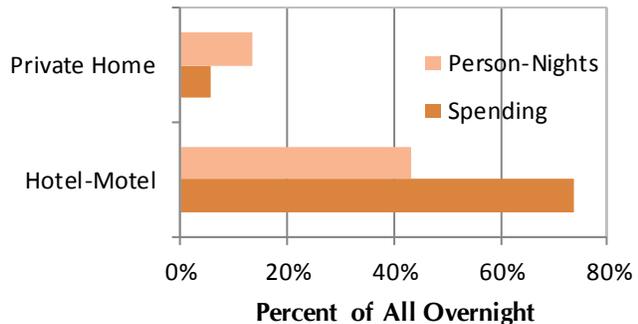
Travel Share of Total Employment (2014)*	24.7%
Overnight Visitor Day Share of Resident Population (2015p)**	25.8%

*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	1,244	2,719	\$373
Private Home	238	816	\$27
Other Overnight	698	2,622	\$99
All Overnight	2,180	6,157	\$499

Central Coast Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	408	488	587	688	717	4.3%	3.8%
Other	14	10	16	23	24	5.7%	3.8%
Visitor	394	478	571	665	693	4.2%	3.8%
Non-transportation	363	430	509	593	632	6.7%	3.8%
Transportation	32	48	62	73	61	-15.8%	4.5%
Earnings (\$Millions)							
Earnings	109	128	161	188	204	8.5%	4.3%
Employment (Thousands)							
Employment	6.3	6.9	7.8	8.3	8.5	1.7%	1.9%
Tax Revenue (\$Millions)							
Total	15.1	18.9	23.9	28.4	30.9	8.9%	4.9%
Local	5.9	7.5	10.1	11.9	13.3	12.0%	5.6%
State	9.2	11.4	13.8	16.5	17.6	6.7%	4.4%

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.

Central Coast Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	552	584	571	585	621	665	693
Other Travel*	14	18	16	20	22	23	24
Total Direct Spending	566	602	587	605	642	688	717
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	133	143	143	144	151	164	181
Food Service	132	143	147	149	162	178	191
Food Stores	55	59	57	60	64	68	71
Local Tran. & Gas	60	74	62	71	72	73	61
Arts, Ent. & Rec.	85	84	81	80	85	91	95
Retail Sales	87	82	82	82	87	91	94
Destination Spending	552	584	571	585	621	665	693
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	102.8	113.9	111.3	115.8	123.2	131.6	140.7
Arts, Ent. & Rec.	23.2	26.5	24.0	25.1	23.8	24.5	29.1
Retail**	18.4	18.8	18.2	18.6	19.8	21.3	22.5
Ground Tran.	2.0	2.1	2.0	2.1	2.3	2.5	2.7
Other Travel*	4.2	5.5	5.1	6.7	7.4	7.8	8.8
Total Direct Earnings	150.6	166.8	160.7	168.2	176.4	187.9	203.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,110	5,480	5,230	5,130	5,320	5,500	5,570
Arts, Ent. & Rec.	1,560	1,640	1,550	1,570	1,590	1,620	1,620
Retail**	910	910	850	850	900	940	980
Ground Tran.	70	70	70	70	70	80	80
Other Travel*	120	150	140	170	190	200	220
Total Direct Employment	7,780	8,240	7,830	7,790	8,070	8,340	8,480
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.0	8.7	10.1	9.9	10.9	11.9	13.3
State Tax Receipts	13.3	14.4	13.8	15.0	15.6	16.5	17.6
Total Local & State	22.3	23.0	23.9	24.9	26.6	28.4	30.9

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

Central Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	375	419	410	416	441	475	499
Hotel, Motel*	267	305	298	298	318	350	373
Private Home	23	24	24	26	27	27	27
Other Overnight	85	90	88	92	96	98	99
Campground	61	64	62	64	69	70	71
Vacation Home	24	26	26	28	28	28	28
Day Travel	177	165	161	169	180	190	194
Spending at Destination	552	584	571	585	621	665	693

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$335	\$733	\$137	\$300	2.4	2.2
Private Home	\$86	\$294	\$33	\$113	2.6	3.4
Other Overnight	\$126	\$473	\$38	\$142	3.3	3.8
All Overnight	\$225	\$616	\$81	\$229	2.8	2.7

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,331	2,582	2,719	953	1,056	1,112
Private Home	801	813	816	309	314	314
Other Overnight	2,558	2,576	2,622	771	777	790
All Overnight	5,689	5,971	6,157	2,033	2,146	2,217

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,066	1,181	1,244	436	483	509
Private Home	234	238	238	90	92	92
Other Overnight	680	685	698	205	206	210
All Overnight	1,981	2,104	2,180	731	781	811

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

SOUTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$76,600
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.20

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,857
Additional employment if each resident household encouraged one additional overnight visitor	90

Visitor Shares

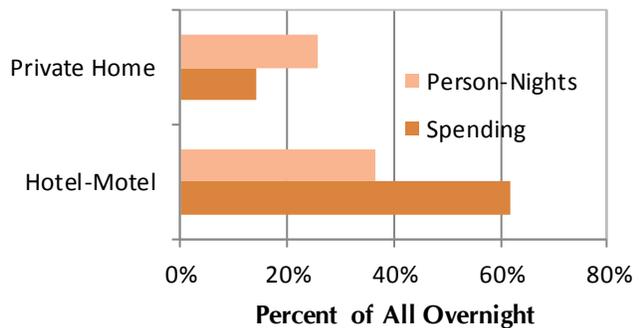
Travel Share of Total Employment (2014)*	11.8%
Overnight Visitor Day Share of Resident Population (2015p)**	13.1%

*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	723	1,547	\$163
Private Home	307	1,057	\$36
Other Overnight	418	1,550	\$61
All Overnight	1,449	4,154	\$260

South Coast Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	237	302	322	377	388	3.0%	3.3%
Other	7	9	9	8	7	-15.0%	0.2%
Visitor	230	293	313	369	381	3.4%	3.4%
Non-transportation	206	253	269	317	336	6.2%	3.3%
Transportation	25	40	44	52	45	-13.4%	4.0%
Earnings (\$Millions)							
Earnings	68	84	92	109	117	7.9%	3.7%
Employment (Thousands)							
Employment	4.5	4.8	4.7	4.8	5.0	4.0%	0.8%
Tax Revenue (\$Millions)							
Total	7.4	9.4	9.8	11.5	12.3	6.6%	3.4%
Local	1.4	1.8	1.7	1.8	2.0	12.6%	2.3%
State	6.0	7.6	8.1	9.8	10.3	5.5%	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.

South Coast Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	318	337	313	339	357	369	381
Other Travel*	10	11	9	9	8	8	7
Total Direct Spending	328	348	322	348	366	377	388
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	65	68	63	68	71	74	82
Food Service	79	84	83	89	97	102	109
Food Stores	33	37	35	37	40	41	43
Local Tran. & Gas	41	51	41	50	50	49	41
Arts, Ent. & Rec.	51	51	48	50	52	54	56
Retail Sales	43	42	40	42	44	45	46
Visitor Air Tran.	5	4	3	3	4	3	4
Destination Spending	318	337	313	339	357	369	381
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	61.1	66.5	62.2	67.6	71.0	75.4	82.3
Arts, Ent. & Rec.	14.5	16.7	14.7	14.8	15.8	15.4	16.0
Retail**	10.4	11.0	10.3	10.9	11.6	12.1	12.8
Ground Tran.	1.2	1.3	1.2	1.3	1.4	1.5	1.6
Visitor Air Tran.	1.6	1.6	1.7	2.1	2.7	2.8	3.3
Other Travel*	1.7	1.8	2.0	1.6	1.2	1.4	1.3
Total Direct Earnings	90.6	98.9	92.1	98.3	103.6	108.7	117.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,130	3,210	2,830	2,940	2,970	2,990	3,150
Arts, Ent. & Rec.	1,200	1,290	1,230	1,210	1,210	1,170	1,160
Retail**	520	530	490	490	500	530	560
Ground Tran.	40	40	40	40	40	50	50
Visitor Air Tran.	40	40	30	40	50	50	50
Other Travel*	60	60	60	40	40	40	40
Total Direct Employment	4,980	5,180	4,680	4,770	4,810	4,820	5,020
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.9	1.9	1.7	1.6	1.7	1.8	2.0
State Tax Receipts	8.2	8.7	8.1	9.2	9.5	9.8	10.3
Total Local & State	10.1	10.6	9.8	10.8	11.2	11.5	12.3

Details may not add to totals due to rounding.

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

South Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	212	233	214	231	243	251	260
Hotel, Motel*	128	142	128	140	148	155	163
Private Home	33	34	33	35	36	36	36
Other Overnight	51	57	53	56	60	60	61
Campground	45	50	47	49	52	53	54
Vacation Home	7	7	7	7	7	7	7
Day Travel	105	105	99	108	114	118	121
Spending at Destination	318	337	313	339	357	369	381

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$257	\$551	\$105	\$225	2.4	2.1
Private Home	\$88	\$303	\$34	\$118	2.6	3.5
Other Overnight	\$135	\$501	\$39	\$146	3.4	3.7
All Overnight	\$174	\$484	\$63	\$180	2.8	2.8

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,388	1,469	1,547	569	602	634
Private Home	1,040	1,045	1,057	407	408	413
Other Overnight	1,512	1,521	1,550	441	444	452
All Overnight	3,940	4,035	4,154	1,417	1,454	1,500

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	649	687	723	266	281	296
Private Home	302	304	307	117	118	119
Other Overnight	408	411	418	119	120	122
All Overnight	1,360	1,401	1,449	503	519	538

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

OREGON COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$87,210
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.00

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$20,592
Additional employment if each resident household encouraged one additional overnight visitor	240

Visitor Shares

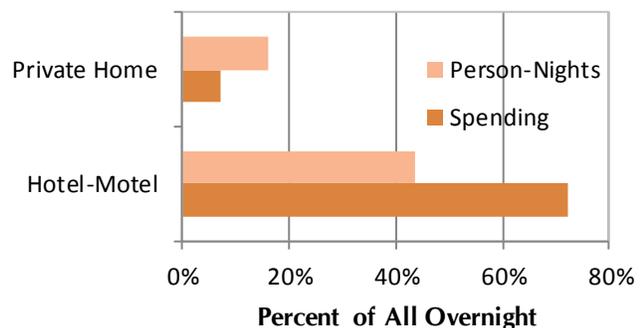
Travel Share of Total Employment (2014)*	18.7%
Overnight Visitor Day Share of Resident Population (2015p)**	21.3%

*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	3,269	7,455	\$915
Private Home	730	2,629	\$84
Other Overnight	1,973	6,703	\$248
All Overnight	5,971	16,788	\$1,247

Oregon Coast Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	1,036	1,275	1,500	1,802	1,875	4.0%	4.0%
Other	16	19	28	20	23	11.4%	2.6%
Visitor	1,021	1,256	1,472	1,782	1,852	3.9%	4.1%
Non-transportation	925	1,108	1,291	1,563	1,667	6.6%	4.0%
Transportation	96	148	182	219	185	-15.3%	4.5%
Earnings (\$Millions)							
Earnings	289	350	427	506	548	8.2%	4.4%
Employment (Thousands)							
Employment	16.9	18.3	19.7	20.8	21.6	3.4%	1.7%
Tax Revenue (\$Millions)							
Total	36.2	45.8	55.2	67.7	73.5	8.5%	4.8%
Local	12.2	15.6	19.5	24.3	27.3	12.4%	5.5%
State	24.0	30.2	35.7	43.5	46.2	6.3%	4.5%

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, 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.

Oregon Coast Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,437	1,525	1,472	1,561	1,669	1,782	1,852
Other Travel*	26	26	28	31	19	20	23
Total Direct Spending	1,463	1,551	1,500	1,592	1,688	1,802	1,875
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	318	340	335	351	372	403	446
Food Service	360	387	393	413	455	499	533
Food Stores	142	152	146	157	168	179	187
Local Tran. & Gas	174	215	179	211	214	216	181
Arts, Ent. & Rec.	218	217	208	212	228	243	253
Retail Sales	220	210	208	214	228	240	248
Visitor Air Tran.	5	4	3	3	4	3	4
Destination Spending	1,437	1,525	1,472	1,561	1,669	1,782	1,852
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	275.7	304.1	294.7	313.9	337.8	360.8	390.0
Arts, Ent. & Rec.	62.2	71.3	64.4	65.8	65.6	67.6	74.6
Retail**	48.1	49.6	47.7	49.9	53.6	57.6	60.8
Ground Tran.	5.3	5.7	5.4	5.8	6.3	7.0	7.5
Visitor Air Tran.	1.6	1.6	1.7	2.1	2.7	2.8	3.3
Other Travel*	12.2	11.9	13.4	14.9	9.7	10.5	11.4
Total Direct Earnings	405.1	444.2	427.4	452.5	475.7	506.4	547.7
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	13.1	13.7	12.8	12.9	13.4	13.7	14.3
Arts, Ent. & Rec.	4.1	4.4	4.1	4.0	4.0	4.0	4.0
Retail**	2.4	2.4	2.3	2.3	2.4	2.5	2.6
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Other Travel*	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Total Direct Employment	20.1	21.1	19.7	19.7	20.3	20.8	21.6
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	18.4	18.3	19.5	20.1	22.1	24.3	27.3
State Tax Receipts	34.6	37.2	35.7	39.5	41.4	43.5	46.2
Total Local & State	53.0	55.6	55.2	59.6	63.5	67.7	73.5

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.

Oregon Coast Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	918	1,030	990	1,042	1,112	1,192	1,247
Hotel, Motel*	633	724	696	729	787	863	915
Private Home	74	78	76	83	84	85	84
Other Overnight	211	227	218	230	241	244	248
Campground	157	168	159	168	179	181	184
Vacation Home	55	60	59	63	63	64	64
Day Travel	518	496	482	520	557	590	605
Spending at Destination	1,437	1,525	1,472	1,561	1,669	1,782	1,852

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$300	\$684	\$123	\$280	2.4	2.3
Private Home	\$83	\$299	\$32	\$116	2.6	3.6
Other Overnight	\$123	\$418	\$37	\$125	3.3	3.4
All Overnight	\$205	\$564	\$74	\$209	2.8	2.7

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	6,426	7,080	7,455	2,628	2,896	3,049
Private Home	2,587	2,610	2,629	1,004	1,012	1,020
Other Overnight	6,538	6,584	6,703	1,961	1,976	2,011
All Overnight	15,551	16,274	16,788	5,593	5,883	6,080

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	3,016	3,325	3,269	1,233	1,360	1,337
Private Home	753	759	730	291	294	283
Other Overnight	1,924	1,938	1,973	578	582	592
All Overnight	5,693	6,022	5,971	2,102	2,235	2,212

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

PORTLAND METRO TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$122,230
Employee Earnings generated by \$100 Visitor Spending	\$25
Local & State Tax Revenues generated by \$100 Visitor Spending	\$6.40

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$248,167
Additional employment if each resident household encouraged one additional overnight visitor	2,030

Visitor Shares

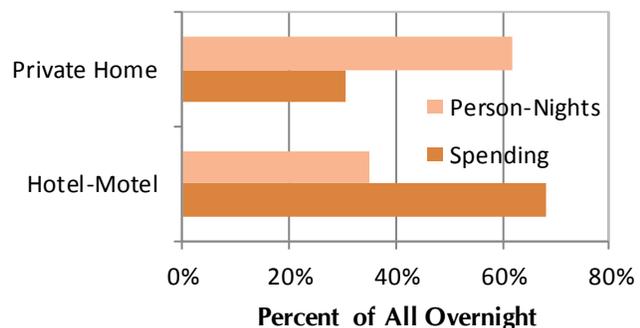
Travel Share of Total Employment (2014)*	2.9%
Overnight Visitor Day Share of Resident Population (2015p)**	4.1%

*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	3,709	8,903	\$2,093
Private Home	4,198	15,316	\$899
Other Overnight	195	772	\$29
All Overnight	8,102	24,991	\$3,022

Portland Metro Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	2,698	3,023	3,649	4,415	4,686	6.1%	3.7%
Other	834	845	1,025	1,142	1,181	3.4%	2.3%
Visitor	1,865	2,178	2,624	3,273	3,505	7.1%	4.3%
Non-transportation	1,178	1,391	1,637	2,100	2,283	8.7%	4.5%
Transportation	687	786	987	1,174	1,222	4.1%	3.9%
Earnings (\$Millions)							
Earnings	677	695	811	1,038	1,125	8.3%	3.4%
Employment (Thousands)							
Employment	26.0	25.7	26.8	31.5	32.8	4.2%	1.6%
Tax Revenue (\$Millions)							
Total	101.9	119.3	139.8	197.8	224.2	13.3%	5.4%
Local	45.1	56.1	67.2	104.4	124.4	19.2%	7.0%
State	56.8	63.2	72.5	93.4	99.8	6.8%	3.8%

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.

Portland Metro Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	2,391	2,620	2,624	2,997	3,118	3,273	3,505
Other Travel*	948	1,001	1,025	1,079	1,086	1,142	1,181
Total Direct Spending	3,339	3,621	3,649	4,076	4,204	4,415	4,686
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	445	515	472	607	641	705	811
Food Service	485	530	567	647	679	706	755
Food Stores	97	109	110	125	129	134	141
Local Tran. & Gas	395	472	428	513	523	528	516
Arts, Ent. & Rec.	174	177	179	196	201	205	214
Retail Sales	297	296	309	339	347	350	362
Visitor Air Tran.	497	520	560	571	598	645	706
Destination Spending	2,391	2,620	2,624	2,997	3,118	3,273	3,505
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	336	384	377	451	478	510	555
Arts, Ent. & Rec.	49	58	55	65	64	67	70
Retail**	52	55	56	62	64	66	70
Ground Tran.	34	36	34	38	39	42	46
Visitor Air Tran.	85	87	93	101	108	119	132
Other Travel*	191	193	197	214	215	234	251
Total Direct Earnings	747	813	811	931	967	1,038	1,125
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	15.1	16.5	15.8	18.0	18.6	19.4	20.2
Arts, Ent. & Rec.	2.4	2.6	2.4	2.6	2.7	2.8	2.8
Retail**	2.1	2.1	2.1	2.3	2.3	2.3	2.4
Ground Tran.	1.3	1.3	1.2	1.3	1.3	1.3	1.4
Visitor Air Tran.	1.7	1.8	1.5	1.5	1.6	1.7	1.8
Other Travel*	4.2	4.3	3.7	3.7	3.8	4.0	4.1
Total Direct Employment	26.8	28.7	26.8	29.4	30.3	31.5	32.8
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	62.5	71.8	67.2	82.2	94.9	104.4	124.4
State Tax Receipts	67.8	73.9	72.5	86.9	89.7	93.4	99.8
Total Local & State	130.3	145.7	139.8	169.0	184.6	197.8	224.2

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.

Portland Metro Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	2,009	2,234	2,228	2,549	2,655	2,802	3,022
Hotel, Motel*	1,309	1,474	1,439	1,708	1,793	1,908	2,093
Private Home	677	732	764	813	833	865	899
Other Overnight	23	27	26	28	29	29	29
Campground	16	20	18	19	20	21	21
Vacation Home	7	8	8	9	9	9	9
Day Travel	382	386	396	448	462	472	484
Spending at Destination	2,391	2,620	2,624	2,997	3,118	3,273	3,505

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$498	\$1,224	\$235	\$564	2.1	2.5
Private Home	\$116	\$433	\$59	\$214	2.0	3.7
Other Overnight	\$115	\$461	\$38	\$151	3.0	4.0
All Overnight	\$247	\$785	\$121	\$373	2.0	3.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	8,422	8,524	8,903	3,940	4,007	4,203
Private Home	14,882	14,968	15,316	7,480	7,550	7,758
Other Overnight	753	759	772	249	251	255
All Overnight	24,057	24,251	24,991	11,669	11,808	12,216

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	3,508	3,551	3,709	1,606	1,632	1,710
Private Home	4,079	4,102	4,198	2,007	2,023	2,076
Other Overnight	191	192	195	62	63	64
All Overnight	7,777	7,845	8,102	3,675	3,718	3,850

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

SOUTHERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$79,940
Employee Earnings generated by \$100 Visitor Spending	\$29
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)	\$36,567
Additional employment if each resident household encouraged one additional overnight visitor	460

Visitor Shares

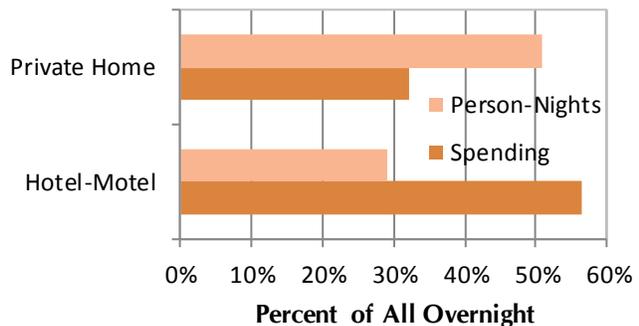
Travel Share of Total Employment (2014)*	4.7%
Overnight Visitor Day Share of Resident Population (2015p)**	6.6%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,529	3,396	\$401
Private Home	1,636	5,838	\$221
Other Overnight	606	2,299	\$78
All Overnight	3,771	11,533	\$700

Southern Oregon Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	627	796	864	959	980	2.2%	3.0%
Other	50	73	89	90	88	-2.7%	3.8%
Visitor	576	723	775	868	892	2.7%	2.9%
Non-transportation	489	585	614	694	734	5.6%	2.7%
Transportation	88	137	160	174	158	-9.2%	4.0%
Earnings (\$Millions)							
Earnings	163	197	212	252	267	6.0%	3.3%
Employment (Thousands)							
Employment	10.0	10.6	10.0	11.0	11.4	3.6%	0.9%
Tax Revenue (\$Millions)							
Total	21.9	28.4	30.9	36.9	39.1	6.0%	4.0%
Local	5.2	7.9	9.4	11.2	12.4	11.0%	5.9%
State	16.6	20.5	21.5	25.7	26.7	3.8%	3.2%

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.

Southern Oregon Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	762	785	775	834	851	868	892
Other Travel*	85	90	89	91	90	90	88
Total Direct Spending	847	875	864	924	941	959	980
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	141	139	137	145	148	157	172
Food Service	181	186	194	209	219	226	240
Food Stores	70	75	74	81	83	86	90
Local Tran. & Gas	121	146	123	149	145	139	119
Arts, Ent. & Rec.	111	107	105	109	112	113	117
Retail Sales	109	102	105	109	112	112	115
Visitor Air Tran.	31	30	37	32	33	35	39
Destination Spending	762	785	775	834	851	868	892
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	135.1	140.8	138.9	150.2	156.6	168.7	180.5
Arts, Ent. & Rec.	33.6	37.2	34.4	35.3	36.7	38.2	39.7
Retail**	25.0	25.5	25.2	26.8	27.6	28.6	30.0
Ground Tran.	3.7	4.0	3.8	4.2	4.3	4.4	4.8
Visitor Air Tran.	2.0	2.3	2.2	2.4	2.6	2.8	2.9
Other Travel*	8.5	8.5	7.6	8.2	8.5	9.1	9.1
Total Direct Earnings	207.8	218.3	212.2	227.2	236.2	251.8	267.0
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	6.9	6.9	6.5	6.8	7.0	7.2	7.5
Arts, Ent. & Rec.	2.2	2.3	2.0	2.1	2.1	2.2	2.2
Retail**	1.2	1.2	1.1	1.2	1.2	1.2	1.2
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Visitor Air Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.3	0.3	0.2	0.2	0.2	0.3	0.2
Total Direct Employment	10.8	10.9	10.0	10.4	10.7	11.0	11.4
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.7	9.1	9.4	9.8	10.3	11.2	12.4
State Tax Receipts	21.5	22.2	21.5	24.7	25.2	25.7	26.7
Total Local & State	30.2	31.3	30.9	34.4	35.5	36.9	39.1

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.

Southern Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	582	619	610	653	666	681	700
Hotel, Motel*	335	350	340	366	374	384	401
Private Home	181	195	200	214	216	219	221
Other Overnight	66	74	70	73	77	78	78
Campground	51	57	53	56	60	60	61
Vacation Home	15	16	16	17	17	18	18
Day Travel	180	166	165	180	185	188	191
Spending at Destination	762	785	775	834	851	868	892

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$283	\$633	\$118	\$262	2.4	2.2
Private Home	\$96	\$346	\$38	\$135	2.5	3.6
Other Overnight	\$115	\$437	\$34	\$129	3.4	3.8
All Overnight	\$159	\$482	\$61	\$186	2.6	3.0

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	3,231	3,276	3,396	1,344	1,363	1,415
Private Home	5,698	5,719	5,838	2,250	2,262	2,317
Other Overnight	2,243	2,257	2,299	665	669	681
All Overnight	11,172	11,252	11,533	4,258	4,294	4,413

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,455	1,475	1,529	602	610	633
Private Home	1,596	1,602	1,636	623	626	640
Other Overnight	591	594	606	175	176	179
All Overnight	3,642	3,672	3,771	1,399	1,412	1,452

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

CENTRAL OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$83,210
Employee Earnings generated by \$100 Visitor Spending	\$29
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)	\$18,298
Additional employment if each resident household encouraged one additional overnight visitor	220

Visitor Shares

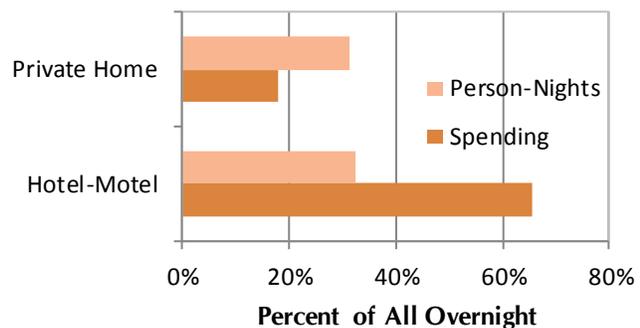
Travel Share of Total Employment (2014)*	6.8%
Overnight Visitor Day Share of Resident Population (2015p)**	10.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,325	2,875	\$410
Private Home	767	2,662	\$107
Other Overnight	797	3,005	\$95
All Overnight	2,889	8,542	\$612

Central Oregon Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	371	464	617	746	791	6.0%	5.2%
Other	19	35	59	56	59	5.1%	7.7%
Visitor	351	429	557	690	732	6.1%	5.0%
Non-transportation	312	361	461	581	631	8.6%	4.8%
Transportation	40	68	96	109	101	-6.9%	6.4%
Earnings (\$Millions)							
Earnings	96	111	146	192	214	11.2%	5.5%
Employment (Thousands)							
Employment	5.7	5.8	7.0	8.3	8.9	6.9%	3.0%
Tax Revenue (\$Millions)							
Total	15.7	18.8	22.0	29.5	32.5	10.0%	5.0%
Local	6.7	7.7	7.9	11.0	12.5	13.6%	4.2%
State	9.0	11.1	14.1	18.6	20.0	7.9%	5.5%

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, 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.

Central Oregon Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	526	573	557	621	666	690	732
Other Travel*	44	49	59	52	54	56	59
Total Direct Spending	570	622	617	673	720	746	791
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	133	138	131	150	166	180	203
Food Service	126	139	142	160	173	181	196
Food Stores	46	52	50	55	58	61	64
Local Tran. & Gas	66	84	70	88	88	85	72
Arts, Ent. & Rec.	67	70	68	73	77	79	83
Retail Sales	70	71	71	77	80	81	84
Visitor Air Tran.	18	19	27	19	23	24	29
Destination Spending	526	573	557	621	666	690	732
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	96.5	107.1	102.1	115.2	124.8	136.7	154.9
Arts, Ent. & Rec.	20.1	24.1	21.9	23.5	25.8	28.9	30.2
Retail**	15.4	16.8	16.1	17.7	18.7	19.4	20.7
Ground Tran.	2.0	2.2	2.1	2.4	2.6	2.7	3.0
Visitor Air Tran.	0.6	0.6	0.6	0.6	0.7	0.8	0.9
Other Travel*	3.1	3.5	3.5	3.7	3.7	4.0	4.4
Total Direct Earnings	137.7	154.3	146.3	163.1	176.3	192.5	214.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,540	4,950	4,710	4,990	5,270	5,550	6,060
Arts, Ent. & Rec.	1,230	1,530	1,400	1,540	1,630	1,750	1,780
Retail**	750	760	720	770	810	820	860
Ground Tran.	70	70	70	80	80	80	90
Visitor Air Tran.	20	20	20	20	20	20	20
Other Travel*	110	110	100	100	100	110	110
Total Direct Employment	6,720	7,450	7,030	7,500	7,910	8,340	8,910
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.5	8.4	7.9	9.0	10.2	11.0	12.5
State Tax Receipts	13.6	14.9	14.1	16.7	17.7	18.6	20.0
Total Local & State	23.1	23.2	22.0	25.7	27.9	29.5	32.5

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.

Central Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	433	476	463	515	554	575	613
Hotel, Motel*	270	297	286	328	358	378	411
Private Home	81	91	93	98	103	103	108
Other Overnight	82	89	83	89	93	94	95
Campground	45	47	42	45	48	48	48
Vacation Home	37	42	41	44	45	46	46
Day Travel	93	97	95	107	112	115	119
Spending at Destination	526	573	557	621	666	690	732

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$344	\$751	\$143	\$310	2.4	2.2
Private Home	\$100	\$355	\$40	\$140	2.5	3.5
Other Overnight	\$103	\$387	\$31	\$119	3.3	3.8
All Overnight	\$192	\$560	\$72	\$212	2.7	2.9

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,600	2,683	2,875	1,078	1,113	1,194
Private Home	2,600	2,591	2,662	1,046	1,044	1,078
Other Overnight	2,931	2,954	3,005	900	907	923
All Overnight	8,130	8,228	8,542	3,023	3,064	3,195

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,198	1,236	1,325	494	510	547
Private Home	749	746	767	296	295	304
Other Overnight	777	784	797	238	240	244
All Overnight	2,725	2,766	2,889	1,028	1,045	1,095

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

EASTERN OREGON TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$60,360
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$9,930
Additional employment if each resident household encouraged one additional overnight visitor	160

Visitor Shares

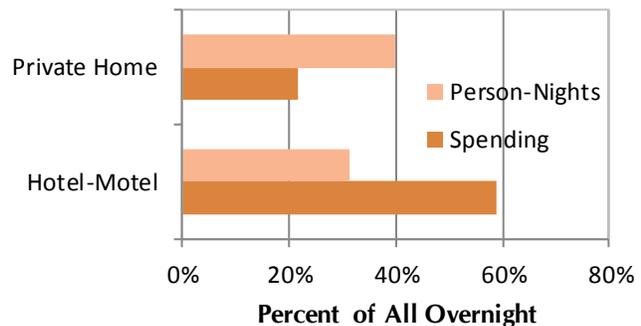
Travel Share of Total Employment (2014)*	5.3%
Overnight Visitor Day Share of Resident Population (2015p)**	7.1%

*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	800	1,584	\$151
Private Home	642	1,975	\$53
Other Overnight	396	1,414	\$48
All Overnight	1,838	4,974	\$253

Eastern Oregon Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	263	307	316	347	352	1.3%	2.0%
Other	9	12	14	15	12	-19.5%	1.9%
Visitor	254	295	302	332	339	2.3%	2.0%
Non-transportation	225	254	257	282	298	5.8%	1.9%
Transportation	29	41	45	50	41	-17.4%	2.5%
Earnings (\$Millions)							
Earnings	73	83	87	104	112	8.1%	2.9%
Employment (Thousands)							
Employment	5.4	5.4	5.0	5.5	5.7	3.4%	0.3%
Tax Revenue (\$Millions)							
Total	9.2	10.8	11.7	13.6	14.4	5.5%	3.0%
Local	2.1	2.6	3.2	3.6	3.9	7.4%	4.0%
State	7.1	8.2	8.5	10.0	10.5	4.8%	2.7%

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.

Eastern Oregon Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	314	307	302	319	324	332	339
Other Travel*	14	17	14	16	16	15	12
Total Direct Spending	328	324	316	335	340	347	352
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	59	64	64	64	67	70	77
Food Service	76	72	75	79	81	85	90
Food Stores	34	33	33	35	36	38	39
Local Tran. & Gas	46	53	45	54	51	50	41
Arts, Ent. & Rec.	56	48	48	49	49	50	52
Retail Sales	42	36	37	38	38	39	40
Destination Spending	314	307	302	319	324	332	339
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	59.0	60.1	59.7	67.6	69.0	72.8	79.3
Arts, Ent. & Rec.	15.5	15.6	14.4	15.5	15.9	16.8	17.9
Retail**	10.9	10.3	10.3	10.8	11.0	11.4	12.0
Ground Tran.	1.5	1.4	1.4	1.5	1.5	1.6	1.7
Other Travel*	0.9	0.8	1.1	0.7	0.7	0.9	1.1
Total Direct Earnings	88.0	88.5	86.9	96.1	98.0	103.8	112.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,440	3,270	3,110	3,290	3,310	3,370	3,520
Arts, Ent. & Rec.	1,490	1,410	1,340	1,430	1,480	1,500	1,520
Retail**	570	520	500	500	500	510	530
Ground Tran.	60	50	50	50	50	50	50
Visitor Air Tran.	10	10	0	0	0	10	10
Other Travel*	50	50	50	40	40	50	50
Total Direct Employment	5,620	5,310	5,050	5,310	5,380	5,490	5,670
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.9	3.1	3.2	3.3	3.4	3.6	3.9
State Tax Receipts	8.7	8.7	8.5	9.8	9.8	10.0	10.5
Total Local & State	11.6	11.8	11.7	13.1	13.3	13.6	14.4

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.

Eastern Oregon Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	219	231	226	237	241	247	253
Hotel, Motel*	131	141	135	140	140	145	151
Private Home	45	48	49	52	53	54	53
Other Overnight	43	43	42	45	47	48	48
Campground	34	32	32	34	37	37	37
Vacation Home	10	10	10	11	11	11	11
Day Travel	95	76	76	82	84	85	87
Spending at Destination	314	307	302	319	324	332	339

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$234	\$463	\$95	\$189	2.5	2.0
Private Home	\$69	\$213	\$27	\$83	2.6	3.1
Other Overnight	\$115	\$408	\$34	\$122	3.4	3.6
All Overnight	\$138	\$364	\$51	\$137	2.7	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,487	1,518	1,584	606	619	646
Private Home	1,902	1,937	1,975	742	756	771
Other Overnight	1,379	1,389	1,414	410	413	420
All Overnight	4,768	4,843	4,974	1,758	1,787	1,837

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	750	766	800	306	312	326
Private Home	619	630	642	241	246	251
Other Overnight	386	389	396	115	116	118
All Overnight	1,755	1,785	1,838	663	674	695

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

MT. HOOD/GORGE TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$79,050
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$7,965
Additional employment if each resident household encouraged one additional overnight visitor	100

Visitor Shares

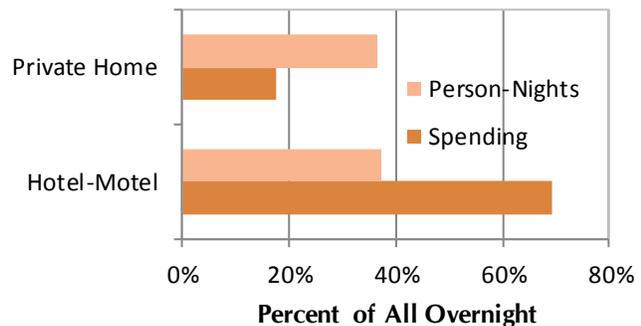
Travel Share of Total Employment (2014)*	7.3%
Overnight Visitor Day Share of Resident Population (2015p)**	9.4%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	596	1,293	\$162
Private Home	344	1,186	\$38
Other Overnight	223	847	\$29
All Overnight	1,163	3,326	\$229

Mt. Hood/Gorge Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	228	255	291	350	369	5.3%	3.3%
Other	13	12	15	17	16	-5.7%	1.3%
Visitor	215	243	276	333	353	5.8%	3.4%
Non-transportation	195	215	241	292	318	8.7%	3.3%
Transportation	20	28	35	41	35	-14.6%	3.9%
Earnings (\$Millions)							
Earnings	61	66	77	97	106	9.2%	3.8%
Employment (Thousands)							
Employment	3.7	3.7	3.8	4.3	4.6	5.9%	1.5%
Tax Revenue (\$Millions)							
Total	7.7	9.0	10.6	13.8	14.9	8.1%	4.5%
Local	2.2	2.7	3.4	4.6	5.1	10.6%	5.9%
State	5.5	6.3	7.2	9.1	9.8	6.9%	3.9%

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.

Mt. Hood/The Gorge Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	267	281	276	309	310	333	353
Other Travel*	13	14	15	17	17	17	16
Total Direct Spending	280	295	291	326	327	350	369
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	46	53	52	60	63	70	80
Food Service	74	76	79	87	88	96	105
Food Stores	23	25	25	27	28	30	31
Local Tran. & Gas	33	41	35	43	41	41	35
Arts, Ent. & Rec.	39	38	38	40	39	42	45
Retail Sales	52	48	48	52	51	54	56
Destination Spending	267	281	276	309	310	333	353
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	47.0	51.7	50.6	57.0	59.7	65.7	72.6
Arts, Ent. & Rec.	11.6	13.1	12.1	12.8	13.6	14.5	15.4
Retail**	9.4	9.5	9.3	10.1	10.2	11.0	11.8
Ground Tran.	1.1	1.1	1.1	1.2	1.2	1.4	1.5
Other Travel*	3.5	3.2	4.0	4.2	4.3	4.6	4.8
Total Direct Earnings	72.5	78.7	77.1	85.4	89.0	97.1	106.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,560	2,650	2,470	2,680	2,760	2,910	3,090
Arts, Ent. & Rec.	750	830	740	740	790	800	850
Retail**	440	420	410	440	430	450	470
Ground Tran.	40	40	40	40	40	40	40
Other Travel*	110	90	110	110	110	110	110
Total Direct Employment	3,900	4,040	3,770	4,010	4,130	4,320	4,570
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.0	3.3	3.4	3.9	4.1	4.6	5.1
State Tax Receipts	6.8	7.3	7.2	8.4	8.6	9.1	9.8
Total Local & State	9.9	10.6	10.6	12.3	12.7	13.8	14.9

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

Mt. Hood/Gorge Visitor Volume and Visitor Spending

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	159	182	177	198	199	214	229
Hotel, Motel*	106	122	118	134	135	148	162
Private Home	30	32	33	36	36	37	38
Other Overnight	22	27	25	27	28	29	29
Campground	16	20	18	19	21	21	21
Vacation Home	6	7	7	8	8	8	8
Day Travel	109	100	99	111	112	119	124
Spending at Destination	267	281	276	309	310	333	353

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$288	\$640	\$125	\$272	2.3	2.2
Private Home	\$77	\$272	\$32	\$109	2.4	3.6
Other Overnight	\$114	\$435	\$34	\$130	3.3	3.8
All Overnight	\$175	\$499	\$69	\$197	2.5	2.9

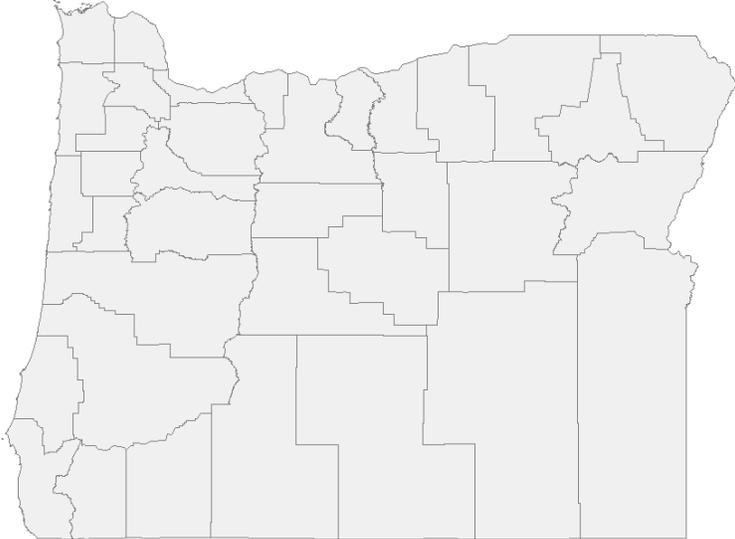
Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,099	1,195	1,293	476	518	562
Private Home	1,123	1,164	1,186	461	479	490
Other Overnight	826	832	847	247	249	253
All Overnight	3,048	3,191	3,326	1,184	1,246	1,305

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	505	551	596	214	234	253
Private Home	326	338	344	130	135	138
Other Overnight	217	219	223	65	65	66
All Overnight	1,048	1,107	1,163	409	434	457

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

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.

BAKER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$59,710
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$931
Additional employment if each resident household encouraged one additional overnight visitor	16

Visitor Shares

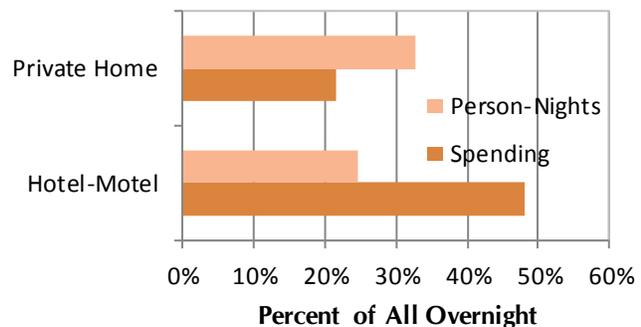
Travel Share of Total Employment (2014)*	8.6%
Overnight Visitor Day Share of Resident Population (2015p)**	10.8%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	86	162	\$15.2
Private Home	70	212	\$6.6
Other Overnight	84	275	\$9.3
All Overnight	239	649	\$31.1

Baker County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	35.0	42.2	41.7	43.7	44.3	1.4%	1.6%
Other	1.3	1.9	2.2	2.5	2.0	-19.3%	2.9%
Visitor	33.7	40.3	39.5	41.2	42.3	2.6%	1.5%
Non-transportation	30.6	35.6	34.5	36.2	38.1	5.3%	1.5%
Transportation	3.1	4.7	5.0	5.1	4.2	-16.3%	2.1%
Earnings (\$Millions)							
Earnings	9.1	10.9	10.9	12.3	12.9	5.0%	2.3%
Employment							
Employment	760	760	670	720	710	-0.5%	-0.4%
Tax Revenue (\$Millions)							
Total	1.2	1.4	1.5	1.6	1.7	4.3%	2.4%
Local	0.3	0.3	0.4	0.4	0.4	7.1%	3.8%
State	0.9	1.1	1.1	1.2	1.2	3.3%	2.0%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	41.4	38.9	39.5	40.6	40.2	41.2	42.3
Other Travel*	2.3	2.8	2.2	2.7	2.6	2.5	2.0
Total Direct Spending	43.6	41.7	41.7	43.2	42.8	43.7	44.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.9	7.3	7.5	7.3	7.4	7.6	8.3
Food Service	11.1	10.2	10.8	11.1	11.2	11.7	12.4
Food Stores	4.9	4.6	4.7	5.0	5.1	5.3	5.5
Local Tran. & Gas	5.3	5.7	5.0	5.7	5.2	5.1	4.2
Arts, Ent. & Rec.	6.2	5.3	5.3	5.3	5.3	5.4	5.6
Retail Sales	7.0	5.8	6.0	6.1	6.0	6.1	6.3
Destination Spending	41.4	38.9	39.5	40.6	40.2	41.2	42.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	7.5	7.4	7.5	7.8	8.0	8.3	8.7
Arts, Ent. & Rec.	1.7	1.7	1.6	1.9	2.1	2.1	2.2
Retail**	1.6	1.5	1.5	1.6	1.6	1.6	1.7
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	11.2	10.9	10.9	11.6	11.9	12.3	12.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	450	430	400	390	400	400	400
Arts, Ent. & Rec.	200	180	180	220	220	220	220
Retail**	90	80	80	80	80	80	80
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	750	700	670	700	710	720	710
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.4	0.4	0.4	0.4	0.4	0.4
State Tax Receipts	1.1	1.1	1.1	1.2	1.2	1.2	1.2
Total Local & State	1.5	1.5	1.5	1.6	1.6	1.6	1.7

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.

Baker 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	28.6	29.0	29.3	29.8	29.5	30.2	31.1
Hotel, Motel*	14.5	15.2	15.0	14.8	14.1	14.5	15.2
Private Home	5.6	5.8	6.0	6.3	6.3	6.5	6.6
Other Overnight	8.5	8.0	8.3	8.7	9.1	9.2	9.3
Campground	5.8	5.1	5.4	5.7	6.1	6.2	6.3
Vacation Home	2.7	2.9	2.8	2.9	3.0	3.0	3.1
Day Travel	12.8	9.9	10.2	10.7	10.7	11.0	11.2
Spending at Destination	41.4	38.9	39.5	40.6	40.2	41.2	42.3

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$228	\$432	\$93	\$177	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$113	\$371	\$34	\$111	3.3	3.3
All Overnight	\$135	\$357	\$48	\$130	2.8	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	152	155	162	62	64	66
Private Home	201	208	212	77	80	81
Other Overnight	268	270	275	81	81	83
All Overnight	621	633	649	220	225	230

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	81	82	86	33	34	35
Private Home	66	68	70	25	26	27
Other Overnight	82	82	84	25	25	25
All Overnight	228	233	239	83	85	87

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

BENTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$65,160
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,155
Additional employment if each resident household encouraged one additional overnight visitor	64

Visitor Shares

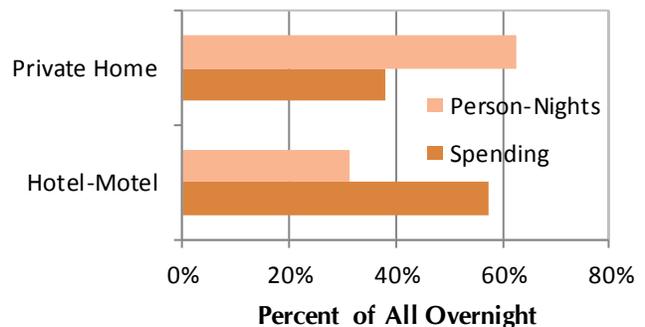
Travel Share of Total Employment (2014)*	3.0%
Overnight Visitor Day Share of Resident Population (2015p)**	4.4%

*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	275	457	\$44.4
Private Home	349	898	\$28.4
Other Overnight	28	86	\$3.4
All Overnight	652	1,440	\$76.1

Benton County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	71.2	88.5	99.1	115.6	117.2	1.4%	3.4%
Other	9.1	12.1	13.8	15.5	13.0	-15.6%	2.5%
Visitor	62.2	76.5	85.4	100.1	104.1	4.0%	3.5%
Non-transportation	56.2	67.2	74.3	87.3	93.2	6.8%	3.4%
Transportation	5.9	9.3	11.1	12.8	10.9	-14.9%	4.2%
Earnings (\$Millions)							
Earnings	18.7	22.3	25.1	30.6	31.2	2.2%	3.5%
Employment							
Employment	1,320	1,490	1,460	1,610	1,650	2.6%	1.5%
Tax Revenue (\$Millions)							
Total	3.0	3.6	4.0	5.0	5.3	5.4%	4.0%
Local	0.8	1.0	1.2	1.5	1.6	12.4%	5.3%
State	2.2	2.6	2.9	3.6	3.7	2.6%	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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	80.1	83.1	85.4	97.2	100.0	100.1	104.1
Other Travel*	14.0	16.8	13.8	17.1	15.8	15.5	13.0
Total Direct Spending	94.1	99.8	99.1	114.3	115.9	115.6	117.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.6	14.6	14.5	16.7	18.0	18.7	20.8
Food Service	21.9	22.5	24.6	27.9	29.1	29.5	31.6
Food Stores	8.1	8.7	9.0	10.1	10.3	10.5	11.0
Local Tran. & Gas	10.3	12.3	11.1	14.0	13.7	12.8	10.9
Arts, Ent. & Rec.	11.9	11.5	11.9	12.9	13.1	13.0	13.6
Retail Sales	14.3	13.5	14.4	15.6	15.8	15.6	16.2
Destination Spending	80.1	83.1	85.4	97.2	100.0	100.1	104.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	14.4	15.5	15.8	18.0	18.4	20.3	21.0
Arts, Ent. & Rec.	4.1	4.6	4.4	4.9	4.5	4.9	4.5
Retail**	3.0	3.0	3.1	3.4	3.5	3.6	3.8
Ground Tran.	0.4	0.4	0.4	0.5	0.5	0.5	0.6
Other Travel*	1.6	1.6	1.3	1.6	1.2	1.3	1.4
Total Direct Earnings	23.4	25.0	25.1	28.4	28.1	30.6	31.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	840	850	800	870	880	940	970
Arts, Ent. & Rec.	430	450	440	480	420	430	440
Retail**	160	160	160	170	170	170	170
Ground Tran.	10	10	10	20	20	20	20
Other Travel*	60	60	50	60	50	50	50
Total Direct Employment	1,510	1,530	1,460	1,590	1,540	1,610	1,650
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.2	1.2	1.3	1.4	1.5	1.6
State Tax Receipts	2.8	2.9	2.9	3.5	3.5	3.6	3.7
Total Local & State	3.8	4.0	4.0	4.8	4.9	5.0	5.3

Details may not add to totals due to rounding.

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

Benton County Visitor Spending and Visitor Volume

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	56.1	60.9	62.0	70.7	72.9	73.1	76.1
Hotel, Motel*	30.9	33.5	33.4	39.6	41.8	42.0	44.4
Private Home	22.2	24.3	25.7	28.0	27.8	27.8	28.4
Other Overnight	3.0	3.0	2.9	3.1	3.3	3.3	3.4
Campground	2.5	2.5	2.4	2.5	2.7	2.7	2.7
Vacation Home	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Day Travel	24.0	22.2	23.3	26.5	27.1	27.0	28.0
Spending at Destination	80.1	83.1	85.4	97.2	100.0	100.1	104.1

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$238	\$396	\$97	\$161	2.5	1.7
Private Home	\$81	\$208	\$32	\$81	2.6	2.6
Other Overnight	\$134	\$402	\$40	\$119	3.4	3.0
All Overnight	\$135	\$296	\$53	\$117	2.6	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	442	434	457	180	177	186
Private Home	875	869	898	342	340	351
Other Overnight	83	84	86	25	25	25
All Overnight	1,401	1,387	1,440	547	541	562

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	266	261	275	108	106	112
Private Home	340	338	349	133	132	136
Other Overnight	28	28	28	8	8	8
All Overnight	634	627	652	250	247	257

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

CLACKAMAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$85,190
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$21,890
Additional employment if each resident household encouraged one additional overnight visitor	257

Visitor Shares

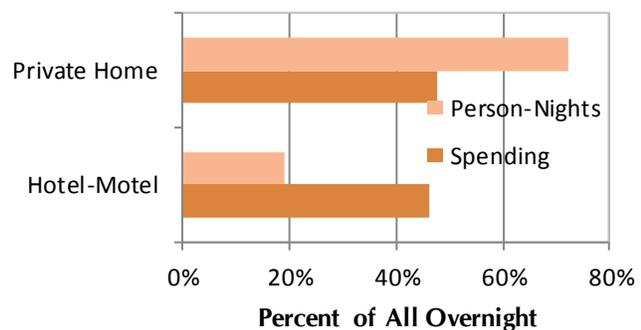
Travel Share of Total Employment (2014)*	2.6%
Overnight Visitor Day Share of Resident Population (2015p)**	4.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	712	1,413	\$184.6
Private Home	1,669	5,144	\$164.3
Other Overnight	185	613	\$20.8
All Overnight	2,566	7,170	\$369.6

Clackamas County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	337.0	394.4	463.5	550.2	560.9	1.9%	3.5%
Other	40.3	46.4	74.1	88.8	78.0	-12.2%	4.5%
Visitor	296.7	347.9	389.5	461.4	482.9	4.7%	3.3%
Non-transportation	268.1	307.0	340.2	404.5	432.1	6.8%	3.2%
Transportation	28.6	40.9	49.3	56.8	50.8	-10.7%	3.9%
Earnings (\$Millions)							
Earnings	87.3	98.1	116.9	142.6	154.6	8.4%	3.9%
Employment							
Employment	4,800	5,010	5,220	5,800	6,050	4.3%	1.6%
Tax Revenue (\$Millions)							
Total	11.3	13.5	15.9	20.4	22.0	8.2%	4.5%
Local	2.1	2.9	3.2	4.6	5.4	17.7%	6.5%
State	9.2	10.6	12.7	15.8	16.6	5.4%	4.0%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	380.0	405.7	389.5	440.0	444.3	461.4	482.9
Other Travel*	53.3	63.5	74.1	89.3	88.9	88.8	78.0
Total Direct Spending	433.3	469.1	463.5	529.3	533.3	550.2	560.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	59.2	66.8	58.5	72.0	73.7	79.5	90.9
Food Service	110.5	118.0	120.1	133.8	137.3	144.3	153.9
Food Stores	28.4	32.4	31.2	34.5	35.1	36.8	38.5
Local Tran. & Gas	47.0	56.2	49.3	59.5	57.4	56.8	50.8
Arts, Ent. & Rec.	47.3	47.6	45.8	49.0	49.3	50.8	52.8
Retail Sales	87.6	84.7	84.6	91.2	91.5	93.2	96.0
Destination Spending	380.0	405.7	389.5	440.0	444.3	461.4	482.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	68.7	77.0	72.5	82.4	84.0	89.0	98.5
Arts, Ent. & Rec.	14.2	16.5	15.0	16.0	17.6	18.7	19.4
Retail**	13.9	14.6	14.1	15.3	15.5	16.3	17.1
Ground Tran.	4.0	4.3	4.1	4.6	4.7	5.0	5.3
Other Travel*	6.6	7.1	11.2	12.3	12.8	13.7	14.2
Total Direct Earnings	107.4	119.5	116.9	130.6	134.6	142.6	154.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,270	3,460	3,150	3,430	3,450	3,560	3,790
Arts, Ent. & Rec.	1,020	1,120	1,020	1,010	1,070	1,100	1,110
Retail**	580	600	560	600	600	600	610
Ground Tran.	150	140	140	150	150	150	160
Other Travel*	260	250	350	350	370	390	390
Total Direct Employment	5,270	5,580	5,220	5,530	5,630	5,800	6,050
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.3	3.8	3.2	3.9	4.3	4.6	5.4
State Tax Receipts	11.5	12.3	12.7	15.1	15.4	15.8	16.6
Total Local & State	14.8	16.1	15.9	19.0	19.6	20.4	22.0

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.

Clackamas 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	281.6	310.6	295.3	335.1	338.1	351.9	369.6
Hotel, Motel*	132.2	147.1	133.1	158.4	160.1	169.6	184.6
Private Home	133.1	142.9	144.0	157.5	157.9	161.9	164.3
Other Overnight	16.3	20.6	18.2	19.3	20.1	20.5	20.8
Campground	10.2	13.9	11.4	12.0	12.8	12.9	13.2
Vacation Home	6.1	6.7	6.8	7.3	7.4	7.5	7.6
Day Travel	98.3	95.1	94.2	104.9	106.2	109.5	113.2
Spending at Destination	380.0	405.7	389.5	440.0	444.3	461.4	482.9

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$279	\$570	\$131	\$259	2.1	2.0
Private Home	\$67	\$212	\$32	\$98	2.1	3.2
Other Overnight	\$109	\$364	\$34	\$112	3.2	3.3
All Overnight	\$112	\$319	\$52	\$144	2.2	2.9

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,297	1,340	1,413	603	626	663
Private Home	4,970	5,045	5,144	2,362	2,405	2,463
Other Overnight	598	603	613	185	186	190
All Overnight	6,866	6,988	7,170	3,150	3,218	3,315

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	653	675	712	295	306	324
Private Home	1,612	1,636	1,669	747	760	777
Other Overnight	181	182	185	56	56	57
All Overnight	2,446	2,493	2,566	1,098	1,122	1,157

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

CLATSOP COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$92,490
Employee Earnings generated by \$100 Visitor Spending	\$29
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)	\$3,223
Additional employment if each resident household encouraged one additional overnight visitor	35

Visitor Shares

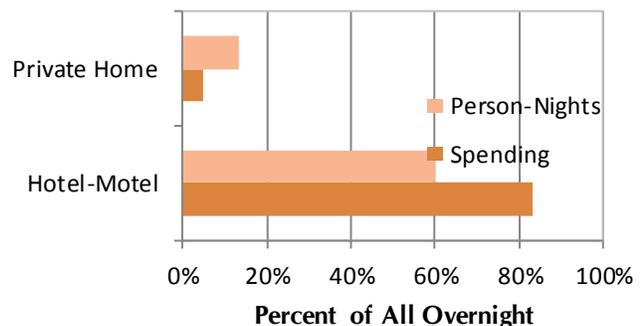
Travel Share of Total Employment (2014)*	23.1%
Overnight Visitor Day Share of Resident Population (2015p)**	27.8%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,253	2,371	\$287.4
Private Home	162	494	\$15.3
Other Overnight	304	1,006	\$38.9
All Overnight	1,720	3,871	\$341.6

Clatsop County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	283.0	346.4	405.2	516.6	539.6	4.4%	4.4%
Other	3.6	13.4	18.2	7.0	5.8	-16.4%	3.3%
Visitor	279.4	333.1	387.0	509.7	533.8	4.7%	4.4%
Non-transportation	257.7	300.7	345.6	454.6	487.1	7.1%	4.3%
Transportation	21.7	32.4	41.4	55.0	46.7	-15.2%	5.2%
Earnings (\$Millions)							
Earnings	80.9	98.9	118.6	142.4	155.8	9.4%	4.5%
Employment							
Employment	4,460	4,780	5,010	5,470	5,800	5.9%	1.8%
Tax Revenue (\$Millions)							
Total	10.8	13.7	16.5	21.6	23.6	9.5%	5.3%
Local	4.4	5.4	6.8	9.3	10.5	12.7%	6.0%
State	6.5	8.2	9.7	12.3	13.1	7.1%	4.8%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	370.3	397.1	387.0	419.2	460.4	509.7	533.8
Other Travel*	17.9	15.5	18.2	20.1	7.1	7.0	5.8
Total Direct Spending	388.2	412.7	405.2	439.3	467.5	516.6	539.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	86.5	94.6	93.2	100.9	109.6	122.6	136.1
Food Service	101.9	110.4	112.7	121.2	137.0	155.1	166.4
Food Stores	30.6	32.8	31.8	34.7	37.9	41.7	43.8
Local Tran. & Gas	38.7	49.2	41.4	49.6	52.2	55.0	46.7
Arts, Ent. & Rec.	51.6	51.6	49.8	51.8	56.9	62.7	65.5
Retail Sales	61.1	58.5	58.1	61.0	66.8	72.6	75.2
Destination Spending	370.3	397.1	387.0	419.2	460.4	509.7	533.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	76.4	85.3	83.0	90.4	100.5	105.7	117.1
Arts, Ent. & Rec.	16.0	18.4	16.7	17.3	17.9	18.8	19.6
Retail**	11.7	12.0	11.6	12.4	13.6	15.2	16.1
Ground Tran.	1.4	1.5	1.5	1.6	1.8	2.1	2.2
Other Travel*	5.7	4.1	5.8	6.2	0.7	0.7	0.7
Total Direct Earnings	111.1	121.5	118.6	127.8	134.4	142.4	155.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,620	3,740	3,520	3,600	3,810	3,910	4,180
Arts, Ent. & Rec.	850	960	830	800	810	840	870
Retail**	550	560	540	550	580	630	660
Ground Tran.	50	50	50	50	60	60	60
Other Travel*	80	70	70	90	30	30	30
Total Direct Employment	5,140	5,390	5,010	5,090	5,280	5,470	5,800
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.3	6.8	6.8	7.5	8.3	9.3	10.5
State Tax Receipts	9.2	10.0	9.7	10.9	11.5	12.3	13.1
Total Local & State	15.5	16.7	16.5	18.3	19.8	21.6	23.6

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.

Clatsop 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	220.8	254.1	246.7	265.9	291.5	324.2	341.6
Hotel, Motel*	175.1	205.3	198.9	214.7	238.7	270.5	287.4
Private Home	13.1	14.1	13.6	15.1	15.2	15.5	15.3
Other Overnight	32.6	34.7	34.2	36.1	37.6	38.2	38.9
Campground	20.5	21.6	21.3	22.4	23.9	24.2	24.7
Vacation Home	12.1	13.1	12.9	13.7	13.7	14.0	14.1
Day Travel	149.5	143.0	140.3	153.3	168.9	185.5	192.2
Spending at Destination	370.3	397.1	387.0	419.2	460.4	509.7	533.8

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$296	\$560	\$121	\$229	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$126	\$419	\$39	\$128	3.3	3.3
All Overnight	\$233	\$512	\$88	\$199	2.6	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,977	2,252	2,371	809	921	970
Private Home	487	492	494	187	189	190
Other Overnight	982	989	1,006	300	302	307
All Overnight	3,446	3,733	3,871	1,296	1,412	1,467

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,045	1,190	1,253	428	487	513
Private Home	160	162	162	61	62	62
Other Overnight	297	299	304	90	91	93
All Overnight	1,502	1,651	1,720	580	640	668

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

COLUMBIA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$52,720
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,817
Additional employment if each resident household encouraged one additional overnight visitor	34

Visitor Shares

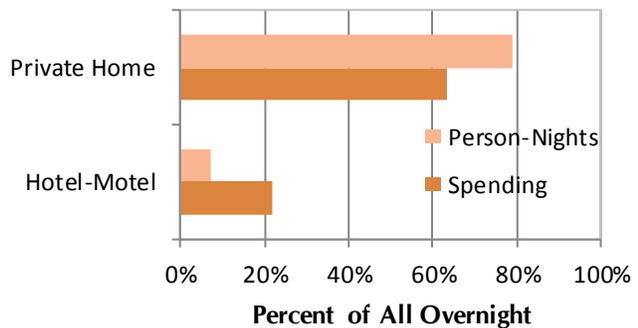
Travel Share of Total Employment (2014)*	3.7%
Overnight Visitor Day Share of Resident Population (2015p)**	3.6%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	24	50	\$4.8
Private Home	169	524	\$12.6
Other Overnight	28	92	\$3.0
All Overnight	222	666	\$20.5

Columbia County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	23.7	29.9	33.7	38.7	37.5	-3.1%	3.1%
Other	3.4	5.7	6.7	7.8	6.3	-19.3%	4.1%
Visitor	20.3	24.2	27.0	30.9	31.2	1.0%	2.9%
Non-transportation	18.5	21.5	23.8	27.3	28.2	3.4%	2.9%
Transportation	1.8	2.7	3.2	3.7	3.1	-16.5%	3.5%
Earnings (\$Millions)							
Earnings	5.4	6.4	8.2	10.0	10.7	6.9%	4.7%
Employment							
Employment	430	480	530	590	610	4.5%	2.4%
Tax Revenue (\$Millions)							
Total	0.8	1.0	1.1	1.4	1.4	3.4%	3.6%
Local	0.0	0.0	0.0	0.0	0.0		
State	0.8	1.0	1.1	1.4	1.4	3.4%	3.6%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	26.9	27.9	27.0	29.3	28.4	30.9	31.2
Other Travel*	6.8	8.5	6.7	8.3	8.0	7.8	6.3
Total Direct Spending	33.7	36.4	33.7	37.6	36.4	38.7	37.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.9	2.8	2.5	2.6	2.2	2.7	3.1
Food Service	7.7	7.9	8.2	8.8	8.8	9.7	10.0
Food Stores	4.2	4.8	4.7	5.2	5.3	5.7	5.8
Local Tran. & Gas	3.2	3.7	3.2	3.8	3.6	3.7	3.1
Arts, Ent. & Rec.	4.0	3.8	3.7	3.8	3.7	4.0	4.1
Retail Sales	4.9	4.7	4.7	5.0	4.9	5.2	5.2
Destination Spending	26.9	27.9	27.0	29.3	28.4	30.9	31.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	4.3	4.5	5.2	6.2	6.1	6.8	7.4
Arts, Ent. & Rec.	1.3	1.4	1.3	1.3	1.3	1.3	1.3
Retail**	1.2	1.3	1.2	1.3	1.3	1.5	1.5
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.2	0.2	0.2	0.3	0.3	0.3	0.3
Total Direct Earnings	7.2	7.6	8.2	9.3	9.2	10.0	10.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	290	280	310	340	340	360	370
Arts, Ent. & Rec.	150	150	140	140	140	140	140
Retail**	60	60	60	60	60	70	70
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	20	20	20	20	20	20
Total Direct Employment	530	520	530	570	560	590	610
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	1.1	1.1	1.1	1.3	1.3	1.4	1.4
Total Local & State	1.1	1.1	1.1	1.3	1.3	1.4	1.4

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.

Columbia 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	17.5	18.6	17.8	19.3	18.4	20.2	20.5
Hotel, Motel*	5.9	5.0	4.4	4.5	3.5	4.4	4.8
Private Home	10.5	11.1	10.9	11.9	12.0	12.8	12.6
Other Overnight	1.1	2.6	2.5	2.8	3.0	3.0	3.0
Campground	0.7	2.1	2.0	2.4	2.5	2.5	2.6
Vacation Home	0.4	0.4	0.4	0.4	0.4	0.5	0.5
Day Travel	9.5	9.2	9.1	10.0	10.0	10.7	10.8
Spending at Destination	26.9	27.9	27.0	29.3	28.4	30.9	31.2

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$228	\$466	\$96	\$196	2.4	2.0
Private Home	\$51	\$159	\$24	\$75	2.1	3.1
Other Overnight	\$107	\$353	\$33	\$108	3.3	3.3
All Overnight	\$69	\$208	\$31	\$92	2.2	3.0

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	39	48	50	16	20	21
Private Home	493	524	524	232	247	247
Other Overnight	90	90	92	28	28	28
All Overnight	622	662	666	277	295	296

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	19	23	24	8	10	10
Private Home	159	169	169	75	80	80
Other Overnight	27	28	28	8	8	9
All Overnight	206	220	222	91	98	99

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

COOS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$81,870
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.40

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,280
Additional employment if each resident household encouraged one additional overnight visitor	52

Visitor Shares

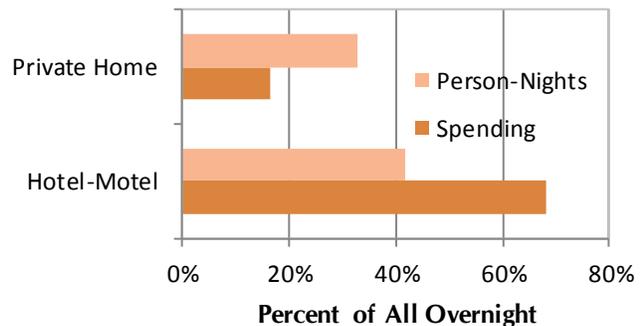
Travel Share of Total Employment (2014)*	9.9%
Overnight Visitor Day Share of Resident Population (2015p)**	11.1%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	579	1,095	\$113.3
Private Home	272	826	\$26.1
Other Overnight	203	656	\$24.5
All Overnight	1,053	2,576	\$164.0

Coos County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	151.2	196.9	210.8	252.9	260.9	3.2%	3.7%
Other	10.8	15.7	14.8	14.3	13.5	-6.0%	1.5%
Visitor	140.4	181.2	195.9	238.6	247.4	3.7%	3.8%
Non-transportation	128.1	161.3	172.4	209.6	223.0	6.4%	3.8%
Transportation	12.3	19.9	23.5	28.9	24.4	-15.6%	4.7%
Earnings (\$Millions)							
Earnings	40.7	50.8	56.3	66.7	71.2	6.8%	3.8%
Employment							
Employment	2,740	2,970	2,940	3,030	3,120	3.0%	0.9%
Tax Revenue (\$Millions)							
Total	5.0	6.4	6.5	7.9	8.4	6.2%	3.5%
Local	1.0	1.3	1.1	1.2	1.4	12.6%	2.0%
State	4.0	5.0	5.4	6.7	7.0	5.0%	3.9%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	200.2	213.0	195.9	215.0	228.3	238.6	247.4
Other Travel*	17.8	19.3	14.8	15.5	15.4	14.3	13.5
Total Direct Spending	218.0	232.3	210.8	230.6	243.6	252.9	260.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	42.7	44.7	40.7	45.3	47.6	50.1	55.5
Food Service	51.5	55.6	53.9	58.7	64.1	68.5	73.1
Food Stores	19.6	21.3	19.9	21.7	23.0	24.2	25.2
Local Tran. & Gas	23.7	29.6	23.5	28.6	29.1	28.9	24.4
Arts, Ent. & Rec.	36.1	35.9	33.1	34.8	37.0	38.5	40.0
Retail Sales	26.6	26.0	24.8	26.1	27.6	28.4	29.2
Destination Spending	200.2	213.0	195.9	215.0	228.3	238.6	247.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	35.9	39.5	36.1	38.8	40.3	42.6	45.9
Arts, Ent. & Rec.	9.6	11.0	9.5	10.5	11.2	11.5	11.9
Retail**	6.1	6.5	6.0	6.4	6.8	7.2	7.6
Ground Tran.	0.8	0.9	0.8	0.9	1.0	1.1	1.2
Other Travel*	3.5	3.5	3.8	3.8	4.0	4.3	4.7
Total Direct Earnings	56.0	61.3	56.3	60.4	63.4	66.7	71.2
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,930	2,010	1,700	1,750	1,740	1,770	1,850
Arts, Ent. & Rec.	770	840	830	870	850	830	810
Retail**	300	310	280	290	300	310	330
Ground Tran.	30	30	30	30	30	30	30
Other Travel*	100	110	100	90	90	90	100
Total Direct Employment	3,140	3,300	2,940	3,020	3,010	3,030	3,120
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.3	1.3	1.1	1.1	1.2	1.2	1.4
State Tax Receipts	5.5	5.9	5.4	6.2	6.5	6.7	7.0
Total Local & State	6.9	7.3	6.5	7.3	7.6	7.9	8.4

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.

Coos 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	129.0	141.9	129.3	141.9	150.3	157.4	164.0
Hotel, Motel*	84.1	94.5	83.9	93.7	100.6	107.1	113.3
Private Home	23.3	24.6	24.2	25.6	25.9	26.1	26.1
Other Overnight	21.6	22.8	21.2	22.5	23.8	24.1	24.5
Campground	18.4	19.4	17.9	19.0	20.3	20.6	20.9
Vacation Home	3.2	3.4	3.3	3.5	3.5	3.5	3.6
Day Travel	71.1	71.1	66.6	73.1	78.0	81.2	83.5
Spending at Destination	200.2	213.0	195.9	215.0	228.3	238.6	247.4

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$252	\$477	\$104	\$196	2.4	1.9
Private Home	\$81	\$248	\$32	\$96	2.6	3.1
Other Overnight	\$127	\$413	\$37	\$121	3.4	3.2
All Overnight	\$170	\$408	\$64	\$156	2.7	2.4

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	968	1,040	1,095	398	427	450
Private Home	815	818	826	319	319	323
Other Overnight	639	643	656	188	189	192
All Overnight	2,423	2,501	2,576	904	935	965

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	512	550	579	210	225	237
Private Home	268	269	272	104	104	105
Other Overnight	198	199	203	58	58	59
All Overnight	978	1,018	1,053	372	388	402

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

CROOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$73,330
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.40

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$947
Additional employment if each resident household encouraged one additional overnight visitor	13

Visitor Shares

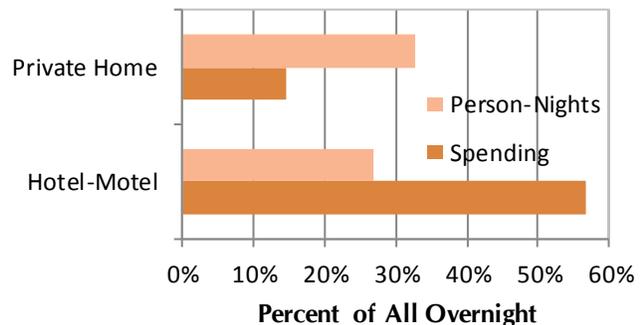
Travel Share of Total Employment (2014)*	5.1%
Overnight Visitor Day Share of Resident Population (2015p)**	8.5%

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

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

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

Overnight Visitor Spending and Volume



2015p	Trips (Thousands)	Nights (Thousands)	Spending (Millions)
Hotel, Motel	111	184	\$18.0
Private Home	84	217	\$4.3
Other Overnight	88	261	\$8.4
All Overnight	283	662	\$30.8

Crook County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	19.4	23.2	29.5	40.3	41.9	3.9%	5.3%
Other	1.5	2.6	2.9	3.3	2.6	-19.3%	3.7%
Visitor	17.9	20.5	26.7	37.1	39.3	6.0%	5.4%
Non-transportation	16.6	18.6	24.1	33.8	36.4	7.9%	5.4%
Transportation	1.3	1.9	2.5	3.3	2.8	-13.3%	5.2%
Earnings (\$Millions)							
Earnings	5.1	6.0	8.1	10.6	11.8	11.3%	5.7%
Employment							
Employment	390	450	460	510	540	7.0%	2.3%
Tax Revenue (\$Millions)							
Total	0.8	0.8	0.9	1.3	1.4	7.9%	3.4%
Local	0.3	0.1	0.2	0.2	0.3	13.5%	-0.6%
State	0.5	0.6	0.8	1.0	1.1	6.7%	4.8%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	25.7	27.1	26.7	32.7	37.0	37.1	39.3
Other Travel*	3.2	3.9	2.9	3.5	3.4	3.3	2.6
Total Direct Spending	28.8	31.0	29.5	36.2	40.4	40.3	41.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	4.8	5.0	5.4	7.3	9.0	9.2	10.4
Food Service	6.4	6.8	7.0	8.5	9.6	9.7	10.4
Food Stores	4.2	4.6	4.2	4.7	5.0	5.1	5.4
Local Tran. & Gas	2.5	3.0	2.5	3.3	3.5	3.3	2.8
Arts, Ent. & Rec.	4.0	4.1	4.0	4.9	5.5	5.4	5.8
Retail Sales	3.8	3.6	3.6	4.0	4.3	4.3	4.4
Destination Spending	25.7	27.1	26.7	32.7	37.0	37.1	39.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	5.6	6.1	5.4	5.9	6.5	7.1	8.3
Arts, Ent. & Rec.	1.5	1.7	1.6	2.0	1.9	2.0	2.0
Retail**	1.0	1.0	1.0	1.1	1.2	1.2	1.3
Ground Tran.	0.1	0.1	0.1	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	8.3	9.1	8.1	9.2	9.8	10.6	11.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	250	270	230	230	240	250	280
Arts, Ent. & Rec.	180	190	180	200	190	190	190
Retail**	50	50	50	50	50	50	60
Ground Tran.	0	0	0	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	490	530	460	490	490	510	540
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.2	0.2	0.2	0.2	0.3
State Tax Receipts	0.8	0.9	0.8	0.9	1.0	1.0	1.1
Total Local & State	1.0	1.0	0.9	1.2	1.2	1.3	1.4

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.

Crook 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	18.9	20.3	20.2	25.1	28.7	28.9	30.8
Hotel, Motel*	7.2	7.7	9.1	13.1	16.3	16.4	18.0
Private Home	3.9	4.3	3.9	4.3	4.3	4.2	4.3
Other Overnight	7.8	8.3	7.2	7.7	8.1	8.3	8.4
Campground	6.5	6.9	5.8	6.3	6.7	6.8	6.9
Vacation Home	1.3	1.4	1.4	1.4	1.4	1.5	1.5
Day Travel	6.8	6.7	6.5	7.6	8.2	8.2	8.5
Spending at Destination	25.7	27.1	26.7	32.7	37.0	37.1	39.3

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$240	\$399	\$98	\$163	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$108	\$321	\$32	\$96	3.4	3.0
All Overnight	\$130	\$295	\$46	\$109	2.8	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	176	172	184	72	70	75
Private Home	213	209	217	83	82	85
Other Overnight	255	257	261	76	76	77
All Overnight	644	637	662	231	228	237

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	106	103	111	43	42	45
Private Home	83	81	84	32	32	33
Other Overnight	86	86	88	26	26	26
All Overnight	274	271	283	101	100	104

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

CURRY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$66,000
Employee Earnings generated by \$100 Visitor Spending	\$37
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.20

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,449
Additional employment if each resident household encouraged one additional overnight visitor	22

Visitor Shares

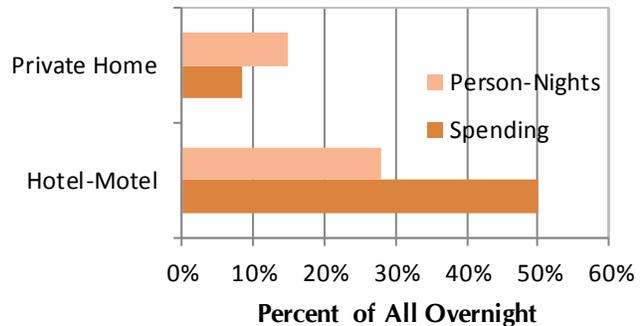
Travel Share of Total Employment (2014)*	17.5%
Overnight Visitor Day Share of Resident Population (2015p)**	18.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	272	452	\$45.2
Private Home	90	232	\$7.3
Other Overnight	290	895	\$36.0
All Overnight	652	1,578	\$88.5

Curry County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	86.1	105.1	111.1	123.9	127.3	2.8%	2.6%
Other	1.7	2.7	3.1	3.5	2.8	-19.3%	3.6%
Visitor	84.4	102.4	108.0	120.4	124.5	3.4%	2.6%
Non-transportation	77.5	91.9	96.1	107.1	113.4	5.9%	2.6%
Transportation	6.9	10.5	12.0	13.3	11.1	-16.2%	3.3%
Earnings (\$Millions)							
Earnings	27.7	33.3	35.7	42.0	46.0	9.6%	3.4%
Employment							
Employment	1,740	1,870	1,740	1,790	1,890	5.8%	0.6%
Tax Revenue (\$Millions)							
Total	2.5	3.1	3.2	3.7	3.9	7.4%	3.2%
Local	0.4	0.5	0.5	0.5	0.6	12.6%	2.9%
State	2.1	2.6	2.7	3.1	3.3	6.4%	3.3%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	106.7	112.5	108.0	113.9	118.3	120.4	124.5
Other Travel*	3.1	3.7	3.1	3.8	3.6	3.5	2.8
Total Direct Spending	109.8	116.1	111.1	117.7	122.0	123.9	127.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	22.6	22.9	22.3	23.1	23.7	24.0	26.3
Food Service	27.2	28.8	29.1	30.5	32.5	33.7	35.9
Food Stores	13.7	15.5	14.7	15.8	16.6	17.2	17.9
Local Tran. & Gas	11.8	14.5	12.0	14.0	13.8	13.3	11.1
Arts, Ent. & Rec.	15.3	15.3	14.6	14.8	15.4	15.7	16.3
Retail Sales	16.2	15.5	15.3	15.7	16.3	16.5	16.9
Destination Spending	106.7	112.5	108.0	113.9	118.3	120.4	124.5
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	25.2	27.0	26.0	28.8	30.6	32.8	36.4
Arts, Ent. & Rec.	4.9	5.7	5.1	4.3	4.5	4.0	4.1
Retail**	4.1	4.3	4.1	4.3	4.5	4.7	4.9
Ground Tran.	0.4	0.4	0.4	0.4	0.4	0.4	0.5
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	34.7	37.6	35.7	37.9	40.2	42.0	46.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,200	1,200	1,130	1,190	1,220	1,220	1,300
Arts, Ent. & Rec.	430	450	400	340	370	340	360
Retail**	200	210	190	190	190	210	220
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,850	1,880	1,740	1,740	1,800	1,790	1,890
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.6	0.6	0.5	0.5	0.5	0.5	0.6
State Tax Receipts	2.7	2.8	2.7	3.0	3.1	3.1	3.3
Total Local & State	3.2	3.4	3.2	3.5	3.6	3.7	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, travel arrangement & reservation services, and convention & trade show organizers. **Retail includes gasoline.

Curry County Visitor Spending and Visitor Volume

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

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	74.3	80.9	77.4	81.1	84.0	85.4	88.5
Hotel, Motel*	39.4	41.7	39.7	41.2	42.0	42.8	45.2
Private Home	6.1	6.3	6.5	7.1	7.2	7.3	7.3
Other Overnight	28.8	32.9	31.2	32.8	34.8	35.3	36.0
Campground	25.6	29.5	27.9	29.4	31.3	31.7	32.4
Vacation Home	3.2	3.4	3.3	3.5	3.5	3.6	3.6
Day Travel	32.4	31.6	30.7	32.8	34.3	35.0	36.0
Spending at Destination	106.7	112.5	108.0	113.9	118.3	120.4	124.5

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$245	\$408	\$100	\$166	2.5	1.7
Private Home	\$81	\$208	\$32	\$81	2.6	2.6
Other Overnight	\$138	\$426	\$40	\$124	3.4	3.1
All Overnight	\$165	\$384	\$56	\$136	3.0	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	419	430	452	171	175	184
Private Home	225	227	232	88	89	91
Other Overnight	873	878	895	254	255	260
All Overnight	1,517	1,534	1,578	513	519	535

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	252	258	272	103	105	111
Private Home	88	88	90	34	34	35
Other Overnight	282	284	290	82	83	84
All Overnight	622	631	652	219	223	230

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

DESCHUTES COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$86,400
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$12,870
Additional employment if each resident household encouraged one additional overnight visitor	149

Visitor Shares

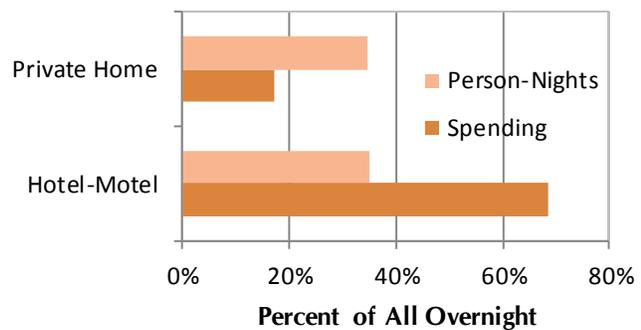
Travel Share of Total Employment (2014)*	6.1%
Overnight Visitor Day Share of Resident Population (2015p)**	10.5%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,239	2,344	\$332.2
Private Home	727	2,211	\$78.0
Other Overnight	579	1,942	\$63.6
All Overnight	2,545	6,497	\$473.8

Deschutes County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	295.9	374.7	510.8	620.9	660.2	6.3%	5.5%
Other	29.9	58.0	93.7	89.8	96.2	7.1%	8.1%
Visitor	266.1	316.7	417.2	531.0	563.9	6.2%	5.1%
Non-transportation	245.0	284.8	370.9	473.8	514.8	8.7%	5.1%
Transportation	21.1	31.9	46.3	57.2	49.1	-14.2%	5.8%
Earnings (\$Millions)							
Earnings	75.3	87.6	117.5	154.2	171.9	11.4%	5.7%
Employment							
Employment	4,230	4,210	5,310	6,250	6,680	6.9%	3.1%
Tax Revenue (\$Millions)							
Total	13.3	16.1	18.9	25.5	28.1	10.3%	5.1%
Local	6.2	7.2	7.4	10.2	11.6	13.6%	4.3%
State	7.1	8.9	11.5	15.2	16.5	8.2%	5.8%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	399.9	435.3	417.2	476.4	509.1	531.0	563.9
Other Travel*	68.7	77.5	93.7	80.7	87.1	89.8	96.2
Total Direct Spending	468.6	512.8	510.8	557.1	596.2	620.9	660.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	108.1	111.6	104.7	121.3	134.4	146.3	165.8
Food Service	104.0	116.0	117.8	133.5	144.4	151.6	164.5
Food Stores	34.3	38.8	37.1	41.8	44.0	45.9	48.3
Local Tran. & Gas	43.3	55.2	46.3	58.5	58.8	57.2	49.1
Arts, Ent. & Rec.	52.5	54.8	52.7	57.2	60.4	61.9	65.3
Retail Sales	57.8	59.0	58.6	64.0	67.1	68.0	70.9
Destination Spending	399.9	435.3	417.2	476.4	509.1	531.0	563.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	77.0	85.9	81.9	93.9	100.7	110.7	125.5
Arts, Ent. & Rec.	15.7	18.9	17.0	17.3	18.7	21.0	22.2
Retail**	11.9	13.0	12.4	13.8	14.5	15.2	16.2
Ground Tran.	1.6	1.8	1.7	2.0	2.1	2.2	2.4
Other Travel*	3.9	4.4	4.4	4.6	4.8	5.1	5.6
Total Direct Earnings	110.1	123.9	117.5	131.5	140.9	154.2	171.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,510	3,890	3,720	3,970	4,160	4,410	4,800
Arts, Ent. & Rec.	780	950	860	870	900	1,010	1,010
Retail**	560	570	540	580	600	620	640
Ground Tran.	60	60	60	60	70	70	70
Other Travel*	150	150	140	140	140	150	150
Total Direct Employment	5,050	5,620	5,310	5,630	5,870	6,250	6,680
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	9.0	7.7	7.4	8.3	9.4	10.2	11.6
State Tax Receipts	11.1	12.2	11.5	13.7	14.5	15.2	16.5
Total Local & State	20.0	19.9	18.9	22.0	23.9	25.5	28.1

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.

Deschutes 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	331.0	363.5	347.0	396.4	424.5	444.4	473.8
Hotel, Motel*	218.0	238.7	226.1	263.5	287.0	305.0	332.2
Private Home	59.5	67.1	66.0	73.6	75.8	76.5	78.0
Other Overnight	53.6	57.8	54.9	59.3	61.8	62.9	63.6
Campground	25.0	25.3	22.6	24.3	25.9	26.2	26.7
Vacation Home	28.6	32.5	32.3	34.9	35.9	36.6	36.9
Day Travel	69.0	71.7	70.2	80.0	84.5	86.7	90.2
Spending at Destination	399.9	435.3	417.2	476.4	509.1	531.0	563.9

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$340	\$647	\$142	\$268	2.4	1.9
Private Home	\$86	\$270	\$35	\$107	2.5	3.1
Other Overnight	\$105	\$352	\$33	\$110	3.2	3.4
All Overnight	\$191	\$482	\$73	\$186	2.6	2.5

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,109	2,187	2,344	878	911	977
Private Home	2,157	2,161	2,211	872	876	902
Other Overnight	1,894	1,910	1,942	592	597	607
All Overnight	6,160	6,258	6,497	2,342	2,384	2,486

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,115	1,156	1,239	461	478	513
Private Home	709	710	727	281	281	289
Other Overnight	565	570	579	176	178	181
All Overnight	2,389	2,437	2,545	918	937	983

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

DOUGLAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$72,750
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$6,010
Additional employment if each resident household encouraged one additional overnight visitor	83

Visitor Shares

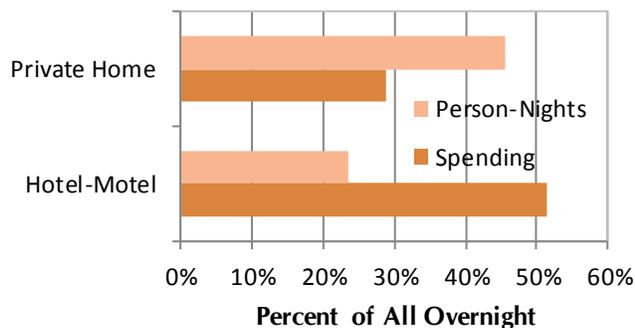
Travel Share of Total Employment (2014)*	6.0%
Overnight Visitor Day Share of Resident Population (2015p)**	6.2%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	324	596	\$65.3
Private Home	375	1,125	\$35.0
Other Overnight	240	764	\$24.3
All Overnight	939	2,485	\$124.6

Douglas County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	152.0	201.4	204.4	230.5	232.6	0.9%	2.9%
Other	8.7	13.2	15.6	17.9	14.5	-18.7%	3.5%
Visitor	143.4	188.2	188.8	212.6	218.1	2.6%	2.8%
Non-transportation	131.7	169.0	168.2	189.5	198.8	4.9%	2.8%
Transportation	11.7	19.2	20.6	23.1	19.3	-16.6%	3.4%
Earnings (\$Millions)							
Earnings	40.0	52.4	53.7	61.8	64.5	4.4%	3.2%
Employment							
Employment	2,740	3,150	2,810	2,990	3,050	1.9%	0.7%
Tax Revenue (\$Millions)							
Total	4.8	6.3	6.3	7.4	7.7	4.0%	3.2%
Local	0.7	1.1	1.0	1.2	1.3	9.0%	4.0%
State	4.1	5.2	5.3	6.2	6.4	3.0%	3.0%

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.

East Douglas County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	113.0	151.4	150.7	171.5	172.2	0.4%	2.8%
Other	8.0	12.3	14.5	16.6	13.4	-18.8%	3.5%
Visitor	105.0	139.2	136.3	154.9	158.7	2.5%	2.8%
Non-transportation	96.1	124.5	120.9	137.5	144.2	4.9%	2.7%
Transportation	8.8	14.7	15.4	17.4	14.5	-16.6%	3.4%
Earnings (\$Millions)							
Earnings	29.4	39.0	38.9	45.4	47.2	4.2%	3.2%
Employment							
Employment	2,030	2,350	2,040	2,200	2,240	1.7%	0.7%
Tax Revenue (\$Millions)							
Total	3.8	5.0	4.9	5.8	6.0	3.7%	3.1%
Local	0.6	0.9	0.8	1.0	1.1	8.5%	4.1%
State	3.2	4.1	4.0	4.8	5.0	2.7%	3.0%

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.

West Douglas County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	39.1	50.0	53.7	59.0	60.4	2.4%	3.0%
Other	0.7	1.0	1.1	1.3	1.1	-17.7%	3.3%
Visitor	38.4	49.1	52.5	57.7	59.4	2.9%	2.9%
Non-transportation	35.6	44.5	47.3	52.0	54.6	5.0%	2.9%
Transportation	2.8	4.5	5.2	5.7	4.8	-16.6%	3.6%
Earnings (\$Millions)							
Earnings	10.5	13.4	14.8	16.4	17.3	5.1%	3.4%
Employment							
Employment	710	800	770	790	810	2.3%	0.8%
Tax Revenue (\$Millions)							
Total	1.0	1.3	1.4	1.6	1.6	4.9%	3.4%
Local	0.1	0.2	0.2	0.2	0.2	11.9%	3.9%
State	0.9	1.1	1.2	1.4	1.4	4.0%	3.3%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	198.4	197.8	188.8	200.8	205.8	212.6	218.1
Other Travel*	15.4	18.6	15.6	19.0	18.4	17.9	14.5
Total Direct Spending	213.8	216.4	204.4	219.8	224.2	230.5	232.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	31.9	31.8	29.2	29.8	30.5	32.4	35.6
Food Service	51.0	51.3	51.7	55.0	57.5	60.5	63.8
Food Stores	21.7	22.5	21.9	23.7	24.6	25.6	26.6
Local Tran. & Gas	21.6	25.2	20.6	24.5	23.8	23.1	19.3
Arts, Ent. & Rec.	39.9	37.1	35.6	37.0	37.9	38.9	40.0
Retail Sales	32.4	29.8	29.8	30.8	31.5	32.0	32.7
Destination Spending	198.4	197.8	188.8	200.8	205.8	212.6	218.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	33.8	35.1	33.1	34.3	35.6	37.0	38.9
Arts, Ent. & Rec.	12.5	13.4	12.1	12.7	13.7	15.1	15.5
Retail**	7.1	7.1	6.8	7.2	7.5	7.8	8.2
Ground Tran.	0.8	0.8	0.7	0.8	0.8	0.9	0.9
Other Travel*	0.9	0.8	0.9	1.0	1.0	1.1	1.0
Total Direct Earnings	55.1	57.2	53.7	55.9	58.6	61.8	64.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,910	1,910	1,740	1,740	1,780	1,800	1,840
Arts, Ent. & Rec.	800	780	680	690	760	780	770
Retail**	360	340	320	330	340	340	360
Ground Tran.	30	30	20	30	30	30	30
Other Travel*	50	50	50	50	50	50	50
Total Direct Employment	3,160	3,100	2,810	2,830	2,940	2,990	3,050
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.1	1.0	1.1	1.1	1.2	1.3
State Tax Receipts	5.5	5.6	5.3	5.9	6.1	6.2	6.4
Total Local & State	6.6	6.7	6.3	7.0	7.2	7.4	7.7

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.

Douglas 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	110.0	116.1	108.7	114.6	116.9	121.1	124.6
Hotel, Motel*	60.1	63.0	55.8	58.0	58.9	62.2	65.3
Private Home	28.5	31.1	31.5	34.1	34.3	34.8	35.0
Other Overnight	21.3	22.0	21.5	22.5	23.7	24.0	24.3
Campground	18.2	18.3	17.6	18.4	19.6	19.9	20.1
Vacation Home	3.1	3.7	3.9	4.1	4.1	4.2	4.2
Day Travel	88.4	81.7	80.0	86.2	88.8	91.5	93.4
Spending at Destination	198.4	197.8	188.8	200.8	205.8	212.6	218.1

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$268	\$493	\$110	\$201	2.4	1.8
Private Home	\$81	\$242	\$31	\$93	2.6	3.0
Other Overnight	\$109	\$346	\$32	\$101	3.4	3.2
All Overnight	\$138	\$359	\$50	\$133	2.8	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	549	573	596	224	234	244
Private Home	1,095	1,107	1,125	421	425	432
Other Overnight	746	750	764	219	220	224
All Overnight	2,390	2,430	2,485	864	880	900

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	298	312	324	122	127	132
Private Home	365	369	375	141	142	144
Other Overnight	234	235	240	69	69	70
All Overnight	897	916	939	331	338	347

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

GILLIAM & SHERMAN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$84,500
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.00

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$180
Additional employment if each resident household encouraged one additional overnight visitor	2

Visitor Shares

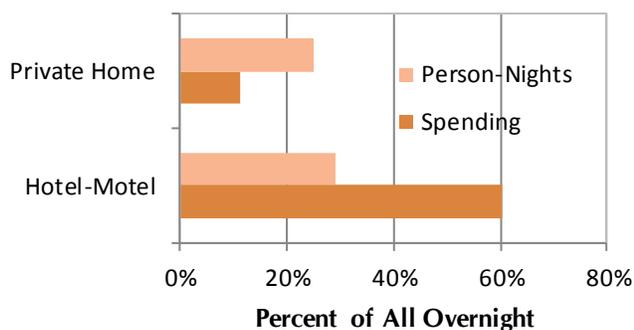
Travel Share of Total Employment (2014)*	2.9%
Overnight Visitor Day Share of Resident Population (2015p)**	11.0%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	27	45	\$3.7
Private Home	15	38	\$0.8
Other Overnight	22	69	\$2.1
All Overnight	64	152	\$6.6

Gilliam & Sherman County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	7.8	8.6	9.1	9.0	9.2	2.3%	1.2%
Other	0.3	0.4	0.5	0.6	0.5	-19.3%	3.0%
Visitor	7.5	8.2	8.6	8.4	8.8	3.8%	1.1%
Non-transportation	6.9	7.5	7.8	7.6	8.1	5.7%	1.0%
Transportation	0.5	0.7	0.8	0.8	0.7	-15.0%	1.4%
Earnings (\$Millions)							
Earnings	1.9	2.0	2.2	2.2	2.3	4.3%	1.4%
Employment							
Employment	140	140	110	100	100	4.0%	-1.9%
Tax Revenue (\$Millions)							
Total	0.19	0.21	0.24	0.25	0.26	3.5%	2.1%
Local			0.01	0.01	0.02	7.1%	
State	0.19	0.21	0.23	0.24	0.25	3.2%	1.7%

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 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.

Gilliam & Sherman Counties Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.0	8.7	8.6	9.0	8.2	8.4	8.8
Other Travel*	0.5	0.6	0.5	0.6	0.6	0.6	0.5
Total Direct Spending	8.5	9.2	9.1	9.6	8.8	9.0	9.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1.6	2.1	2.2	2.1	1.9	2.0	2.2
Food Service	2.0	2.1	2.2	2.3	2.1	2.2	2.3
Food Stores	1.1	1.1	1.1	1.2	1.1	1.2	1.2
Local Tran. & Gas	0.8	0.9	0.8	0.9	0.8	0.8	0.7
Arts, Ent. & Rec.	1.4	1.4	1.4	1.4	1.2	1.3	1.3
Retail Sales	1.1	1.0	1.0	1.1	1.0	1.0	1.0
Destination Spending	8.0	8.7	8.6	9.0	8.2	8.4	8.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.2	1.4	1.5	1.5	1.4	1.4	1.5
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.3	0.3	0.3	0.3	0.3	0.3	0.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.0	2.2	2.2	2.3	2.2	2.2	2.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	80	70	70	70	60	70	70
Arts, Ent. & Rec.	30	20	20	20	20	20	20
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	130	120	110	110	100	100	100
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts			0.01	0.01	0.01	0.01	0.02
State Tax Receipts	0.21	0.23	0.23	0.25	0.24	0.24	0.25
Total Local & State	0.21	0.23	0.24	0.27	0.25	0.25	0.26

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.

Gilliam & Sherman County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2011p

	2006	2008	2010	2012	2013	2014	2015p
All Overnight	5.6	6.6	6.6	6.8	6.1	6.3	6.6
Hotel, Motel*	3.0	4.0	4.1	4.1	3.4	3.5	3.7
Private Home	0.6	0.6	0.7	0.7	0.7	0.8	0.8
Other Overnight	2.0	2.0	1.8	1.9	2.0	2.0	2.1
Campground	1.9	1.8	1.7	1.8	1.9	1.9	1.9
Vacation Home	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Day Travel	2.4	2.1	2.1	2.2	2.1	2.1	2.2
Spending at Destination	8.0	8.7	8.6	9.0	8.2	8.4	8.8

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$205	\$341	\$84	\$139	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$103	\$318	\$30	\$92	3.5	3.1
All Overnight	\$123	\$283	\$43	\$103	2.9	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	42	43	45	17	18	18
Private Home	36	37	38	14	15	15
Other Overnight	67	68	69	20	20	20
All Overnight	145	148	152	51	52	53

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	25	26	27	10	11	11
Private Home	14	15	15	5	6	6
Other Overnight	22	22	22	6	6	6
All Overnight	61	62	64	22	23	23

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

GRANT COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$57,540
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$285
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

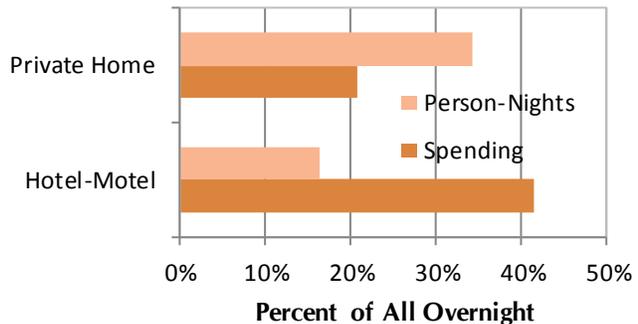
Travel Share of Total Employment (2014)*	4.3%
Overnight Visitor Day Share of Resident Population (2015p)**	8.2%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	22	37	\$3.2
Private Home	29	75	\$1.5
Other Overnight	38	110	\$2.8
All Overnight	89	223	\$7.6

Grant County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	8.0	9.0	9.8	10.6	10.7	0.2%	1.9%
Other	0.6	0.9	1.0	1.1	0.9	-19.3%	2.7%
Visitor	7.4	8.1	8.8	9.5	9.7	2.6%	1.8%
Non-transportation	6.8	7.3	7.9	8.5	8.9	4.7%	1.8%
Transportation	0.6	0.8	0.9	1.0	0.8	-15.9%	2.3%
Earnings (\$Millions)							
Earnings	2.1	2.2	2.4	2.5	2.7	9.8%	2.0%
Employment							
Employment	200	200	180	170	170	0.1%	-0.8%
Tax Revenue (\$Millions)							
Total	0.3	0.3	0.4	0.4	0.4	5.2%	2.1%
Local	0.0	0.1	0.1	0.1	0.1	7.1%	2.7%
State	0.2	0.2	0.3	0.3	0.3	4.8%	2.0%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	8.3	8.0	8.8	8.5	8.9	9.5	9.7
Other Travel*	1.0	1.2	1.0	1.2	1.2	1.1	0.9
Total Direct Spending	9.3	9.1	9.8	9.7	10.1	10.6	10.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	1.5	1.5	1.7	1.5	1.7	1.8	2.0
Food Service	2.1	2.0	2.3	2.2	2.4	2.6	2.7
Food Stores	1.3	1.3	1.4	1.4	1.5	1.6	1.6
Local Tran. & Gas	0.9	1.0	0.9	1.0	1.0	1.0	0.8
Arts, Ent. & Rec.	1.3	1.2	1.3	1.2	1.2	1.3	1.4
Retail Sales	1.2	1.0	1.2	1.1	1.2	1.2	1.2
Destination Spending	8.3	8.0	8.8	8.5	8.9	9.5	9.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.5	1.5	1.6	1.5	1.6	1.7	1.9
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Retail**	0.3	0.3	0.3	0.3	0.4	0.4	0.4
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.3	2.2	2.4	2.3	2.4	2.5	2.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	120	100	110	100	100	100	110
Arts, Ent. & Rec.	60	50	50	40	50	50	40
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	200	170	180	160	170	170	170
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.2	0.3	0.3	0.3	0.3	0.3
Total Local & State	0.3	0.3	0.4	0.4	0.3	0.4	0.4

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.

Grant 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	6.1	6.2	6.9	6.5	6.9	7.4	7.6
Hotel, Motel*	2.6	2.4	2.9	2.4	2.7	3.0	3.2
Private Home	1.2	1.2	1.4	1.5	1.5	1.5	1.5
Other Overnight	2.4	2.5	2.5	2.6	2.7	2.8	2.8
Campground	1.6	1.7	1.8	1.8	2.0	2.0	2.0
Vacation Home	0.7	0.8	0.8	0.8	0.8	0.8	0.8
Day Travel	2.1	1.8	1.9	2.0	2.0	2.1	2.2
Spending at Destination	8.3	8.0	8.8	8.5	8.9	9.5	9.7

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$213	\$355	\$87	\$145	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$85	\$248	\$26	\$75	3.3	2.9
All Overnight	\$98	\$237	\$34	\$85	2.9	2.4

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	32	36	37	13	15	15
Private Home	74	75	75	29	29	29
Other Overnight	107	108	110	32	32	33
All Overnight	213	219	223	74	76	78

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	19	22	22	8	9	9
Private Home	29	29	29	11	11	11
Other Overnight	37	37	38	11	11	11
All Overnight	85	88	89	30	31	32

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

HARNEY COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$51,910
Employee Earnings generated by \$100 Visitor Spending	\$36
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$338
Additional employment if each resident household encouraged one additional overnight visitor	7

Visitor Shares

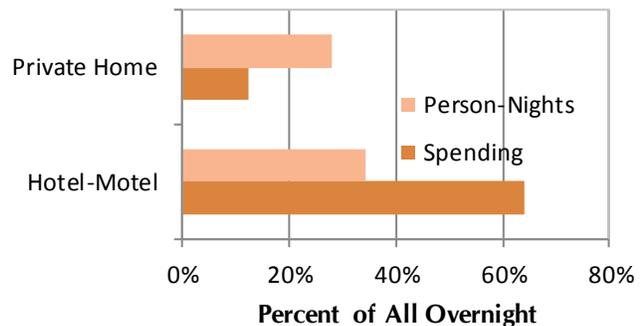
Travel Share of Total Employment (2014)*	6.9%
Overnight Visitor Day Share of Resident Population (2015p)**	9.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	56	93	\$8.1
Private Home	29	74	\$1.5
Other Overnight	32	98	\$2.8
All Overnight	117	265	\$12.5

Harney County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	14.9	15.9	14.6	16.8	17.2	2.7%	1.0%
Other	0.6	0.8	1.0	1.1	0.9	-19.3%	2.8%
Visitor	14.3	15.1	13.6	15.6	16.3	4.2%	0.9%
Non-transportation	13.3	13.8	12.4	14.3	15.1	6.1%	0.9%
Transportation	1.0	1.3	1.2	1.4	1.2	-14.4%	1.3%
Earnings (\$Millions)							
Earnings	4.7	4.9	4.5	5.3	5.8	10.0%	1.5%
Employment							
Employment	380	330	280	300	320	6.4%	-1.2%
Tax Revenue (\$Millions)							
Total	0.5	0.6	0.6	0.7	0.7	7.2%	2.7%
Local	0.1	0.2	0.2	0.2	0.3	9.1%	4.9%
State	0.4	0.4	0.4	0.4	0.5	6.1%	1.7%

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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	17.4	14.5	13.6	15.5	15.1	15.6	16.3
Other Travel*	1.0	1.2	1.0	1.2	1.2	1.1	0.9
Total Direct Spending	18.4	15.7	14.6	16.7	16.3	16.8	17.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	4.0	3.8	3.4	3.9	3.9	4.0	4.4
Food Service	4.3	3.5	3.4	3.9	3.8	4.0	4.3
Food Stores	1.9	1.6	1.7	1.9	1.9	1.9	2.0
Local Tran. & Gas	1.6	1.5	1.2	1.5	1.4	1.4	1.2
Arts, Ent. & Rec.	3.7	2.7	2.5	2.8	2.7	2.7	2.8
Retail Sales	2.0	1.4	1.4	1.5	1.5	1.5	1.5
Destination Spending	17.4	14.5	13.6	15.5	15.1	15.6	16.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	4.0	3.5	3.2	3.5	3.6	3.9	4.4
Arts, Ent. & Rec.	1.0	0.9	0.7	0.8	0.8	0.8	0.9
Retail**	0.5	0.4	0.4	0.4	0.4	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	5.7	4.9	4.5	4.9	4.9	5.3	5.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	220	200	180	170	180	180	200
Arts, Ent. & Rec.	120	100	90	90	90	90	90
Retail**	30	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	380	330	280	290	290	300	320
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.2	0.2	0.2	0.3	0.2	0.2	0.3
State Tax Receipts	0.5	0.4	0.4	0.4	0.4	0.4	0.5
Total Local & State	0.7	0.6	0.6	0.7	0.7	0.7	0.7

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.

Harney 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	12.3	11.2	10.3	11.8	11.5	11.9	12.5
Hotel, Motel*	8.4	7.8	6.5	7.7	7.3	7.6	8.1
Private Home	1.2	1.2	1.4	1.5	1.4	1.5	1.5
Other Overnight	2.7	2.2	2.5	2.6	2.8	2.8	2.8
Campground	2.4	1.9	2.2	2.3	2.5	2.5	2.5
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	5.2	3.3	3.3	3.7	3.6	3.7	3.8
Spending at Destination	17.4	14.5	13.6	15.5	15.1	15.6	16.3

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$216	\$359	\$88	\$146	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$99	\$302	\$29	\$89	3.4	3.0
All Overnight	\$131	\$288	\$47	\$107	2.8	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	86	89	93	35	36	38
Private Home	70	73	74	27	28	29
Other Overnight	96	96	98	28	28	29
All Overnight	252	258	265	91	93	95

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	52	53	56	21	22	23
Private Home	27	28	29	11	11	11
Other Overnight	31	32	32	9	9	9
All Overnight	111	113	117	41	42	43

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

HOOD RIVER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$86,210
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.70

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,432
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

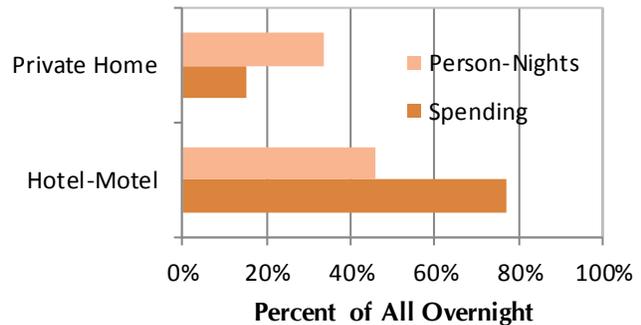
Travel Share of Total Employment (2014)*	6.3%
Overnight Visitor Day Share of Resident Population (2015p)**	10.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	233	440	\$51.5
Private Home	100	303	\$9.4
Other Overnight	57	184	\$4.6
All Overnight	389	927	\$65.5

Hood River County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	54.7	61.7	73.1	87.4	92.5	5.8%	3.6%
Other	2.2	3.3	3.3	3.7	3.1	-17.8%	2.2%
Visitor	52.5	58.5	69.8	83.7	89.4	6.8%	3.6%
Non-transportation	47.7	51.8	61.1	73.8	80.8	9.6%	3.6%
Transportation	4.8	6.7	8.6	9.9	8.6	-13.6%	4.0%
Earnings (\$Millions)							
Earnings	14.0	15.4	18.4	23.0	24.7	7.6%	3.9%
Employment							
Employment	880	890	920	1,030	1,050	1.8%	1.2%
Tax Revenue (\$Millions)							
Total	2.2	2.5	3.1	3.9	4.2	7.9%	4.6%
Local	0.8	0.8	1.2	1.5	1.7	10.6%	5.6%
State	1.4	1.6	1.9	2.4	2.5	6.2%	4.0%

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.

Hood River County Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	63.7	65.0	69.8	77.4	79.3	83.7	89.4
Other Travel*	3.7	4.2	3.3	4.0	3.9	3.7	3.1
Total Direct Spending	67.4	69.2	73.1	81.4	83.1	87.4	92.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	13.9	15.3	16.7	18.6	20.6	22.4	25.8
Food Service	17.6	17.6	19.9	21.8	22.3	23.8	26.0
Food Stores	5.3	5.5	5.7	6.3	6.4	6.8	7.2
Local Tran. & Gas	7.8	9.3	8.6	10.6	10.0	9.9	8.6
Arts, Ent. & Rec.	8.8	8.2	8.7	9.3	9.3	9.7	10.3
Retail Sales	10.4	9.2	10.1	10.8	10.7	11.1	11.6
Destination Spending	63.7	65.0	69.8	77.4	79.3	83.7	89.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	11.4	12.1	13.0	14.5	15.7	17.4	18.7
Arts, Ent. & Rec.	2.7	2.8	2.9	2.8	2.8	2.7	2.9
Retail**	1.9	1.9	2.0	2.2	2.2	2.3	2.5
Ground Tran.	0.3	0.3	0.3	0.3	0.3	0.4	0.4
Other Travel*	0.4	0.3	0.2	0.2	0.2	0.2	0.2
Total Direct Earnings	16.7	17.4	18.4	20.0	21.2	23.0	24.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	660	670	670	700	740	780	800
Arts, Ent. & Rec.	150	150	140	130	130	120	120
Retail**	100	90	90	100	100	100	110
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	20	10	10	10	10	10	10
Total Direct Employment	940	930	920	950	990	1,030	1,050
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.9	1.0	1.2	1.3	1.4	1.5	1.7
State Tax Receipts	1.8	1.8	1.9	2.2	2.3	2.4	2.5
Total Local & State	2.7	2.8	3.1	3.5	3.7	3.9	4.2

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.

Hood River 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	42.3	46.9	50.3	55.8	57.4	60.9	65.5
Hotel, Motel*	31.4	34.8	37.8	42.3	43.9	47.0	51.5
Private Home	7.5	7.9	8.5	9.1	9.0	9.3	9.4
Other Overnight	3.5	4.2	4.1	4.3	4.5	4.6	4.6
Campground	2.6	3.2	3.0	3.2	3.4	3.5	3.5
Vacation Home	0.9	1.0	1.0	1.1	1.1	1.1	1.1
Day Travel	21.4	18.1	19.4	21.6	21.8	22.8	23.9
Spending at Destination	63.7	65.0	69.8	77.4	79.3	83.7	89.4

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$286	\$541	\$117	\$221	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$85	\$277	\$25	\$81	3.4	3.2
All Overnight	\$187	\$436	\$71	\$168	2.6	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	386	407	440	158	166	180
Private Home	289	296	303	111	114	116
Other Overnight	179	180	184	53	53	54
All Overnight	854	884	927	322	333	350

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	204	215	233	84	88	95
Private Home	95	97	100	36	37	38
Other Overnight	55	56	57	16	16	17
All Overnight	355	368	389	136	142	150

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

JACKSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$80,900
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.30

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,232
Additional employment if each resident household encouraged one additional overnight visitor	176

Visitor Shares

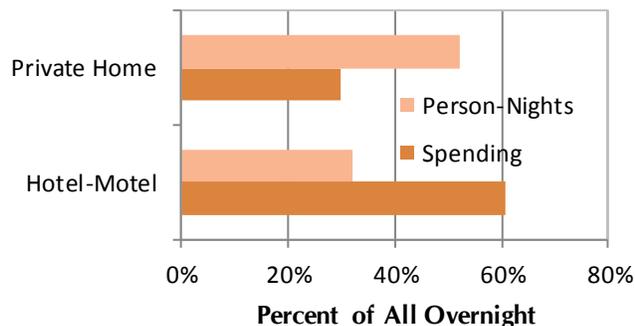
Travel Share of Total Employment (2014)*	4.4%
Overnight Visitor Day Share of Resident Population (2015p)**	6.8%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	906	1,713	\$208.1
Private Home	906	2,754	\$98.0
Other Overnight	255	824	\$30.3
All Overnight	2,066	5,291	\$336.4

Jackson County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	307.9	399.8	453.0	509.3	528.3	3.7%	3.7%
Other	57.2	90.9	115.6	118.3	121.5	2.7%	5.1%
Visitor	250.7	308.9	337.4	391.0	406.8	4.0%	3.3%
Non-transportation	226.2	271.3	292.5	339.8	360.1	6.0%	3.1%
Transportation	24.5	37.6	45.0	51.2	46.7	-8.9%	4.4%
Earnings (\$Millions)							
Earnings	76.5	92.2	102.5	124.2	132.3	6.5%	3.7%
Employment							
Employment	4,300	4,640	4,500	5,070	5,290	4.4%	1.4%
Tax Revenue (\$Millions)							
Total	10.8	14.4	16.2	20.0	21.5	7.3%	4.7%
Local	3.2	4.8	6.0	7.4	8.3	12.4%	6.6%
State	7.6	9.5	10.3	12.6	13.1	4.3%	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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	317.3	334.0	337.4	367.0	381.6	391.0	406.8
Other Travel*	101.8	106.6	115.6	112.1	112.4	118.3	121.5
Total Direct Spending	419.1	440.6	453.0	479.1	494.1	509.3	528.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	66.4	67.3	69.2	74.2	77.5	82.4	90.5
Food Service	85.2	89.9	95.8	103.7	110.4	114.7	122.0
Food Stores	30.3	33.5	33.0	36.1	37.6	38.9	40.7
Local Tran. & Gas	40.8	50.7	45.0	53.9	53.6	51.2	46.7
Arts, Ent. & Rec.	44.6	44.3	44.4	46.4	48.2	49.0	50.8
Retail Sales	50.0	48.2	50.0	52.7	54.4	54.7	56.2
Destination Spending	317.3	334.0	337.4	367.0	381.6	391.0	406.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	62.1	66.5	67.4	72.6	76.7	83.7	89.6
Arts, Ent. & Rec.	12.9	14.8	13.9	14.2	14.9	15.4	15.9
Retail**	10.5	11.0	10.9	11.7	12.2	12.6	13.3
Ground Tran.	1.9	2.2	2.1	2.3	2.4	2.4	2.7
Other Travel*	8.4	8.7	8.1	8.9	9.4	10.2	10.7
Total Direct Earnings	95.7	103.1	102.5	109.7	115.5	124.2	132.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,100	3,200	3,060	3,210	3,370	3,560	3,730
Arts, Ent. & Rec.	730	830	700	660	700	700	710
Retail**	440	450	440	460	470	480	500
Ground Tran.	70	80	70	80	80	70	80
Other Travel*	270	300	230	240	250	260	260
Total Direct Employment	4,610	4,860	4,500	4,640	4,870	5,070	5,290
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.3	5.6	6.0	6.4	6.7	7.4	8.3
State Tax Receipts	9.9	10.4	10.3	11.8	12.2	12.6	13.1
Total Local & State	15.1	16.1	16.2	18.2	19.0	20.0	21.5

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.

Jackson 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	255.3	276.5	278.8	302.4	314.3	322.5	336.4
Hotel, Motel*	152.3	163.2	166.0	180.3	189.4	196.2	208.1
Private Home	76.6	83.9	86.2	94.3	95.5	96.4	98.0
Other Overnight	26.4	29.4	26.5	27.8	29.4	29.8	30.3
Campground	22.9	25.6	22.7	23.7	25.3	25.6	26.1
Vacation Home	3.5	3.8	3.8	4.1	4.1	4.2	4.2
Day Travel	62.1	57.5	58.7	64.6	67.3	68.5	70.4
Spending at Destination	317.3	334.0	337.4	367.0	381.6	391.0	406.8

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$286	\$548	\$121	\$230	2.4	1.9
Private Home	\$86	\$271	\$36	\$108	2.4	3.1
Other Overnight	\$126	\$407	\$37	\$119	3.4	3.2
All Overnight	\$160	\$412	\$64	\$163	2.5	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,619	1,653	1,713	683	699	727
Private Home	2,705	2,704	2,754	1,099	1,103	1,133
Other Overnight	803	808	824	235	237	241
All Overnight	5,127	5,165	5,291	2,018	2,039	2,101

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	856	874	906	357	365	379
Private Home	889	889	906	353	353	362
Other Overnight	249	250	255	73	73	75
All Overnight	1,994	2,013	2,066	783	792	816

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

JEFFERSON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$47,610
Employee Earnings generated by \$100 Visitor Spending	\$34
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$801
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

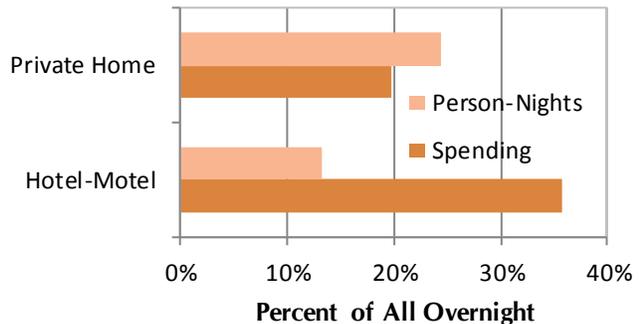
Travel Share of Total Employment (2014)*	11.1%
Overnight Visitor Day Share of Resident Population (2015p)**	11.2%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	73	121	\$13.0
Private Home	86	220	\$7.0
Other Overnight	183	542	\$15.2
All Overnight	342	883	\$35.2

Jefferson County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	31.4	36.6	42.5	47.5	48.7	2.4%	3.0%
Other	1.5	2.4	3.0	3.3	2.7	-19.3%	3.9%
Visitor	29.9	34.2	39.5	44.2	46.0	4.0%	2.9%
Non-transportation	27.2	30.3	34.6	38.8	41.4	6.7%	2.8%
Transportation	2.7	3.9	4.9	5.4	4.6	-15.5%	3.7%
Earnings (\$Millions)							
Earnings	7.3	8.3	10.0	14.5	15.6	7.5%	5.2%
Employment							
Employment	600	600	690	950	970	2.7%	3.3%
Tax Revenue (\$Millions)							
Total	1.1	1.3	1.5	2.0	2.1	7.4%	4.5%
Local	0.3	0.3	0.4	0.5	0.6	13.5%	5.5%
State	0.8	1.0	1.1	1.5	1.5	5.3%	4.2%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	38.8	40.5	39.5	43.0	46.0	44.2	46.0
Other Travel*	2.8	3.5	3.0	3.5	3.4	3.3	2.7
Total Direct Spending	41.6	44.0	42.5	46.6	49.4	47.5	48.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.5	6.6	6.3	7.1	8.2	7.8	8.6
Food Service	9.6	10.1	10.5	11.4	12.3	12.0	12.8
Food Stores	5.6	6.0	5.8	6.2	6.5	6.6	7.0
Local Tran. & Gas	4.8	5.8	4.9	6.0	6.1	5.4	4.6
Arts, Ent. & Rec.	6.6	6.5	6.3	6.6	6.9	6.7	7.0
Retail Sales	5.6	5.5	5.6	5.8	6.0	5.8	6.0
Destination Spending	38.8	40.5	39.5	43.0	46.0	44.2	46.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.1	6.5	6.4	7.0	8.2	8.6	9.4
Arts, Ent. & Rec.	1.7	2.0	1.8	2.8	3.4	3.9	4.1
Retail**	1.5	1.6	1.5	1.6	1.7	1.7	1.8
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	9.5	10.3	10.0	11.7	13.6	14.5	15.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	360	350	360	370	420	430	460
Arts, Ent. & Rec.	180	250	250	350	400	420	420
Retail**	80	80	80	80	90	80	80
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	630	700	690	810	930	950	970
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.4	0.4	0.5	0.6	0.5	0.6
State Tax Receipts	1.1	1.1	1.1	1.3	1.5	1.5	1.5
Total Local & State	1.4	1.6	1.5	1.8	2.0	2.0	2.1

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.

Jefferson 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	29.3	31.0	30.1	32.9	35.3	33.8	35.2
Hotel, Motel*	9.9	10.4	10.0	11.8	13.6	12.1	13.0
Private Home	5.6	6.1	6.4	6.8	6.9	6.7	7.0
Other Overnight	13.7	14.5	13.7	14.3	14.8	15.1	15.2
Campground	8.9	9.2	8.7	9.1	9.7	9.7	9.9
Vacation Home	4.8	5.3	5.0	5.2	5.2	5.3	5.3
Day Travel	9.5	9.5	9.4	10.2	10.7	10.4	10.8
Spending at Destination	38.8	40.5	39.5	43.0	46.0	44.2	46.0

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$264	\$439	\$108	\$179	2.5	1.7
Private Home	\$81	\$208	\$32	\$81	2.6	2.6
Other Overnight	\$94	\$277	\$28	\$83	3.4	2.9
All Overnight	\$119	\$298	\$40	\$103	3.0	2.5

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	130	113	121	53	46	49
Private Home	216	208	220	85	81	86
Other Overnight	528	532	542	157	158	161
All Overnight	875	853	883	295	286	297

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	78	68	73	32	28	30
Private Home	84	81	86	33	32	33
Other Overnight	179	180	183	53	54	55
All Overnight	341	329	342	118	113	118

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

JOSEPHINE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$66,000
Employee Earnings generated by \$100 Visitor Spending	\$33
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,473
Additional employment if each resident household encouraged one additional overnight visitor	68

Visitor Shares

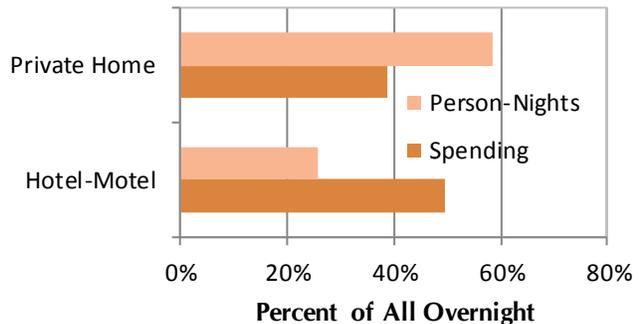
Travel Share of Total Employment (2014)*	4.6%
Overnight Visitor Day Share of Resident Population (2015p)**	6.0%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	256	485	\$44.4
Private Home	362	1,100	\$34.2
Other Overnight	92	299	\$10.2
All Overnight	710	1,884	\$88.8

Josephine County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	91.2	107.1	111.8	123.9	124.7	0.7%	2.1%
Other	8.9	11.3	12.6	14.2	11.9	-16.4%	1.9%
Visitor	82.3	95.8	99.2	109.7	112.8	2.9%	2.1%
Non-transportation	74.1	83.9	85.9	95.1	100.6	5.7%	2.1%
Transportation	8.2	11.9	13.3	14.5	12.2	-15.9%	2.7%
Earnings (\$Millions)							
Earnings	26.4	29.4	30.7	35.6	38.8	9.2%	2.6%
Employment							
Employment	1,710	1,650	1,570	1,650	1,750	6.1%	0.2%
Tax Revenue (\$Millions)							
Total	3.2	4.1	4.2	4.9	5.1	5.7%	3.1%
Local	0.6	1.0	1.0	1.1	1.2	8.5%	5.1%
State	2.7	3.1	3.2	3.8	3.9	4.9%	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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	106.0	101.2	99.2	105.8	110.7	109.7	112.8
Other Travel*	13.2	15.9	12.6	15.2	14.6	14.2	11.9
Total Direct Spending	119.2	117.1	111.8	121.0	125.4	123.9	124.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	20.4	17.9	17.4	17.8	19.1	19.4	21.3
Food Service	27.7	26.7	27.7	29.5	31.4	31.6	33.5
Food Stores	11.2	11.7	11.4	12.4	12.9	13.1	13.7
Local Tran. & Gas	14.2	15.6	13.3	15.7	15.6	14.5	12.2
Arts, Ent. & Rec.	15.1	13.8	13.6	14.0	14.6	14.4	14.9
Retail Sales	17.4	15.6	15.9	16.5	17.1	16.7	17.2
Destination Spending	106.0	101.2	99.2	105.8	110.7	109.7	112.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	21.8	21.0	20.6	21.7	22.7	24.8	27.3
Arts, Ent. & Rec.	4.8	5.1	4.7	4.6	4.6	4.8	5.2
Retail**	4.1	4.0	4.0	4.2	4.4	4.4	4.6
Ground Tran.	0.5	0.5	0.5	0.5	0.6	0.6	0.6
Other Travel*	1.2	1.3	1.0	1.0	0.9	1.0	1.1
Total Direct Earnings	32.5	31.9	30.7	32.0	33.2	35.6	38.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,090	1,040	980	990	1,030	1,060	1,140
Arts, Ent. & Rec.	420	420	360	360	340	350	360
Retail**	190	180	180	180	190	180	190
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	50	40	40	40	40	50
Total Direct Employment	1,770	1,720	1,570	1,590	1,620	1,650	1,750
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.1	1.0	1.0	1.0	1.1	1.1	1.2
State Tax Receipts	3.4	3.3	3.2	3.6	3.7	3.8	3.9
Total Local & State	4.6	4.3	4.2	4.6	4.8	4.9	5.1

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.

Josephine 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	82.1	80.4	78.4	83.3	87.1	86.3	88.8
Hotel, Motel*	44.4	40.4	38.8	40.6	43.4	42.7	44.4
Private Home	28.7	30.0	30.7	33.3	33.9	33.5	34.2
Other Overnight	9.0	10.0	8.9	9.4	9.9	10.0	10.2
Campground	7.3	8.1	7.0	7.4	7.9	8.0	8.1
Vacation Home	1.8	1.9	1.9	2.0	2.0	2.0	2.0
Day Travel	23.9	20.8	20.8	22.6	23.6	23.4	24.1
Spending at Destination	106.0	101.2	99.2	105.8	110.7	109.7	112.8

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$224	\$424	\$92	\$173	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$115	\$374	\$34	\$110	3.4	3.3
All Overnight	\$125	\$328	\$47	\$125	2.7	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	482	467	485	197	191	198
Private Home	1,083	1,066	1,100	416	409	422
Other Overnight	292	294	299	86	87	88
All Overnight	1,857	1,828	1,884	699	687	709

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	255	247	256	104	101	105
Private Home	356	351	362	137	135	139
Other Overnight	90	91	92	27	27	27
All Overnight	701	688	710	267	262	271

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

KLAMATH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$70,330
Employee Earnings generated by \$100 Visitor Spending	\$34
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.60

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,619
Additional employment if each resident household encouraged one additional overnight visitor	51

Visitor Shares

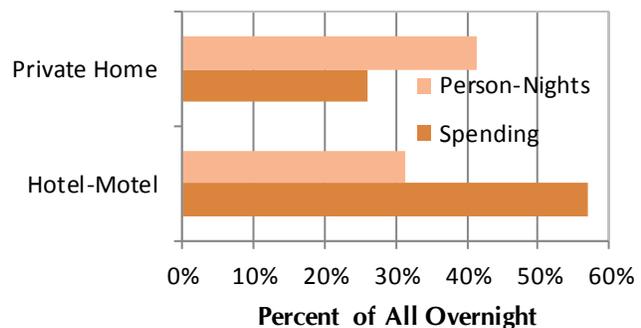
Travel Share of Total Employment (2014)*	6.2%
Overnight Visitor Day Share of Resident Population (2015p)**	8.6%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	353	667	\$61.2
Private Home	286	870	\$27.0
Other Overnight	175	574	\$17.8
All Overnight	814	2,112	\$106.0

Klamath County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	105.0	126.4	135.3	140.6	140.7	0.0%	2.0%
Other	11.4	15.3	14.1	11.8	8.8	-25.6%	-1.7%
Visitor	93.7	111.1	121.2	128.8	131.9	2.4%	2.3%
Non-transportation	84.0	96.5	104.2	110.9	117.0	5.4%	2.2%
Transportation	9.7	14.6	17.1	17.9	14.9	-16.4%	2.9%
Earnings (\$Millions)							
Earnings	29.0	33.7	37.1	43.7	45.6	4.4%	3.1%
Employment							
Employment	1,750	1,750	1,680	1,860	1,900	2.3%	0.5%
Tax Revenue (\$Millions)							
Total	3.7	4.6	5.1	5.8	6.0	4.3%	3.3%
Local	0.8	1.2	1.5	1.6	1.7	8.1%	4.9%
State	2.9	3.4	3.6	4.2	4.3	2.9%	2.8%

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.

Klamath County Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	119.7	123.4	121.2	130.4	125.1	128.8	131.9
Other Travel*	17.2	18.6	14.1	15.2	14.9	11.8	8.8
Total Direct Spending	137.0	142.0	135.3	145.6	140.0	140.6	140.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	26.4	26.3	25.9	27.4	25.7	27.2	29.8
Food Service	29.3	30.3	31.4	33.7	33.0	34.5	36.4
Food Stores	11.2	12.4	12.5	13.5	13.5	14.1	14.7
Local Tran. & Gas	16.9	20.0	17.1	20.4	18.5	17.9	14.9
Arts, Ent. & Rec.	18.3	17.6	17.4	18.0	17.5	17.9	18.4
Retail Sales	17.7	16.7	16.9	17.5	17.0	17.3	17.6
Destination Spending	119.7	123.4	121.2	130.4	125.1	128.8	131.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	25.1	26.2	25.7	29.6	29.8	31.9	33.9
Arts, Ent. & Rec.	5.6	6.2	5.8	6.0	5.8	5.7	5.8
Retail**	3.9	4.0	4.0	4.2	4.1	4.3	4.5
Ground Tran.	0.6	0.6	0.6	0.7	0.6	0.7	0.7
Other Travel*	1.2	1.1	1.0	1.1	1.1	1.1	0.6
Total Direct Earnings	36.3	38.2	37.1	41.6	41.4	43.7	45.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,140	1,120	1,040	1,180	1,150	1,170	1,210
Arts, Ent. & Rec.	420	440	410	450	440	450	450
Retail**	180	180	180	190	180	180	190
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	40	40	40	40	40	30
Total Direct Employment	1,820	1,810	1,680	1,880	1,820	1,860	1,900
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.2	1.5	1.5	1.4	1.5	1.6	1.7
State Tax Receipts	3.7	3.8	3.6	4.3	4.1	4.2	4.3
Total Local & State	4.9	5.3	5.1	5.7	5.6	5.8	6.0

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.

Klamath 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	94.3	99.9	97.8	105.0	100.3	103.4	106.0
Hotel, Motel*	57.8	59.7	57.1	61.9	57.0	58.9	61.2
Private Home	23.8	25.1	24.9	26.5	26.0	26.9	27.0
Other Overnight	12.7	15.1	15.9	16.7	17.3	17.6	17.8
Campground	6.9	8.8	9.8	10.3	10.9	11.1	11.2
Vacation Home	5.8	6.2	6.1	6.4	6.4	6.5	6.6
Day Travel	25.5	23.5	23.4	25.4	24.8	25.5	25.9
Spending at Destination	119.7	123.4	121.2	130.4	125.1	128.8	131.9

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$224	\$424	\$92	\$173	2.4	1.9
Private Home	\$81	\$246	\$31	\$94	2.6	3.0
Other Overnight	\$103	\$338	\$31	\$102	3.3	3.3
All Overnight	\$136	\$346	\$50	\$130	2.7	2.5

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	632	644	667	259	264	273
Private Home	826	854	870	319	328	334
Other Overnight	560	564	574	169	170	173
All Overnight	2,018	2,062	2,112	747	762	780

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	334	340	353	137	139	144
Private Home	272	281	286	105	108	110
Other Overnight	170	172	175	51	52	53
All Overnight	776	793	814	293	299	307

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

LAKE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$60,890
Employee Earnings generated by \$100 Visitor Spending	\$24
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$302
Additional employment if each resident household encouraged one additional overnight visitor	5

Visitor Shares

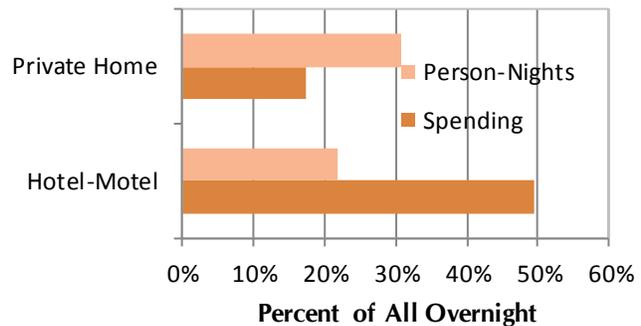
Travel Share of Total Employment (2014)*	5.4%
Overnight Visitor Day Share of Resident Population (2015p)**	9.0%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	35	58	\$4.9
Private Home	31	81	\$1.6
Other Overnight	43	124	\$3.1
All Overnight	109	263	\$9.6

Lake County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg. 14-15p	00-15p
Spending (\$Millions)							
Total	9.8	11.0	13.4	13.6	13.7	1.1%	2.3%
Other	0.6	0.9	1.1	1.2	1.0	-19.3%	3.6%
Visitor	9.3	10.2	12.3	12.4	12.7	3.1%	2.2%
Non-transportation	8.5	9.2	11.0	11.1	11.7	5.2%	2.1%
Transportation	0.7	1.0	1.2	1.2	1.1	-15.2%	2.5%
Earnings (\$Millions)							
Earnings	2.2	2.4	2.9	3.0	3.1	2.1%	2.3%
Employment							
Employment	210	210	250	220	210	-4.7%	0.0%
Tax Revenue (\$Millions)							
Total	0.3	0.4	0.5	0.5	0.5	3.4%	3.1%
Local	0.1	0.1	0.1	0.1	0.1	8.5%	5.6%
State	0.3	0.3	0.3	0.4	0.4	1.9%	2.5%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	11.5	10.9	12.3	12.1	11.9	12.4	12.7
Other Travel*	1.0	1.2	1.1	1.3	1.3	1.2	1.0
Total Direct Spending	12.5	12.1	13.4	13.4	13.2	13.6	13.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.4	2.2	2.7	2.5	2.4	2.6	2.8
Food Service	2.8	2.7	3.2	3.2	3.2	3.4	3.5
Food Stores	1.6	1.6	1.7	1.7	1.7	1.8	1.9
Local Tran. & Gas	1.2	1.3	1.2	1.4	1.3	1.2	1.1
Arts, Ent. & Rec.	1.8	1.7	1.9	1.8	1.7	1.8	1.8
Retail Sales	1.6	1.4	1.6	1.5	1.5	1.6	1.6
Destination Spending	11.5	10.9	12.3	12.1	11.9	12.4	12.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.7	1.6	1.8	1.6	1.6	1.8	1.8
Arts, Ent. & Rec.	0.5	0.6	0.6	0.6	0.5	0.6	0.6
Retail**	0.5	0.4	0.5	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	2.7	2.7	2.9	2.7	2.7	3.0	3.1
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	160	150	160	140	140	140	130
Arts, Ent. & Rec.	40	50	50	60	50	50	50
Retail**	30	20	30	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	230	230	250	220	220	220	210
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
State Tax Receipts	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Total Local & State	0.4	0.4	0.5	0.4	0.5	0.5	0.5

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.

Lake 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	8.4	8.3	9.4	9.1	9.0	9.3	9.6
Hotel, Motel*	4.3	4.0	5.1	4.7	4.4	4.6	4.9
Private Home	1.3	1.3	1.5	1.5	1.5	1.6	1.6
Other Overnight	2.9	3.0	2.8	2.9	3.0	3.1	3.1
Campground	2.0	2.0	1.9	1.9	2.0	2.1	2.1
Vacation Home	0.9	1.0	0.9	1.0	1.0	1.0	1.0
Day Travel	3.0	2.6	2.9	3.0	3.0	3.1	3.1
Spending at Destination	11.5	10.9	12.3	12.1	11.9	12.4	12.7

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$207	\$345	\$85	\$141	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$83	\$239	\$25	\$72	3.3	2.9
All Overnight	\$104	\$244	\$37	\$88	2.8	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	54	56	58	22	23	24
Private Home	77	79	81	30	31	32
Other Overnight	121	122	124	37	37	37
All Overnight	252	257	263	89	91	93

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	33	34	35	13	14	14
Private Home	30	31	31	12	12	12
Other Overnight	42	42	43	13	13	13
All Overnight	104	107	109	38	39	39

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

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$71,210
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.30

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$24,470
Additional employment if each resident household encouraged one additional overnight visitor	344

Visitor Shares

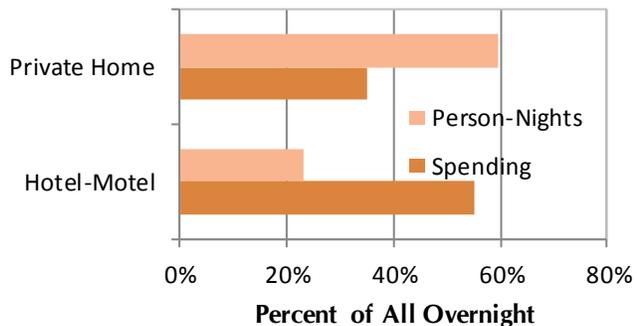
Travel Share of Total Employment (2014)*	5.1%
Overnight Visitor Day Share of Resident Population (2015p)**	6.0%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,021	1,898	\$268.8
Private Home	1,550	4,693	\$161.5
Other Overnight	432	1,345	\$45.5
All Overnight	3,002	7,935	\$475.9

Lane County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	494.4	601.7	732.9	843.9	871.1	3.2%	3.8%
Other	97.9	129.7	221.2	234.6	238.1	1.5%	6.1%
Visitor	396.5	472.0	511.7	609.3	633.1	3.9%	3.2%
Non-transportation	357.5	415.6	448.8	533.4	565.6	6.0%	3.1%
Transportation	39.0	56.4	62.9	75.9	67.5	-11.1%	3.7%
Earnings (\$Millions)							
Earnings	119.9	142.0	167.9	220.3	237.5	7.8%	4.7%
Employment							
Employment	7,440	8,010	8,460	9,790	10,120	3.4%	2.1%
Tax Revenue (\$Millions)							
Total	17.4	21.5	23.9	31.1	33.6	8.2%	4.5%
Local	5.4	7.2	7.8	10.5	11.9	13.8%	5.4%
State	12.0	14.4	16.1	20.6	21.7	5.3%	4.0%

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.

East Lane County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	419.2	513.3	632.7	722.2	744.0	3.0%	3.9%
Other	94.5	126.6	212.0	219.0	221.0	0.9%	5.8%
Visitor	324.7	386.7	420.8	503.2	522.9	3.9%	3.2%
Non-transportation	290.1	336.8	365.0	435.5	462.4	6.2%	3.2%
Transportation	34.6	50.0	55.8	67.7	60.6	-10.5%	3.8%
Earnings (\$Millions)							
Earnings	99.1	118.0	138.5	182.0	196.3	7.9%	4.7%
Employment							
Employment	6,100	6,600	6,940	8,040	8,320	3.5%	2.1%
Tax Revenue (\$Millions)							
Total	15.6	19.4	21.2	27.7	29.9	8.2%	4.4%
Local	5.2	6.9	7.2	9.8	11.1	13.7%	5.2%
State	10.4	12.5	13.9	17.9	18.8	5.2%	4.0%

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.

West Lane County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	75.2	88.3	100.2	121.7	127.2	4.5%	3.6%
Other	3.4	3.1	9.3	15.5	17.0	9.7%	11.3%
Visitor	71.8	85.2	90.9	106.2	110.1	3.7%	2.9%
Non-transportation	67.4	78.8	83.8	97.9	103.2	5.4%	2.9%
Transportation	4.4	6.5	7.1	8.2	6.9	-15.9%	3.1%
Earnings (\$Millions)							
Earnings	20.8	24.1	29.4	38.3	41.2	7.5%	4.7%
Employment							
Employment	1,330	1,410	1,530	1,750	1,800	3.1%	2.0%
Tax Revenue (\$Millions)							
Total	1.8	2.2	2.7	3.4	3.7	7.7%	4.8%
Local	0.3	0.3	0.6	0.7	0.8	14.3%	7.9%
State	1.6	1.9	2.1	2.7	2.9	6.0%	4.1%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	491.8	536.8	511.7	572.1	584.3	609.3	633.1
Other Travel*	162.5	180.2	221.2	214.7	226.8	234.6	238.1
Total Direct Spending	654.3	717.0	732.9	786.9	811.1	843.9	871.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	82.8	98.3	88.1	100.6	103.5	112.2	124.8
Food Service	135.1	145.4	147.2	164.0	170.5	179.4	190.7
Food Stores	49.3	56.3	54.8	60.6	62.2	65.2	67.9
Local Tran. & Gas	62.1	75.3	62.9	77.4	75.7	75.9	67.5
Arts, Ent. & Rec.	75.6	77.1	74.2	78.8	80.5	83.1	86.1
Retail Sales	86.9	84.4	84.5	90.7	91.8	93.6	96.0
Destination Spending	491.8	536.8	511.7	572.1	584.3	609.3	633.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	92.7	106.1	99.7	113.6	117.8	127.3	137.5
Arts, Ent. & Rec.	22.1	26.0	23.6	24.8	28.4	30.1	31.2
Retail**	16.8	17.9	17.4	18.8	19.3	20.2	21.2
Ground Tran.	3.5	3.6	3.4	3.4	3.4	3.8	4.0
Other Travel*	20.7	24.3	24.0	32.5	36.3	38.9	43.7
Total Direct Earnings	155.8	178.0	167.9	193.2	205.2	220.3	237.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,610	5,050	4,590	4,990	5,130	5,310	5,520
Arts, Ent. & Rec.	2,070	2,430	2,220	2,240	2,370	2,420	2,380
Retail**	780	810	760	810	830	840	870
Ground Tran.	140	130	120	120	110	120	120
Other Travel*	780	860	770	950	1,060	1,100	1,230
Total Direct Employment	8,380	9,290	8,460	9,100	9,500	9,790	10,120
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.7	8.5	7.8	8.8	9.6	10.5	11.9
State Tax Receipts	15.4	17.0	16.1	19.2	19.9	20.6	21.7
Total Local & State	23.2	25.5	23.9	28.0	29.5	31.1	33.6

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.

Lane 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	352.0	405.1	381.7	428.7	435.9	456.1	475.9
Hotel, Motel*	190.8	222.0	198.9	230.0	235.5	251.3	268.8
Private Home	129.2	141.5	142.7	156.8	156.3	160.0	161.5
Other Overnight	32.0	41.6	40.1	41.9	44.1	44.8	45.5
Campground	25.5	33.6	31.6	32.8	34.9	35.4	36.0
Vacation Home	6.5	7.9	8.6	9.1	9.2	9.4	9.5
Day Travel	139.8	131.7	129.9	143.4	148.3	153.3	157.2
Spending at Destination	491.8	536.8	511.7	572.1	584.3	609.3	633.1

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$334	\$630	\$142	\$263	2.4	1.9
Private Home	\$86	\$265	\$34	\$104	2.5	3.1
Other Overnight	\$114	\$354	\$34	\$105	3.4	3.1
All Overnight	\$154	\$408	\$60	\$159	2.6	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,731	1,802	1,898	735	765	805
Private Home	4,525	4,604	4,693	1,816	1,848	1,885
Other Overnight	1,312	1,320	1,345	389	392	399
All Overnight	7,568	7,727	7,935	2,941	3,005	3,089

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	930	969	1,021	389	406	427
Private Home	1,494	1,520	1,550	588	599	611
Other Overnight	421	424	432	125	126	128
All Overnight	2,845	2,913	3,002	1,103	1,131	1,166

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

LINCOLN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$89,290
Employee Earnings generated by \$100 Visitor Spending	\$28
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.90

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,493
Additional employment if each resident household encouraged one additional overnight visitor	50

Visitor Shares

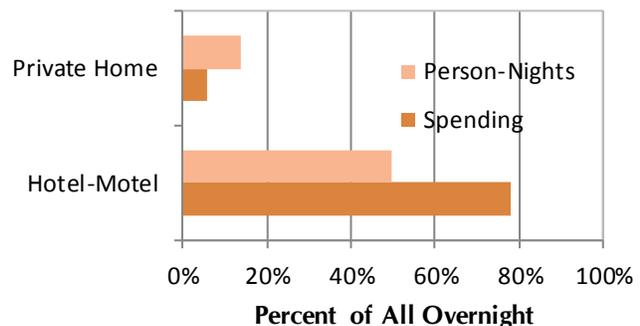
Travel Share of Total Employment (2014)*	23.3%
Overnight Visitor Day Share of Resident Population (2015p)**	26.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,246	2,358	\$326.8
Private Home	202	615	\$21.7
Other Overnight	512	1,691	\$66.6
All Overnight	1,960	4,664	\$415.1

Lincoln County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	293.7	349.9	433.0	507.2	529.6	4.4%	4.0%
Other	12.0	9.4	9.8	11.0	10.1	-8.6%	-1.2%
Visitor	281.6	340.5	423.2	496.2	519.6	4.7%	4.2%
Non-transportation	259.6	306.8	377.9	442.6	474.2	7.1%	4.1%
Transportation	22.1	33.7	45.4	53.6	45.3	-15.4%	4.9%
Earnings (\$Millions)							
Earnings	77.7	90.2	116.5	133.2	145.4	9.2%	4.3%
Employment							
Employment	4,300	4,690	5,540	5,800	5,860	1.2%	2.1%
Tax Revenue (\$Millions)							
Total	12.2	15.4	19.8	23.4	25.6	9.4%	5.0%
Local	5.5	7.0	9.3	11.0	12.3	11.9%	5.5%
State	6.7	8.4	10.5	12.4	13.3	7.2%	4.7%

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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	408.6	432.5	423.2	432.6	459.6	496.2	519.6
Other Travel*	10.5	12.5	9.8	11.3	11.0	11.0	10.1
Total Direct Spending	419.0	445.0	433.0	443.9	470.7	507.2	529.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	116.2	120.4	120.5	121.7	127.3	138.6	153.6
Food Service	92.9	102.7	105.1	105.9	116.3	129.0	138.5
Food Stores	37.1	39.6	38.2	40.4	43.0	46.1	48.3
Local Tran. & Gas	43.3	53.7	45.4	51.3	52.3	53.6	45.3
Arts, Ent. & Rec.	59.7	59.2	57.2	56.6	60.5	64.9	67.7
Retail Sales	59.4	57.0	56.8	56.7	60.3	64.0	66.1
Destination Spending	408.6	432.5	423.2	432.6	459.6	496.2	519.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	78.4	86.0	84.2	88.2	93.5	99.6	106.4
Arts, Ent. & Rec.	15.8	18.0	16.4	17.5	14.9	14.9	19.1
Retail**	12.6	13.0	12.6	12.8	13.8	14.9	15.8
Ground Tran.	1.5	1.6	1.6	1.6	1.7	2.0	2.1
Other Travel*	2.0	2.2	1.7	1.7	1.7	1.9	2.1
Total Direct Earnings	110.3	120.9	116.5	121.9	125.6	133.2	145.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,830	4,090	3,920	3,850	3,960	4,090	4,120
Arts, Ent. & Rec.	940	950	930	990	930	940	950
Retail**	640	640	600	600	630	670	690
Ground Tran.	60	60	50	50	60	60	60
Other Travel*	50	50	40	40	40	40	40
Total Direct Employment	5,510	5,770	5,540	5,520	5,630	5,800	5,860
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.4	8.1	9.3	9.2	10.1	11.0	12.3
State Tax Receipts	10.1	10.9	10.5	11.4	11.8	12.4	13.3
Total Local & State	18.6	19.0	19.8	20.6	21.8	23.4	25.6

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.

Lincoln 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	313.6	344.1	337.4	342.6	363.7	394.0	415.1
Hotel, Motel*	238.2	264.1	259.6	260.1	277.9	306.7	326.8
Private Home	18.5	19.7	19.2	20.9	21.4	21.8	21.7
Other Overnight	57.0	60.2	58.5	61.6	64.4	65.5	66.6
Campground	36.9	38.6	37.2	38.9	41.6	42.2	43.2
Vacation Home	20.1	21.7	21.4	22.7	22.8	23.2	23.4
Day Travel	95.0	88.4	85.9	90.0	96.0	102.2	104.5
Spending at Destination	408.6	432.5	423.2	432.6	459.6	496.2	519.6

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$339	\$641	\$139	\$262	2.4	1.9
Private Home	\$92	\$280	\$35	\$107	2.6	3.0
Other Overnight	\$129	\$428	\$39	\$130	3.3	3.3
All Overnight	\$242	\$559	\$89	\$212	2.7	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,022	2,239	2,358	827	916	964
Private Home	605	613	615	232	235	236
Other Overnight	1,650	1,662	1,691	504	507	516
All Overnight	4,276	4,514	4,664	1,563	1,659	1,717

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,069	1,184	1,246	437	484	510
Private Home	199	201	202	76	77	78
Other Overnight	499	503	512	152	153	156
All Overnight	1,767	1,888	1,960	665	715	743

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

LINN COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$68,510
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,810
Additional employment if each resident household encouraged one additional overnight visitor	70

Visitor Shares

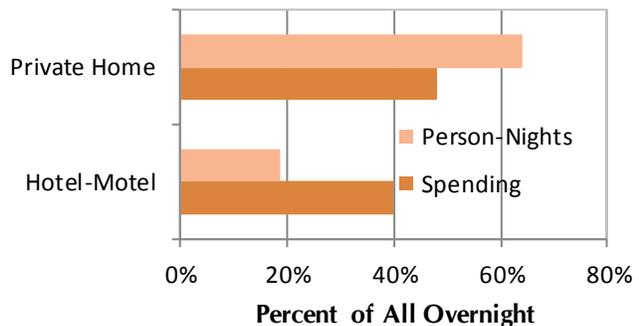
Travel Share of Total Employment (2014)*	3.1%
Overnight Visitor Day Share of Resident Population (2015p)**	4.4%

*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	224	373	\$33.8
Private Home	479	1,231	\$38.9
Other Overnight	107	330	\$9.8
All Overnight	810	1,934	\$82.6

Linn County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	82.9	103.9	112.9	136.6	136.0	-0.4%	3.4%
Other	9.9	14.3	16.9	19.4	15.9	-18.1%	3.2%
Visitor	73.0	89.6	96.1	117.2	120.1	2.5%	3.4%
Non-transportation	66.3	79.0	84.0	102.5	107.8	5.1%	3.3%
Transportation	6.7	10.5	12.1	14.7	12.3	-15.9%	4.2%
Earnings (\$Millions)							
Earnings	18.9	22.7	24.8	29.9	33.7	12.8%	3.9%
Employment							
Employment	1,430	1,570	1,490	1,640	1,810	10.2%	1.5%
Tax Revenue (\$Millions)							
Total	3.0	3.7	4.0	5.1	5.5	7.2%	4.1%
Local	0.4	0.6	0.6	0.9	1.0	12.4%	6.9%
State	2.6	3.1	3.3	4.2	4.4	6.0%	3.6%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	96.5	101.6	96.1	110.7	114.3	117.2	120.1
Other Travel*	16.9	20.9	16.9	20.7	20.0	19.4	15.9
Total Direct Spending	113.4	122.5	112.9	131.4	134.4	136.6	136.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	11.5	12.6	10.8	12.8	14.0	15.3	16.9
Food Service	26.6	27.9	28.0	32.2	33.8	35.1	37.1
Food Stores	12.0	13.1	12.6	14.4	14.8	15.3	15.9
Local Tran. & Gas	12.1	14.7	12.1	15.5	15.2	14.7	12.3
Arts, Ent. & Rec.	15.4	15.2	14.6	16.0	16.4	16.7	17.2
Retail Sales	18.8	18.1	17.9	19.8	20.2	20.2	20.7
Destination Spending	96.5	101.6	96.1	110.7	114.3	117.2	120.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	14.4	15.8	14.8	16.8	17.5	18.3	21.6
Arts, Ent. & Rec.	4.6	5.3	4.8	4.9	5.1	5.4	5.6
Retail**	3.9	4.0	3.9	4.4	4.5	4.6	4.8
Ground Tran.	0.5	0.5	0.5	0.5	0.6	0.6	0.6
Other Travel*	1.1	1.0	0.9	0.9	0.9	1.0	1.0
Total Direct Earnings	24.4	26.7	24.8	27.5	28.5	29.9	33.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	950	990	870	950	990	1,010	1,150
Arts, Ent. & Rec.	400	390	360	350	350	350	360
Retail**	190	190	190	210	210	210	220
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	60	60	50	50	50	50	50
Total Direct Employment	1,630	1,650	1,490	1,580	1,620	1,640	1,810
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.7	0.8	0.6	0.8	0.9	0.9	1.0
State Tax Receipts	3.4	3.6	3.3	4.0	4.1	4.2	4.4
Total Local & State	4.1	4.3	4.0	4.9	5.0	5.1	5.5

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.

Linn 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	64.0	70.4	65.7	75.7	78.3	80.5	82.6
Hotel, Motel*	24.3	27.0	22.9	28.0	30.2	32.1	33.8
Private Home	31.2	34.2	34.1	38.6	38.5	38.7	38.9
Other Overnight	8.6	9.2	8.6	9.1	9.6	9.7	9.8
Campground	7.4	7.8	7.3	7.7	8.1	8.2	8.3
Vacation Home	1.2	1.4	1.4	1.5	1.5	1.5	1.5
Day Travel	32.5	31.2	30.4	35.1	36.1	36.7	37.5
Spending at Destination	96.5	101.6	96.1	110.7	114.3	117.2	120.1

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$223	\$370	\$91	\$151	2.5	1.7
Private Home	\$81	\$208	\$32	\$81	2.6	2.6
Other Overnight	\$102	\$314	\$30	\$92	3.4	3.1
All Overnight	\$113	\$267	\$43	\$102	2.7	2.4

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	341	354	373	139	144	152
Private Home	1,208	1,209	1,231	472	473	481
Other Overnight	322	324	330	94	94	96
All Overnight	1,871	1,887	1,934	705	711	729

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	205	213	224	84	87	91
Private Home	470	470	479	184	184	187
Other Overnight	105	105	107	31	31	31
All Overnight	780	789	810	298	301	310

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

MALHEUR COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$64,440
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.40

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,074
Additional employment if each resident household encouraged one additional overnight visitor	17

Visitor Shares

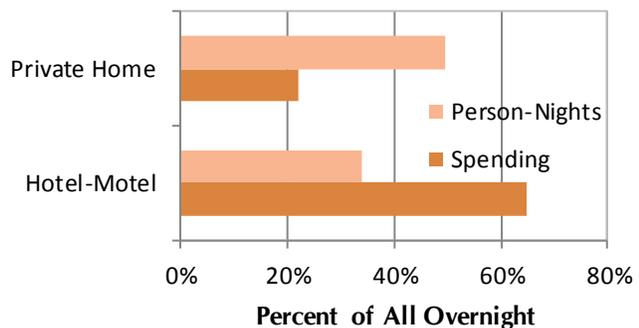
Travel Share of Total Employment (2014)*	3.4%
Overnight Visitor Day Share of Resident Population (2015p)**	5.6%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	133	220	\$19.7
Private Home	123	315	\$6.3
Other Overnight	34	104	\$3.9
All Overnight	289	640	\$29.9

Malheur County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	32.5	37.6	37.6	40.3	41.0	1.7%	1.6%
Other	2.5	3.7	4.3	4.8	3.9	-19.3%	3.0%
Visitor	30.0	33.9	33.3	35.5	37.1	4.6%	1.4%
Non-transportation	27.8	30.9	30.2	32.2	34.3	6.4%	1.4%
Transportation	2.2	3.0	3.1	3.3	2.8	-13.4%	1.8%
Earnings (\$Millions)							
Earnings	8.8	9.8	9.8	11.1	11.8	6.3%	2.0%
Employment							
Employment	610	610	550	570	580	3.0%	-0.3%
Tax Revenue (\$Millions)							
Total	1.3	1.5	1.7	1.9	2.0	6.0%	3.1%
Local	0.4	0.5	0.6	0.7	0.7	9.1%	5.1%
State	0.9	1.0	1.0	1.2	1.2	4.2%	2.1%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	35.9	31.2	33.3	35.9	35.0	35.5	37.1
Other Travel*	4.4	5.3	4.3	5.2	5.0	4.8	3.9
Total Direct Spending	40.3	36.5	37.6	41.1	40.0	40.3	41.0
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	8.0	7.9	8.5	9.1	9.1	9.2	10.2
Food Service	9.2	7.8	8.6	9.3	9.1	9.4	10.0
Food Stores	4.1	3.6	3.9	4.2	4.2	4.3	4.5
Local Tran. & Gas	3.4	3.3	3.1	3.7	3.4	3.3	2.8
Arts, Ent. & Rec.	6.3	5.0	5.2	5.4	5.2	5.2	5.5
Retail Sales	4.9	3.6	3.9	4.1	4.0	4.0	4.1
Destination Spending	35.9	31.2	33.3	35.9	35.0	35.5	37.1
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	7.1	6.4	6.8	7.5	7.6	7.8	8.3
Arts, Ent. & Rec.	1.8	1.7	1.6	1.9	1.9	1.9	2.0
Retail**	1.1	0.9	1.0	1.0	1.0	1.1	1.1
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.2	0.2	0.2	0.2
Total Direct Earnings	10.4	9.4	9.8	10.9	10.9	11.1	11.8
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	410	360	370	380	380	380	400
Arts, Ent. & Rec.	150	120	120	150	140	130	120
Retail**	60	50	50	50	50	50	50
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	630	530	550	590	580	570	580
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.5	0.6	0.6	0.7	0.7	0.7	0.7
State Tax Receipts	1.1	1.0	1.0	1.2	1.2	1.2	1.2
Total Local & State	1.6	1.6	1.7	1.9	1.9	1.9	2.0

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.

Malheur 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	26.5	25.1	26.8	28.8	28.1	28.5	29.9
Hotel, Motel*	17.6	16.6	17.5	19.0	18.3	18.4	19.7
Private Home	5.3	5.6	5.9	6.2	6.0	6.2	6.3
Other Overnight	3.5	2.9	3.4	3.6	3.8	3.8	3.9
Campground	3.3	2.6	3.1	3.3	3.5	3.5	3.6
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	9.4	6.1	6.5	7.1	6.9	7.0	7.2
Spending at Destination	35.9	31.2	33.3	35.9	35.0	35.5	37.1

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$219	\$364	\$89	\$148	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$129	\$395	\$38	\$116	3.4	3.1
All Overnight	\$123	\$267	\$47	\$103	2.6	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	213	211	220	87	86	90
Private Home	299	307	315	117	120	123
Other Overnight	101	102	104	30	30	30
All Overnight	614	620	640	233	236	243

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	128	127	133	52	52	54
Private Home	116	119	123	45	47	48
Other Overnight	33	33	34	10	10	10
All Overnight	278	280	289	107	108	112

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

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

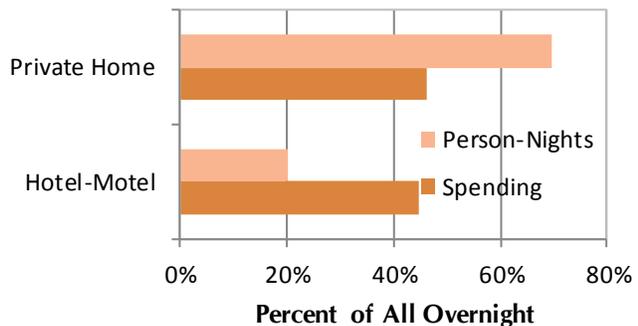
Travel Share of Total Employment (2014)*	2.6%
Overnight Visitor Day Share of Resident Population (2015p)**	4.4%

*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.

MORROW COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$81,750
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.30

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$362
Additional employment if each resident household encouraged one additional overnight visitor	4

Visitor Shares

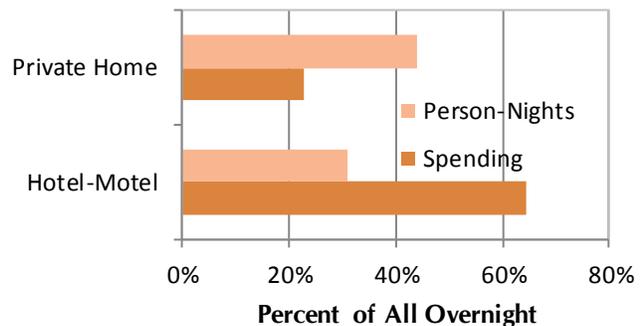
Travel Share of Total Employment (2014)*	2.4%
Overnight Visitor Day Share of Resident Population (2015p)**	6.3%

*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



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	50	83	\$6.9
Private Home	46	117	\$2.3
Other Overnight	23	66	\$1.3
All Overnight	119	266	\$10.5

Morrow County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	10.0	11.2	12.0	14.5	14.7	1.5%	2.6%
Other	0.9	1.4	1.5	1.8	1.4	-19.3%	3.4%
Visitor	9.1	9.8	10.4	12.7	13.3	4.4%	2.6%
Non-transportation	8.4	8.8	9.3	11.4	12.2	6.5%	2.5%
Transportation	0.7	1.0	1.1	1.3	1.1	-13.4%	2.8%
Earnings (\$Millions)							
Earnings	2.5	2.6	2.8	3.4	3.5	2.1%	2.3%
Employment							
Employment	190	190	150	180	170	-6.4%	-1.0%
Tax Revenue (\$Millions)							
Total	0.3	0.3	0.3	0.4	0.4	2.1%	2.7%
Local	0.0	0.0	0.0	0.0	0.0	7.1%	20.0%
State	0.3	0.3	0.3	0.4	0.4	2.1%	2.7%

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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	10.6	11.5	10.4	11.5	12.9	12.7	13.3
Other Travel*	1.6	2.0	1.5	1.9	1.8	1.8	1.4
Total Direct Spending	12.2	13.5	12.0	13.4	14.7	14.5	14.7
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	2.1	2.7	2.4	2.7	3.2	3.2	3.5
Food Service	2.7	2.9	2.8	3.1	3.4	3.4	3.7
Food Stores	1.3	1.3	1.3	1.4	1.5	1.5	1.6
Local Tran. & Gas	1.1	1.4	1.1	1.3	1.4	1.3	1.1
Arts, Ent. & Rec.	1.7	1.8	1.6	1.7	1.9	1.8	1.9
Retail Sales	1.5	1.4	1.3	1.4	1.5	1.5	1.5
Destination Spending	10.6	11.5	10.4	11.5	12.9	12.7	13.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	1.7	1.9	1.6	1.8	2.1	2.1	2.2
Arts, Ent. & Rec.	0.6	0.7	0.6	0.6	0.6	0.6	0.7
Retail**	0.5	0.5	0.4	0.5	0.5	0.5	0.5
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	2.8	3.2	2.8	3.1	3.4	3.4	3.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	130	140	100	100	120	120	110
Arts, Ent. & Rec.	30	30	30	30	30	40	30
Retail**	20	20	20	20	20	20	20
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	190	200	150	160	170	180	170
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.4	0.4	0.3	0.4	0.4	0.4	0.4
Total Local & State	0.4	0.4	0.3	0.4	0.4	0.4	0.4

Details may not add to totals due to rounding.

*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.

Morrow 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	7.8	9.1	8.2	9.0	10.2	10.0	10.5
Hotel, Motel*	4.7	5.7	5.0	5.6	6.6	6.5	6.9
Private Home	2.0	2.2	2.1	2.2	2.3	2.3	2.3
Other Overnight	1.2	1.2	1.1	1.2	1.2	1.3	1.3
Campground	0.7	0.7	0.6	0.6	0.7	0.7	0.7
Vacation Home	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Day Travel	2.7	2.4	2.3	2.5	2.7	2.7	2.8
Spending at Destination	10.6	11.5	10.4	11.5	12.9	12.7	13.3

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$204	\$339	\$83	\$138	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$63	\$180	\$19	\$55	3.3	2.8
All Overnight	\$106	\$233	\$40	\$89	2.7	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	82	80	83	34	33	34
Private Home	116	113	117	45	44	46
Other Overnight	64	64	66	19	20	20
All Overnight	262	258	266	98	96	100

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	49	48	50	20	20	20
Private Home	45	44	46	18	17	18
Other Overnight	22	22	23	7	7	7
All Overnight	117	115	119	45	44	45

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

MULTNOMAH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$112,850
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$9.60

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$106,420
Additional employment if each resident household encouraged one additional overnight visitor	943

Visitor Shares

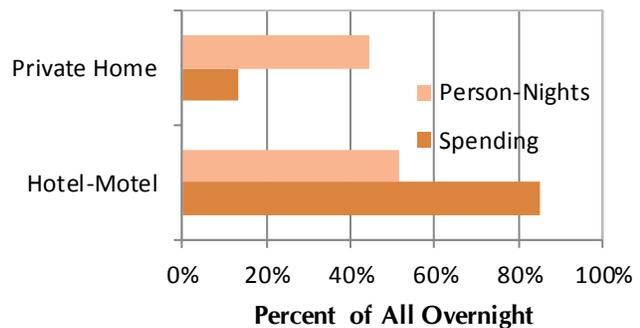
Travel Share of Total Employment (2014)*	3.4%
Overnight Visitor Day Share of Resident Population (2015p)**	4.3%

*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



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	3,141	6,388	\$1,429.1
Private Home	1,745	5,411	\$178.4
Other Overnight	140	465	\$18.1
All Overnight	5,026	12,264	\$1,625.6

Multnomah County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	2,106	2,310	2,819	3,431	3,688	7.5%	3.8%
Other	1,219	1,232	1,521	1,722	1,821	5.8%	2.7%
Visitor	888	1,078	1,297	1,710	1,868	9.2%	5.1%
Non-transportation	738	892	1,069	1,417	1,553	9.6%	5.1%
Transportation	149	187	228	293	315	7.4%	5.1%
Earnings (\$Millions)							
Earnings	521	516	601	774	838	8.2%	3.2%
Employment							
Employment	18,000	17,380	17,980	21,120	21,880	3.6%	1.3%
Tax Revenue (\$Millions)							
Total	79	93	108	156	178	14.3%	5.6%
Local	40	50	59	93	111	19.0%	7.1%
State	39	42	49	63	68	7.4%	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 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.

East Multnomah County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	48.7	53.6	57.6	74.2	79.1	6.7%	3.3%
Other	5.8	4.8	4.2	4.6	4.7	1.1%	-1.5%
Visitor	42.8	48.8	53.5	69.6	74.5	7.1%	3.8%
Non-transportation	39.3	43.7	47.5	62.0	67.9	9.5%	3.7%
Transportation	3.6	5.1	6.0	7.6	6.6	-13.0%	4.1%
Earnings (\$Millions)							
Earnings	13.2	14.0	15.2	20.2	22.1	9.6%	3.5%
Employment							
Employment	810	800	770	950	990	5.0%	1.4%
Tax Revenue (\$Millions)							
Total	1.8	2.0	2.3	3.1	3.4	9.0%	4.4%
Local	0.6	0.8	0.9	1.3	1.4	10.6%	5.4%
State	1.1	1.3	1.4	1.8	2.0	7.8%	3.8%

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.

West Multnomah County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	2,058	2,257	2,761	3,357	3,609	7.5%	3.8%
Other	1,213	1,227	1,517	1,717	1,816	5.8%	2.7%
Visitor	845	1,030	1,244	1,640	1,793	9.3%	5.1%
Non-transportation	699	848	1,022	1,355	1,485	9.6%	5.2%
Transportation	146	182	222	285	308	7.9%	5.1%
Earnings (\$Millions)							
Earnings	508	502	585	754	815	8.1%	3.2%
Employment							
Employment	17,190	16,570	17,210	20,170	20,890	3.5%	1.3%
Tax Revenue (\$Millions)							
Total	77	91	106	153	175	14.4%	5.6%
Local	39	50	59	92	109	19.1%	7.1%
State	38	41	47	61	66	7.4%	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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	1,167	1,302	1,297	1,537	1,608	1,710	1,868
Other Travel*	1,393	1,462	1,521	1,581	1,624	1,722	1,821
Total Direct Spending	2,560	2,764	2,819	3,118	3,232	3,431	3,688
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	342	398	371	477	504	562	647
Food Service	296	328	355	410	430	450	484
Food Stores	51	57	59	67	69	73	77
Local Tran. & Gas	208	245	228	266	280	293	315
Arts, Ent. & Rec.	102	105	107	119	122	126	132
Retail Sales	167	169	178	198	203	206	214
Destination Spending	1,167	1,302	1,297	1,537	1,608	1,710	1,868
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	219	252	249	297	317	340	366
Arts, Ent. & Rec.	28	34	32	40	38	40	42
Retail**	27	29	30	33	34	36	38
Ground Tran.	25	26	24	27	28	30	33
Other Travel*	256	258	266	290	301	329	358
Total Direct Earnings	555	598	601	688	718	774	838
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	9.8	10.8	10.5	11.8	12.3	12.7	13.1
Arts, Ent. & Rec.	1.0	1.0	1.0	1.1	1.1	1.1	1.2
Retail**	1.0	1.1	1.1	1.2	1.2	1.2	1.3
Ground Tran.	1.0	1.0	0.9	0.9	0.9	1.0	1.1
Other Travel*	5.3	5.5	4.7	4.7	4.8	5.1	5.3
Total Direct Employment	18.1	19.4	18.0	19.7	20.4	21.1	21.9
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	56	63	59	73	84	93	111
State Tax Receipts	45	50	49	58	60	63	68
Total Local & State	101	113	108	130	144	156	178

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.

Multnomah 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	985	1,119	1,108	1,318	1,382	1,476	1,626
Hotel, Motel*	837	956	935	1,131	1,193	1,284	1,429
Private Home	133	148	157	171	172	175	178
Other Overnight	15	16	16	17	17	18	18
Campground	11	12	12	12	13	13	14
Vacation Home	3	4	4	4	4	4	5
Day Travel	182	183	190	219	226	233	242
Spending at Destination	1,167	1,302	1,297	1,537	1,608	1,710	1,868

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$474	\$988	\$224	\$455	2.1	2.1
Private Home	\$64	\$204	\$33	\$102	1.9	3.2
Other Overnight	\$120	\$404	\$39	\$129	3.1	3.4
All Overnight	\$272	\$687	\$133	\$323	2.1	2.5

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	5,993	6,107	6,388	2,803	2,871	3,015
Private Home	5,259	5,298	5,411	2,697	2,730	2,804
Other Overnight	454	457	465	147	148	150
All Overnight	11,705	11,862	12,264	5,646	5,748	5,969

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	2,946	3,002	3,141	1,347	1,378	1,447
Private Home	1,696	1,709	1,745	845	854	875
Other Overnight	136	137	140	44	44	45
All Overnight	4,778	4,848	5,026	2,235	2,276	2,367

*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%

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.

TILLAMOOK COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$104,660
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.90

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,321
Additional employment if each resident household encouraged one additional overnight visitor	13

Visitor Shares

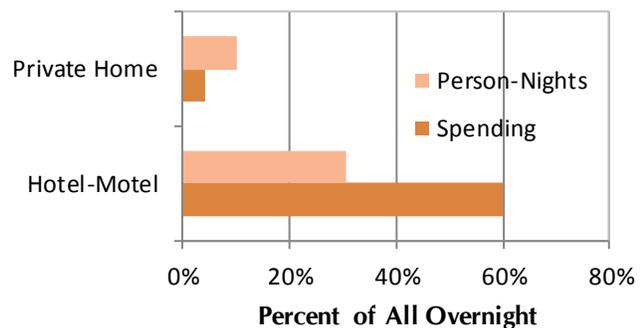
Travel Share of Total Employment (2014)*	16.4%
Overnight Visitor Day Share of Resident Population (2015p)**	27.5%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	492	818	\$82.0
Private Home	102	262	\$5.2
Other Overnight	530	1,525	\$46.0
All Overnight	1,125	2,605	\$133.3

Tillamook County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	108.2	138.2	186.2	221.1	229.4	3.8%	5.1%
Other	1.9	3.0	3.5	4.0	3.2	-19.3%	3.5%
Visitor	106.3	135.2	182.8	217.1	226.2	4.2%	5.2%
Non-transportation	99.2	124.2	167.6	199.2	211.0	5.9%	5.2%
Transportation	7.1	11.0	15.2	17.8	15.2	-14.8%	5.2%
Earnings (\$Millions)							
Earnings	30.0	38.1	55.0	66.2	69.5	5.1%	5.8%
Employment							
Employment	1,500	1,680	2,100	2,150	2,190	2.0%	2.6%
Tax Revenue (\$Millions)							
Total	2.8	3.8	5.1	6.3	6.7	6.3%	5.9%
Local	0.5	0.8	1.0	1.3	1.5	12.7%	7.9%
State	2.3	3.0	4.1	5.0	5.2	4.6%	5.4%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	177.5	183.2	182.8	195.1	208.7	217.1	226.2
Other Travel*	3.5	4.3	3.5	4.3	4.1	4.0	3.2
Total Direct Spending	181.1	187.5	186.2	199.4	212.8	221.1	229.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	32.7	34.3	35.3	37.5	40.2	42.1	46.3
Food Service	47.1	48.9	50.9	54.5	59.4	62.9	66.9
Food Stores	22.4	24.1	23.2	25.1	26.7	28.0	29.2
Local Tran. & Gas	14.8	17.5	15.2	18.0	18.2	17.8	15.2
Arts, Ent. & Rec.	30.7	30.5	30.0	30.8	33.2	34.6	36.1
Retail Sales	29.8	27.8	28.0	29.3	31.0	31.7	32.5
Destination Spending	177.5	183.2	182.8	195.1	208.7	217.1	226.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	35.5	38.3	38.3	40.0	43.2	48.1	49.9
Arts, Ent. & Rec.	8.4	9.7	9.0	8.7	8.2	8.9	9.8
Retail**	7.0	7.1	6.9	7.3	7.8	8.2	8.6
Ground Tran.	0.7	0.7	0.7	0.8	0.8	0.9	1.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Total Direct Earnings	51.7	56.0	55.0	57.0	60.2	66.2	69.5
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,290	1,280	1,270	1,190	1,260	1,340	1,370
Arts, Ent. & Rec.	460	550	460	400	380	380	380
Retail**	390	370	340	350	380	400	410
Ground Tran.	30	20	20	20	30	30	30
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	2,170	2,240	2,100	1,960	2,060	2,150	2,190
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.2	1.0	1.0	1.1	1.2	1.3	1.5
State Tax Receipts	4.0	4.2	4.1	4.5	4.7	5.0	5.2
Total Local & State	5.2	5.2	5.1	5.6	5.9	6.3	6.7

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.

Tillamook 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	98.1	107.1	107.0	113.0	121.3	126.6	133.3
Hotel, Motel*	53.9	59.9	62.2	65.2	71.5	76.0	82.0
Private Home	4.4	4.7	4.7	5.2	5.2	5.3	5.2
Other Overnight	39.8	42.5	40.1	42.6	44.6	45.4	46.0
Campground	28.3	30.1	27.9	29.6	31.6	32.0	32.6
Vacation Home	11.5	12.4	12.2	13.0	13.0	13.3	13.4
Day Travel	79.5	76.1	75.7	82.1	87.4	90.4	92.9
Spending at Destination	177.5	183.2	182.8	195.1	208.7	217.1	226.2

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$246	\$409	\$100	\$167	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$100	\$285	\$30	\$87	3.3	2.9
All Overnight	\$149	\$332	\$51	\$119	2.9	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	730	777	818	298	317	334
Private Home	259	259	262	101	101	103
Other Overnight	1,487	1,498	1,525	449	453	461
All Overnight	2,476	2,535	2,605	848	871	897

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	439	467	492	179	190	201
Private Home	101	101	102	39	39	40
Other Overnight	517	522	530	157	159	161
All Overnight	1,057	1,090	1,125	376	389	402

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

UMATILLA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$59,310
Employee Earnings generated by \$100 Visitor Spending	\$34
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)	\$3,447
Additional employment if each resident household encouraged one additional overnight visitor	58

Visitor Shares

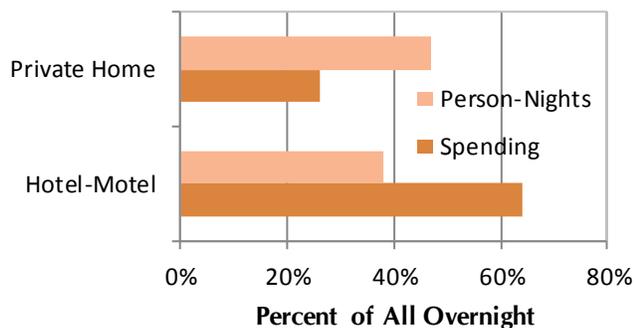
Travel Share of Total Employment (2014)*	5.9%
Overnight Visitor Day Share of Resident Population (2015p)**	5.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	395	657	\$63.4
Private Home	309	794	\$25.1
Other Overnight	88	255	\$9.3
All Overnight	792	1,706	\$97.8

Umatilla County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	104.4	127.9	133.7	148.8	150.2	0.9%	2.5%
Other	8.8	10.7	11.8	13.4	10.4	-22.8%	1.1%
Visitor	95.5	117.2	121.9	135.4	139.8	3.3%	2.6%
Non-transportation	86.6	103.5	106.5	118.5	125.6	6.0%	2.5%
Transportation	8.9	13.7	15.4	16.8	14.2	-15.7%	3.1%
Earnings (\$Millions)							
Earnings	27.9	33.7	36.0	45.3	48.7	7.6%	3.8%
Employment							
Employment	1,990	2,090	2,030	2,300	2,410	4.8%	1.3%
Tax Revenue (\$Millions)							
Total	3.7	4.5	4.9	5.9	6.2	5.0%	3.5%
Local	0.8	1.0	1.2	1.4	1.5	6.5%	4.5%
State	2.9	3.5	3.7	4.5	4.7	4.6%	3.2%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	122.4	122.9	121.9	126.9	133.8	135.4	139.8
Other Travel*	12.4	14.5	11.8	13.4	12.9	13.4	10.4
Total Direct Spending	134.8	137.4	133.7	140.3	146.8	148.8	150.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	22.3	25.7	25.5	25.2	27.9	28.6	31.4
Food Service	30.7	30.2	31.6	33.0	35.2	36.2	38.5
Food Stores	11.6	11.6	11.5	12.3	13.0	13.4	14.0
Local Tran. & Gas	15.4	17.9	15.4	17.8	17.6	16.8	14.2
Arts, Ent. & Rec.	25.6	22.3	22.2	22.6	23.7	23.9	24.7
Retail Sales	16.9	15.1	15.6	15.9	16.5	16.5	17.0
Destination Spending	122.4	122.9	121.9	126.9	133.8	135.4	139.8
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	23.0	24.6	24.4	29.9	30.6	32.2	35.0
Arts, Ent. & Rec.	6.7	6.8	6.3	6.9	6.6	7.2	7.4
Retail**	3.8	3.7	3.7	3.9	4.0	4.2	4.4
Ground Tran.	0.6	0.6	0.6	0.6	0.6	0.7	0.7
Other Travel*	1.0	0.9	1.0	0.6	0.6	1.1	1.2
Total Direct Earnings	35.2	36.7	36.0	41.9	42.4	45.3	48.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,280	1,280	1,230	1,370	1,390	1,410	1,480
Arts, Ent. & Rec.	610	610	570	600	600	640	680
Retail**	180	180	170	170	170	180	190
Ground Tran.	20	20	20	20	20	20	20
Other Travel*	50	50	50	30	30	50	50
Total Direct Employment	2,150	2,140	2,030	2,190	2,220	2,300	2,410
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	1.0	1.1	1.2	1.2	1.4	1.4	1.5
State Tax Receipts	3.6	3.7	3.7	4.3	4.4	4.5	4.7
Total Local & State	4.7	4.9	4.9	5.5	5.7	5.9	6.2

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.

Umatilla 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	79.0	87.0	85.8	88.5	93.5	94.6	97.8
Hotel, Motel*	50.2	56.9	55.3	56.0	59.8	60.6	63.4
Private Home	20.3	21.5	22.4	23.8	24.7	24.8	25.1
Other Overnight	8.6	8.6	8.1	8.7	9.0	9.2	9.3
Campground	5.8	5.6	5.2	5.5	5.9	5.9	6.1
Vacation Home	2.7	3.0	3.0	3.2	3.2	3.2	3.2
Day Travel	43.4	35.9	36.1	38.4	40.3	40.8	41.9
Spending at Destination	122.4	122.9	121.9	126.9	133.8	135.4	139.8

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$237	\$394	\$97	\$161	2.5	1.7
Private Home	\$81	\$208	\$32	\$81	2.6	2.6
Other Overnight	\$121	\$349	\$36	\$106	3.3	2.9
All Overnight	\$149	\$317	\$57	\$124	2.6	2.1

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	625	629	657	255	257	268
Private Home	775	775	794	303	303	310
Other Overnight	249	251	255	75	76	77
All Overnight	1,649	1,655	1,706	633	635	655

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	376	378	395	153	154	161
Private Home	301	301	309	118	118	121
Other Overnight	86	87	88	26	26	27
All Overnight	763	766	792	297	298	308

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

UNION COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$52,630
Employee Earnings generated by \$100 Visitor Spending	\$37
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,068
Additional employment if each resident household encouraged one additional overnight visitor	20

Visitor Shares

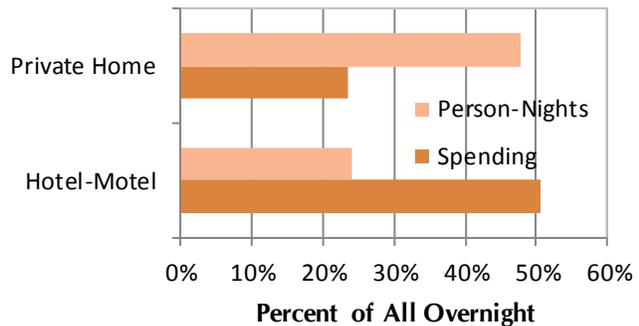
Travel Share of Total Employment (2014)*	4.0%
Overnight Visitor Day Share of Resident Population (2015p)**	5.9%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	84	139	\$12.4
Private Home	103	265	\$5.3
Other Overnight	52	159	\$6.1
All Overnight	238	563	\$23.7

Union County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	29.2	30.8	29.3	33.1	33.3	0.5%	0.9%
Other	1.9	3.0	3.5	4.0	3.3	-19.3%	3.5%
Visitor	27.3	27.8	25.8	29.1	30.0	3.2%	0.6%
Non-transportation	25.3	25.3	23.3	26.3	27.7	5.1%	0.6%
Transportation	1.9	2.5	2.5	2.7	2.3	-15.2%	1.3%
Earnings (\$Millions)							
Earnings	9.4	9.4	9.3	10.5	11.3	7.4%	1.2%
Employment							
Employment	650	580	540	570	580	2.2%	-0.7%
Tax Revenue (\$Millions)							
Total	1.2	1.2	1.2	1.5	1.5	5.0%	1.9%
Local	0.4	0.3	0.3	0.5	0.5	7.1%	2.2%
State	0.8	0.8	0.8	1.0	1.0	4.0%	1.7%

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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	28.9	27.8	25.8	27.5	27.2	29.1	30.0
Other Travel*	3.5	4.3	3.5	4.4	4.2	4.0	3.3
Total Direct Spending	32.4	32.1	29.3	31.8	31.4	33.1	33.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	6.1	6.3	5.7	5.8	5.9	6.5	7.1
Food Service	7.3	6.8	6.7	7.2	7.2	7.8	8.2
Food Stores	3.9	4.0	3.8	4.1	4.2	4.4	4.6
Local Tran. & Gas	2.7	3.0	2.5	2.9	2.7	2.7	2.3
Arts, Ent. & Rec.	4.9	4.3	3.9	4.0	3.9	4.2	4.3
Retail Sales	4.0	3.3	3.2	3.4	3.3	3.5	3.5
Destination Spending	28.9	27.8	25.8	27.5	27.2	29.1	30.0
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	6.9	6.9	6.8	6.9	7.0	7.5	8.1
Arts, Ent. & Rec.	1.5	1.6	1.3	1.3	1.6	1.7	1.7
Retail**	1.0	1.0	0.9	1.0	1.0	1.1	1.1
Ground Tran.	0.2	0.1	0.1	0.1	0.1	0.2	0.2
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Total Direct Earnings	9.8	9.7	9.3	9.5	9.9	10.5	11.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	350	350	340	330	320	330	340
Arts, Ent. & Rec.	190	160	140	160	180	180	170
Retail**	50	50	50	50	50	50	50
Ground Tran.	10	0	0	0	0	0	0
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	600	570	540	550	560	570	580
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.4	0.4	0.3	0.4	0.4	0.5	0.5
State Tax Receipts	0.9	0.9	0.8	0.9	0.9	1.0	1.0
Total Local & State	1.3	1.3	1.2	1.4	1.4	1.5	1.5

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.

Union 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	21.9	22.2	20.4	21.6	21.4	22.9	23.7
Hotel, Motel*	12.1	11.9	10.6	10.8	10.4	11.6	12.4
Private Home	4.3	4.6	4.7	5.2	5.1	5.4	5.3
Other Overnight	5.5	5.7	5.2	5.5	5.9	6.0	6.1
Campground	5.1	5.2	4.8	5.1	5.4	5.5	5.6
Vacation Home	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Day Travel	7.1	5.6	5.4	5.9	5.8	6.2	6.3
Spending at Destination	28.9	27.8	25.8	27.5	27.2	29.1	30.0

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$218	\$362	\$89	\$148	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$132	\$404	\$38	\$118	3.4	3.1
All Overnight	\$115	\$265	\$42	\$100	2.7	2.3

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	122	133	139	50	54	57
Private Home	252	265	265	98	103	104
Other Overnight	155	156	159	45	45	46
All Overnight	529	554	563	193	203	207

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	73	80	84	30	33	34
Private Home	98	103	103	38	40	40
Other Overnight	50	51	52	15	15	15
All Overnight	222	234	238	83	88	90

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

WALLOWA COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$46,890
Employee Earnings generated by \$100 Visitor Spending	\$45
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.10

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$356
Additional employment if each resident household encouraged one additional overnight visitor	8

Visitor Shares

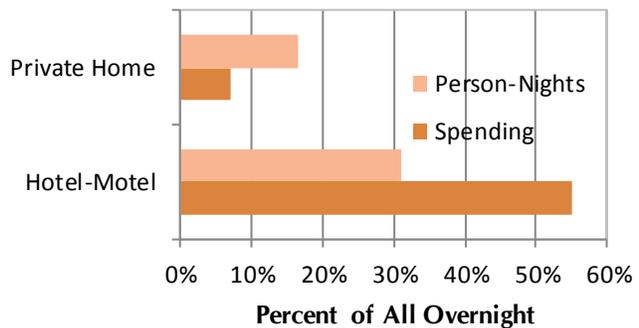
Travel Share of Total Employment (2014)*	11.7%
Overnight Visitor Day Share of Resident Population (2015p)**	17.2%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	83	139	\$12.0
Private Home	27	70	\$1.4
Other Overnight	77	229	\$7.9
All Overnight	188	438	\$21.4

Wallowa County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	19.0	21.7	25.7	27.6	28.4	3.0%	2.7%
Other	0.6	0.8	1.0	1.1	0.9	-19.3%	2.8%
Visitor	18.5	20.9	24.7	26.5	27.6	3.9%	2.7%
Non-transportation	17.2	19.1	22.6	24.3	25.6	5.6%	2.7%
Transportation	1.3	1.8	2.1	2.3	1.9	-15.0%	2.9%
Earnings (\$Millions)							
Earnings	6.1	6.9	8.4	10.6	12.4	17.8%	4.9%
Employment							
Employment	480	440	490	560	590	6.2%	1.4%
Tax Revenue (\$Millions)							
Total	0.6	0.7	0.9	1.0	1.1	10.6%	3.9%
Local	0.2	0.2	0.3	0.3	0.3	7.1%	3.1%
State	0.4	0.5	0.6	0.7	0.8	12.1%	4.2%

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.

Wallowa County Travel Impacts, 2006-2015p

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	24.8	24.8	24.7	25.5	25.0	26.5	27.6
Other Travel*	1.0	1.2	1.0	1.2	1.1	1.1	0.9
Total Direct Spending	25.7	25.9	25.7	26.7	26.1	27.6	28.4
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	5.6	6.2	6.1	6.1	6.1	6.6	7.2
Food Service	6.1	5.9	6.2	6.4	6.4	6.8	7.2
Food Stores	3.2	3.3	3.4	3.6	3.6	3.8	4.0
Local Tran. & Gas	2.2	2.5	2.1	2.5	2.3	2.3	1.9
Arts, Ent. & Rec.	4.3	4.0	3.9	3.9	3.8	4.0	4.1
Retail Sales	3.3	2.9	2.9	3.0	2.9	3.0	3.1
Destination Spending	24.8	24.8	24.7	25.5	25.0	26.5	27.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	5.7	6.0	5.9	6.7	6.7	7.5	8.8
Arts, Ent. & Rec.	1.3	1.4	1.2	1.1	1.5	1.6	2.2
Retail**	1.1	1.1	1.1	1.2	1.2	1.2	1.3
Ground Tran.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Total Direct Earnings	8.3	8.6	8.4	9.1	9.4	10.6	12.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	360	320	300	340	330	360	390
Arts, Ent. & Rec.	110	130	140	120	150	150	150
Retail**	60	50	50	50	50	50	50
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	540	510	490	520	530	560	590
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.3	0.3	0.3	0.3	0.3	0.3	0.3
State Tax Receipts	0.6	0.6	0.6	0.7	0.7	0.7	0.8
Total Local & State	0.9	0.9	0.9	0.9	1.0	1.0	1.1

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.

Wallowa 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	18.2	19.3	19.2	19.7	19.3	20.5	21.4
Hotel, Motel*	10.7	11.4	11.0	11.0	10.3	11.3	12.0
Private Home	1.2	1.3	1.3	1.4	1.3	1.4	1.4
Other Overnight	6.3	6.6	6.9	7.3	7.7	7.8	7.9
Campground	5.2	5.4	5.6	6.0	6.4	6.5	6.6
Vacation Home	1.2	1.3	1.3	1.3	1.3	1.3	1.3
Day Travel	6.6	5.5	5.5	5.8	5.7	6.0	6.2
Spending at Destination	24.8	24.8	24.7	25.5	25.0	26.5	27.6

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$213	\$354	\$87	\$144	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$117	\$345	\$35	\$103	3.4	3.0
All Overnight	\$141	\$316	\$49	\$114	2.9	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	123	133	139	50	54	57
Private Home	66	70	70	26	27	28
Other Overnight	223	225	229	66	67	68
All Overnight	413	428	438	142	148	152

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	74	80	83	30	33	34
Private Home	26	27	27	10	11	11
Other Overnight	75	76	77	22	23	23
All Overnight	175	183	188	63	66	68

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

WASCO COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$59,220
Employee Earnings generated by \$100 Visitor Spending	\$40
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,360
Additional employment if each resident household encouraged one additional overnight visitor	23

Visitor Shares

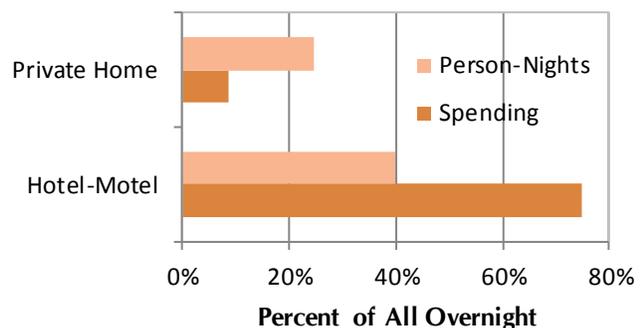
Travel Share of Total Employment (2014)*	11.2%
Overnight Visitor Day Share of Resident Population (2015p)**	11.7%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	278	462	\$54.7
Private Home	103	266	\$5.3
Other Overnight	130	389	\$10.8
All Overnight	511	1,117	\$70.8

Wasco County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	66.6	77.5	90.0	102.4	108.6	6.0%	3.3%
Other	1.9	2.8	3.5	4.0	3.2	-19.3%	3.7%
Visitor	64.7	74.6	86.5	98.4	105.3	7.0%	3.3%
Non-transportation	60.8	69.1	79.8	90.9	98.8	8.7%	3.3%
Transportation	3.9	5.5	6.8	7.5	6.6	-13.1%	3.5%
Earnings (\$Millions)							
Earnings	19.8	22.7	26.8	33.4	37.0	10.9%	4.3%
Employment							
Employment	1,290	1,330	1,400	1,590	1,790	12.4%	2.2%
Tax Revenue (\$Millions)							
Total	1.9	2.3	2.7	3.4	3.7	8.7%	4.7%
Local	0.3	0.5	0.7	0.9	0.9	10.6%	6.8%
State	1.5	1.8	2.0	2.6	2.8	8.0%	4.1%

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.

North Wasco County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	42.3	47.7	56.2	64.9	68.0	4.8%	3.2%
Other	1.8	2.7	3.3	3.8	3.1	-19.3%	3.7%
Visitor	40.6	45.0	52.9	61.1	64.9	6.3%	3.2%
Non-transportation	38.0	41.5	48.6	56.2	60.7	8.0%	3.2%
Transportation	2.6	3.6	4.3	4.9	4.2	-13.3%	3.3%
Earnings (\$Millions)							
Earnings	11.9	13.1	16.0	20.3	22.3	10.1%	4.3%
Employment							
Employment	780	770	840	960	1,080	11.8%	2.2%
Tax Revenue (\$Millions)							
Total	1.4	1.7	2.0	2.6	2.8	8.3%	4.9%
Local	0.3	0.5	0.7	0.9	0.9	10.6%	6.8%
State	1.0	1.2	1.4	1.7	1.9	7.2%	4.1%

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.

South Wasco County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	24.2	29.8	33.8	37.5	40.6	8.1%	3.5%
Other	0.1	0.2	0.2	0.2	0.2	-19.3%	3.7%
Visitor	24.1	29.6	33.6	37.3	40.4	8.3%	3.5%
Non-transportation	22.9	27.7	31.2	34.6	38.1	9.9%	3.5%
Transportation	1.3	1.9	2.4	2.7	2.3	-12.6%	4.0%
Earnings (\$Millions)							
Earnings	7.9	9.6	10.8	13.1	14.7	12.1%	4.2%
Employment							
Employment	510	560	560	630	710	13.3%	2.2%
Tax Revenue (\$Millions)							
Total	0.5	0.6	0.7	0.8	0.9	9.9%	4.1%
Local	0.0	0.0	0.0	0.0	0.0	#DIV/0!	#DIV/0!
State	0.5	0.6	0.7	0.8	0.9	9.9%	4.1%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	79.8	85.5	86.5	86.8	86.2	98.4	105.3
Other Travel*	3.3	4.1	3.5	4.3	4.2	4.0	3.2
Total Direct Spending	83.1	89.6	90.0	91.1	90.3	102.4	108.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	21.9	24.8	24.8	24.1	24.6	29.0	33.0
Food Service	19.4	20.5	21.9	22.1	22.0	25.4	27.5
Food Stores	7.6	8.5	8.4	8.9	9.0	9.9	10.5
Local Tran. & Gas	6.3	7.6	6.8	7.6	7.1	7.5	6.6
Arts, Ent. & Rec.	13.1	13.4	13.4	12.9	12.6	14.4	15.2
Retail Sales	11.5	10.8	11.2	11.2	10.9	12.1	12.6
Destination Spending	79.8	85.5	86.5	86.8	86.2	98.4	105.3
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	17.4	19.3	19.4	19.9	21.6	24.2	27.3
Arts, Ent. & Rec.	3.9	4.6	4.4	4.2	5.2	5.7	6.1
Retail**	2.4	2.5	2.5	2.5	2.5	2.8	3.0
Ground Tran.	0.3	0.4	0.4	0.4	0.4	0.4	0.5
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Earnings	24.2	26.9	26.8	27.1	29.9	33.4	37.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	930	960	920	950	1,020	1,060	1,170
Arts, Ent. & Rec.	310	400	360	350	400	400	470
Retail**	110	100	100	110	100	110	120
Ground Tran.	10	10	10	10	10	10	10
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	1,370	1,480	1,400	1,430	1,540	1,590	1,790
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.5	0.5	0.7	0.7	0.7	0.9	0.9
State Tax Receipts	1.9	2.1	2.0	2.2	2.3	2.6	2.8
Total Local & State	2.4	2.6	2.7	2.8	3.0	3.4	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.

Wasco 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	49.5	57.4	57.7	56.7	56.5	65.2	70.8
Hotel, Motel*	37.3	43.1	43.7	41.6	40.9	49.2	54.7
Private Home	4.1	4.5	4.6	5.0	5.0	5.3	5.3
Other Overnight	8.1	9.8	9.4	10.0	10.5	10.7	10.8
Campground	6.6	8.0	7.6	8.1	8.6	8.7	8.8
Vacation Home	1.5	1.8	1.8	1.9	2.0	2.0	2.0
Day Travel	30.2	28.1	28.8	30.1	29.7	33.2	34.5
Spending at Destination	79.8	85.5	86.5	86.8	86.2	98.4	105.3

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$291	\$483	\$118	\$197	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$94	\$280	\$28	\$83	3.4	3.0
All Overnight	\$174	\$368	\$63	\$139	2.7	2.1

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	359	429	462	146	175	188
Private Home	249	263	266	97	103	104
Other Overnight	380	382	389	112	113	115
All Overnight	987	1,075	1,117	356	391	407

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	216	258	278	88	105	113
Private Home	97	102	103	38	40	40
Other Overnight	127	128	130	38	38	39
All Overnight	439	488	511	163	183	192

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

WASHINGTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$82,080
Employee Earnings generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.70

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$32,558
Additional employment if each resident household encouraged one additional overnight visitor	397

Visitor Shares

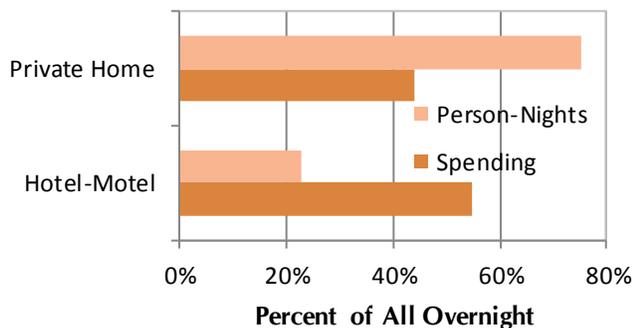
Travel Share of Total Employment (2014)*	2.2%
Overnight Visitor Day Share of Resident Population (2015p)**	3.8%

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

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

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

Overnight Visitor Spending and Volume



2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	893	1,823	\$241.2
Private Home	1,902	5,898	\$182.1
Other Overnight	46	160	\$5.2
All Overnight	2,842	7,882	\$428.6

Washington County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	409.5	488.8	560.1	670.0	684.5	2.2%	3.5%
Other	73.9	104.4	118.0	129.8	115.3	-11.2%	3.0%
Visitor	335.6	384.5	442.1	540.2	569.2	5.4%	3.6%
Non-transportation	299.0	333.9	380.1	467.1	502.5	7.6%	3.5%
Transportation	36.7	50.6	62.0	73.1	66.8	-8.6%	4.1%
Earnings (\$Millions)							
Earnings	109.6	124.8	142.7	183.8	200.4	9.1%	4.1%
Employment							
Employment	5,460	5,560	5,780	7,060	7,490	6.2%	2.1%
Tax Revenue (\$Millions)							
Total	16.4	18.6	22.1	29.7	32.6	10.0%	4.7%
Local	4.3	4.1	6.1	9.1	10.9	19.6%	6.4%
State	12.1	14.4	16.0	20.6	21.8	5.8%	4.0%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	417.1	448.1	442.1	512.0	536.4	540.2	569.2
Other Travel*	115.1	139.0	118.0	141.3	129.7	129.8	115.3
Total Direct Spending	532.2	587.1	560.1	653.2	666.1	670.0	684.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	70.9	81.3	70.7	93.4	100.1	103.2	118.7
Food Service	126.5	135.5	142.4	161.1	171.2	174.4	186.5
Food Stores	31.9	35.1	35.5	39.7	41.5	42.5	44.8
Local Tran. & Gas	57.2	67.2	62.0	75.3	75.8	73.1	66.8
Arts, Ent. & Rec.	50.1	50.0	50.0	54.1	56.3	56.3	58.7
Retail Sales	80.6	79.0	81.6	88.4	91.6	90.7	93.8
Destination Spending	417.1	448.1	442.1	512.0	536.4	540.2	569.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	78.8	88.5	85.1	105.9	112.2	120.0	133.2
Arts, Ent. & Rec.	14.3	16.5	15.5	17.2	17.5	18.5	19.3
Retail**	13.7	14.3	14.4	15.8	16.5	16.8	17.8
Ground Tran.	5.9	6.4	6.2	7.2	7.5	7.8	8.3
Other Travel*	20.6	22.9	21.5	23.2	19.2	20.7	21.8
Total Direct Earnings	133.3	148.6	142.7	169.2	172.9	183.8	200.4
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,570	3,840	3,590	4,250	4,440	4,690	5,060
Arts, Ent. & Rec.	800	900	870	940	940	980	1,020
Retail**	540	550	540	570	590	590	610
Ground Tran.	220	220	210	230	240	240	240
Other Travel*	610	650	580	570	530	560	560
Total Direct Employment	5,740	6,150	5,780	6,560	6,740	7,060	7,490
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	4.9	6.8	6.1	7.5	8.8	9.1	10.9
State Tax Receipts	15.5	16.8	16.0	19.8	20.2	20.6	21.8
Total Local & State	20.4	23.6	22.1	27.3	29.0	29.7	32.6

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.

Washington 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	303.6	335.1	326.5	382.1	400.8	404.1	428.6
Hotel, Motel*	158.5	177.5	162.6	205.8	218.9	221.4	241.2
Private Home	141.0	153.0	159.4	171.4	176.8	177.6	182.1
Other Overnight	4.1	4.6	4.6	4.9	5.1	5.2	5.2
Campground	2.2	2.5	2.3	2.5	2.6	2.7	2.7
Vacation Home	1.9	2.2	2.2	2.4	2.5	2.5	2.5
Day Travel	113.6	112.9	115.6	129.9	135.6	136.1	140.7
Spending at Destination	417.1	448.1	442.1	512.0	536.4	540.2	569.2

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$280	\$585	\$132	\$270	2.1	2.1
Private Home	\$61	\$194	\$31	\$96	2.0	3.2
Other Overnight	\$93	\$324	\$33	\$113	2.8	3.5
All Overnight	\$110	\$314	\$54	\$151	2.0	2.8

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	1,775	1,746	1,823	831	821	861
Private Home	5,763	5,726	5,898	2,879	2,872	2,969
Other Overnight	156	158	160	55	55	56
All Overnight	7,694	7,629	7,882	3,765	3,749	3,886

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	870	855	893	398	393	412
Private Home	1,858	1,846	1,902	911	907	937
Other Overnight	45	46	46	16	16	16
All Overnight	2,773	2,747	2,842	1,325	1,316	1,365

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

WHEELER COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$72,350
Employee Earnings generated by \$100 Visitor Spending	\$24
Local & State Tax Revenues generated by \$100 Visitor Spending	\$2.90

Visitor Volume (2015p)

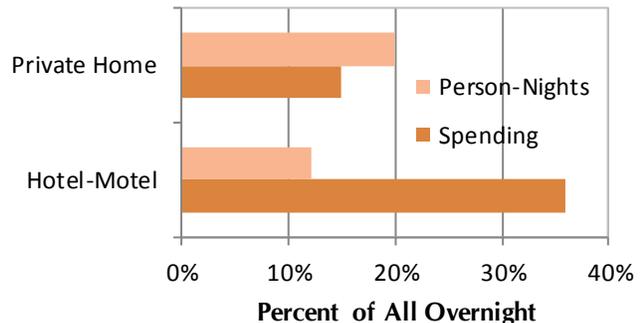
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$46
Additional employment if each resident household encouraged one additional overnight visitor	1

Visitor Shares

Travel Share of Total Employment (2014)*	3.1%
Overnight Visitor Day Share of Resident Population (2015p)**	13.9%

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

Overnight Visitor Spending and Volume



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

2015p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	5	9	\$0.7
Private Home	6	14	\$0.3
Other Overnight	16	49	\$0.9
All Overnight	27	72	\$2.0

Wheeler County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	2.2	2.4	2.8	2.8	2.8	0.7%	1.6%
Other	0.1	0.2	0.2	0.2	0.2	-19.3%	2.5%
Visitor	2.1	2.2	2.6	2.6	2.6	2.4%	1.5%
Non-transportation	1.9	2.0	2.3	2.3	2.4	5.0%	1.5%
Transportation	0.2	0.3	0.3	0.3	0.3	-16.5%	2.1%
Earnings (\$Millions)							
Earnings	0.5	0.5	0.6	0.6	0.6	5.6%	1.6%
Employment							
Employment	40	40	40	40	40	1.7%	-0.8%
Tax Revenue (\$Millions)							
Total	0.1	0.1	0.1	0.1	0.1	3.3%	1.7%
State	0.1	0.1	0.1	0.1	0.1	3.3%	1.7%

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 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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	2.5	2.7	2.6	2.6	2.5	2.6	2.6
Other Travel*	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total Direct Spending	2.7	2.9	2.8	2.8	2.7	2.8	2.8
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	0.5	0.5	0.5	0.5	0.4	0.5	0.5
Food Service	0.6	0.6	0.7	0.7	0.7	0.7	0.7
Food Stores	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Local Tran. & Gas	0.3	0.4	0.3	0.3	0.3	0.3	0.3
Arts, Ent. & Rec.	0.4	0.4	0.4	0.4	0.3	0.4	0.4
Retail Sales	0.4	0.3	0.3	0.3	0.3	0.3	0.3
Destination Spending	2.5	2.7	2.6	2.6	2.5	2.6	2.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Arts, Ent. & Rec.	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Retail**	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	0.6	0.7	0.6	0.6	0.6	0.6	0.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	30	30	30	30	20	30	30
Arts, Ent. & Rec.	10	10	10	0	0	0	0
Retail**	10	10	10	10	10	10	10
Ground Tran.	0	0	0	0	0	0	0
Other Travel*	0	0	0	0	0	0	0
Total Direct Employment	40	40	40	40	40	40	40
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.0	0.0	0.0	0.0	0.0	0.0	0.0
State Tax Receipts	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Local & State	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Details may not add to totals due to rounding.

*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.

Wheeler 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	1.8	2.0	2.0	1.9	1.9	1.9	2.0
Hotel, Motel*	0.8	0.9	0.9	0.8	0.7	0.7	0.7
Private Home	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Other Overnight	0.8	0.9	0.8	0.9	0.9	0.9	0.9
Campground	0.6	0.6	0.6	0.6	0.7	0.7	0.7
Vacation Home	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Day Travel	0.7	0.6	0.6	0.7	0.7	0.7	0.7
Spending at Destination	2.5	2.7	2.6	2.6	2.5	2.6	2.6

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$203	\$338	\$83	\$138	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$65	\$192	\$19	\$57	3.4	3.0
All Overnight	\$83	\$212	\$27	\$72	3.0	2.6

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	8	8	9	3	3	4
Private Home	13	14	14	5	5	6
Other Overnight	48	48	49	14	14	14
All Overnight	69	70	72	23	23	24

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	5	5	5	2	2	2
Private Home	5	5	6	2	2	2
Other Overnight	16	16	16	5	5	5
All Overnight	26	27	27	9	9	9

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

YAMHILL COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 Job	\$66,820
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.20

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$3,357
Additional employment if each resident household encouraged one additional overnight visitor	50

Visitor Shares

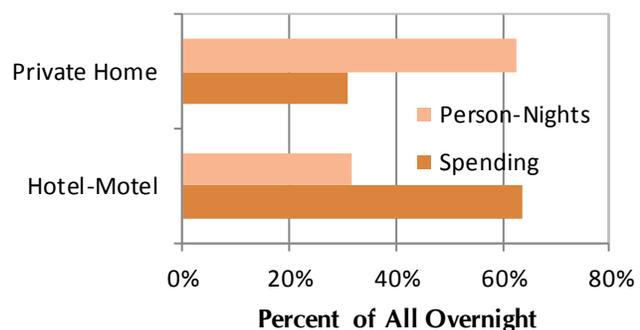
Travel Share of Total Employment (2014)*	3.3%
Overnight Visitor Day Share of Resident Population (2015p)**	4.4%

*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	322	535	\$46.1
Private Home	406	1,044	\$20.9
Other Overnight	31	93	\$3.5
All Overnight	759	1,673	\$70.5

Yamhill County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Ave. Annual % Chg.	
						14-15p	00-15p
Spending (\$Millions)							
Total	56.7	68.4	94.2	115.5	118.1	2.2%	5.0%
Other	8.0	11.6	14.2	17.0	13.8	-18.4%	3.8%
Visitor	48.8	56.8	80.0	98.6	104.2	5.8%	5.2%
Non-transportation	44.8	51.1	71.9	88.9	95.9	7.8%	5.2%
Transportation	3.9	5.6	8.1	9.6	8.4	-12.8%	5.2%
Earnings (\$Millions)							
Earnings	13.2	14.9	21.6	28.8	31.7	10.3%	6.0%
Employment							
Employment	1,020	1,030	1,250	1,560	1,610	3.0%	3.1%
Tax Revenue (\$Millions)							
Total	1.9	2.2	2.9	4.1	4.4	6.9%	5.7%
Local	0.1	0.1	0.2	0.6	0.6	12.4%	14.9%
State	1.8	2.1	2.7	3.6	3.8	6.0%	4.9%

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.

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

	2006	2008	2010	2012	2013	2014	2015p
Total Direct Travel Spending (\$Million)							
Destination Spending	61.0	69.9	80.0	95.4	98.3	98.6	104.2
Other Travel*	13.9	17.8	14.2	17.7	17.5	17.0	13.8
Total Direct Spending	75.0	87.7	94.2	113.1	115.7	115.5	118.1
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	8.6	11.2	14.5	18.4	19.4	20.1	23.1
Food Service	17.2	19.4	22.9	27.1	28.3	28.6	30.7
Food Stores	8.1	9.4	9.9	11.4	11.6	11.8	12.5
Local Tran. & Gas	6.4	8.2	8.1	10.5	10.2	9.6	8.4
Arts, Ent. & Rec.	9.8	10.7	12.3	14.3	14.8	14.7	15.4
Retail Sales	10.8	11.0	12.2	13.8	14.0	13.7	14.2
Destination Spending	61.0	69.9	80.0	95.4	98.3	98.6	104.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	9.6	11.7	13.6	16.2	18.1	18.8	21.0
Arts, Ent. & Rec.	3.0	3.7	4.1	5.1	5.1	5.1	5.7
Retail**	2.3	2.6	2.7	3.1	3.2	3.2	3.4
Ground Tran.	0.4	0.4	0.5	0.6	0.6	0.6	0.7
Other Travel*	0.8	0.8	0.7	0.8	1.0	1.0	1.0
Total Direct Earnings	16.0	19.2	21.6	25.7	27.9	28.8	31.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	590	680	730	820	900	910	950
Arts, Ent. & Rec.	330	330	340	430	450	450	450
Retail**	110	120	120	130	140	140	140
Ground Tran.	10	10	20	20	20	20	20
Other Travel*	50	50	40	40	50	50	50
Total Direct Employment	1,090	1,190	1,250	1,450	1,550	1,560	1,610
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	0.1	0.1	0.2	0.4	0.5	0.6	0.6
State Tax Receipts	2.3	2.6	2.7	3.4	3.6	3.6	3.8
Total Local & State	2.4	2.7	2.9	3.9	4.1	4.1	4.4

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.

Yamhill 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	36.8	44.9	52.7	63.4	65.6	66.0	70.5
Hotel, Motel*	17.9	23.2	31.0	39.6	41.8	42.2	46.1
Private Home	16.2	18.6	18.7	20.7	20.5	20.5	20.9
Other Overnight	2.7	3.1	3.0	3.1	3.3	3.3	3.5
Campground	2.3	2.7	2.5	2.6	2.8	2.8	3.0
Vacation Home	0.4	0.5	0.5	0.5	0.5	0.5	0.5
Day Travel	24.2	25.0	27.3	32.0	32.7	32.6	33.7
Spending at Destination	61.0	69.9	80.0	95.4	98.3	98.6	104.2

Average Expenditures for Overnight Visitors, 2015p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$211	\$352	\$86	\$143	2.5	1.7
Private Home	\$51	\$132	\$20	\$51	2.6	2.6
Other Overnight	\$126	\$374	\$37	\$111	3.4	3.0
All Overnight	\$108	\$236	\$42	\$93	2.6	2.2

Overnight Visitor Volume, 2013-2015p

	Person-Nights (000)			Party-Nights (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	519	509	535	212	207	218
Private Home	1,019	1,011	1,044	398	395	408
Other Overnight	91	91	93	27	27	28
All Overnight	1,629	1,611	1,673	637	629	654

	Person-Trips (000)			Party-Trips (000)		
	2013	2014	2015p	2013	2014	2015p
Hotel, Motel*	312	306	322	127	125	131
Private Home	396	393	406	155	154	159
Other Overnight	30	31	31	9	9	9
All Overnight	739	730	759	291	287	299

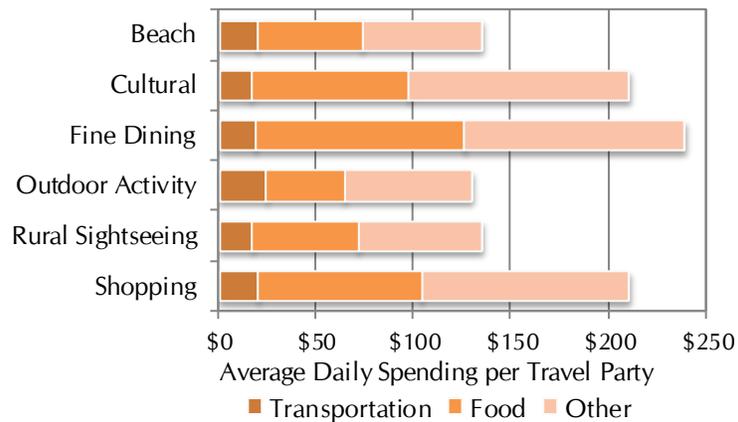
*Includes all lodging where a lodging tax is collected except campgrounds.

V. OREGON DAY TRAVEL, 2015P

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.

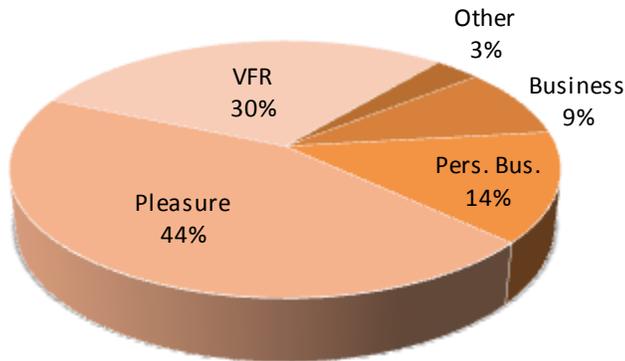
Day Trip Activity, 2015p



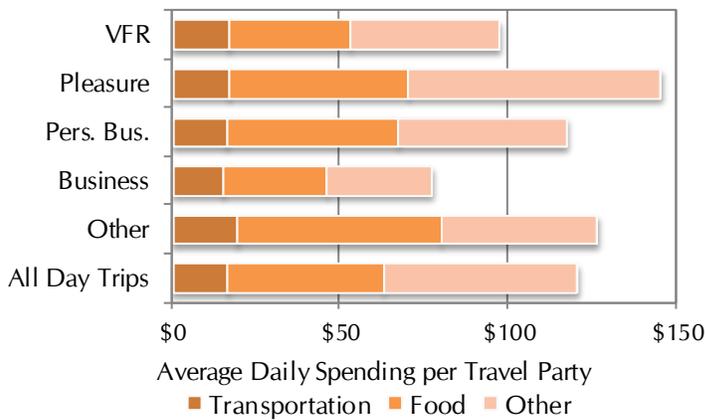
	Average Daily Spending per Travel Party				Party Size
	Total	Transp.	Food	Other	
Beach	\$145.4	\$17.5	\$65.0	\$62.9	2.8
Cultural	\$227.6	\$14.8	\$97.4	\$115.4	2.8
Fine Dining	\$261.3	\$16.7	\$129.3	\$115.4	2.6
Outdoor Activity	\$137.1	\$21.7	\$48.7	\$66.7	2.8
Rural Sightseeing	\$145.7	\$15.4	\$65.7	\$64.6	2.7
Shopping	\$227.7	\$17.8	\$101.0	\$108.9	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

Purpose of Day Trip, 2015p



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	\$97.1	\$16.6	\$36.3	\$44.1	2.4
Pleasure	\$145.1	\$16.7	\$53.5	\$74.9	2.7
Personal Business	\$117.1	\$16.0	\$51.0	\$50.1	2.2
Business	\$77.1	\$15.0	\$31.0	\$31.2	1.6
Other	\$126.2	\$19.3	\$60.5	\$46.4	2.0
Total	\$120.4	\$16.5	\$46.3	\$57.6	2.4

Sources: TNS TravelsAmerica and Dean Runyan Associates.

VI. LOCAL TRANSIENT LODGING TAX RECEIPTS

Transient lodging taxes are one of the most direct means for jurisdictions to collect revenues from visitors. They are also a useful indicator of travel activity in the state, since almost all of these sales are made by travelers. Transient lodging tax receipts therefore provide a basis for evaluating both travel trends and the distribution of travel activity in the state.

During 2015, ninety-one cities and sixteen counties in Oregon levied a locally administered transient lodging tax. This tax, ranging from 2 percent to 13.5 percent, is collected on the sale (i.e., rental) of a room at a lodging establishment such as a hotel, motel, bed & breakfast or at a campground site or RV park.

Local lodging tax receipts increased by 10.1 percent from the 2014 to 2015 fiscal years. (The large increase in revenues in the past two fiscal years is in part attributable to the establishment of the Tourism Improvement District in the City of Portland, which levies an additional 2 percent tax on lodging establishments with 50 or more rooms. TID collections began in October 1, 2012)

Oregon Local Lodging Tax Receipts



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

¹ See <http://www.oregon.gov/DOR/programs/gov-research/Pages/research-lodging.aspx> for information on the 1 percent state lodging tax collected by the Oregon Department of Revenue.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

Current Rate	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
BAKER COUNTY												
County-wide	*	301	318	385	411	394	386	413	391	395	404	455
BENTON COUNTY												
Corvallis	9.0%	947	1,021	1,095	1,126	1,076	1,080	1,062	1,239	1,364	1,425	1,604
CLACKAMAS COUNTY												
Sandy	3.0%	12	17	18	15	21	21	20	24	26	26	38
Lake Oswego	6.0%	459	532	615	733	678	716	796	806	949	1,011	1,146
Oregon City	4.0%	37	42	52	57	54	52	52	55	63	77	99
Wilsonville	5.0%	190	207	268	275	219	193	214	209	242	273	258
County-wide	6.0%	2,225	2,454	2,777	3,071	2,661	2,432	2,683	2,894	3,198	3,421	3,786
CLATSOP COUNTY												
Astoria	9.0%	745	932	1,029	1,195	976	1,024	952	971	1,111	1,253	1,423
Cannon Beach	7.0%	1,750	1,867	1,997	2,110	2,049	2,074	2,336	2,465	2,631	2,761	
Gearhart	7.0%	112	112	119	120	130	135	129	118	163	167	189
Seaside	8.0%	2,183	2,356	2,596	2,979	2,960	2,982	2,854	2,922	3,550	3,550	4,120
Warrenton	12.0%	281	274	316	328	308	458	463	446	483	620	626
Unincorporated	9.5%	109	122	135	116	153	164	168	188	216	214	334
COLUMBIA COUNTY												
COOS COUNTY												
Bandon	6.0%	375	383	434	426	386	391	384	376	438	462	
Coos Bay	7.0%	468	496	554	561	461	464	469	485	507	520	583
Coquille Indian Tribe	8.0%	0	0	0	0	0	108	274	281	296	295	343
Lakeside	7.5%	36	37	39	40	37	23	35	35	37	40	46
North Bend	7.0%	215	233	245	246	307	84	89	96	96	102	102
CROOK COUNTY												
Prineville	8.5%	146	163	197	194	164	149	176	180	207	191	253
CURRY COUNTY												
Brookings	6.0%	171	160	171	178	160	141	140	142	168	165	166
Gold Beach	6.0%	341	272	292	314	306	309	300	297	311	324	355
Port Orford	7.0%	23	44	45	47	42	46	49	51	54	59	64

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

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

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

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
DESCHUTES COUNTY												
Bend	10.4%	2,799	3,107	3,303	3,427	2,938	2,960	3,280	3,524	3,888	4,660	6,367
Redmond	9.0%	406	463	493	509	436	458	504	503	533	587	691
Sisters	8.0%	184	213	224	267	280	275	288	308	331	355	407
Unincorporated	8.0%	3,056	3,231	3,304	3,511	3,270	2,960	3,139	3,258	3,691	4,266	5,107
DOUGLAS COUNTY												
Reedsport	5.0%-7.0%*	158	164	173	175	151	168	160	170	182	181	221
Roseburg	8.0%	799	835	881	892	826	775	785	806	801	904	1,011
Sutherlin	8.0%*	67	60	73	68	55	64	79	84	82	91	149
Winston	5.0%	10	10	9	9	7	6	7	6	7	7	16
GILLIAM COUNTY												
GRANT COUNTY												
County-wide	8.0%	63	93	98	85	84	92	96	80	89	108	127
HARNEY COUNTY												
Burns	9.0%	64	64	79	99	71	67	93	104	85	85	91
Hines	8.0%	104	117	129	150	143	130	135	141	144	153	166
HOOD RIVER COUNTY												
Cascade Locks	7.0%	100	110	117	129	119	129	135	127	144	153	177
Hood River	8.0%	465	538	578	630	694	738	787	828	971	1,202	1,361
Unincorporated	8.0%	211	219	224	236	176	180	224	234	237	109	114
JACKSON COUNTY												
Ashland	9.0%	1,414	1,558	1,551	1,537	1,854	1,923	1,897	1,978	2,081	2,081	2,339
Central Point	9.0%	0	0	293	343	299	298	304	362	452	373	391
Jacksonville	9.0%	64	57	64	70	79	81	87	96	103	104	117
Medford	9.0%	1,868	2,148	2,410	2,553	2,283	2,273	2,373	2,502	2,646	2,929	3,315
Phoenix	6.0%	16	39	27	36	24	13	11	13	21	33	35
Rogue River	6.0%	50	50	48	47	40	44	44	47	57	66	74
Shady Cove	6.0%	66	66	65	81	68	43	45	42	43	43	50
Talent	6.0%	7	7	5	2	4	4	5	5	6	5	6
JEFFERSON COUNTY												
Madras	9.0%	136	149	172	202	196	183	194	195	222	251	278
Metolius	6.0%	2	2	2	2	1	1	1	1	1	2	1
Unincorporated	6.0%	165	182	228	227	203	205	188	255	273	293	282

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

*Tax rate is 7.0% in Reedsport and 5.0% in areas surrounding Reedsport that impose a tax. Sutherlin rate increase from 5% to 8% on August 14, 2014.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
JOSEPHINE COUNTY												
Grants Pass	9.0%	928	1,003	1,047	1,024	970	941	939	951	1,062	1,111	1,204
KLAMATH COUNTY												
County-wide	8.0%	1,050	1,095	1,330	1,477	1,421	1,376	1,409	1,400	1,565	1,707	1,896
LAKE COUNTY												
County-wide	6.0%	78	96	111	107	94	98	125	94	107	116	135
LANE COUNTY												
Coburg	8.0%	41	45	48	50	47	38	39	38	36	39	45
Cottage Grove	9.0%	168	182	213	224	227	205	186	207	215	236	254
Creswell	8.0%	55	68	82	81	80	83	128	118	141	130	156
Dunes City	8.0%	23	25	24	24	20	21	26	33	31	30	40
Eugene	9.5%	2,872	3,114	3,470	3,686	3,611	3,175	3,458	3,404	3,751	3,999	4,480
Florence	9.0%	259	276	297	299	498	538	565	540	557	629	714
Junction City	8.0%	21	22	26	24	20	18	20	18	21	23	30
Lowell	8.0%									0.3	0.6	0.9
McKenzie	8.0%	137	173	173	241	387	205	220	212	228	248	270
Oakridge	8.0%	40	43	51	83	69	50	54	57	69	75	85
Springfield	9.5%	1,218	1,483	1,597	1,655	1,630	1,435	1,641	1,904	2,056	2,260	2,574
Veneta	8.0%	0.2	0.1	0.6	0.4	0.5	0.4	0.2	0.3	0.5	0.5	0.5
Westfir	8.0%	8.0	7.4	9.6	9.2	1.2	0.7	0.6	0.4	0.5	0.0	0.2
Unincorporated	8.0%	497	512	546	571	475	416	470	462	510	540	608
LINCOLN COUNTY												
Depoe Bay	8.0%	390	441	403	401	378	457	453	473	505	519	545
Lincoln City	9.5%	3,138	3,083	3,438	3,704	4,417	4,352	4,260	4,234	4,514	4,983	5,887
Newport	9.5%	1,866	2,113	2,272	2,357	2,228	2,256	2,291	2,323	2,426	2,751	3,172
Waldport	7.0%	22	23	23	23	23	23	23	30	34	41	52
Yachats	7.0%	418	442	503	520	496	477	429	451	481	512	605
Unincorporated	9.0%	968	1,078	1,119	1,389	1,599	1,556	1,673	1,696	1,801	1,776	1,856
LINN COUNTY												
Albany	9.0%	550	611	701	741	675	595	656	716	755	804	927
Lebanon	9.0%	20	22	30	36	36	34	35	39	39	45	70
Sweet Home	6.0%	14	18	18	19	21	21	23	25	27	29	36

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

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

	Current Rate	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
MALHEUR COUNTY												
Ontario	9.0%	453	520	607	618	578	583	634	659	672	712	734
MARION COUNTY												
Keizer	6.0%	57	66	76	80	69	61	63	57	49	54	68
Salem	9.0%	1,828	2,052	2,395	2,506	2,416	2,138	2,215	2,239	2,445	2,731	3,125
Silverton	9.0%	0	0	0	0	0	0	166	191	199	214	
Stayton	7.0%	0	0	0	0	0	0	0	0	0	0	4
Sublimity	7.0%	34	32	40	38	23	23	22	21	23	22	21
Woodburn	9.0%	210	218	224	239	271	215	256	274	276	353	335
MORROW COUNTY												
Heppner	5.0%	5	5	4	4	5	4	4	6	4	4	4
MULTNOMAH COUNTY												
Fairview	6.0%	40	39	39	43	38	37	38	39	45	49	59
Gresham	6.0%	442	469	556	616	563	455	460	495	605	664	809
Portland	8.0%*	14,170	15,964	17,527	19,647	23,572	16,512	19,143	21,359	28,747	35,063	41,804
Troutdale	6.95%	313	356	341	375	414	403	429	428	452	481	578
Wood Village	6.0%	84	84	98	105	100	85	89	97	105	110	126
County-Wide	5.5%	13,467	14,794	16,726	18,491	16,115	15,441	18,208	20,052	21,464	24,268	29,692
POLK COUNTY												
SHERMAN COUNTY												
Condon	6.0%					16	13	14	14			
TILLAMOOK COUNTY												
Garibaldi	8.0%	64	65	93	81	57	58	80	90	121	113	138
Manzanita	9.0%	262	289	313	355	378	384	374	388	466	599	679
Nehalem	9.0%										3	2
Rockaway Beach	9.0%	221	230	226	257	255	224	257	254	309	373	623
Tillamook	10.0%	202	223	316	344	292	276	313	278	291	321	363
Wheeler	9.0%	18	19	20	22	23	17	25	23	27	24	28
County-wide	1.0-10.0%*										785	2,461

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

*The rate for Portland includes the 6.0% basic rate for all establishments and the 2.0% Tourism Improvement District rate for establishments with 50 or more rooms.

Tillamook county-wide tax began on January 1, 2014. The rate is 10% in unincorporated areas and ranges from 1% to 3% in other jurisdictions.

Local Lodging Tax Receipts by Jurisdiction

Fiscal Year ending June 30

Amounts in \$000

Current Rate	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	
UMATILLA COUNTY												
Hermiston	8.0%*	276	300	313	320	339	359	364	412	374	437	494
Milton-Freewater	7.0%	0	0	0	0	15	20	9	24	14	18	7
Pendleton	8.0%	633	649	768	791	777	778	805	799	836	862	913
Umatilla	3.5%	15	17	16	17	18	18	30	44	26	32	42
UNION COUNTY												
LaGrande	5.0%	229	241	232	271	239	220	245	271	268	300	304
County-wide	3.0%	139	147	143	167	146	125	147	150	165	181	
WALLOWA COUNTY												
Enterprise	3.0%	32	37	39	36	39	37	34	34			34
County-wide	5.0%	181	209	232	244	253	248	240	251	252	244	284
WASCO COUNTY												
The Dalles	8.0%	477	490	562	524	688	652	671	672	648	726	933
WASHINGTON COUNTY												
County-wide	9.0%	3,941	4,537	6,480	7,014	6,332	5,673	6,869	7,604	8,269	9,053	10,069

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

*The rate for Hermiston is 8.0% for 6 or fewer days and 2.5% for occupancy of 7 to 30 days.

APPENDICES

APPENDIX A	2015 TRAVEL IMPACT AND VISITOR VOLUME ESTIMATES
APPENDIX B	KEY TERMS AND DEFINITIONS
APPENDIX C	RELATIONSHIP BETWEEN SPENDING AND VOLUME
APPENDIX D	REGIONAL TRAVEL IMPACT MODEL
APPENDIX E	TRAVEL INDUSTRY ACCOUNTS
APPENDIX F	OREGON EARNINGS AND EMPLOYMENT BY INDUSTRY SECTOR
APPENDIX G	INDUSTRY GROUPS

2015 TRAVEL IMPACT AND VISITOR VOLUME ESTIMATES

This appendix provides a brief overview of the methodology, terminology and limitations of the travel impact and visitor volume estimates.

REVISIONS TO 2015 REPORT

There were no major revisions in this year's report. The summary travel trend table for the counties, regions and state was replaced with a table that provides a breakout of transportation and non-transportation visitor spending. The motivation for this change was the volatility in transportation costs, particularly motor fuel, in recent years.

DIRECT IMPACTS

The estimates of the direct impacts associated with traveler spending in Oregon were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the Oregon travel industry were gathered from various local, state and federal sources.

Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are also broken out by type of traveler accommodation and by the type of business in which the expenditures occur.

OVERNIGHT VISITOR VOLUME AND AVERAGE SPENDING ESTIMATES

This report also provides county, regional and statewide estimates of visitor volume and average spending (which includes both domestic and international visitation) for overnight visitors. These estimates are derived from the RTIM spending estimates and other source data (see Appendix D). It should be noted that in the case of trips, the sum of county and regions are greater than the statewide estimate. This is because travelers may visit more than one destination on the same trip. Similar the length of stay on a given trip will less at a particular destination than for the state as whole due to pass-through time spent in route to the destination.

In addition, the treatment of transportation expenditures (ground and air) depends upon the level of geography (county, region or state). County level estimates of destination spending do not include airfares and only a portion of ground transportation expenditures. Regional level estimates of destination spending include airfares (one-way) and a larger share of ground transportation. State level estimates include all one-way airfares and all expenditures for ground transportation.

SECONDARY (INDIRECT AND INDUCED) IMPACTS

Direct impacts are reported for all counties within Oregon. Secondary employment and earnings impacts over and above direct impacts are reported at the state level only for the year 2015. These indirect and induced impacts are generated from the direct impacts produced by the RTIM, discussed above, and an input-output model of the Oregon economy prepared by the IMPLAN Group, LLC. Indirect impacts represent the purchases of goods and services from other firms by businesses that directly receive expenditures from travelers. Hotels, for example, purchase maintenance services from independent contractors. Induced impacts represent the purchase of goods and services by employees whose earnings are in part derived from travel expenditures. The sum of the direct, indirect and induced impacts equals the total impact of all spending by visitors in the state. The “multiplier” refers to the ratio of the total impacts to the direct impacts for employment or earnings. A description of the methodology used to estimate secondary impacts can be found in the Appendix.

PRELIMINARY ESTIMATES

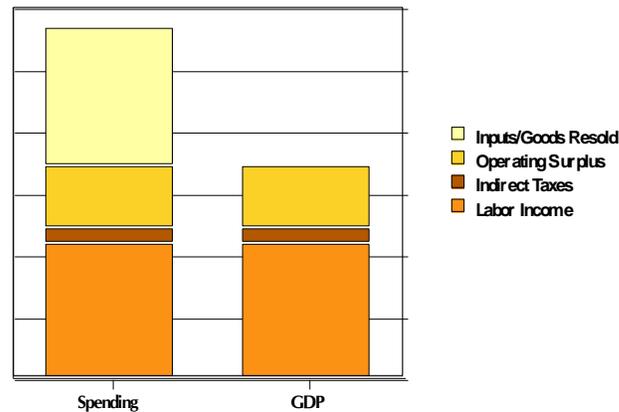
Preliminary estimates for 2015 were prepared at the state and county level. These estimates take advantage of the most current available data. However, because full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2015 becomes available.

GROSS DOMESTIC PRODUCT

An estimate of the Gross Domestic Product (GDP) of the Oregon travel industry based on the RTIM direct travel impacts is also provided in this report. The GDP of an industry is equal to gross output (sales or receipts) minus intermediate inputs (the goods and services purchased from other industries). GDP is always less than output or sales because GDP measures only the “value added” of an industry and does not include the cost of the inputs that are also necessary to produce a good or service. GDP is a useful concept because it permits comparisons of the economic contributions of different industries.

The relationship between spending and gross domestic product is illustrated in the figure below. Examples of inputs are the food or accounting services that restaurants purchase from suppliers. “Goods resold” are the commodities that retail establishments purchase from manufacturers or wholesale trade businesses and resell with a markup. These inputs or goods are not counted as the GDP of the restaurant or retail industry because their value was created in other industries (agriculture, accounting, manufacturing).

Relationship Between Spending and Gross Domestic Product



It is for this reason that “travel spending” – as measured from surveys of visitors – is not the best measure of the travel industry’s real economic contribution. This is because some visitor spending is actually counted as the GDP of other industries (e.g., agriculture, accounting, manufacturing). Furthermore, these other industries may or may not be located within the geographic area of interest. If the farm were located within the region of interest, then the GDP of the local farm would be included as an indirect or secondary effect. If not (e.g., a manufacturing firm in another state or country), then that portion of GDP is not counted.

The preceding graph also shows the three main components of GDP. For most industries, labor income (essentially equivalent to earnings in this report) is the primary component of GDP. This is true of the travel industry. A second component is the tax payments that businesses make to government, such as sales, excise and property taxes. In the case of excise taxes, businesses are essentially a collection agency for the government. The final component, operating surplus, represents the income and payments (e.g., dividends, interest) to other stakeholders of the firm.

The concept of GDP also illustrates that with small geographic units of analysis (e.g., counties), earnings, employment, and tax revenues are the best measures of the economic value of the travel industry to the local economy. Small area measures of GDP are less reliable and much of the operating surplus may leak out of the local economy anyway. Indirect effects are also generally less in smaller economies.

COMPARISON WITH OTHER EXPORT-ORIENTED INDUSTRIES

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, extractive industries, and manufacturing are the best examples of goods producing export-oriented industries. Many professional services (e.g., engineering, architecture, law) are also traded in export markets. The travel industry is also an export-oriented industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do the exports of other industries.

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

For the purposes of this report, we have defined five major export-oriented industries in Oregon.

- **Microelectronics.** This industry includes establishments that manufacture computers, communications equipment and similar products and components that utilize integrated circuits. This is the largest manufacturing subsector (NAICS 334).
- **Agriculture & food processing.** This industry group encompasses parts of two major industry categories: agriculture, and food manufacturing or processing.
- **Logging and wood products.** This industry group is comprised of logging and the manufacture of wood products, including paper.
- **Travel.** A portion of the transportation, retail, leisure, and hospitality industries as estimated in this report.
- **Software.** This industry comprises establishments primarily engaged in computer software publishing or reproduction.

Comparisons with these industries are more meaningful for the travel industry than comparisons with non-export oriented industries (e.g., health care, retail trade, government) where industry growth is largely a function of population and demographic factors. See Appendix C for a list of Oregon industries.

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates in this report are expressed in *current* dollars unless otherwise noted.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

KEY TERMS AND DEFINITIONS

ECONOMIC IMPACTS

Commodity: A classification of a product or service, such as lodging or food service. An establishment or industry may produce more than one commodity.

Direct Impacts: Employment, earnings and tax receipts *directly* generated by travel spending, as distinguished from secondary and total impacts.

Earnings: Earnings include wage and salary disbursements, other earned income or benefits, and proprietor income. Only the earnings attributable to travel expenditures are included.

Employment: Industry employment (jobs) associated with travel-generated earnings. Includes both full-time and part-time positions, and salaried or self-employed individuals. Employment is reported as an average for a time period, typically annual. (Unless otherwise noted, the employment estimates refer to establishment or industry employment at place of work, not the employment status or residence of the individual.)

Federal Taxes: Federal taxes include the motor fuel excise tax, airline ticket taxes, and personal income and payroll taxes.

Hotel, Motel: Includes all lodging where a lodging tax is collected except campgrounds.

Industry: A classification of business or government establishments based on their primary technological process. (See NAICS Appendix table.)

Local Taxes: Lodging, sales and auto rental taxes imposed by cities, counties and other regional tax jurisdictions in Oregon. Passenger Facility Charges attributable to visitors (a fee imposed on airline tickets) are included in counties with airports. Property taxes are not included.

Other spending: See Travel spending.

Private Home: Unpaid overnight accommodations of friends and relatives.

Receipts: Travel expenditures less the sales and excise taxes paid by the consumer.

State Taxes: Lodging, motor fuel, and business and personal income taxes imposed by the state of Oregon.

Total Impacts: The sum of Direct and Secondary impacts.

Travel spending: The sum of visitor and other spending related to travel. Other spending includes spending by residents on ground and air transportation for the purpose of travel to other destinations and spending on travel arrangement services.

Vacation Home: A housing unit for occasional use where a lodging tax is not collected.

Visitor spending: All spending on goods & services by visitors at the destination. Also referred to as destination spending.

VISITOR VOLUME

Length of Stay: The number of nights that a visitor or travel party is away from home on a trip.

Night: Applies to overnight visitors only. The number of nights on a trip is the length of stay. The count of days and nights is generally equivalent for overnight visitors. (See trips.)

Party-trips: The number of trips to the destination by travel parties. Party-trips are equal to the number of Visitor-trips divided by the average party size.

Party-nights: The number of nights or days that travel parties stayed at the destination. Party-nights are equal to the number of visitor-nights divided by the average party size or the number of party-trips multiplied by the average length of stay.

Party Size: The number of individuals (adults and children, including non-household members) that are traveling together and are sharing the costs of travel.

Room Demand: A count of the number of hotel/motel rooms that are sold on a nightly basis over a given period of time. Also referred to as *room nights sold*.

Travel party: A *travel party* includes all *visitors* (adults and children) traveling together. The *party size* represents the average number of visitors or persons in the travel party.

Trip: A trip may include more than one day or night at a destination. For overnight visitor categories, the total number of trips will be less than the number of nights. The *length of stay* for the trip represents the number of nights (or days) at the destination.

Visitor: An individual traveler that stays overnight away from home in paid or unpaid accommodations, or a day visitor that travels at least fifty miles one-way from home on non-routine trip.

Visitor Air Arrival: A passenger who travels by air and initiated the trip at another location. Visitor air arrivals do not include passengers who are returning home from a trip to another destination or passengers that are making a connection to another flight.

Visitor-trips: The number of trips to the destination by visitors or persons. This is also equivalent to as the total number of *visits*.

Visitor-nights: The number of nights or days that visitors (persons) stayed at the destination. Visitor-nights are equal to the number of visitor-trips multiplied by the average length of stay.

RELATIONSHIP BETWEEN SPENDING AND VOLUME

The Spending, Average Expenditures and Volume tables are computationally related as shown with the sample data below.

- **Spending equals Average Expenditures multiplied by Volume** for comparable party/person and night/trip categories
- **Travel parties and persons** are related by division or multiplication with **Party Size**
- **Trips and nights** are related by division or multiplication with **Length of Stay**

Visitor Spending by Type of Accommodation (\$Million), YEAR

		YEAR
All Overnight	$656,000 \times \$86 = \$56,100,000$ (calculated from person-trips)	56.1
Hotel, Motel	$160,000 \times \$200 = \$32,000,000$ (calculated from party-nights)	32.0
Private Home	$1,030,000 \times \$20 = \$20,600,000$ (calculated from person-nights)	20.6
Other Overnight	$10,000 \times \$350 = \$3,500,000$ (calculated from party-trips)	3.5
Campground		3.0
Vacation Home		0.5
Day Travel		30.0
Spending at Destination		86.1

Average Expenditures for Overnight Visitors, YEAR

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

Overnight Visitor Volume, YEAR

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

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

REGIONAL TRAVEL IMPACT MODEL

PRIMARY DATA SOURCES

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



Visitor Volume
(Travel Party Days by
Type of
Accommodation)



ECONOMIC IMPACTS OF TRAVEL

Accommodation
Sales,
Visitor Surveys,
Airfares



Visitor Spending
(Type of
Accommodation and
Type of Commodity)



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



*Note: Receipts equals
Spending less
POS Taxes*

Business Receipts
(not reported)



Business Taxes
(Taxes on business
income or receipts)

Ratio of
Earnings to
Receipts for
relevant
Industry



Earnings
(By Industry)



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

Average
Annual
Earnings per
job for
relevant
industry



Employment
(By Industry)

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

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

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

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

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

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

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

PRIMARY CONCEPTS, CATEGORIES & DATA REQUIREMENTS

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

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

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

TRAVEL INDUSTRY

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

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

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

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

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

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

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

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

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

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

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

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

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

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

RTIM Travel Impact Industries Matched to NAICS

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

Source: Dean Runyan Associates

DEMAND SEGMENTS

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

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

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

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

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

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

the evaluation of the tax impacts of resident versus nonresident travel might also be important.⁹

Second, travel is behaviorally defined by length of distance from home (usually at least 50 miles one-way), trip purpose (non-routine), and/or the use of an overnight accommodation away from home. Rarely is domestic travel defined by virtue of crossing a geographic boundary.¹⁰ The operators of tourist attractions in local communities are generally less interested in the origin of visitors than in the revenue that they generate for their businesses. In terms of the economic impacts at the *local* level, the distinction between in-state residents, out-of-state residents and international visitors may not be relevant other than for the purpose of marketing. However, other geographic characteristics of the visitor (e.g., distance traveled, the specific area of origin) are generally more useful measures of the visitor market than whether the visitor is a resident or nonresident.

Finally, the distinction among different ***types of traveler accommodations*** is generally reported in the RTIM. Typically, these categories are:

- Visitors who stay in hotels, motels, B&Bs., and similar lodging facilities
- Visitors who stay at campsites
- Visitors who stay in the private homes of friends or relatives
- Visitors who stay in vacation or second homes
- Visitors who do not stay in overnight accommodations on their trip away from home (day visitors).

These distinctions can be useful because estimates of economic impacts are often used for different purposes. The total of all accommodation types, of course, is an estimate of the total magnitude of the visitor industry. Visitors who stay in commercial lodging such as hotels and motels are most likely to have the greatest economic impact on a person-day basis. These visitors are also more likely to be influenced by marketing efforts. In urban areas, a large proportion will represent business travel. In other words, the type of accommodation category can be used in conjunction with other types of data to analyze the market characteristics of visitors.

⁹ Nonresident visitors who pay taxes in their destination state represent an unambiguous gain for the state. This effect is less clear for resident travelers within the state.

¹⁰ In essence, state level travel impact estimates really represent an aggregation of smaller geographic units, such as counties or regions. Populous states with large landmasses (e.g., California or Texas) will have a higher proportion of resident travel than small states (e.g., Rhode Island or Delaware).

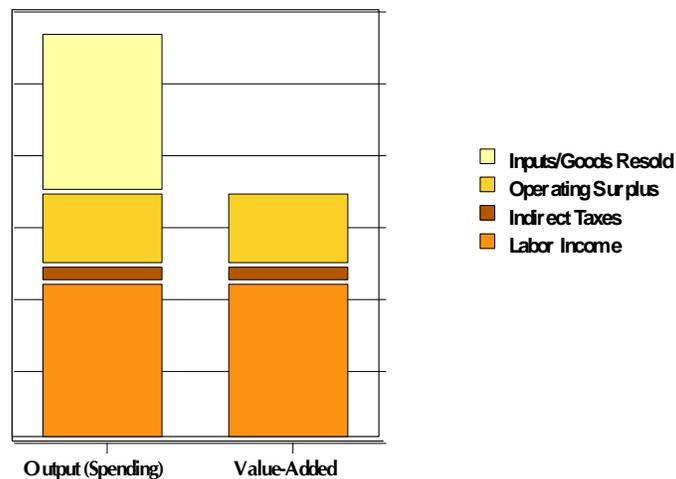
COMPONENTS OF INDUSTRY OUTPUT

Because both the RTIM and the TTSA are empirically linked to NAICS industry accounts, it is possible to provide estimates of different components of economic output. The major economic components most often estimated are:¹¹

- Travel spending (Gross Output)
- Value-added (Gross Product)
- Earnings (labor income)
- Indirect business taxes (sales, excise, property taxes & fees).

The relationship of these components is shown below. As indicated, the value-added of a particular industry (the bar on the right) is equal to gross output (travel spending) minus the intermediate inputs used by travel industry businesses to produce the good or service. Restaurants, for example, prepare and serve the food products that are purchased from suppliers. Airlines purchase or lease airplanes from other firms. These intermediate inputs are not counted as part of the value-added of the travel industry. They are counted as value-added in other industries (e.g., agriculture, aerospace manufacturing).

Components of Industry Output



The distinction between gross output and value-added is probably even more important at the state or regional level. This is because the intermediate inputs that are purchased from other industries are even more likely to be purchased from businesses located in different regions or states. For example, the economic impact

¹¹ There are some small differences between the BEA TTSA and the RTIM in what these components include. The BEA allocates proprietor income to Operating Surplus, the RTIM allocates it to Labor Income. The RTIM does not have an estimate of property taxes in indirect taxes. Overall, property taxes on businesses are a relatively small proportion of indirect taxes.

of air passenger travel in the state of Hawaii should not include the purchase of airplanes manufactured in other parts of the world. Travel industry value-added is a more meaningful measure of the true economic impact of visitor spending in Hawaii because a portion of the economic impact of visitor spending in the state will actually occur elsewhere.¹²

Value-added can also be viewed in terms of the distribution or payout of industry receipts, exclusive of those paid to other firms for intermediate inputs. Some of the receipts are distributed to labor as wages, benefits, and proprietor income. Some receipts are paid to government as indirect taxes. These taxes are called “indirect” because most of them are actually paid by consumers in the form of sales or excise taxes.¹³ The remainder leaves gross operating surplus. Out of gross operating surplus various payments are made in the form of dividends, interest, and other payments, or retained by the firm. The sum of these three broad categories of payments is equal to travel industry value-added. To summarize:

Value-added = Spending *less* intermediate goods & services, or

Value-added = Labor Income *plus* indirect business taxes *plus* gross operating surplus.

The RTIM is similar to the TTSA in that it also provides estimates of these components of economic output. Travel spending, earnings, and tax impacts are generally provided at the state or regional level. Value-added is generally reported at the state-level only (sometimes referred to as Travel Industry Gross State Product). At the level of the state, travel industry value-added or GSP is an important measure – more economically meaningful than travel spending.¹⁴ For smaller geographic areas, however, the rationale for reporting value-added is less clear. First, there are real data limitations and data costs in deriving these estimates. Second, ***the most important components of value added for the travel industry are earnings and tax receipts***. Because the travel industry is relatively labor intensive and because a large proportion of travel industry goods and services are subject to excise and sales taxes, these two components of value-added (labor income and indirect taxes) are relatively high for the travel industry. The local effects of gross operating surplus are generally less important and certainly much more difficult to assess than are earnings and tax impacts. The relevance of earnings and tax receipts is also in keeping the export-oriented emphasis of the travel industry: earnings and tax receipts are more likely to stay in the local economy than is operating surplus.

¹² It should also be noted the value of the intermediate inputs used by travel industry firms will not necessarily disappear if the travel industry stops buying them. Aerospace firms will shift their production to other users (e.g., military). Agriculture will seek new markets for their products.

¹³ Other taxes included here are property taxes, business franchise taxes, and other fees. Income taxes are not included, because they are paid out of operating surplus.

¹⁴ It is also possible to compare different industries with respect to their value-added. It is more difficult and less useful to compare industries on the basis of sales.

INDIRECT, INDUCED AND SECONDARY EFFECTS

To this point, the discussion of travel industry accounts has referred only to the direct output components. That is, the ripple effects of the re-spending of travel industry receipts throughout the larger economy have not been analyzed. The structure of both the TTSA and the RTIM permit such analysis.

- **Indirect** effects refer to the intermediate inputs used to produce the final product or service, providing that those inputs are themselves produced within the designated geographic area.
- **Induced** effects refer to the purchase of goods and services by *employees* that are attributable to direct and indirect impacts. These induced impacts are derived from economic data that describe the purchasing patterns of households. For example, employees of all the designated export-oriented industries will spend their income on food, household durables, health care, and so on.
- The sum of indirect and induced impacts is sometimes referred to as the **secondary** effect. These secondary impacts may be as great or greater than the direct impact alone.
- The ratio of the total effects (direct plus either indirect, induced, or secondary) to the direct effects is the **multiplier**.

The BEA reports the **indirect** components of economic output. This is equivalent to domestic travel spending less the goods and services imported from abroad to meet domestic demand. For travel, these imports would include souvenirs manufactured in China and petroleum extracted in Saudi Arabia. The indirect output multiplier for 2002 was 1.76. The ratio of domestic travel spending to travel industry value-added was 1.88. The difference reflects the intermediate inputs for travel imported from abroad.

At the state level, these indirect output multipliers are typically lower because relatively more of the intermediate inputs are purchased from outside of the state. At the county or metropolitan level, the multipliers are generally even lower for the same reason. Furthermore, the estimates are usually less reliable because of the data limitations of the regional input-output model used to estimate the indirect effects.

The BEA does not report **induced** effects – the effect of household spending of the direct and indirect labor income. Typically, these induced effects will be larger than the indirect effects at the state or regional level, in part because they are based on both the direct and indirect components.¹⁵ As with indirect effects, the induced effects will also tend to be lower for smaller economic areas and the reliability of the estimates will be less.

¹⁵ The induced effects can be estimated with the Implan model maintained by the Minnesota Implan Group.

Secondary effects should be interpreted cautiously. These effects describe the relationship of economic transactions at a point in time. These relationships will not necessarily remain constant with a change in direct economic output. This is because all economic resources have alternative uses. Because of this, it is often difficult to determine the effect of an increase or decrease in visitor spending on the larger economic system over time.

THE REGIONAL TRAVEL IMPACT MODEL AND TRAVEL & TOURISM SATELLITE ACCOUNTS COMPARED

This appendix has provided an overview of Dean Runyan Associates RTIM and the Bureau of Economic Analysis' domestic TTSA. These travel industry accounts are similar in terms of how they define the travel industry and the measures of the industry that are reported. The differences stem largely from their different levels of analysis – the BEA provides estimates at the national level only, while the RTIM's are typically constructed on a state or regional level. Because of this geographic focus, the RTIM provides a distinction between the visitor industry and the travel industry. The RTIM also provides measures of all of the components of economic output and secondary effects at the state or large region level. At smaller units of analysis, however, the emphasis is on earnings and tax receipts generated by travel spending as these are the most reliable and meaningful measures of the economic impact of travel at the local level.

Oregon Earnings and Employment by Industry Sector, 2014

Industry Sector	Earnings (\$Million)	Percent of Total	Employment (Thousand)	Percent of Total
Primarily Export-Oriented	18,294	15.6%	298	12.9%
Agriculture, Forestry, Fishing and related	3,238	2.8%	95	4.1%
Mining	154	0.1%	6	0.3%
Manufacturing	14,902	12.7%	197	8.5%
**Travel	2,610	2.2%	101	4.4%
Primarily Non Export-Oriented	57,290	48.8%	1,107	47.9%
Construction	6,968	5.9%	114	4.9%
Utilities	706	0.6%	5	0.2%
Wholesale trade	6,082	5.2%	80	3.5%
Retail trade	7,750	6.6%	242	10.5%
Real estate and rental and leasing	2,004	1.7%	99	4.3%
Management of companies and enterprises	5,156	4.4%	41	1.8%
Administrative and waste services	4,259	3.6%	125	5.4%
Other services, except public administration	4,290	3.7%	122	5.3%
Government and government enterprises	20,075	17.1%	278	12.0%
Mixed	41,701	35.6%	905	39.2%
Transportation and warehousing	3,617	3.1%	68	2.9%
Information	3,110	2.7%	40	1.7%
Finance and insurance	5,263	4.5%	94	4.1%
Professional and technical services	8,701	7.4%	148	6.4%
Educational services	1,590	1.4%	58	2.5%
Health care and social assistance	14,369	12.3%	268	11.6%
Leisure and Hospitality	5,051	4.3%	229	9.9%
Oregon Total**	117,285	100.0%	2,310	100.0%

**Travel is not included in the sub and grand totals because it is also represented in other sectors (primarily leisure and hospitality, transportation, and retail trade).

Industry Groups

Accommodation & Food Services

- Food services and drinking places
- Hotels and motels, including casino hotels
- Other accommodations

Arts, Entertainment & Recreation

- Amusement parks, arcades, and gambling industries
- Bowling centers
- Fitness and recreational sports centers
- Independent artists, writers, and performers
- Museums, historical sites, zoos, and parks
- Other amusement and recreation industries
- Performing arts companies
- Promoters of performing arts and sports and agents for public figures
- Spectator sports companies

Construction

- Construction of new nonresidential commercial and health care structures
- Construction of new nonresidential manufacturing structures
- Construction of new residential permanent site single- and multi-family structures
- Construction of other new nonresidential structures
- Construction of other new residential structures
- Maintenance and repair construction of nonresidential structures
- Maintenance and repair construction of residential structures

Education and Health Services

- Child day care services
- Community food, housing, and other relief services, including rehabilitation services
- Home health care services
- Individual and family services
- Medical and diagnostic labs and outpatient and other ambulatory care services
- Nursing and residential care facilities
- Offices of physicians, dentists, and other health practitioners
- Other private educational services
- Private elementary and secondary schools
- Private hospitals
- Private junior colleges, colleges, universities, and professional schools

Financial Activities

- Commercial and industrial machinery and equipment rental and leasing
- Funds, trusts, and other financial vehicles
- General and consumer goods rental except video tapes and discs
- Imputed rental activity for owner-occupied dwellings
- Insurance agencies, brokerages, and related activities
- Insurance carriers
- Lessors of nonfinancial intangible assets
- Monetary authorities and depository credit intermediation activities
- Nondepository credit intermediation and related activities
- Real estate establishments
- Securities, commodity contracts, investments, and related activities
- Video tape and disc rental

Information

- Book publishers
- Cable and other subscription programming
- Data processing, hosting, ISP, web search portals and related services
- Directory, mailing list, and other publishers
- Internet publishing and broadcasting
- Motion picture and video industries
- Newspaper publishers
- Other information services
- Periodical publishers
- Radio and television broadcasting
- Software publishers
- Sound recording industries
- Telecommunications

Manufacturing & Utilities

(280 industries)

Natural Resources and Mining

- All other crop farming
- Animal production, except cattle and poultry and eggs
- Cattle ranching and farming
- Commercial Fishing
- Commercial hunting and trapping
- Commercial logging
- Cotton farming
- Dairy cattle and milk production
- Drilling oil and gas wells
- Extraction of oil and natural gas
- Forestry, forest products, and timber tract production
- Fruit farming
- Grain farming
- Greenhouse, nursery, and floriculture production
- Mining and quarrying other nonmetallic minerals
- Mining and quarrying sand, gravel, clay, and ceramic and refractory minerals
- Mining and quarrying stone
- Mining coal
- Mining copper, nickel, lead, and zinc
- Mining gold, silver, and other metal ore
- Mining iron ore
- Oilseed farming
- Poultry and egg production
- Sugarcane and sugar beet farming
- Support activities for agriculture and forestry
- Support activities for oil and gas operations
- Support activities for other mining
- Tobacco farming
- Tree nut farming
- Vegetable and melon farming

Other Services

- Automotive repair and maintenance, except car washes
- Car washes
- Civic, social, professional, and similar organizations
- Commercial and industrial machinery and equipment repair and maintenance
- Death care services
- Dry-cleaning and laundry services
- Electronic and precision equipment repair and maintenance
- Grantmaking, giving, and social advocacy organizations
- Other personal services
- Personal and household goods repair and maintenance
- Personal care services
- Private household operations
- Religious organizations

Professional and Business Services

- Accounting, tax preparation, bookkeeping, and payroll services
- Advertising and related services
- All other miscellaneous professional, scientific, and technical services
- Architectural, engineering, and related services
- Business support services
- Computer systems design services
- Custom computer programming services
- Employment services
- Environmental and other technical consulting services
- Facilities support services
- Investigation and security services
- Legal services
- Management of companies and enterprises
- Management, scientific, and technical consulting services
- Office administrative services
- Other computer related services, including facilities management
- Other support services
- Photographic services
- Scientific research and development services
- Services to buildings and dwellings
- Specialized design services
- Travel arrangement and reservation services
- Veterinary services
- Waste management and remediation services

Public Administration

- Federal electric utilities
- Other Federal Government enterprises
- Other state and local government enterprises
- State and local government electric utilities
- State and local government passenger transit
- US Postal Service

Trade

- Retail Nonstores - Direct and electronic sales
- Retail Stores - Building material and garden supply
- Retail Stores - Clothing and clothing accessories
- Retail Stores - Electronics and appliances
- Retail Stores - Food and beverage
- Retail Stores - Furniture and home furnishings
- Retail Stores - Gasoline stations
- Retail Stores - General merchandise
- Retail Stores - Health and personal care
- Retail Stores - Miscellaneous
- Retail Stores - Motor vehicle and parts
- Retail Stores - Sporting goods, hobby, book and music
- Wholesale trade businesses

Transport

- Automotive equipment rental and leasing
- Couriers and messengers
- Scenic and sightseeing transportation and support activities for transportation
- Transit and ground passenger transportation
- Transport by air
- Transport by pipeline
- Transport by rail
- Transport by truck
- Transport by water
- Warehousing and storage



City of Gold Beach

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Visitor Center: 541-247-7526 • www.goldbeach.org

TO: Curry County Board of Commissioners
CC: Community Development Director
FROM: Jodi Fritts, Gold Beach City Administrator
DATE: Monday, June 27, 2016
RE: Curry County Economic Development

BACKGROUND INFORMATION ON COUNTY /CITY OF GOLD BEACH PLANNING IGA

I think there may be some confusion about the Planning IGA that the County and City recently entered into.

As you know, the Planning Division of your Community Development Department currently consists of the Director and one staff planner to handle all the current and long range planning duties for the unincorporated areas of the County. In 2009, the Planning Division consisted of the Planning Director, Planning Manager, Planner, and 2 clerks.

Back Story: We (City) were contacted in April by the Community Development Director, Carolyn Johnson, for assistance with current planning duties and general counter questions during the upcoming vacation period of the planner. The City was willing and able to help. One of my assistants and I used to be county planners so it made sense for all of us. We assisted the department during the month long vacation period-at no cost to the County-because we felt it was the right thing to do to help you out. And I honestly feel it's our obligation to provide the best service we can to our shared citizens.

Not long after that, Johnson and I were discussing other ways our two small departments could better meet that service obligation to our citizens, as well as mutually assist our agencies with funding and work load. We determined that Johnson had the greater community development and long-range planning skills and our agency had the Curry institutional knowledge and short-range (current) coastal/rural planning skills. We decided that by combining our efforts we could better serve our customers and more efficiently utilize our limited department budgets. The City would provide specific application processing services to the Planning Division and the County would get to retain a goodly portion of the fees from those land use applications. The City in turn would earn revenue to help replace discontinued planning funds we formerly received annually from DLCD. *The proverbial Win/Win situation.*

I am sort of at a loss to understand why coordinating with the City to free up your planning staff to work on long-term planning and community development issues AND deriving \$\$ from

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the venture can be anything but a *really good* thing for the County? I'm also at a loss to understand why Johnson running her department more efficiently and better utilizing her limited department budget can be construed as a failing on her part? That is a good use of Curry's limited financial and personnel resources.

COORDINATION & COLLABORATION

Countywide we have the opportunity for other similar collaboration and coordination efforts. I have talked informally with other local leaders about how all the agencies/groups within Curry: cities, special districts, schools, NGOs, and the County often provide competing or similar departments or services. None of us has the capacity to duplicate services. But we do. And we continue doing it, year after year. It's the perfect example of that saying about always doing the same thing but expecting a different result. Continuing to bang our heads against the wall is wasteful, and it doesn't provide our citizens with the best and most efficient service delivery systems. A lot of people I speak with acknowledge the need to collaborate/coordinate, but no one seems ready to drop their individual power structures (EGOS--sorry, but that is what it is) in order to follow through on trying to address the problem.

The June 22nd memo that Community Development Director Johnson provided to you is a good first step in that direction—analyzing the duties and services of the Economic Development Department and suggesting efficiencies in order to continue to provide services but do it in such a way that limited funding and personal resources are not duplicated. There is nothing in that memo that is personal or threatening. It's an objective assessment of which department/agency/person is best suited and positioned to assume the list of duties you presented to Johnson. It has nothing to do with Community Development Department empire building or silly conspiracy theories—it is simply a professional assessment. An assessment you asked her to give, so don't kill the messenger--you asked her the question.

CURRY ECONOMIC DEVELOPMENT DEPARTMENT

This is not meant in any mean or disrespectful way. It is an honest question, and I'd really like an honest answer because I truly do not don't know what the answer is:

What *meaningful* economic development services or products have come out of the County Economic Development Department in the past 2 years?

The reason for my question is that maybe my city manager understanding of the duties/services and products of an economic development department are all wrong? Maybe I just don't know what economic development duties really are?

Because of that confusion, I went to the federal US Economic Development Administration website: www.eda.gov to gain a better understanding. This is their front page info:

The City of Gold Beach is dedicated to enhancing quality of life, while promoting the health, safety, and welfare of our citizens, businesses, and visitors in the most fiscally responsible manner. In doing this, the City will respect the past, respond to current concerns, and plan for the future, while maintaining environmental sensitivity in our beach oriented community.

WHAT IS ECONOMIC DEVELOPMENT?

Economic Development creates the conditions for economic growth and improved quality of life by expanding the capacity of individuals, firms, and communities to maximize the use of their talents and skills to support innovation, lower transaction costs, and responsibly produce and trade valuable goods and services.

Economic Development requires effective, collaborative institutions focused on advancing mutual gain for the public and the private sector. ***Economic Development is essential to ensuring our economic future.***

After visiting the website, I confirmed that I wasn't confused at all. That's pretty much what I have always thought the duties of an economic development department were.

But I have to say, as the chief administrative officer of a neighboring jurisdiction, I am at a loss. I'm not sure how interaction with Port Orford and Brookings has been, but Gold Beach has had no *meaningful* interaction with the Economic Development since Susan Brown was shown the door by some former commissioners that I won't name. Since then, there has been no *"improved quality of life by expanding the capacity of individuals, firms, and communities to maximize the use of their talents and skills to support innovation, lower transaction costs, and responsibly produce and trade valuable goods and services."*

Since Brown's departure from that position:

There have been no development inquiries. No zoning inquiries. No inquiries regarding development incentives. No requests to coordinate with the County or other agencies on any ED projects. No updates on what County ED is working on (*I get those regularly from South Coast Development Council and CCD*). There have been no local needs assessments for skills or small business resources. No documents produced to help small businesses. No recruitment of talent or resources to fill local voids. There has been no *"mutual gain for the public and private sector."*

Having said that, I would make the addition of *"...that Gold Beach is aware of"* to the end of every sentence in the above paragraph. If those activities have occurred, please accept my sincere apologies, but Gold Beach was not a participant in any such activities, and that valuable information wasn't shared with us so we are simply unaware. I know how difficult it is to share information in this digital age, and I understand what an effort it is to personally meet with neighboring agencies--especially when they are located so far from your offices. It's absolutely excusable considering how busy I know we are with our own respective duties.

And for the record, I am ***no way*** downplaying the significant economic impact of tourism to Curry County¹.

There is some concern that without the County, local tourism is doomed to failure. That is, quite simply, not true. I will tell you what I told the former ED Director when we were

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introduced in the fall of 2014: there is no reason for the County to spend their limited ED dollars on tourism because we have a robust regional tourism cooperative in place that has tourism covered--like no time in the past. I respectfully said use those dollars instead for other economic development work that is not being addressed (*see the federal EDA info above*). That is the void that the County Economic Department needed to fill then—and still does as far as Gold Beach is concerned.

Which brings me to my final point. The real purpose of your meeting today (according to your published agenda) was to adopt supplemental FY14-15 budget appropriations. There has been social media and email chatter about personnel funding within your department. I would like to offer the following advice (to be taken or tossed at your discretion): put aside for a moment the individual or person that occupies specific positions within your budget. The question to be asked is not should we keep Employee X, or Employee X has done wonderful things so we have to keep them—they probably have done wonderful things. The question that must be asked is: do we have the money to *fund* that POSITION? Not the PERSON occupying the position because that person can, and will, change, but can we fund the POSITION?

As an example, during the preparation of the FY14-15 budget last year, it became apparent to me that the City could not afford to keep a separate Muni Court Clerk position. We all liked the person that was the clerk and she performed her job well, but the bottom line was the City could not afford to continue to fund the POSITION. Not the *person*, but the *position*. So we eliminated the position, and the duties were absorbed into the duties of the other clerks within the Finance Office—because that was the best use of City resources.

And before the press and bloggers say Ms. Fritts is out to get Ms. Matteson, please understand I value her because she has worked cooperatively with the City on tourism related projects—she's currently helping us with the Cycle Oregon event. She has actually been the only one in the Economic Development Department the City could effectively communicate with, and I greatly appreciate that and value her help. But, as I said above, this is *budget decision*. It's not a PERSON decision. It's a POSITION decision. Does the County have the funds for this POSITION?

I hope this memo helps clear up some of the confusion about the City's relationship with the Community Development and Economic Development Departments, but I would be happy to answer any questions you may have. I'm easily reached by email: jfritts@goldbeachoregon.gov or please feel free to stop in at City Hall.

¹ I don't ever down play the huge impact tourism has on Gold Beach or the Wild Rivers Coast. Part of my duties include being the tax administrator of our City transient room tax. The buck stops with me on marketing Gold Beach and our Wild Rivers Coast region, and operating our visitor center.

I don't enjoy rattling off my CV of regional tourism works, but here's a sampling to demonstrate that regional tourism is being addressed collaboratively quite effectively:

- I was one of the original supporters of the region's successful application to Travel Oregon for the Wild Rivers Coast Rural Tourism Studio workshop program that began in 2012 and the action teams that continue working behind the scenes right now. We have produced several tourism products and reinforced/reinvigorated existing ones in the past 4 years with the continued assistance of Travel Oregon.
- The creation and designation of the Wild Rivers Coast State Scenic Bikeway (*the FIRST and so far ONLY scenic bikeway on the Coast*) came directly out of the regional cooperative.
- I'm the vice-president of the Wild Rivers Coast marketing partnership with the cities of Port Orford, Brookings, Crescent City, and Del Norte County. Just this past week we went to press on a map product that we have been collaborating on for over a year with the Curry Coastal Pilot.
- I'm the current president of the Oregon Coast Visitor Association (OCVA). OCVA is the Travel Oregon sanctioned official Coast region Regional Destination Marketing Organization (RDMO). I joined that organization in 2013 because we didn't have any southcoast/Wild Rivers Coast representation on that regional destination marketing board. Gary Milliman from Brookings was just appointed to our Board 2 weeks ago as well.
- Gold Beach was host to the Oregon Tourism Commission (Travel Oregon's state commission) meeting this month. That was due in part to our success with their RTS program and our collaboration with regional tourism partners.
- Annually I attend travel shows, and fund other community partners to attend shows on our behalf to promote not just Gold Beach but the entire Wild Rivers Coast.

I'd love to provide you with copies of recent awesome national and regional press clippings of Wild Rivers Coast stories if you want. The cover of the January 2015 Cosmopolitan (yes *THAT* Cosmo) hangs on my office wall—that story was generated after a dinner and beach fire “fam tour” I conducted (along with Travel Oregon handlers) for the Cosmo editor and 3 other regional writers sent down by Travel Oregon in September 2014. This was immediately after getting off a fam trip on Jerrys Jets which took a group of Outdoor Travel Writers from California up the Rogue River to Agness. The jet boat ride was one of the day trips organized by our WRC Partnership group as part of the OWC Annual Meeting which was held at Lucky 7 Casino in Smith River.

No one is a bigger believer in the power of tourism to our region. And I have the data of steady increases since 2012 in our occupancy and tax revenues to prove it—which I will cheerfully provide to anyone that asks.

But I'm guessing most folks are not aware of any of these activities, and I like it just fine that way. It's okay that most folks are not aware. We quietly go about the business of promoting/marketing and supporting regional tourism efforts and the visitors are coming to our Wild Rivers Coast and spending their visitor dollars here. That is all the payment we need.

CURRY COUNTY BOARD OF COMMISSIONERS
AGENDA ITEM ROUTING SLIP
FORM 10-001.1

PART I – SUBMITTING DEPARTMENT: RETURN TO [BOC OFFICE@CO.CURRY.OR.US](mailto:BOC_OFFICE@CO.CURRY.OR.US)

AGENDA ITEM TITLE: Adopt a Job Description for an Existing Position - Econ Dev Asst Asst.

AGENDA DATE^a: 9/2/15 **SUBMITTING DEPARTMENT:** Commissioners

^aSubmit **5:00 p.m. on the Wednesday** prior to the next General meeting.

CONTACT PERSON: Julie Schmelzer

PHONE/EXT: 3253

BRIEF BACKGROUND OR NOTE^b:

^bindicate if more than one copy to be signed

FILES ATTACHED:

SUBMISSION TYPE: Order

- (1)Order
- (2)Job Description
- (3)
- (4)

Are there originals in route (paper copies with pre-existing signatures) Yes No

QUESTIONS:

1. Would this item be a departure from the Annual Budget if approved? Yes No
(If Yes, brief detail)
2. Does this agenda item impact any other County department? Yes No
(If Yes, brief detail)
3. If Land Transaction, filed with the clerk? Yes No N/A

INSTRUCTIONS ONCE SIGNED:

No Additional Activity Required

OR

Send Document Hardcopy/Electronically to:

Name:

Address:

City/State/Zip:

Phone:

Due date to send: / /

^cNote: Most signed documents are filed/recorded with the Clerk per standard process.

PART II – COUNTY CLERK REVIEW

EVALUATION CRITERIA:

CLERK ASSESSMENT: Does this agenda item meet filing/recording standards? Yes No N/A

(If No, brief detail)

PART III - FINANCE DEPARTMENT REVIEW

EVALUATION CRITERIA 1-4:

1. Confirmed Submitting Department's finance-related responses Yes No
Comment:
2. Confirmed Submitting Department's personnel-related materials Yes No N/A
Comment: No need for Salary Committee review
3. If job description, Salary Committee reviewed: Yes No N/A
4. If hire order requires an UA, is it approved? Yes No Pending N/A

PART IV – COUNTY COUNSEL REVIEW

AGENDA ASSIGNMENT TYPE: Administrative Actions

LEGAL ASSESSMENT: Does this agenda item have a legal impact? Yes No

(If Yes, brief detail)

PART V – BOARD OF COMMISSIONER REVIEW/COMMENT

LIAISON COMMISSIONER AGREES TO ADD TO AGENDA:

Commissioner Susan Brown Yes No

Commissioner Thomas Huxley Yes No

Commissioner David Brock Smith Yes No

Comment:

**CURRY COUNTY
JOB DESCRIPTION**

JOB TITLE: Economic Development Assistant - Page 1

EXEMPT: No
SALARY LEVEL: N-8
SUPERVISOR: Director of Administration for the Board
PREPARED BY: Director of Administration for the Board August 2015

POSITION SUMMARY:

Position performs a variety of administrative tasks and overall assistance on economic development projects directed by and in support of the Director of Administration's activities, marketing programs and administrative functions. Assignments are performed under general supervision of the Director of Administration for the Board.

This position is responsible for administrative work and providing assistance on economic development efforts involving business development, retention and enhancement of county wide economic development strategies & programs. This position must know the overall functions of the Board of Commissioners Office as well in that it is to serve as a 'back up' in the absence of the Administrative Assistant in the Board of Commissioners' Office. He or she will perform a variety of routine and complex administrative work.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Duties assigned to this classification include, but are not limited to the following:

1. Assists in the preparation of marketing, advertising, tourism, promotional, themes, logos, marketing brochures displays, visual and electronic demonstrations that promote the county's economic development goals, objectives and public relations procedures for recruiting and retaining businesses providing living wage jobs in Curry County.
2. Acts as assistant to the Director of Administration for the Board for economic & community development related duties.
3. Gathers and prepares data for studies, reports and analyses.
4. Assists in preparation of economic development reports, technical research studies, prepares statistical reports, and supporting data, for drafting or revising local legislation and plans.
5. Maintains and enhances the Economic Development web site.

JOB DESCRIPTION
JOB TITLE: Economic Development Assistant - Page 2

ESSENTIAL DUTIES AND RESPONSIBILITIES: (cont.)

6. Attends and supports continuing education seminars, committees, and conferences related to economic development.
7. Works with the Director of Administration for the Board to establish policies, special events, conferences and meetings which will enhance the rapport with and quality of life for the businesses & community.
8. Assists with grant acquisition, grant management and grant reporting.
9. Assists with management of the Brookings Airport including NOTEMS, hangar rental fees, land leases, operations, facilities, fuel, access, etc.
10. Performs special projects, and other duties as assigned by the Director of Administration for the Board.
11. Processes claims for the Director of Administration for the Board related to the economic development program.
12. Process all OLCC applications.
13. Be able to attend meetings or present information on behalf of the Director of Administration to the Board.

KNOWLEDGE, SKILL AND ABILITY REQUIRED BY THIS POSITION:

Knowledge of -

Knowledge in the use of word processing, webpage, database and spreadsheet software.

Knowledge in performing detailed research and technical studies, and communicating the results in an effective manner.

Knowledge of social media marketing.

Ability to -

Communicate effectively in both oral and written forms.

Estimate and manage time efficiently.

Make decisions independently in accordance with established policy.

Maintain confidentiality.

Lead volunteer staff.

Courteously meet and deal effectively with other employees and the public.

Skill in -

Microsoft Office, Publisher, Excel, Word, Web and Social Media applications.
Grant writing and grant management.

JOB DESCRIPTION
JOB TITLE: Economic Development Assistant - Page 3

DESIRABLE QUALIFICATIONS:

Knowledge or experience related to County operations; experience working with the public; marketing; and community development.

SUPERVISORY CONTROLS OF THIS POSITION:

Work is performed under general direction of the Director of Administration for the Board. Recurring routine assignments are independently performed on basis of past experience. Employee receives general instructions regarding scope of and approach to projects or assignments, but procedures and problem resolution are left to the employee's discretion and interpretation. Work is reviewed periodically to ensure determinations and decisions are made in accordance with department policy and procedures.

GUIDELINES:

Work is performed within federal, state, county and departmental laws, rules, policies and procedures; software and equipment manuals, specialized dictionaries and reference materials. A considerable amount of judgment and initiative is used to interpret these guidelines.

EDUCATION AND/OR EXPERIENCE:

Associates degree and five years or more of experience in an office work environment including experience in administrative, financial, grant management and marketing functions; or any satisfactory equivalent combination of education, training and experience.

PHYSICAL DEMANDS AND WORK ENVIRONMENT:

Work is performed in an office environment; work is generally sedentary and requires hearing voice conversation and keyboarding, lifting up to thirty-five (35) pounds. A valid Oregon Driver license is required.

Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

**CURRY COUNTY
JOB DESCRIPTION**

JOB TITLE: Administrative Assistant – Commissioners – Page 1

EXEMPT: No
SALARY LEVEL: N-8
SUPERVISOR: Director of Administration for the Board
PREPARED BY: Director of Administration for the Board August 2015

POSITION SUMMARY:

Serves as the Administrative Assistant for the office of the Board of Commissioners. This position is the first point of contact for the public as they call or visit the Board of Commissioners office. Performs clerical work and document creation, which may include the handling of highly sensitive and confidential information. Proficient in MS Office Suite including Word, Excel, Power Point and Outlook.

This Administrative Assistant classification is distinguished from other administrative or executive assistant classifications by the greater degree of complexity of office and administrative duties undertaken. This position requires a superior degree of independent judgment to complete the multifaceted assignments.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

1. Answers phones and greets the public as they come to the Board of Commissioners Office.
2. Serves as the recording secretary for Board of Commissioners' meetings and workshops which includes, but is not limited to, taking minutes, running the audio visual equipment and posting the audio, video, and other documentation to the county website.
3. Assembles information and prepares agendas for Commissioners' public meetings. Reviews agenda items submitted for completeness and accuracy and posts submissions to the BOC drive for approval prior to public posting. Provides agenda and supporting information to the public and media outlets by posting notices and agendas via email, web and bulletin board posting. Prepares agenda packets with supporting documents for Board members prior to public meetings.
4. Responsible for acquiring Board signatures on documents following BOC approval which may include filing those documents with the County Clerk.
5. Prepares and files minutes for all meetings and workshops held by the Board of Commissioners.
6. Coordinates and maintains all documents and activities for County Advisory Boards and County Committees which includes term expirations, vacancy notices, resignation acknowledgements, appointments, orders and appreciation letters; maintains paper and electronic files as required. Coordinates with County Departments, and "spin-offs" as needed. Notifies the Board when appointments should be made for advisory committees, boards and commissions.

JOB DESCRIPTION
JOB TITLE: Administrative Assistant – Page 2

ESSENTIAL DUTIES AND RESPONSIBILITIES: (cont.)

7. Maintains county web pages for the Commissioners' Office. Posts public notices, county committee and advisory boards, committee vacancies, and departmental updates to the county website and as required by law.
8. Prepares correspondence such as letters, emails, reports, orders, resolutions, notices and other material of important nature, some of which may be confidential in nature.
9. In coordination with the Director of Administration for the Board prepares and distributes Curry County Newsletter quarterly or as needed.
10. Coordinates the scheduling of activities and work flow to accomplish operating objectives, including office systems and procedures.
11. Schedules and maintains the master calendar for the Board of Commissioners. Advises each Board member of background information in preparation of scheduled meetings, providing reference material as needed.
12. Prepares claims for payments/reimbursements for submission to Accounts Payable and prepares deposits as necessary.
13. Tracks monthly odometer readings and reports mileage to the Road Department.
14. Distributes and collects time sheets for signatures.
15. Maintain office equipment and supplies.
16. Performs other duties as necessary under direction of Board of Commissioners and the Director of Administration for the Board.

SUPERVISORY RESPONSIBILITIES:

There are no supervisory responsibilities.

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED BY THIS POSITION:

Thorough Knowledge of-

Office practices and methods of office organization.
Business English, spelling, grammar, composition.

Ability to-

Communicate effectively in oral and written form, and to work effectively with other employees, agencies & the general public using courtesy, tact & good judgment.

Use computers and business software proficiently including but not limited to MS Office Suite.

Prioritize tasks and meet deadlines.

JOB DESCRIPTION

JOB TITLE: Administrative Assistant – Commissioners – Page 3

Ability to - (cont.)

Remain calm and use good judgment during confrontational or high pressure situations.

Maintain confidentiality.

Use initiative and judgment in carrying out responsibilities with minimal instruction and guidance. Courteously meet and deal effectively with other employees, all County department heads, legislative and congressional representatives, federal, state, and city agencies, public agencies, advisory boards, committees, private businesses, contractors, consultants, media and the public. Understand and comply with statutory requirements for public records, public notice, public meetings and advisory boards/committees.

GUIDELINES:

Work is performed within departmental policy and procedure: federal, state and county statutes, rules, regulations and ordinances, personnel rules, various administrative reference materials, office management reference materials, secretarial handbooks. Employee uses seasoned judgment, initiative, and experience in interpreting guidelines and contributes to modifications of existing guidelines by advising the Board of problems encountered.

EDUCATION AND/OR EXPERIENCE:

Associates degree and five years or more of experience in an office work environment including experience in administrative, financial and office management functions; or any satisfactory equivalent combination of education, training and experience.

Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

Creating Meaningful Jobs, DRIVING ECONOMIC GROWTH

Tourism Performs

Before the passage of the 2003 Oregon Tourism Investment Proposal, Oregon's annual marketing budget ranked 47th in the nation. Now Oregon ranks 23rd, and can more effectively compete for visitor dollars.

	In 2003	In 2014	Change
Direct Employment	84,500 jobs	101,000	+20%
Employee Earnings	\$1.7 billion	\$2.6 billion	+53%
Visitor Spending	\$6.5 billion	\$10.3 billion	+58%
Taxes (State/Local)	\$246 million	\$421 million	+71%

Support Tourism, Support Oregon

In 2003, Oregon faced one of its highest unemployment rates in history. Eager to create new opportunities for Oregonians, the Oregon Tourism Investment Proposal was created, enacted and signed into law. The bill made tourism and hospitality a pillar of Oregon's economy by reinvesting 1% of lodging revenue back into tourism development and marketing. Visitors generate significant spending, lawmakers reasoned, and businesses may look to relocate to Oregon after executives vacation here. With proper support, they believed tourism could be a powerful tool to bolster the state's flagging economy.

Tourism and hospitality industry members in every region of the state collaborate on dozens of strategic marketing programs each year funded by Oregon's Tourism Investment. These efforts brought more than 28 million overnight visitors to Oregon in 2011—for an average stay of four nights.

Visitor spending reached more than
\$10.3 billion in 2014
generating **\$2.6 billion**
in employee earnings.

Continued dedication to the state's tourism industry will keep this powerful economic engine running strong.

The investment is paying off:

\$1 spent on state marketing
= **\$237** in visitor
spending*

\$1 spent on state marketing
= **\$11** in state and local
tax revenue*

*Advertising Accountability Study, Longwoods International, 2014
- Results for 2012-2013 campaigns



Tourism Jobs Provide Vibrant Career Paths for Good Jobs Now, Rewarding Careers Later

Tourism jobs provide a training

ground for Oregon's future workforce, enabling younger workers to demonstrate a professional work ethic and to build good work habits.

Tourism jobs provide flexibility

for seniors, parents, students and other workers.

Tourism jobs are often small business

jobs connected to the communities they serve, all over the state.



“Each summer Cog Wild is responsible for employing over 30 guides and filling hundreds of hotel rooms and vacation houses with visiting mountain bikers. It is a huge privilege, one we don't take lightly. We train our staff in customer service, local history and how to handle changing scenarios and different level riders – all great skills that will carry them through life. We understand we have one chance to create an amazing experience that will be shared with other mountain bikers back at home.”

Melanie Fisher

Owner, Cog Wild
Bend, Oregon



“I began my career as an assistant housekeeper and worked my way up to a satisfying career in the hospitality and tourism industry. I'm now the General Manager of the Jupiter Hotel in Portland and I know firsthand the opportunities that exist for rewarding careers within the tourism industry. I currently oversee 27 employees and help them strive to be everything they can be in the fulfilling travel and tourism industry.”

Al Munguia

General Manager, Jupiter Hotel
Portland, Oregon



“In Yachats, tides and visitors flow in and out. The visitors helps us create living-wage jobs and grow a business, enriching the flavors of place. Some guests have been coming here for generations and some are discovering Yachats for the very first time. The economic impact flowing into our community helps us to build a resilient and abundant community, and to share the taste of Yachats with a wide range of visitors and locals alike.”

Nathan Bernard

Owner, Yachats Brewing
Yachats, Oregon

Tourism directly generates more than 101,000* jobs in Oregon

—
and indirectly creates nearly another 52,500 jobs in agriculture, construction, manufacturing, transportation and other sectors.

“It’s very clear that Travel Oregon awakens such wanderlust, that people all over the world feel compelled to come and see it for themselves. Essentially, Travel Oregon is in the business of turning inspiration into experience. And these experiences translate into economic boon.”



Governor Kate Brown

Tourism Benefits Rural Economics

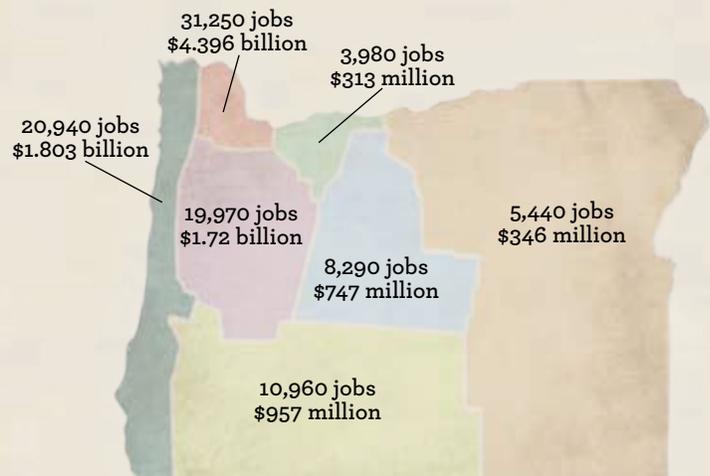
Tourism jobs are crucial for economic growth, especially in rural counties:

- Tourism is one of the three largest industries for employment in rural counties
- Oregon’s ten most tourism-dependent counties are rural

Tourism provides the jobs necessary to support rural economies in transition.

In some rural areas, tourism jobs provide the means to diversify local economies.

Meaningful Employment & Revenue for All of Oregon



*Dean Runyan, Oregon Travel Impacts, 2015
- Results for 2014





Oregonians Value Tourism



“Tourism is a job creator on its own, but it’s also essentially the front door to the rest of the economy.”

Duncan Wyse
President,
Oregon Business Council

Tourism Boosts Oregon Business

Travel Oregon is one of the most visible manifestations—nationally and internationally—of the Oregon brand. The positive associations of Oregon established by the brand benefit businesses and agencies beyond hospitality, including:

High Tech, Manufacturing & Other Industries—Vacationing executives consider relocating businesses to Oregon for its outdoor lifestyle and the overall quality of life that the Oregon brand espouses.

Agriculture—Oregon’s thriving culinary and agri-tourism industry boosts the profile of Oregon seafood, produce, wine, beer and spirits, stimulating national and international sales.

State Parks/Marine Board/Fish & Wildlife—More visitors are drawn to take advantage of Oregon’s great natural resources, populating more campsites and buying more boating, fishing and hunting tags.

Tourism is vital to our state’s economy. It provides jobs, fuels small business development and generates revenue in every corner of the state. The tourism and hospitality industry is Oregon’s largest traded sector employer and a leading contributor to our gross state product. With Travel Oregon investing collaboratively and strategically with businesses and organizations across the state, the Oregon brand will continue to contribute to the state’s economic well-being for many years to come.

Travel Oregon Oregon Tourism Commission

250 Church Street SE, Suite 100
Salem, Oregon 97301-1282 • 503-967-1560 • 503-967-1579 fax
Industry@TravelOregon.com • TravelOregon.com • Industry.TravelOregon.com



11/2015



Secretary of State Audit Report

Jeanne P. Atkins, Secretary of State

Mary Wenger, Interim Director, Audits Division



Oregon's Counties: 2016 Financial Condition Review

Summary

We first issued a county financial condition report for the State of Oregon in 2012 with updated reports to be issued every two years. The primary source of data for the report is each county's audited financial statements for fiscal years 2006 through 2015. Since our report in 2014, many counties have improved their financial condition. For example, every county experienced increases in per capita income and declines in unemployment rates. Nearly all counties indicate a strong liquidity position with a ratio of at least \$5 of cash on-hand for each \$1 of short-term obligation.

For purposes of our analysis of Oregon's 36 counties, we selected 10 indicators that provide a general assessment of financial condition. For each indicator we present a detailed discussion. We also looked at the declining federal timber revenue to counties to identify added financial strain.

Although many counties have improved their financial condition since 2012, four counties continue to be identified as counties to monitor; that is, counties whose financial condition may indicate a higher risk of distress. We performed additional analysis on these four counties, which are individually portrayed in the *Counties to Monitor* section of this report:

- Curry
- Douglas
- Josephine
- Polk

Some of the counties have initiated varying strategies to address their situation. We summarized their actions and plans within this report. We do not propose solutions for counties because decisions about county taxes and the level of services are based on local priorities, within practical and legal requirements and limitations.

Early identification of financial problems enables a government to introduce remedies sooner. State monitoring of local governments can provide assurance key partners in service delivery are financially sound, and if warning trends appear, can also prompt action. A key challenge facing several states and their local governments is the right solution when a government is in severe financial distress.

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Background

County and State Interrelationships

Counties play a key role in providing government services, and even precede Oregon’s statehood. Once *Oregon Country* and its counties were carved into states, Oregon transitioned from a provisional government to a territorial government, and finally to a state government. This evolution was mirrored at the county level, starting with four counties in 1843, with further divisions becoming the current 36 counties in 1917.

Originally, all counties functioned almost exclusively as agents of state government; all their activity had to be either authorized or mandated by state law. Under the provisional government, they were responsible for tracking property, probating estates, overseeing minor judicial functions, enforcing laws, operating jails, and conducting elections. The territorial government added some responsibility for “poor relief,” public health, and agricultural services.

In 1958 an amendment to the Oregon Constitution authorized counties to adopt *home rule* charters, and a 1973 state law granted all counties the power to exercise broad home rule authority. Nine have adopted home rule charters wherein voters have the power to adopt and amend their own county government organization.

Today’s counties provide a wide range of public services including:

- public health
- mental health
- community corrections
- juvenile services
- criminal prosecution
- hospitals
- nursing homes
- airports
- parks
- libraries
- land-use planning
- building regulation
- refuse disposal
- air-pollution control
- elections
- veterans services
- economic development
- urban renewal
- public housing
- vector control
- county fairs
- museums
- animal control
- civil defense
- senior services

Some of these services are supported with local taxes, whereas others rely in part on state and federal revenue, such as public health and senior services. As shown in the following chart, the Association of Oregon Counties identified major services provided by the state, counties, and by both entities.

SHARED STATE-COUNTY SERVICES

SERVING THE CITIZENS OF OREGON

HEALTH & HUMAN SERVICES	PUBLIC SAFETY	NATURAL RESOURCES & RECREATION	TRANSPORTATION, LAND USE & ECONOMIC DEV.	OTHER COMMUNITY SERVICES
Child Protection	Appellate Court	State Parks	State Highways	Administrative Services
Housing	State Police	State Lands	State Fair	Assessment & Taxation
Mental Health Hospital	State Prison	Water Regulation	Land Use Planning & Coord.	PERS
Aging/Senior Services	Attorney General	Wildlife Regulation	Land Use Permitting	Employee/Labor Relations
Alcohol/Drug Treatment	Trial Courts	County Forest Trust Lands/ State Forest Management	Highway & Road System	Elections
Alcohol/Drug Prevention	District Attorney	Habitat Restoration	Senior & Disabled Transport.	Extension Service
Children & Families Svcs.	911/Emerg. Communications	Wildlife/Predator Control	Energy Development	Telecommunications
Dev. Disabled Services	Emergency Management	Federal Land Policy	Engineering	Administrative Services
Mental Health Services	Homeland Security	Noxious Weed Control	Building Permits & Inspection	Procurement
Oregon Health Plan Svcs.	Community Corrections	Watermaster	Economic Development	Recording Public Documents
Veterans Services	Court Security	County Forest Management	County Fair	County Library
Public Health Services	Juvenile Services	County Parks	Infrastructure Development	County Museums
Environmental Health	Marine Patrol	Vector Control	Surveying	County Service Districts
Housing Services	Drug Courts	Soil & Water Conservation	County Transportation System	
Medical Examiner	County Law Library			
Emergency Planning and Response	Sheriff Patrol			
Solid Waste Management	Animal Control			
Recycling Programs	Justice Courts			
	Search and Rescue			
	County Jail			

Green = State-Provided Services Red = State/County-Shared Services Blue = County-Provided Services



Directly supports schools/education

4-30-10

Financial and Demographic Indicators

The ability to evaluate the financial condition of a local government, whether by key decision makers within the government, taxpayers, rating agencies, bondholders or other parties, is critically important in today's economic environment.

Counties in Oregon are not immune to financial troubles. Public attention has been directed to counties including Curry, Josephine, and Douglas, who have been reported as facing financial hardship. Revenues from local sources such as property taxes and interest income, as well as intergovernmental revenues from state and federal agencies, have declined since 2008. Oregon, more than some other states, is further affected by the anticipated loss of federal timber payments.

How each county has addressed the current situation has varied. Some held back prior year receipts in reserve with plans to allocate out over the next few years when sources are no longer available. Some tried to pass local tax levies to support programs such as public safety. Some explored alternative sources of revenues such as wind farms and local sales taxes. Counties are examining and considering changes to expenditures including staff reductions and program restructuring. Some have looked to outsourcing services such as libraries. The 2012 legislature passed legislation allowing counties to use road funds to help with sheriff's patrols. A few counties made use of interfund borrowings of dedicated funds to support ongoing services. This last practice has potential implications if a county is unable to repay these loans. So far none of the counties have issued long-term debt to support current services.

Financially stressed local governments are not new; economic conditions threatened local governments in the past and many states developed mechanisms to monitor financial condition and respond when necessary.

Evaluating financial condition involves a number of factors including the national and local economies, population, and composition of the community, and the internal finances of the local government.

Our research of how other states assess the financial condition of local governments found there are a number of different approaches and definitions of what constitutes distress. Despite the differences, one thing is certain; a combination of carefully selected indicators can provide a valuable tool for assessing the overall health of a local government.

The term *financial condition* can have many meanings. In a narrow accounting sense, financial condition means a government's ability to generate enough cash over 30 or 60 days to pay its bills. In a broader sense, it can mean a government's ability to generate enough revenues over its normal budgetary period to meet its expenditures and not incur deficits.

Analysis of Financial Condition of Oregon Counties

The objective of this report is to analyze the financial condition of county governments within the state of Oregon. We looked closely at federal timber revenue to counties. We did not propose specific solutions because the decisions about county taxes and service levels are based on local priorities, within practical and legal requirements and limitations.

We first prepared a financial condition report for the State of Oregon in 2012 based on the methodology developed by the International City and County Managers' Association (ICMA: *Evaluating Financial Condition: A Handbook for Local Governments, 1985*) and our research of efforts undertaken by other states. We applied the same general methodology to this effort, but because it involved 36 counties, we first developed a means of identifying counties warranting particular attention.

For purposes of this report, we define *financial condition* as a local government's ability to maintain existing service levels, withstand local and regional economic disruptions, and meet the demands of natural growth, decline, and change.

We included timber revenues as an indicator due to the expected end of federal timber payments, which many counties rely upon for their daily operations.

For purposes of our analysis, we selected the following 10 indicators that we feel provide a general assessment of the financial condition of Oregon's counties:

- Local Support
- Timber Revenue Dependence
- Debt Burden
- Liquidity
- Fund Balance
- Retirement Benefit Obligation
- Public Safety
- Personal Income
- Population Trends
- Unemployment

For each indicator, we present a detailed discussion and analysis. Much of the data included in this report was obtained from each county's audited financial statements. In addition, our analysis focused on the financial condition of each county's governmental funds, which includes the General Fund. Unless otherwise noted, the data is presented on a fiscal year basis (e.g., 2015 represents the fiscal year beginning July 1, 2014 and ending June 30, 2015). The data analyzed is through fiscal year 2015. Averages are presented on a five-year basis except that Wasco County's 2015 report has not been received to date; therefore, its information is only through 2014 with averages presented on a four-year basis.

Using the results of our analysis, we identified the counties whose financial condition may indicate a higher risk of distress. These counties were selected for additional analysis, and are presented in the *Counties to Monitor* section of this report.

County Indicators Overview

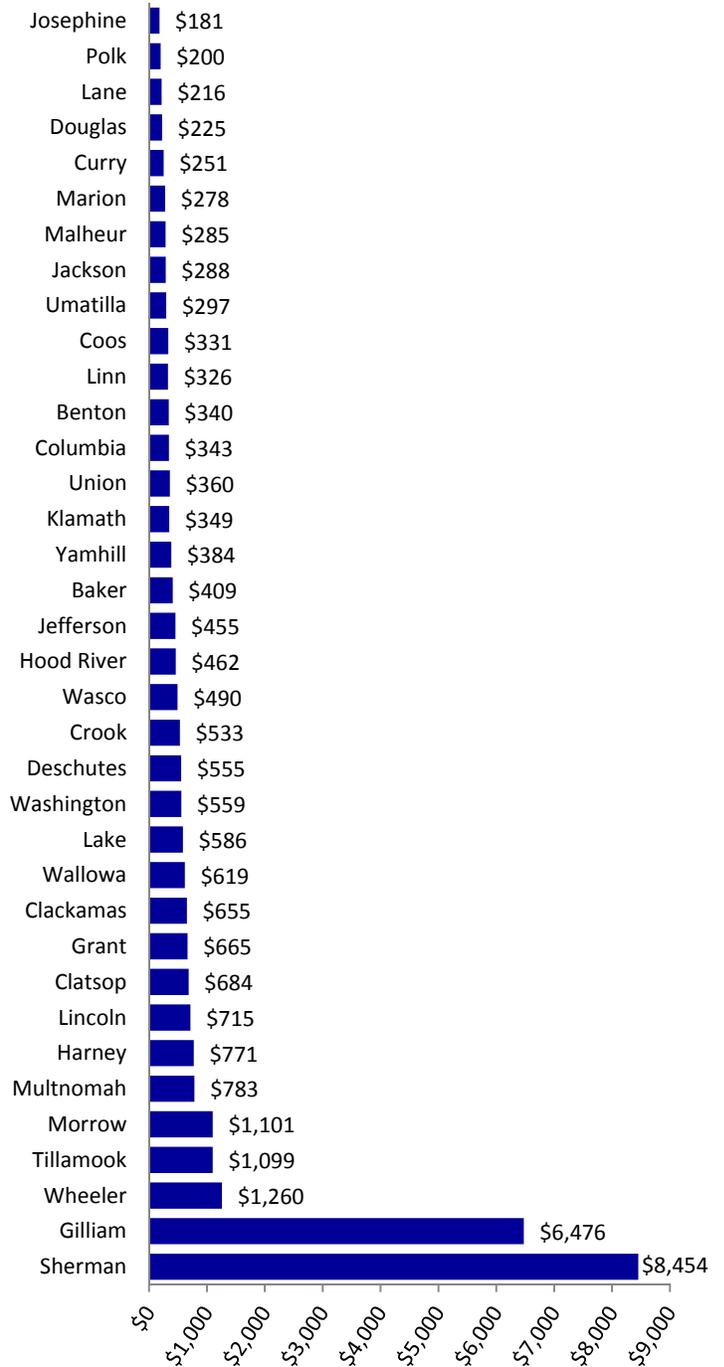
Local Support

Locally generated revenues should be sufficient to meet a county’s current and future service needs. The ability to generate local revenues is dependent on several factors including property values, taxable property, and population.

Property taxes are one of the most important sources of locally generated revenues for a county. Property taxes are composed of three primary parts: 1) permanent rate and gap bond levies, 2) local option levies, and 3) bond levies. Most taxing districts can utilize these options. The passage of statewide constitutional tax limitations in the 1990s (Measures 5, 47, and 50), established permanent rates for each taxing district. A county’s permanent tax rate is the maximum rate it can impose without approval by voters. Taxes from the permanent rates are discretionary and fund the general operating budgets of the taxing districts. The property tax rate chart does not include rates for special taxing districts created to fund specific county services such as enhanced law enforcement or libraries.

Between 2011 and 2015, most counties generated an average of at least \$300 per capita in local revenues, an average equal to that reported in our previous report. Gilliam and Sherman counties, on average, generated the largest local revenues per capita, which were five times greater than the next highest county. Revenues generated from wind farms and/or landfill and recycling centers contributed to the high averages in these counties.

Local Revenue per Capita
5-year average, FY 2011-2015



The average permanent tax rate among Oregon counties is \$2.82 per \$1,000 of assessed property value. Josephine and Curry counties have the lowest permanent tax rates and the only rates below \$1.00. Low permanent rates combined with limited taxable property can constrain a county's ability to raise revenues. To illustrate, Josephine County, with the lowest permanent tax rate of \$0.59 and 62% of its area in non-taxable federal lands, generated the least amount of local revenues at \$190 per capita in 2015; however, this is an increase from the previous low of \$174 in 2013.

Property Tax Rates

Permanent rate per \$1,000, FY 2014-15



Timber Revenue Dependence

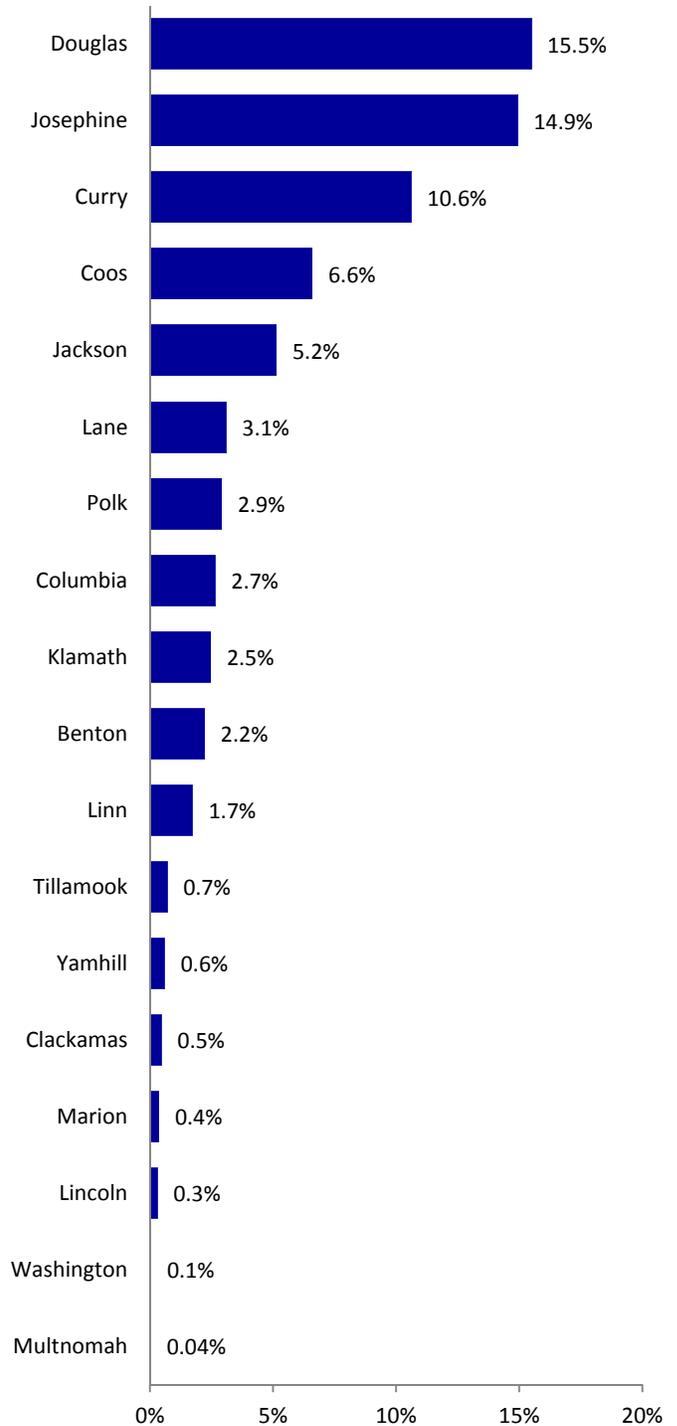
Revenues determine the capacity of a government to provide services to citizens and are affected by economic and policy changes. Oregon counties generate revenues from several sources, including other governments. The federal government provides timber revenue to eligible counties for 1) loss of property tax revenue, which results from an inability to impose taxes on federally owned forest lands, and 2) reduction in the amount of logging allowed on federal forest lands. Federal timber revenues are often restricted for specific purposes such as funding schools or road maintenance. The unrestricted portion of timber revenues can be used by a county for general operating expenditures.

For purposes of our analysis, we focused this indicator solely on federal timber revenues from the Department of Interior’s Bureau of Land Management (BLM) to 18 Oregon counties. These revenues, known as Oregon and California (O&C) and Coos Bay Wagon Road (CBWR) payments, are generally unrestricted and their availability greatly impacts a county’s General Fund. For counties heavily dependent on timber payments, the loss of this revenue may result in cash flow problems and fewer services provided to its citizens. Over the five-year period between 2011 and 2015, the average federal timber revenues in Curry, Douglas and Josephine counties ranged from 11% to 16% of their respective governmental fund revenues; a decrease from our previous report, which reflected a range of 14% to 20% between 2009 and 2013 for the same three counties. Accordingly, with the decline in timber revenues counties must rely more and more on other revenues for general operations.

Percent of Governmental Fund Revenue from Federal BLM Timber Payments

5-year average, FY 2011-2015

Only includes recipient counties



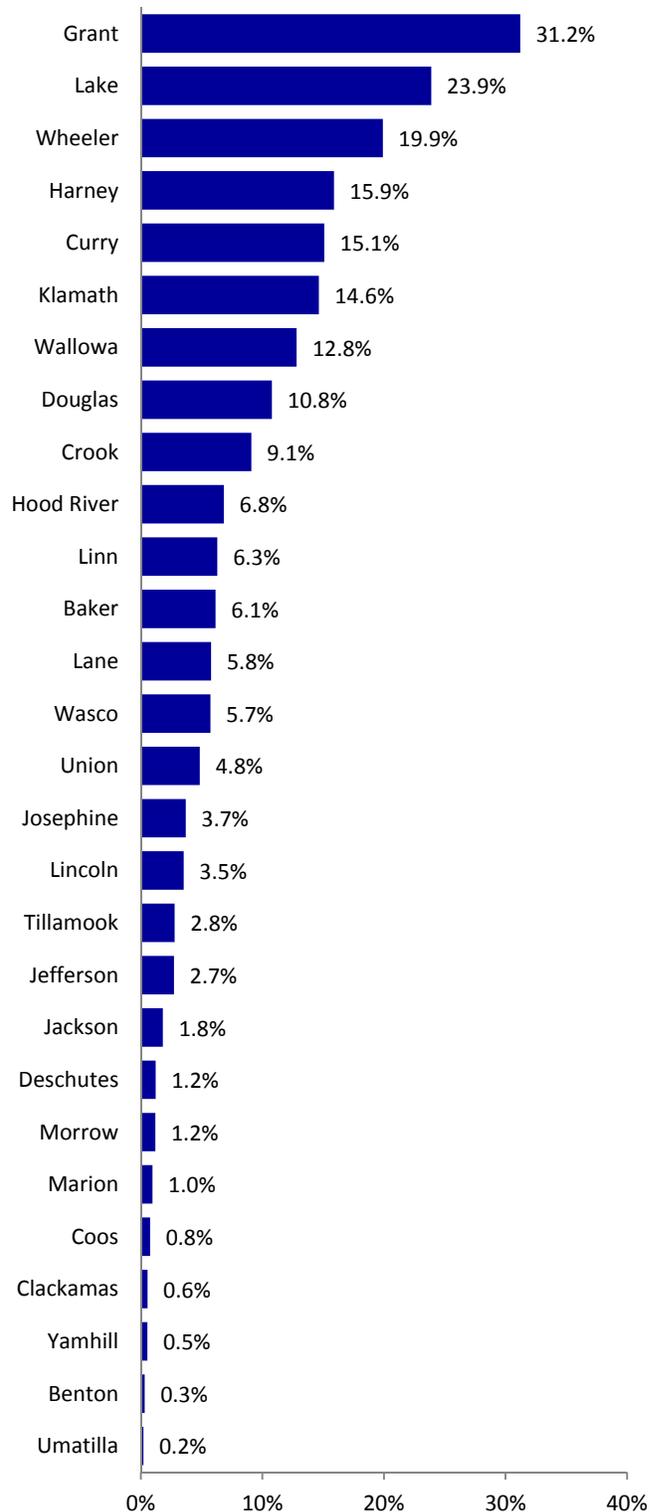
Counties also receive and depend on funding for roadways from the United States Forest Service (USFS) and the State of Oregon. We did not include these transportation funds in our analysis of counties to monitor because they are restricted for specific purposes. Oregon counties received about \$44 million in federal funding directed to roads in FY 2014-15, down from \$46 million in FY 2012-13. This funding, which was based on past timber revenues to Oregon counties, is not expected to continue in future years. In addition to federal funding, counties also received about \$234 million from the State of Oregon in FY 2014-15 (up from \$214 million in FY 2012-13), which was based on different factors such as their number of registered motor vehicles. The Oregon Constitution restricts the use of these federal and state revenues to roadway improvements.

For many of the larger counties with more miles of roads but fewer registered motor vehicles, federal funds were a substantial supplement to their state road funds. These counties will now only receive state revenue related to their registered vehicles, adversely affecting their transportation programs. Collectively, Oregon's counties lost nearly half of their road maintenance funding since 2009. Inadequate spending on road maintenance could have immediate consequences for many counties, though some built substantial reserves in an effort to delay the impact. The extent of the loss, the restricted use of the funds, and the challenge in determining the timing and magnitude of the economic impact make it difficult to assess the effect on financial conditions. The chart shows the reliance of Oregon counties on federal road funds to help pay the cost of road maintenance. Counties receive other federal revenue such as payments in lieu of taxes and state forest payments, but the amounts have less effect on the county's government funds.

Percent of Governmental Fund Revenue from Federal USFS Timber Payments (Road Fund Portion Only)

5-year average, FY 2010-2014

Only includes recipient counties



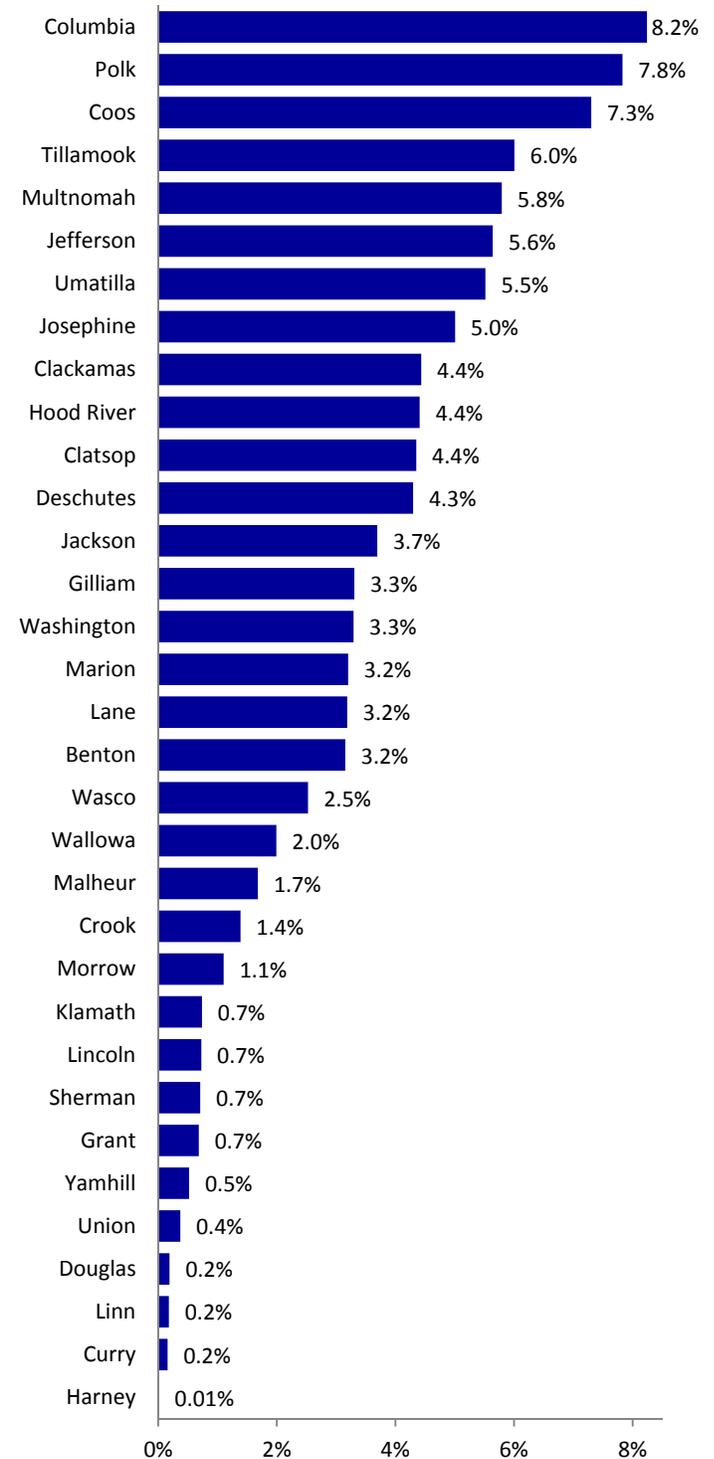
Debt Burden

The issuance of debt is one strategy a county can use to provide cash to fund expenditures. However, increasing debt service (principal and interest payments on outstanding debt) reduces expenditure flexibility by adding to a county's obligations. It can be a major part of a county's fixed costs, and its increase may indicate excessive debt and fiscal strain. A key indicator used to evaluate a county's debt burden is the percentage of debt service to revenues. States recognized as having sound debt management practices typically use a range between 5% and 8% of revenues. The State of Oregon uses a target of 5%.

From 2011-2015, seven counties had an average debt service to governmental fund revenues percentage exceeding 5%, an improvement from the nine counties in our previous report for 2009-2013. However, all 36 counties continue to remain within the range recognized as sound debt management.

Debt Service to Total Governmental Fund Revenues

5-year average, FY 2011-2015



Liquidity

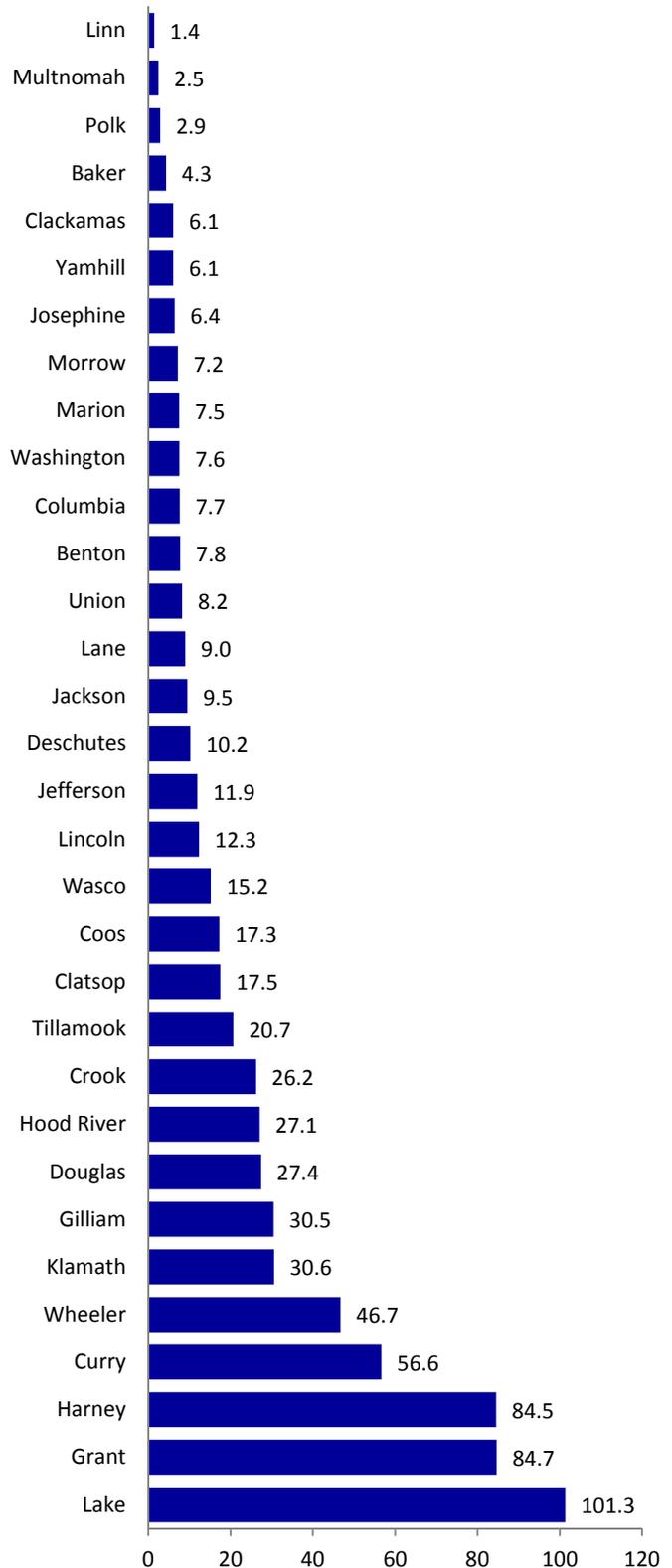
A good measure of a county's short-term financial condition is its liquidity or cash position. Cash position determines a county's ability to pay its short-term obligations by measuring the amount of cash on hand at the end of the year in relation to the amount of current liabilities. A ratio of less than one indicates the county's cash position is not sufficient to meet its short-term obligations.

As with our last report covering 2009-2013, all 36 counties maintained an average cash position sufficient to meet their short-term liabilities during 2011-2015. Nearly all counties showed a favorable cash position of at least 5:1, indicating the counties had a minimum of \$5 available to cover each dollar of short-term obligations. The number of counties with a 5:1 ratio has increased over the last two years.

Malheur, Sherman, Umatilla, and Wallowa counties are excluded from the liquidity analysis and graph on the right because they prepare their financial statements on the modified cash basis of accounting and no current liabilities are reported.

Liquidity

5-year average, FY 2011-2015



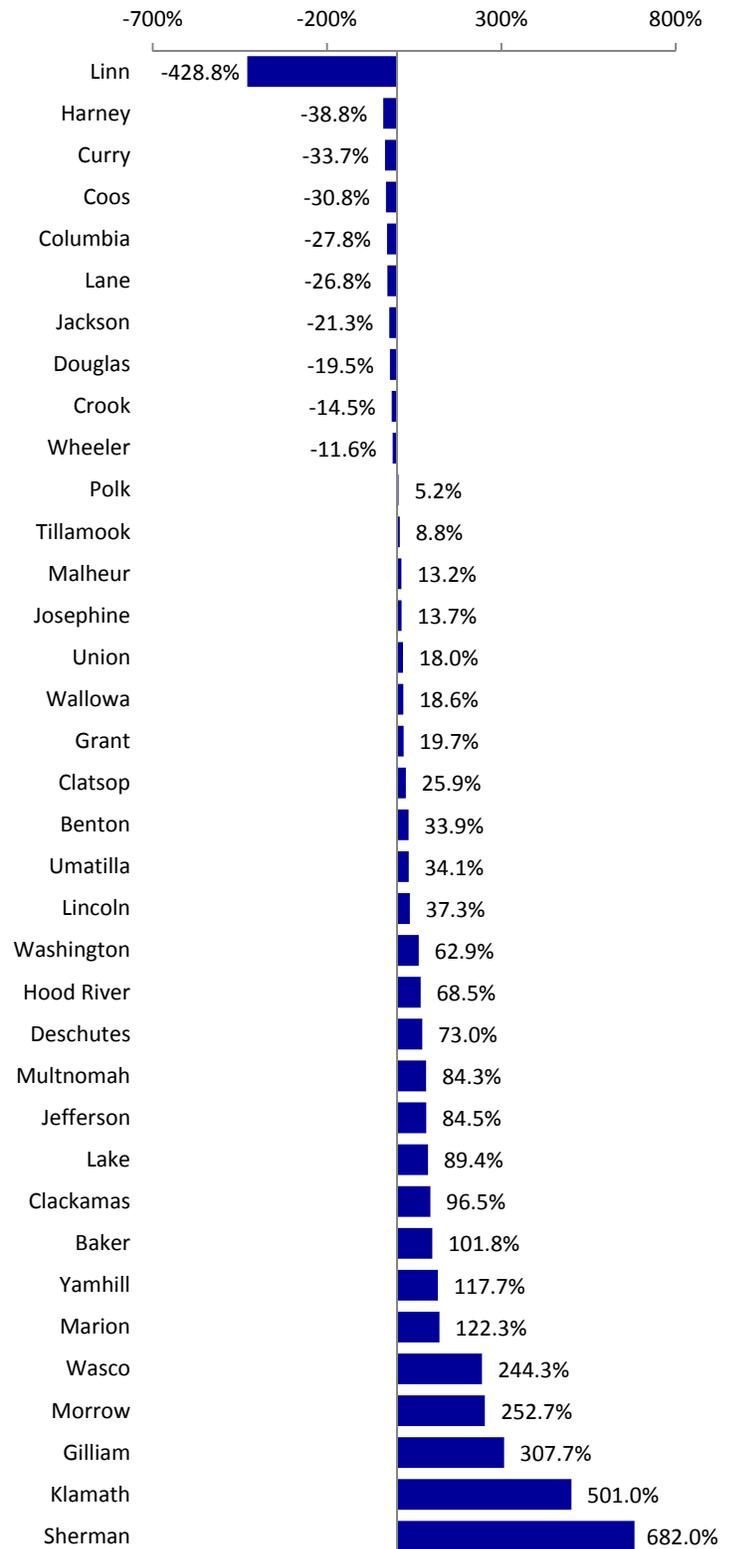
Fund Balance

Most counties rely on property tax revenue as a primary source of income for the General Fund to cover annual operating costs. A positive fund balance provides resources to weather revenue shortfalls or expenditure overruns. Continuous reductions in fund balance could lead to future problems, even if the current fund balance is positive.

In 2011, professional reporting standards changed fund balance classifications from reserved and unreserved to nonspendable, restricted, committed, assigned, and unassigned. The last three classifications are similar to the previous unreserved fund balance and are considered unrestricted because they are within the government's authority to determine how those funds are spent. From 2010 to 2015 ten counties experienced decreases in their respective General Fund unrestricted fund balance.

Linn County experienced the sharpest decrease of about \$5 million or 429% and reported a negative General Fund balance in each year analyzed. County officials reported the negative balance is due primarily to extensive use of interfund loans from the county's Road Fund. Five other counties experienced decreases ranging from 27-39% during this period.

Percent Change in General Fund Unrestricted Fund Balance FY 2010-2015



Retirement Benefit Obligation

An unfunded liability is one incurred during the current or a prior year that does not have to be paid until a future year, and for which reserves have not been set aside. It is similar to long-term debt in that it represents a legal commitment to pay at some time in the future. If such obligations are permitted to grow over a long period of time, they can have a substantial effect on a county's financial condition. This indicator measures the burden of each county's unfunded actuarial liability associated with its pension and other post-employment benefit plans (OPEB) on its citizens.

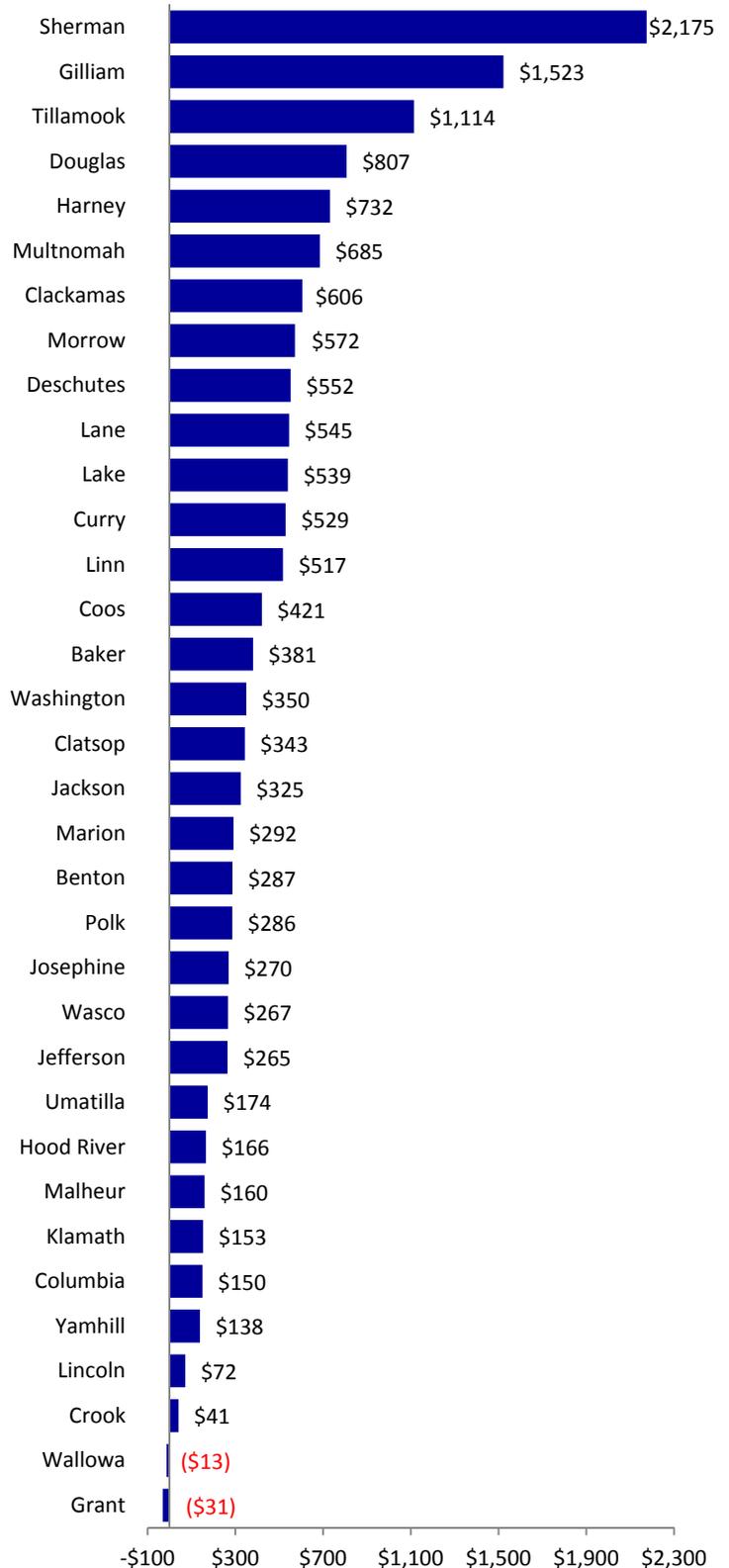
The average obligation in 2015 was \$453 per capita, a significant increase from the 2013 average of \$255 reflected in our last report. Pension plans in two counties were fully funded with no outstanding liability. Counties with retirement benefit obligations per capita of \$0 or less are considered fully funded. This generally occurs when pension bonds were issued to reduce the county's retirement obligation.

In 2015, Sherman and Gilliam counties had the highest retirement benefit obligations per capita. Although Sherman and Gilliam counties are making 100% of their annual required contributions, their unfunded liabilities are \$3.9 million and \$3 million, respectively (up from \$2.4 million and \$1.5 million, respectively, in 2013). Investment losses and a stagnant population result in a higher retirement obligation per capita.

Retirement Benefit Obligation per Capita

FY 2015

\$0 or less indicates fully funded



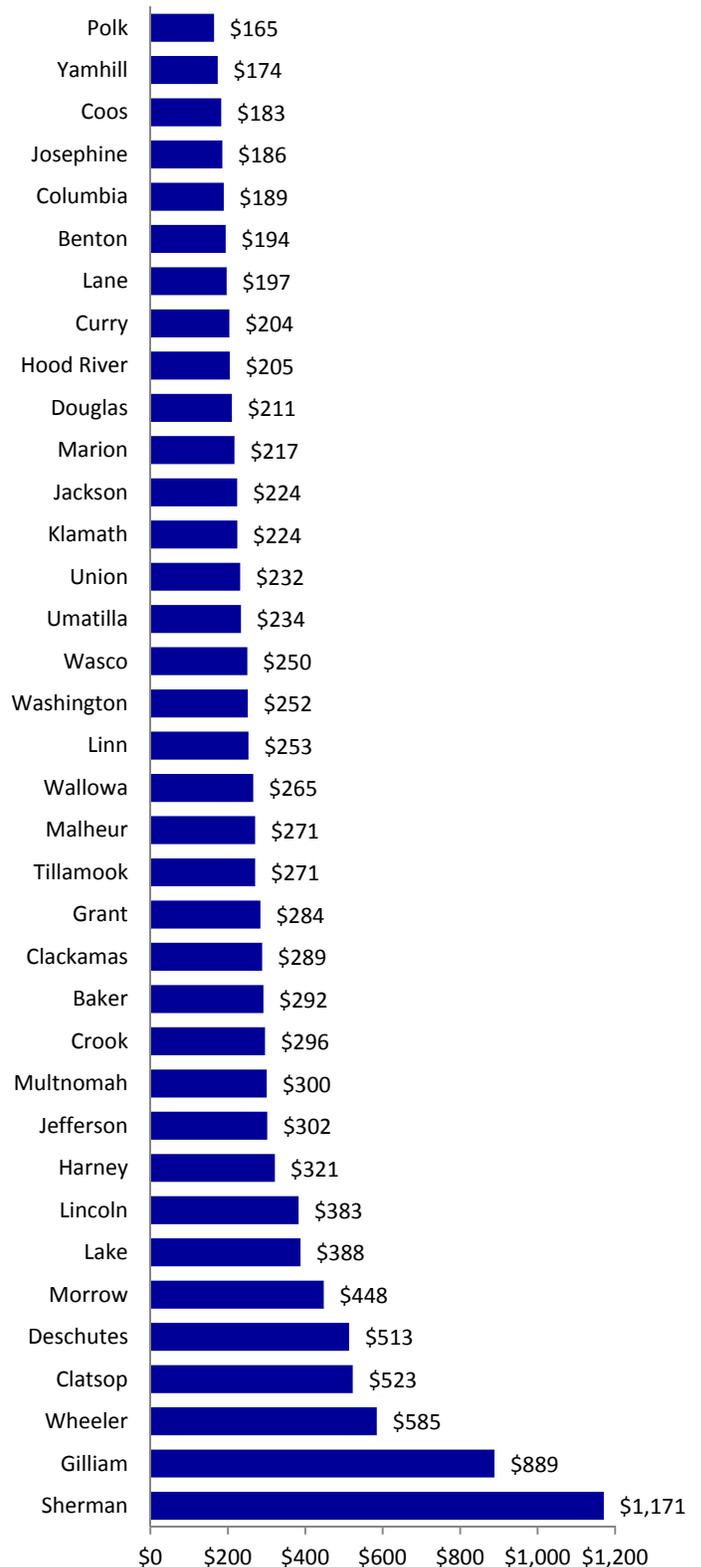
Public Safety

Public safety is a primary responsibility of a county to ensure its citizens are protected. Consistent with our previous report Sherman and Gilliam continued to significantly out-spend all other counties in this area. On the other hand, Yamhill, Coos, and Polk counties continue to spend the least amount on public safety. For example, Polk County road patrols were limited to 10 hours per day in 2015 compared to 24 hour/7 days a week patrols. Overall, the average public safety expenditures for each county increased from amounts presented in our last report.

Public safety programs are supported with discretionary funds. When resources are constrained, public safety is one of the first areas subjected to expenditure reductions. Some counties turned to the Oregon State Police to help supplement needed patrols. Other counties are getting creative by considering the possibility of volunteer crime scene investigators and park patrols, or strategically placing unmanned patrol cars throughout the area to create the impression of a higher police presence.

Some counties have attempted to reverse recent cuts in public safety by proposing property tax levies, which must receive a majority vote from the local citizens to pass. Polk County passed a levy in May 2015 to increase staffing for its jail and expanded patrol hours. Elsewhere in the state, voters in Curry and Josephine counties rejected multiple proposed ballot measures to fully fund public safety.

Public Safety Spending Per Capita
5-year average, FY 2011-2015



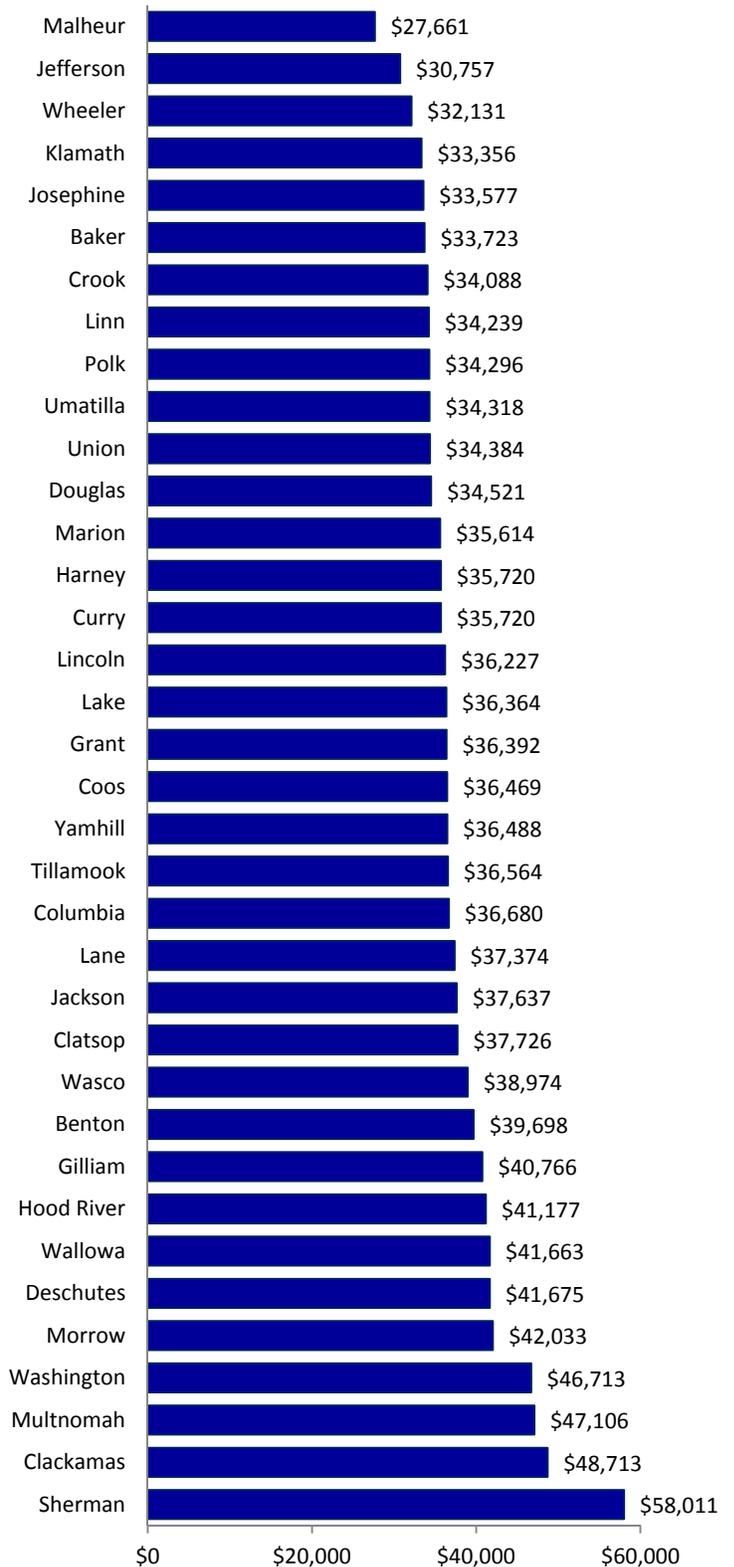
Personal Income

Personal income per capita is one measure of a county's ability to raise taxes: the higher the per capita income, the more property tax, income tax, and business tax the county can generate. If income is evenly distributed, a higher per capita income will usually mean a lower dependency on government services such as transportation, health, recreation, and public assistance. A decline in per capita income causes a drop in consumer purchasing power and can provide advance notice that businesses, especially in the retail sector, will suffer a decline that can ripple through the rest of the county's economy.

Income data for 2014 is the latest available, and based on those figures the per capita personal income among Oregon's 36 counties ranged from about \$28,000 to \$58,000, up from the low of \$26,000 reported for 2012. Every county experienced increases from 2012. Morrow and Sherman counties had the largest increases of over 30% since 2009, while Harney and Lake counties experienced the largest increases of 13% since 2012. The per capita increases in Morrow, Sherman, and Lake counties occurred in conjunction with population increases while Harney County's population remained fairly stable between 2012 and 2013.

Personal Income per Capita

FY 2014*



* Income data for 2015 was not available.

Population Trends

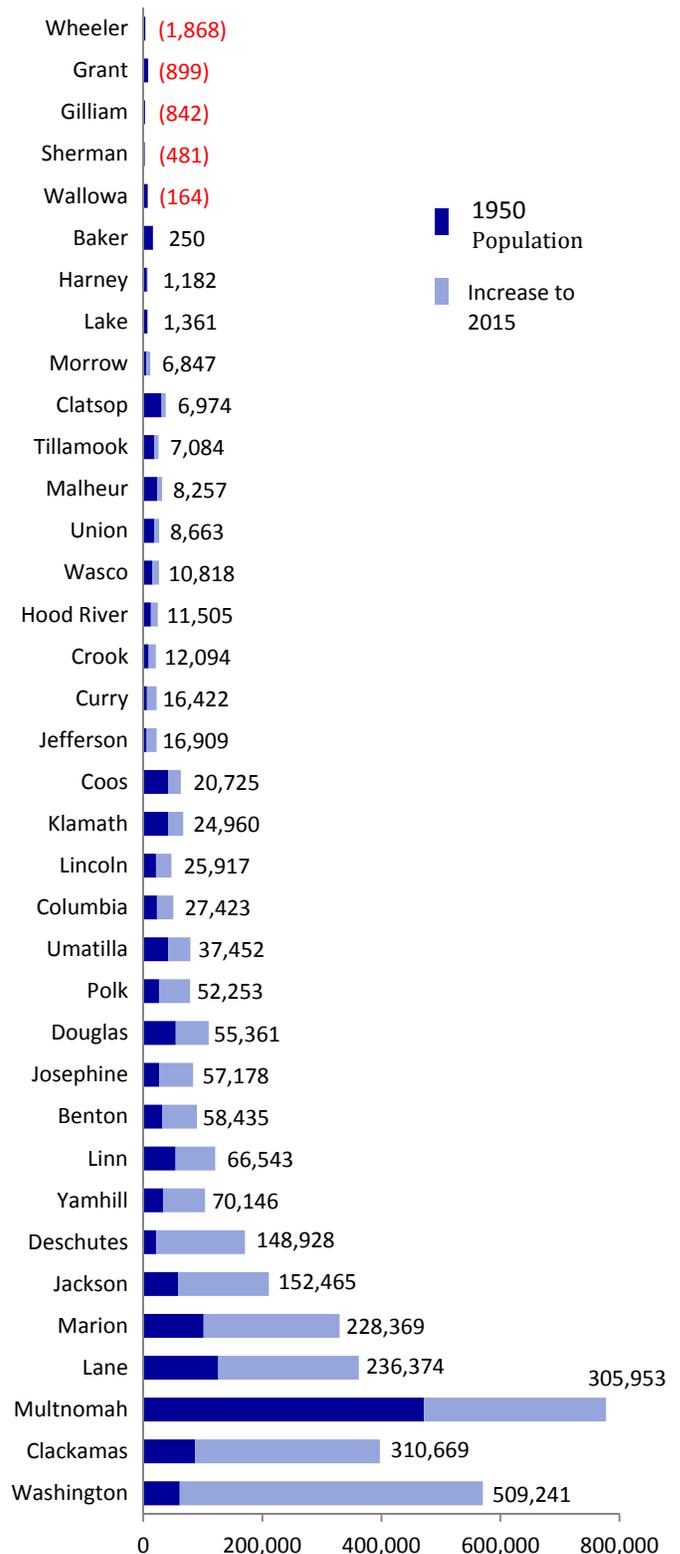
Population change can directly affect governmental revenues. For example, some taxes are collected on a per capita basis, and many intergovernmental revenues and grants are distributed according to population. A decline in population would, at first glance, appear to relieve the pressure for expenditures, because the population requiring services is smaller. In practice though, a county faced with population decline is rarely able to make reductions in expenditures proportional to the population loss.

From 1950 through 2015, most counties experienced an overall growth in population. Populations more than doubled during this period in 18 counties, and an additional five counties experienced increases of over 50%. Deschutes and Washington Counties experienced the largest growth in population with increases of 148,928 or 683% and 509,241 or 831%, respectively. This growth is consistent with trends reflected in our previous report.

A few counties, however, continue to experience declines. Wheeler, Gilliam, Sherman, and Grant counties all experienced declines greater than 10% since 1950. Wheeler and Gilliam counties had the greatest decreases of 1,868 (57%) and 842 (30%), respectively.

Consistent with our previous report, between 2010 and 2015, the largest population increases occurred in Washington (40,800) and Multnomah (42,156) counties. The next two largest increases were in Clackamas (21,393) and Marion (14,435) counties. The remaining counties either increased by fewer than 14,000 or decreased in population. Coos, Grant, and Harney counties experienced a population decrease during this same period ranging from a loss of 15 to 127 persons.

Population Change, 1950 to 2015



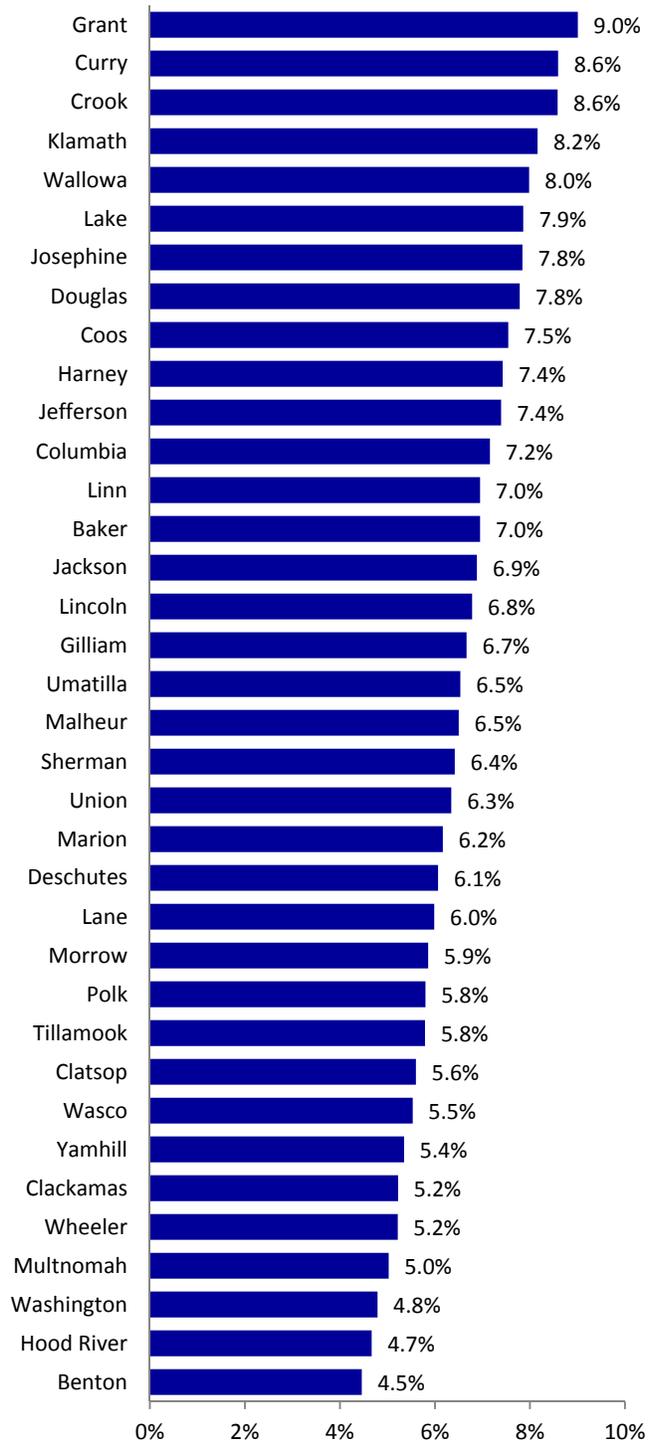
Unemployment

A county's unemployment rate is a key indicator of economic health, as well as a county's long-term financial prospects. During 2015, the average county unemployment rate ranged from a low of 4.5% to a high of 9.0%, down from 5.9% to 12.5% during 2013.

The State's seasonally adjusted unemployment rate during this period was 5.73% (7.9% in 2013). Unemployment in 25 counties exceeded the State rate, up from 22 counties in 2013.

Unemployment Rate

FY 2015 Seasonally Adjusted



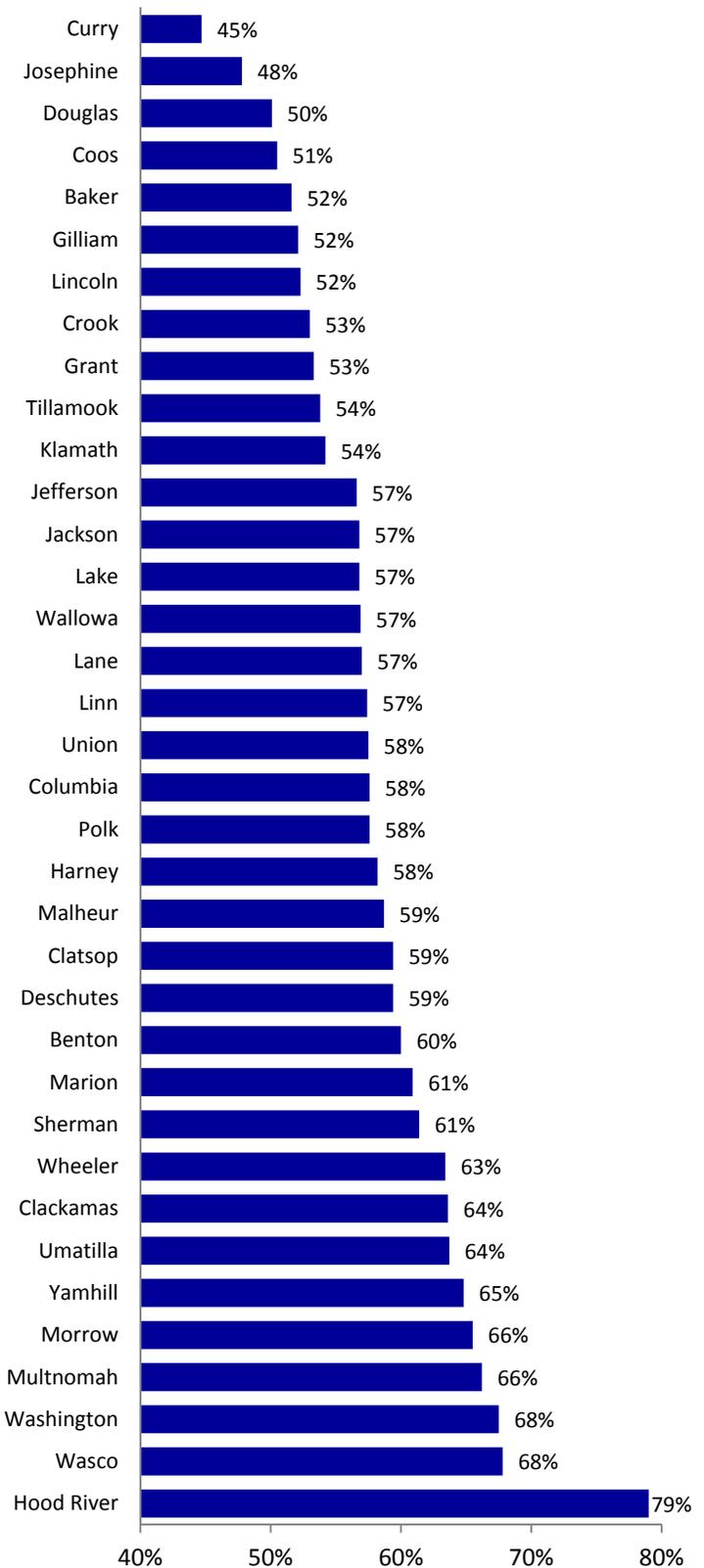
Another way to gauge the local economy is by measuring whether people are participating in the workforce. The labor force is the number of persons employed or unemployed and looking for work. The participation rate is calculated by dividing that number by the total population age 16 and older. The Oregon Department of Employment produces an annual analysis of the labor force participation rate.

The rate varies from a low of 45% in Curry County with a higher than average unemployment rate and relatively older population, to a high of 79% in Hood River County with a high concentration of younger prime-age workers. This range is consistent with the 2013 estimate of 45% to 82%. The statewide average rate of 61% is unchanged from 2013.

A much higher percentage of the population is participating in the workforce in the counties along the Columbia Gorge, such as Wasco, Sherman, and Hood River.

High unemployment and relatively older populations affect the counties with relatively low participation rates.

Labor Force Participation Rate
2014 Estimate



Counties to Monitor

As presented in the previous section, for the purposes of our analysis, we selected 10 indicators that provide a general assessment of the financial condition of Oregon's 36 counties. We included timber revenues as an indicator since some counties are heavily reliant on timber monies.

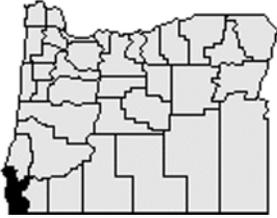
The results of our analysis indicate the following four counties may be at a higher risk of distress than other counties. We reported these four counties as counties to monitor in our 2012 and 2014 reports. Five counties reported in our 2014 report (Columbia, Coos, Jackson, Lane, and Linn) are no longer counties to monitor given improvements in various indicators such as unemployment, public safety per capita, and fund balance. The counties to monitor are presented in alphabetical order. Because the circumstances of each county are different, much more information is needed to rank them in order of severity, and to draw a clear distinction between those with a weaker financial condition.

- Curry
- Douglas
- Josephine
- Polk

We performed additional analysis of these counties and contacted county officials to determine what action they are taking to address the financial condition of their county. Their responses are presented within their individual sections of this report.

We did not propose any specific solutions because the decisions about county taxes and the level of services are based on local priorities, within practical and legal requirements and limitations.

Curry County



Overview

Curry County is approximately 1,648 square miles, of which about 66% is publicly owned. The county's major industries are agriculture, forest products, fishing and tourism. Curry has the second lowest property tax rate in Oregon and is reliant on federal timber revenues. The county's labor force participation rate is the lowest of the counties, its unemployment rate is the second highest, and its spending on public safety is among the bottom 10 counties. A number of county services ranging from animal control, health and human services, home hospice care, and environmental sanitation transitioned to non-profit organizations between 2011 and 2014. Despite these trends, the county has shown good debt management practices and has strong liquidity.

County Response

As mentioned above, Curry County has little to no debt and strong liquidity. Curry County's land allocation of 66% federal, 22% private forest and 7% farming and agricultural and 1% state, only leaves 4% of taxable land base at the second lowest rate in the State. With the end of federal timber payments to fund services and minimal tax revenues, Curry County will have a multimillion-dollar budget shortfall beginning in fiscal year 2017-18. This shortfall will cause major county services, such as public safety, assessment and taxation, and elections, to receive drastic reductions in staff and department closures, resulting in a subsequent loss of crucial services to citizens.

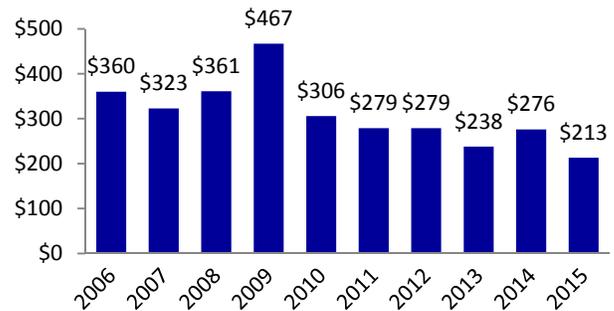
County commissioners are working closely with the Association of Oregon Counties, the National Association of Counties, the Association of O&C Counties, and state and federal legislators to increase harvest yields and restore federal forest timber payments to counties. Proposed local funding solutions to bridge the impending budget shortfall have not been passed by county residents.

Local Support

Local revenues per capita slowly declined over the past decade. From 2006 to 2015 local revenues decreased from \$7.8 million to \$4.8 million while the county's population increased by about 1,100. The county's permanent tax rate of \$0.60 per \$1,000 of assessed property value is the second lowest in Oregon.

Local Revenue Per Capita

Adjusted for inflation



Timber Revenue Dependence

In 2015 Curry County received about \$1.4 million in federal timber revenues, which represented about 9% of the county's total governmental fund revenues. The county's reliance on timber revenues has declined since 2006, when timber revenues were \$5 million or about 17% of total governmental fund revenues. Curry is one of 18 counties receiving federal timber revenues. The county's 2015 timber revenues provided about \$62 in revenues per capita.

Timber Dependence Per Capita

Adjusted for inflation

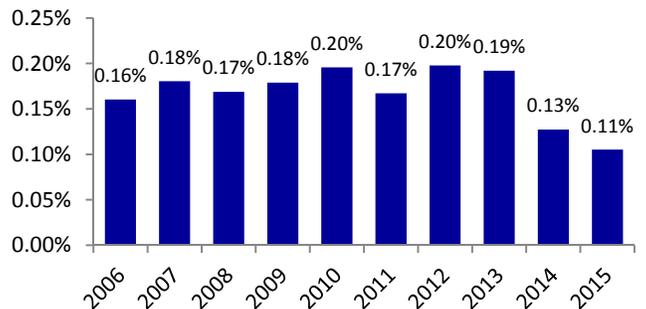


Debt Burden

The county's debt service payments remained stable from 2006 to 2015. At 0.11% of 2015 total governmental fund revenues, the debt service level is one of the lowest of the Oregon counties and indicates the county has implemented sound debt management practices.

Debt Service as Percentage of Governmental Fund Revenues

Adjusted for inflation

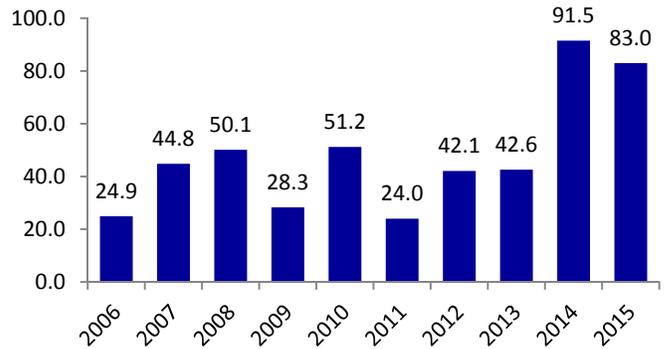


Liquidity

Curry's liquidity ratio varied over the past 10 years but has consistently maintained a ratio greater than 23. At this level, it has more than enough cash to meet its short-term liabilities. County officials reported the liquidity level is a result of efforts to put General Fund monies into reserves in anticipation of the loss of federal timber revenues. The liquidity ratio improved in 2014 due to a decrease in short-term liabilities.

Liquidity Ratio

Adjusted for inflation

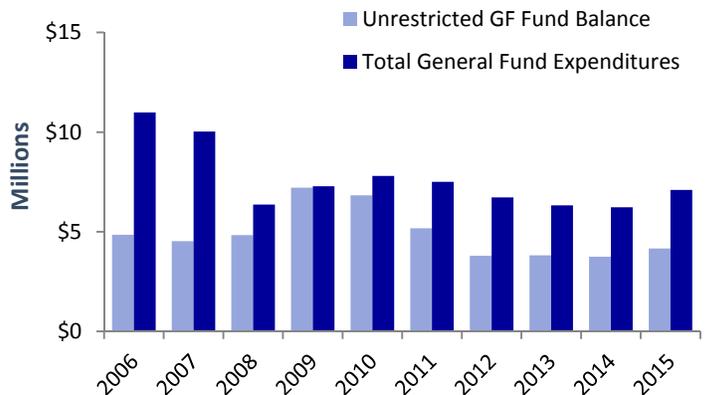


Fund Balance

The county's General Fund unrestricted fund balance as a percentage of total General Fund expenditures fluctuated between a low of 44% in 2006, to a high of 99% in 2009, to its current 59% in 2015. These percentages are considered indicative of adequate reserves.

Fund Balance

Adjusted for inflation



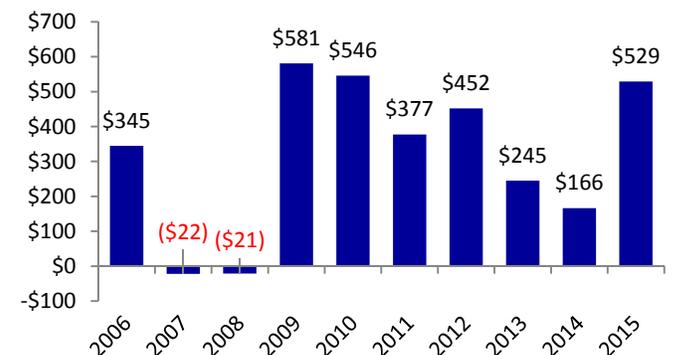
Retirement Benefit Obligation

The county provides pension and other retirement benefits to its employees. Its unfunded actuarial liability fluctuated each year since 2006. The current liability of \$11.9 million in 2015 is close to the \$12.4 million in 2009. The increase in 2015 is attributed to multiple factors including poor investment returns and market fluctuations.

Retirement Benefit Obligation Per Capita

Adjusted for inflation

\$0 or less indicates fully funded



Public Safety

Public safety expenditures per capita increased by 22% to \$229 in 2015 after the low of \$187 in 2014.

Public Safety Expenditures per Capita

Adjusted for inflation

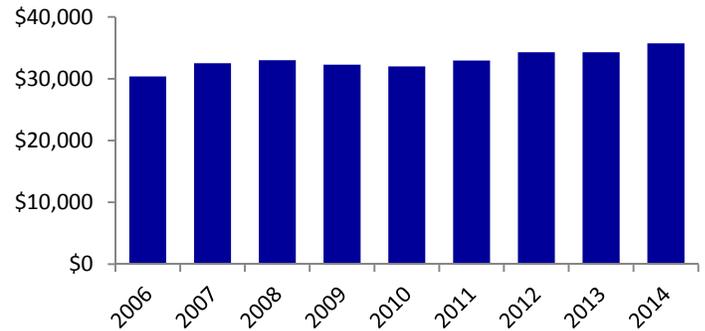


Personal Income

Personal income per capita gradually increased from 2006 to 2014. The county's 2014 per capita personal income level of \$35,720 is 22nd among Oregon counties.

Personal Income Per Capita

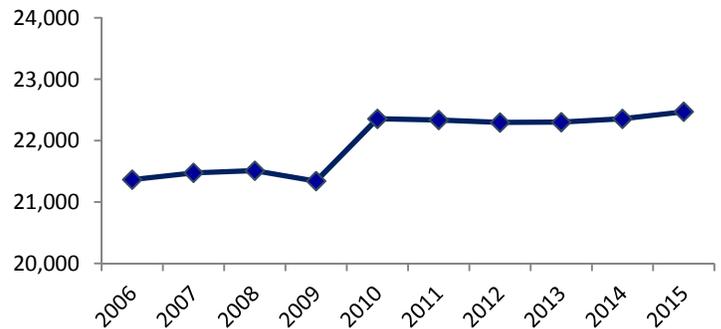
Adjusted for inflation based on 2014 dollars



Population Trends

Curry had an estimated population of 22,470 in 2015, which ranks 25th among Oregon counties. The county's population has increased slowly since 2006.

10-Year Population Trend

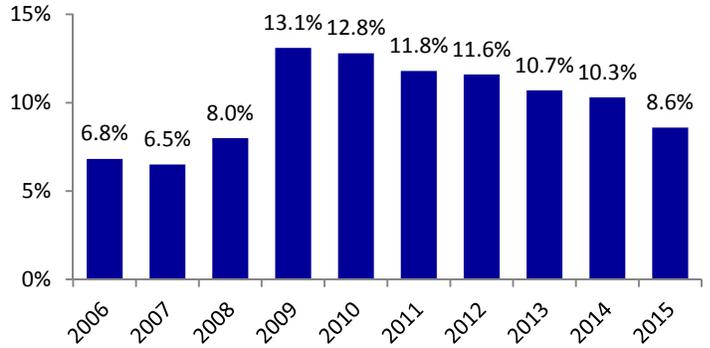


Unemployment

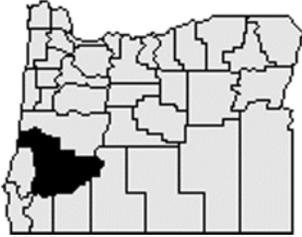
Since spiking in 2009 the county's unemployment rate has decreased due to the improving economy. The county's unemployment rate in 2015 was the second highest of Oregon counties and was about 2.9% higher than the State's unemployment rate for the year.

County Unemployment Rates

Seasonally adjusted average



Douglas County



Overview

Approximately 50% of Douglas County's 5,071 square miles is public land, with forest products and agriculture being key to its economy. The county levies the fourth lowest property tax rate in Oregon, which limits its ability to generate local revenues. Declines in revenue have outpaced reductions in spending resulting in operating deficits each year since 2012. Douglas is the most dependent among counties on federal timber payments, and has the third lowest labor participation rate. The county's large fund balance has helped the county to weather its declining revenues.

The financial management indicators show the county has sound debt management practices and one of the largest fund balances among counties. In addition, Douglas County has strong liquidity and a steady population growth over the past several decades.

County Response

Douglas County continues to deal with decreases in timber revenue and safety net funding from the federal government. Over the past 10 years, Douglas County has cut service costs, reduced staff by 30%, and until the safety net allocation was cut in half in 2011, increased reserve funds to help weather the fiscal transition.

The county began drawing on reserve funds in 2011 to maintain critical public safety services and instituted new fees and charges to replace safety nets in departmental budgets. Raising property taxes has been problematic in Douglas County as much of the population lives in unincorporated cities that have met the \$10 cap on taxes. Residents outside incorporated areas are unwilling to bear an inequitable share of property tax increases.

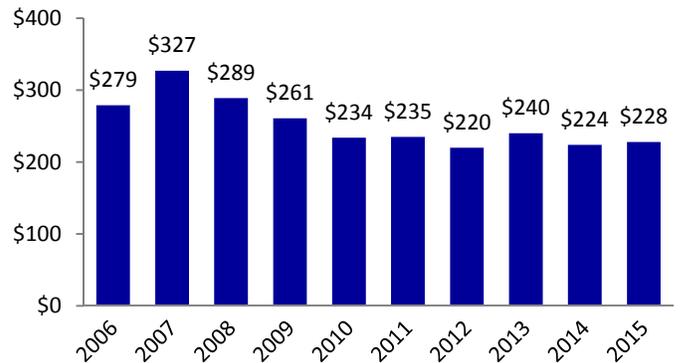
In 2015, county residents began paying parking fees at county parks and tipping fees for household trash sent to the landfill. The county is also considering forming a taxing district for the library system. County leaders indicated reinstating a harvest program while instituting the original revenue sharing formulas with the BLM and USFS on the 52% of county land owned by the federal government is the most equitable solution to the county's funding problems.

Local Support

The county's local revenues of \$25 million in 2015 is down from \$29 million in 2006, resulting in a decrease of local revenues per capita to \$228 in 2015 compared to \$279 in 2006. Local revenues per capita in 2015 were the fourth lowest in the state. Its permanent tax rate of \$1.11 per \$1,000 of assessed property value is the fourth lowest rate in Oregon.

Local Revenue Per Capita

Adjusted for inflation

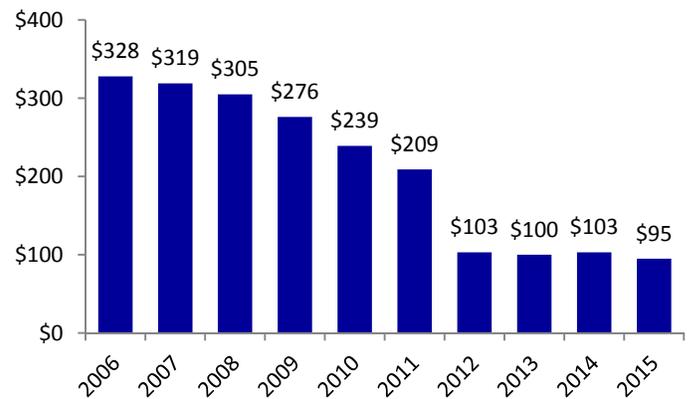


Timber Revenue Dependence

Douglas County is the most dependent on federal timber revenues. Those resources contributed 26% of the county's total governmental fund revenues in 2006, declining to 16% in 2015.

Timber Dependence Per Capita

Adjusted for inflation

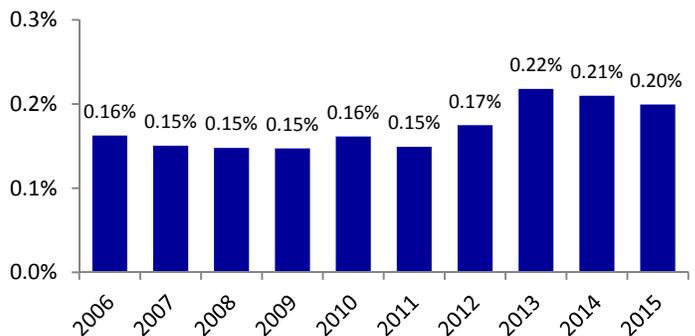


Debt Burden

The county's debt service payments remained stable from 2006 to 2015. At 0.20% of 2015 total governmental fund revenues, the debt service level is one of the lowest of the Oregon counties and indicates the county has implemented sound debt management practices.

Debt Service as Percentage of Governmental Fund Revenues

Adjusted for inflation

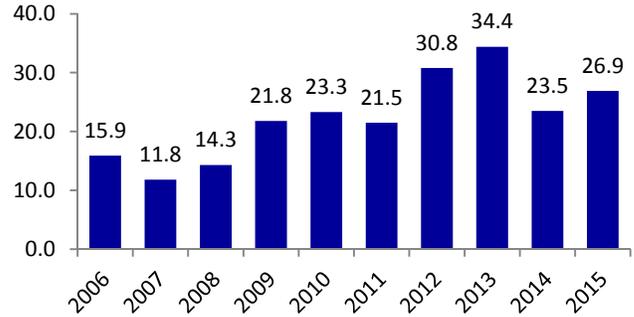


Liquidity

Douglas County consistently maintained a liquidity ratio greater than 11 between 2006 and 2015. At its current level, the county has sufficient cash to meet its short-term liabilities.

Liquidity Ratio

Adjusted for inflation

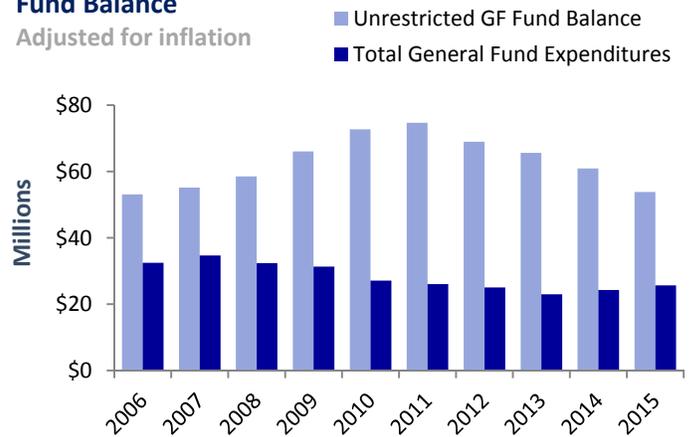


Fund Balance

The county's General Fund unrestricted fund balance of \$53.8 million in 2015 is consistent with \$53.1 million in 2006. During this same period, total fund expenditures decreased from \$32.4 million to \$25.7 million. As a result, the General Fund unrestricted fund balance meets its current needs. The county's 2015 unrestricted fund balance is the largest among Oregon counties.

Fund Balance

Adjusted for inflation

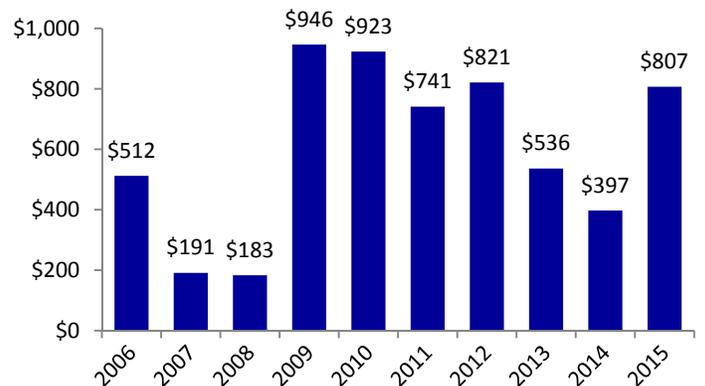


Retirement Benefit Obligation

The county provides pension and other retirement benefits to its employees. The unfunded liability associated with these benefits has fluctuated over the decade. Douglas's retirement obligations declined significantly from 2009 to 2013 due to pension reform and improved returns on investments, but returned to a higher level in 2015 due to multiple factors.

Retirement Benefit Obligation Per Capita

Adjusted for inflation

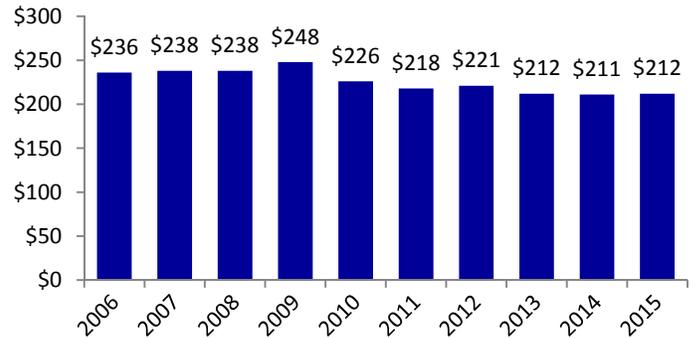


Public Safety

Spending per capita on public safety programs decreased about 10% since 2006, but has remained fairly consistent since 2013. At its current funding level, the county is in the bottom 10 counties for public safety spending per capita.

Public Safety Expenditures per Capita

Adjusted for inflation

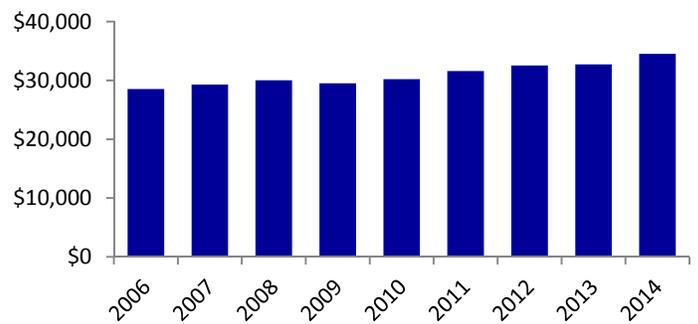


Personal Income

Per capita personal income levels in Douglas County rose from about \$28,500 in 2006 to about \$34,500 in 2014, an increase of about 21%, but the county still remained in the bottom third of all counties.

Personal Income Per Capita

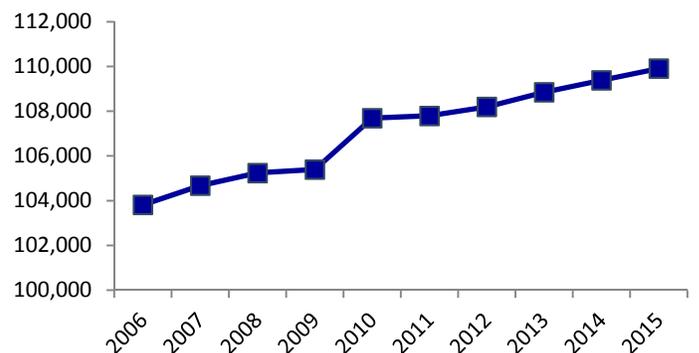
Adjusted for inflation based on 2014 dollars



Population Trends

Douglas County ranks ninth among Oregon counties with an estimated population of 109,910 in 2015. The population continued to grow over the last decade.

10-Year Population Trend

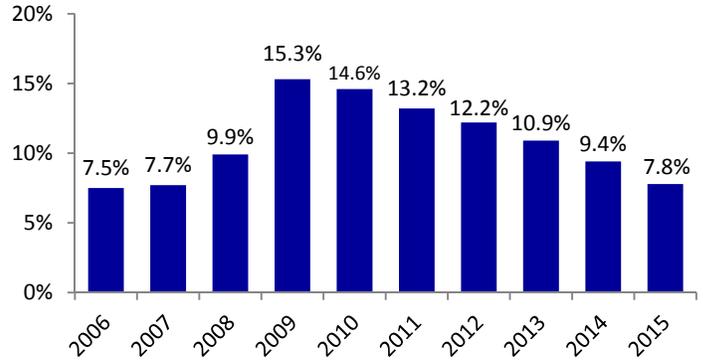


Unemployment

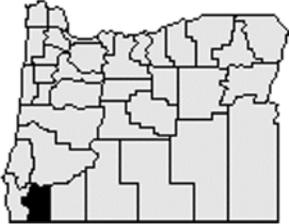
Although Douglas County's unemployment rate declined each year since 2009 due to an improving economy, its 2015 rate was the eighth highest of Oregon counties. It was 2% higher than the State's unemployment rate.

County Unemployment Rates

Seasonally adjusted average



Josephine County



Overview

Josephine County was the last county created before statehood and relies on lumber, tourism, and agriculture. Roughly 62% of its 1,641 square miles is publicly owned.

Josephine is one of the most dependent on federal timber payments and levies the lowest property tax rate. While a number of financial management indicators such as the county's debt burden and liquidity are positive, the majority indicate a high degree of risk. For example, the county's low property tax rate limits its ability to generate local revenues. Labor force participation is low and per capita personal income is the fifth lowest among counties. Cuts in public safety spending have led to the closure of the county juvenile jail and significant layoffs in the sheriff's department.

County Response

The County anticipates a stable budget for fiscal year 2016-17, with adequate revenues to maintain current service levels. However, for fiscal year 2017-18 the County is anticipating the loss of federal timber payments, in which case the County will prepare a balanced budget with strategic reductions in services and staffing, notably in the Public Safety Fund but also in the General Fund and the Internal Services Fund. Most other county funds operate on their own dedicated revenue sources and will not be significantly affected by the loss of federal timber payments.

Local Support

Local revenues decreased by 40% since 2006, to \$15.9 million in 2015. Local revenue per capita in 2015 was the lowest of the counties. The decline is likely due to a combination of factors, including population change and economic conditions. The county's permanent tax rate of \$0.59 per \$1,000 of assessed property value is the lowest in Oregon.

Local Revenue Per Capita

Adjusted for inflation

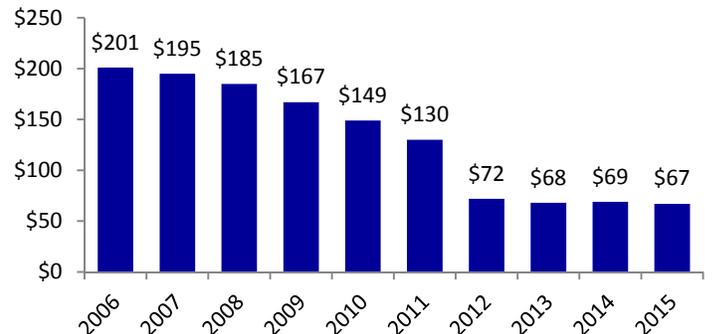


Timber Revenue Dependence

Federal timber payments decreased about 66% over the last decade falling from \$16.3 million in 2006 to \$5.6 million in 2015. About 13% of total revenues came from timber payments in 2015.

Timber Dependence Per Capita

Adjusted for inflation

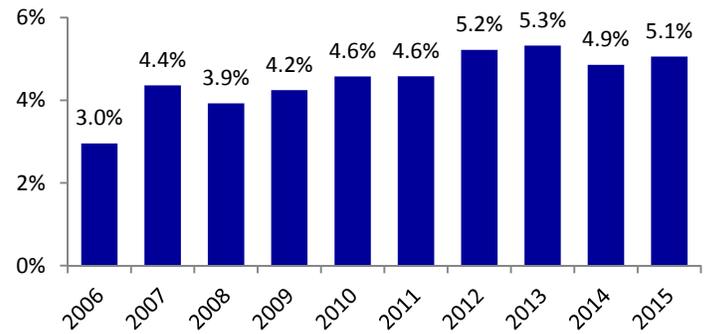


Debt Burden

The county's debt service payments, as a percentage of total governmental fund revenues, gradually increased over the past 10 years. However, the percentages still fall within the range of sound debt management.

Debt Service as Percentage of Governmental Fund Revenues

Adjusted for inflation

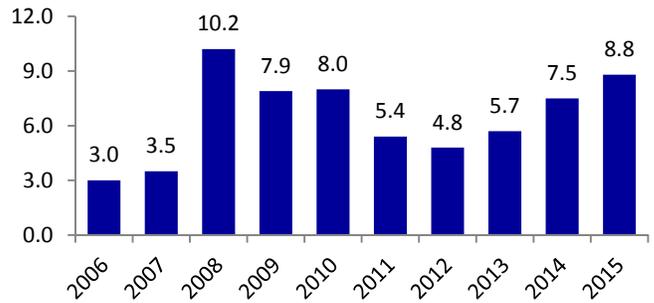


Liquidity

The county has strengthened its liquidity ratio the last eight years. At its current level, the county has sufficient cash to meet its existing short-term liabilities.

Liquidity Ratio

Adjusted for inflation

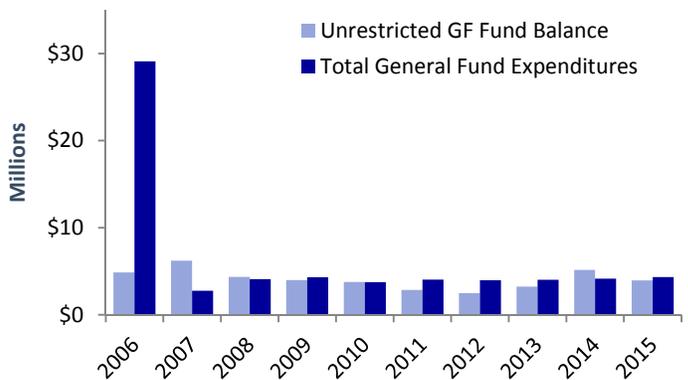


Fund Balance

The county's unrestricted General Fund balance was about \$5 million in 2006 while total General Fund expenditures were \$29 million. In 2007 the county began recording public safety expenditures in the new Public Safety Fund rather than the General Fund. Since then, the unrestricted General Fund balance has been generally comparable to total General Fund expenditures.

Fund Balance

Adjusted for inflation



Retirement Benefit Obligation

The county provides pension and other retirement benefits to its employees. The unfunded liability and resulting per capita obligation associated with these benefits more than doubled from 2014 to 2015. This is due to multiple factors including poor investment returns in current market conditions. At \$270 per capita, the county's retirement obligation is among the lowest of all Oregon counties.

Retirement Benefit Obligation Per Capita

Adjusted for inflation

\$0 or less indicates fully funded

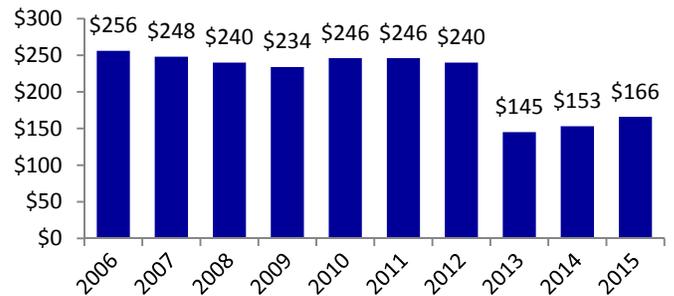


Public Safety

Josephine County's per capita spending on public safety programs was relatively stable each year until 2013 when it decreased about 40% from \$20 million to \$12 million, primarily due to a decrease in federal timber revenue. The county has the second lowest public safety expenditure per capita in 2015.

Public Safety Expenditures per Capita

Adjusted for inflation

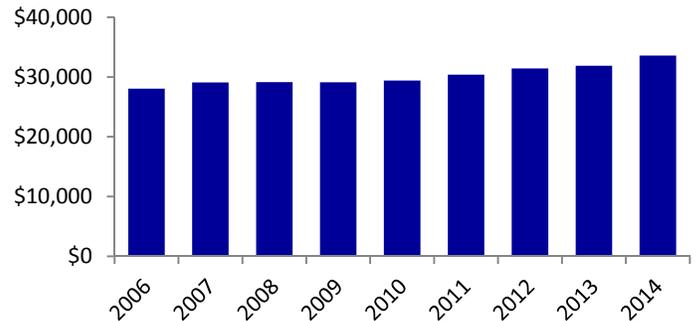


Personal Income

Per capita personal income levels increased about 20% since 2006. Even with these increases the county was the fifth lowest among Oregon counties in 2014.

Personal Income Per Capita

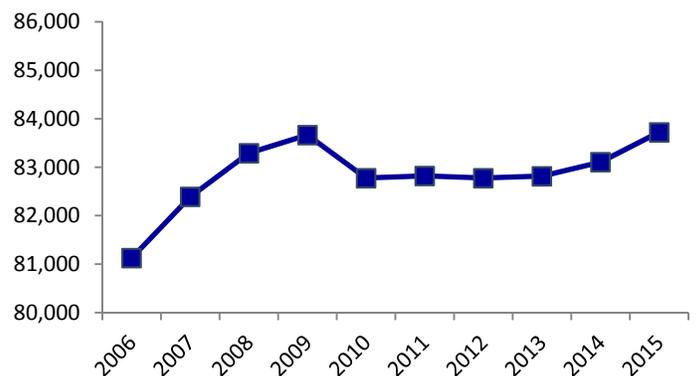
Adjusted for inflation based on 2014 dollars



Population Trends

In 2015, Josephine County was the 12th largest among Oregon counties with an estimated population of 83,720. The population has more than tripled since 1950. The county's population has been steadily increasing since 2010.

10-Year Population Trend

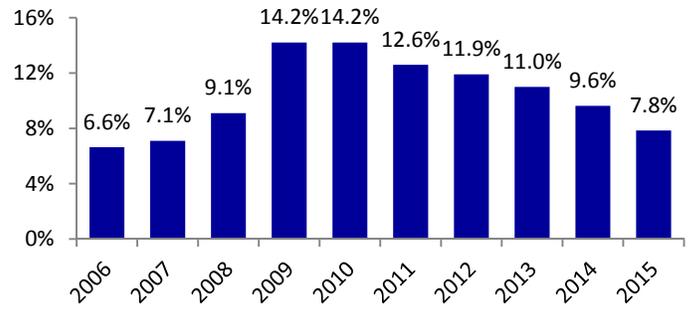


Josephine County

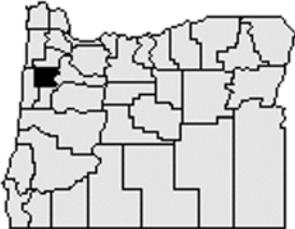
Unemployment

The county's unemployment rate decreased since 2009 with the improved economy. In 2015 the county's unemployment was the seventh highest in Oregon and was 2.1% higher than the State's rate.

County Unemployment Rates
Seasonally adjusted average



Polk County



Overview

Polk County covers approximately 745 square miles (11.3% is publicly owned). Its major industries are agriculture, forest products, manufacturing, and education.

The county is not overly reliant on federal timber revenues and enjoys the 11th lowest unemployment rate in Oregon. County spending on public safety is the lowest in the state; however, a law enforcement local option levy passed by voters in May 2015 is expected to generate approximately \$2.3 million annually to help pay for additional law enforcement. Although it has one of the highest debt burdens, it is still within the range recognized as sound debt management. The county experienced significant population growth the last two decades.

County Response

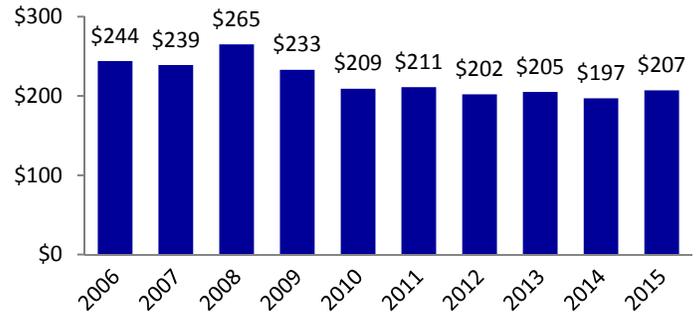
With the passage in May 2015 of a five year public safety operating levy to address public safety needs and increase fund balances in both the general fund and other funds, the “counties to monitor” label is no longer applicable in the county’s opinion. A report of this type is based on historical information and does not address future plans or solutions. Polk County will continue to monitor and manage its revenues and expenditures in a prudent manner to ensure fiscal responsibility and professional service delivery to its citizens.

Local Support

Locally generated revenues remained fairly consistent over the past 10 years at approximately \$16 million annually. For 2015, local revenues per capita were the second lowest in the state. The county's permanent tax rate of \$1.72 per \$1,000 of assessed property value is the 12th lowest in Oregon.

Local Revenue Per Capita

Adjusted for inflation



Timber Revenue Dependence

In 2006, Polk County received about \$2.9 million in federal timber revenues, which represented 6% of the county's total governmental fund revenues. In 2015, these revenues were about \$0.9 million or about 2% of total governmental fund revenues. The county's 2015 federal timber revenues provided about \$12 in revenues per capita.

Timber Dependence Per Capita

Adjusted for inflation

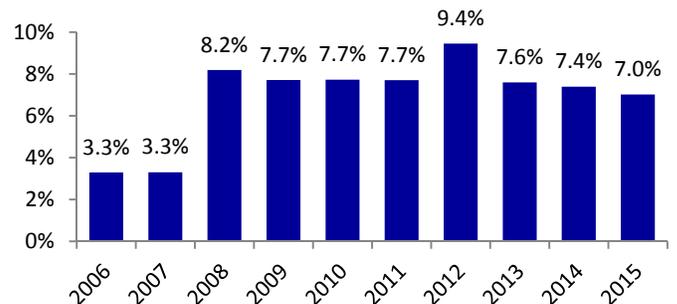


Debt Burden

At 7% of its 2015 total governmental fund revenues, the county's debt service ranks among the highest of Oregon's counties. However, its level of debt service is still within the range recognized as sound debt management.

Debt Service as Percentage of Governmental Fund Revenues

Adjusted for inflation

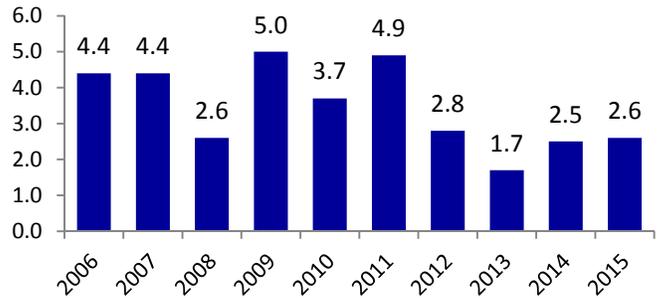


Liquidity

Over the past 10 years, the county maintained an adequate liquidity ratio each year to meet its current needs. Although the county has sufficient cash to meet its existing short-term liabilities, its 2015 liquidity ratio of 2.6 is the third lowest of the counties.

Liquidity Ratio

Adjusted for inflation

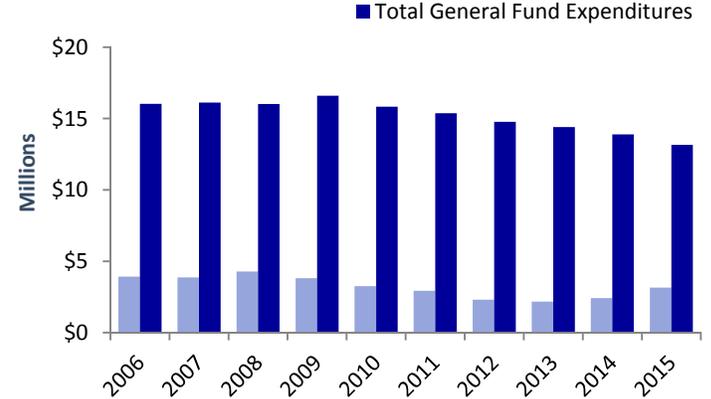


Fund Balance

The county's General Fund unrestricted fund balance decreased from \$3.9 million in 2006 to \$3.1 million in 2015. During this same period expenditures decreased from \$16 million to \$13 million.

Fund Balance

Adjusted for inflation



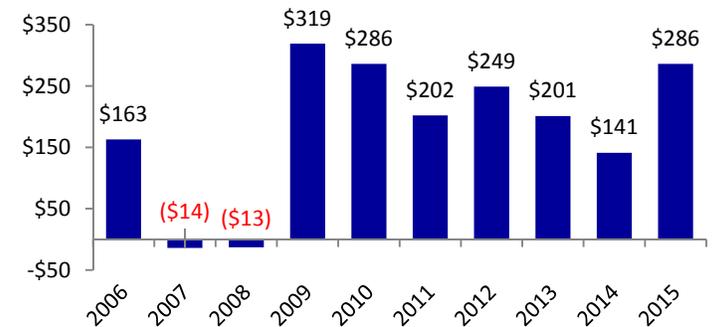
Retirement Benefit Obligation

The county provides pension and other retirement benefits to its employees. In 2015, the retirement obligation per capita increased due in part to poor returns on the State's investments. When compared with other counties, Polk's retirement obligation is in the bottom third.

Retirement Benefit Obligation Per Capita

Adjusted for inflation

\$0 or less indicates fully funded

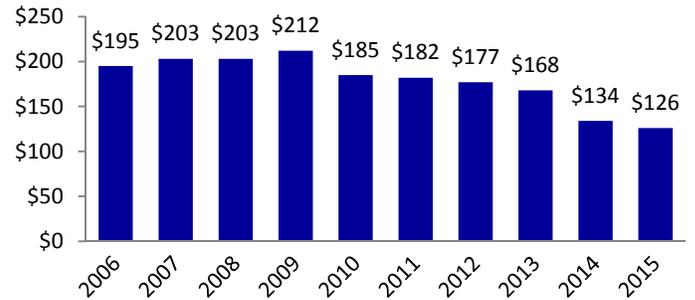


Public Safety

Polk County's public safety expenditures per capita declined since 2009. Public safety program expenditures decreased from \$14.6 million in 2009 to \$9.9 million in 2015. Polk County is the lowest county in public safety expenditure spending per capita. In May 2015 a levy was passed to generate funding for additional law enforcement.

Public Safety Expenditures Per Capita

Adjusted for inflation

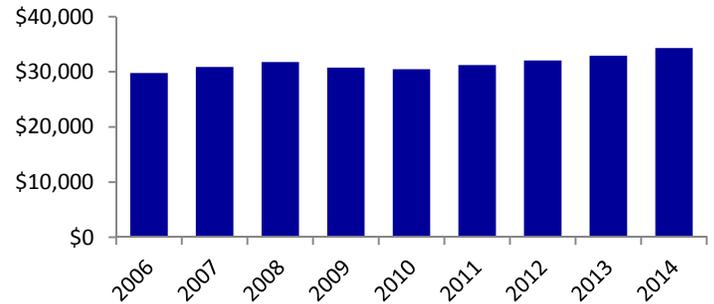


Personal Income

Although personal income per capita in Polk County steadily increased since 2006, it ranks in the bottom 10 among Oregon counties.

Personal Income Per Capita

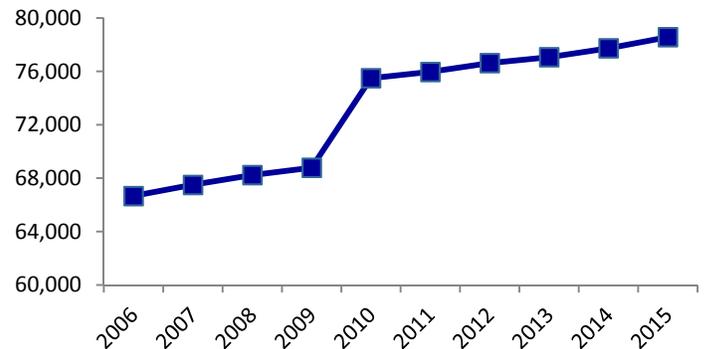
Adjusted for inflation based on 2014 dollars



Population Trends

Polk County ranks 14th among Oregon counties with an estimated population of 78,570 in 2015. The population has continued to grow the past 10 years.

10-Year Population Trend

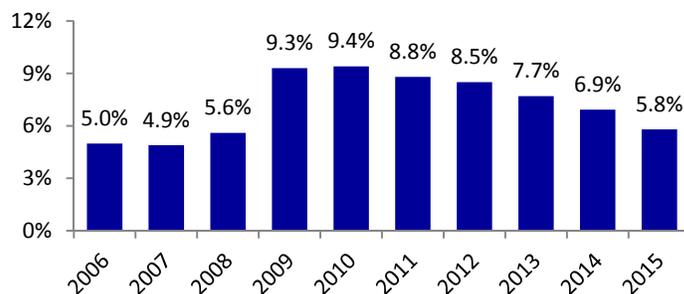


Unemployment

The county's unemployment rate gradually decreased since 2009 due to an improving economy. In 2015, the unemployment rate is close to the State's average rate of 5.7%.

County Unemployment Rates

Seasonally adjusted average



Oregon's Approach to Financial Monitoring and Intervention

During the 2012 legislative session, Oregon enacted laws to address financial distress among its counties; the legislation was designed to assist troubled counties that were impacted by the recent loss of federal timber revenues.

The purpose of the legislation was to provide assistance to counties that had received federal timber revenues through the Secure Rural Schools and Community Self-Determination Act of 2000 (SRS) and are now facing a financial crisis. Under this law, counties whose SRS revenues exceeded 10% of their property tax revenue qualified to declare distress and seek state assistance and intervention. The legislation allowed several timber impacted counties to use road funds for sheriff patrols without repayment until January 2016 and allowed all counties to transfer road funds for public safety costs as long as the road funds were repaid within three years.

During the 2013 session, legislation was passed that allows the Governor to determine if a public safety fiscal emergency exists within one or more counties. The purpose of this law is to reduce the loss of life, injury to persons or property and suffering that could result from a public safety fiscal emergency. Once an emergency is declared, the state will bear 50% of the cost of public safety and the county will bear the remaining 50% through income tax, tax on telecommunications services, any assessment the county is lawfully capable of imposing, or existing sources of county revenues.

If assistance is requested, the law allows for the establishment of a fiscal assistance board with the power to, among other things, reallocate funds, cut services, lay off employees, reduce expenditures, sell or lease real or personal county property, issue bonds, and renegotiate debt repayment. However, implementation of the governor's board actions require a majority vote of its members and a majority vote of the county's governing board.

Unfortunately, counties that do not qualify under the new law have few remedies at the state level. While Oregon does allow Irrigation and Drainage Districts to file bankruptcy, it does not allow counties to file for bankruptcy. Other than these few measures, local governments are responsible for managing their own financial problems.

Best Practices

Dr. Charles Coe, a professor in the School of Public and International Affairs at North Carolina State University, has studied local government financial monitoring. Based on his research, he recommends the following best practices to prevent fiscal crises:

- Utilize a system that provides early warning of fiscal distress. The ideal system analyzes the most current financial reports; states that use budgets or interim financial information are able to identify problems earlier than those that use annual financial reports. However, audited financial reports may contain more accurate information. The system also needs to carefully consider which indicators to use. Some indicator systems may tend to produce false warnings or false assurances. In order to be effective, the system must accurately predict distress.
- Assist troubled local governments when evidence of possible distress is detected. States that are successful in assisting local governments also have adequate staff to provide the technical assistance. This assistance could also be achieved through referral systems or other means to help the local government help itself.
- Strongly intervene if a crisis occurs. For the state to protect its interests, it must be able to mandate action. States with a strong ability in this area can take the extreme action of local government takeover for the duration of the crisis.

Our 2012 report includes an appendix of laws existing in other states related to local government financial oversight and state intervention.

<http://sos.oregon.gov/Documents/audits/full/2012/2012-17.pdf>

Objectives, Scope and Methodology

The objective of this report is to evaluate the financial condition of Oregon's county governments using the Financial Trend Monitoring System developed by the International City and County Management Association (ICMA). In addition, we sought to identify general strategies used by other states to monitor and address counties with financial problems.

This report was produced for informational purposes and does not constitute an audit performed in accordance with generally accepted government auditing standards.

The primary source of data in this report was obtained from each county's audited financial statements of fiscal years 2006 through 2015. In addition, our analysis focused on the financial condition of each county's governmental funds, which includes its General Fund. Unless otherwise indicated, data are presented on a fiscal year basis (e.g., 2015 represents the fiscal year beginning July 1, 2014 and ending June 30, 2015). In order to account for inflation, we expressed financial data in constant dollars. We adjusted dollar amounts for each prior year to equal the purchasing power of money in fiscal year 2015. We used the Consumer Price Index – All Urban Consumers U.S. city Average, as reported by the Bureau of Labor Statistics, U.S. Department of Labor. Charts that have been adjusted for inflation will be indicated in the chart title.

Financial indicators used in this report were derived primarily from information contained in the ICMA *Evaluating Financial Condition: A Handbook for Local Governments*. However, additional factors were considered and, in some cases, the indicators were modified to fit Oregon's unique situation. For example, differences in accounting principles employed by counties made it difficult to identify discretionary operational spending.

Counties selected for additional analysis were identified using a number of criteria including: 1) the county's dependence on federal timber revenue, 2) the number of indicators in which the county was identified as high risk of distress, and 3) our general understanding of the counties (i.e., publicly known financial troubles).

We reviewed information for reasonableness and consistency. We did not, however, audit the accuracy of source documents or the reliability of the data in computer-based systems. Our review of data was not intended to give absolute assurance that all information was free from error. Rather, our intent was to provide reasonable assurance that the reported information presented a fair picture of the financial condition of county governments in the State of Oregon. In addition, while the report offers financial highlights, it does not thoroughly determine the reasons for negative or positive performance. More analysis is needed to provide such explanations.

Additional information, such as economic and demographic indicators, was obtained from the following sources:

- Oregon Employment Department
- Oregon Department of Administrative Services
- Oregon Department of Revenue
- Oregon Public Employees Retirement System
- Oregon Secretary of State, Archives Division
- Portland State University Population Research Center
- United States Department of the Interior, Bureau of Land Management
- United States Department of Labor, Bureau of Labor Statistics
- Curry County Officials
- Douglas County Officials
- Josephine County Officials
- Polk County Officials
- *ICMA Evaluating Financial Condition: A Handbook for Local Governments*

About the Secretary of State Audits Division

The Oregon Constitution provides that the Secretary of State shall be, by virtue of her office, Auditor of Public Accounts. The Audits Division exists to carry out this duty. The division reports to the elected Secretary of State and is independent of other state agencies within the Executive, Legislative, and Judicial branches of Oregon government. The division audits all state officers, agencies, boards, and commissions and oversees audits and financial reporting for local governments.

Audit Team

Mary Wenger, CPA, Interim Director

Phil Hopkins, CPA, Audit Manager

Kari Mott, MBA, Principal Auditor

Paul Birkvold, CPA, Senior Auditor

This report, a public record, is intended to promote the best possible management of public resources. Copies may be obtained from:

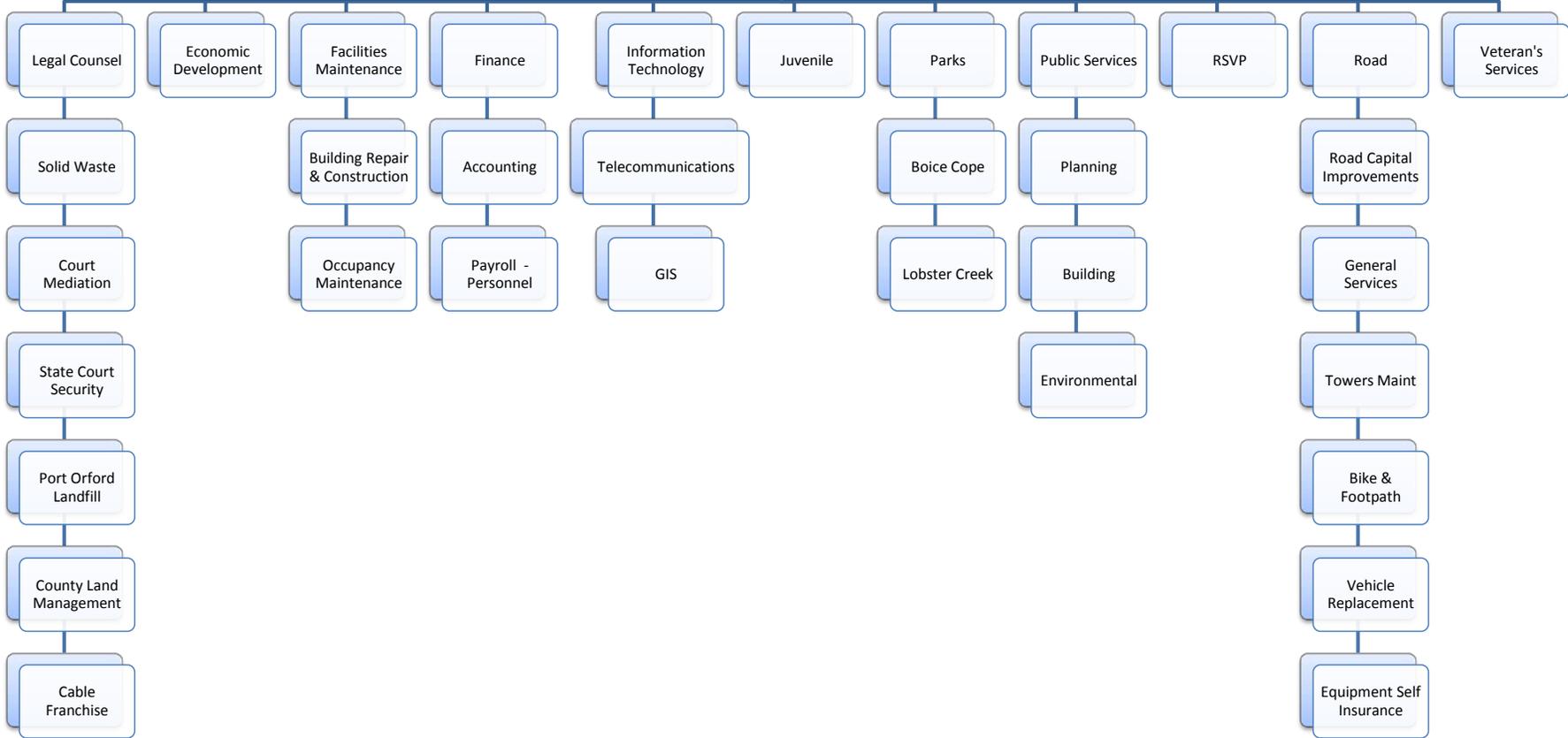
internet: sos.oregon.gov/audits

phone: 503-986-2255

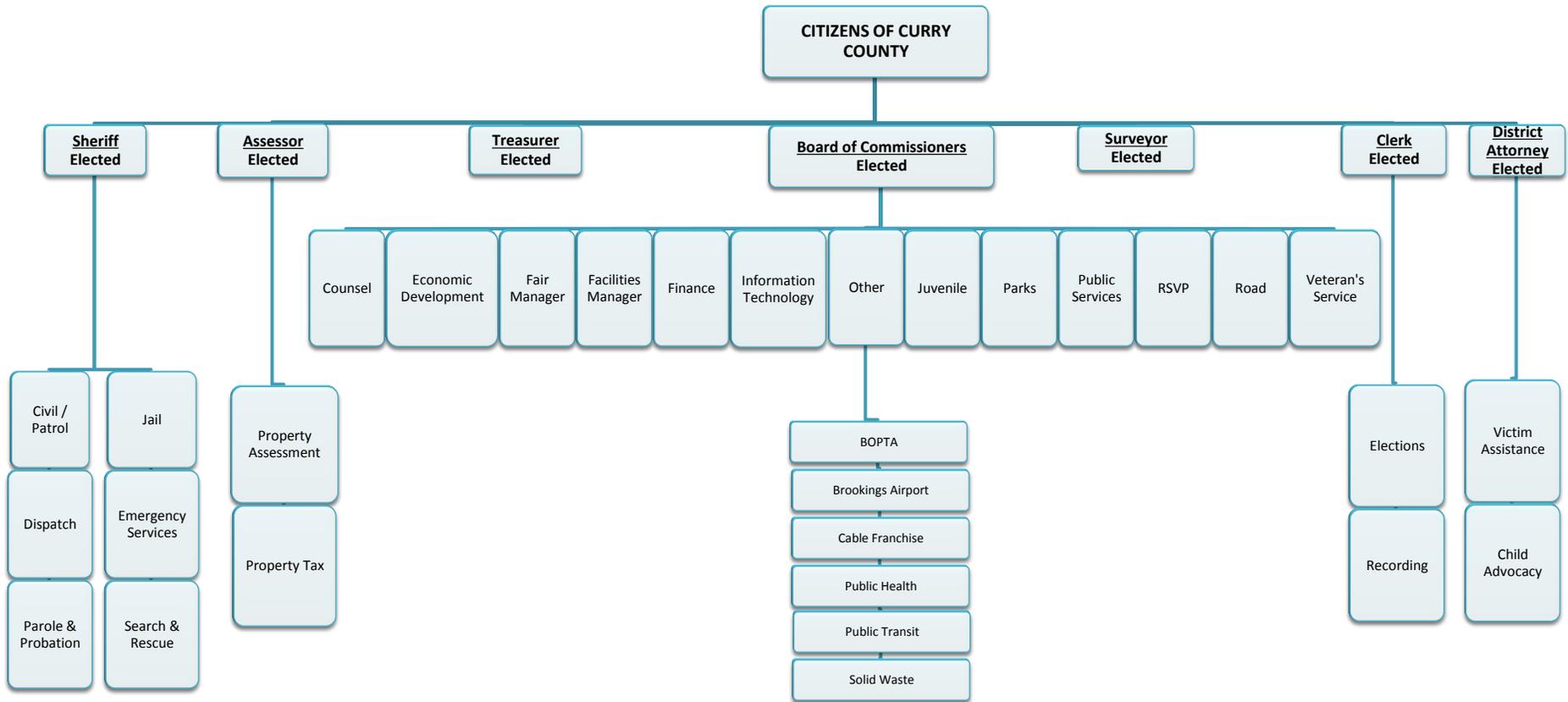
mail: Oregon Audits Division
255 Capitol Street NE, Suite 500
Salem, OR 97310

The courtesies and cooperation extended by officials and employees of Oregon counties and the Association of Oregon Counties during the course of this review were commendable and sincerely appreciated.

**Departments Under Direction Of Commissioners -
Department Heads Are Appointed**



CURRY COUNTY ORGANIZATION CHART



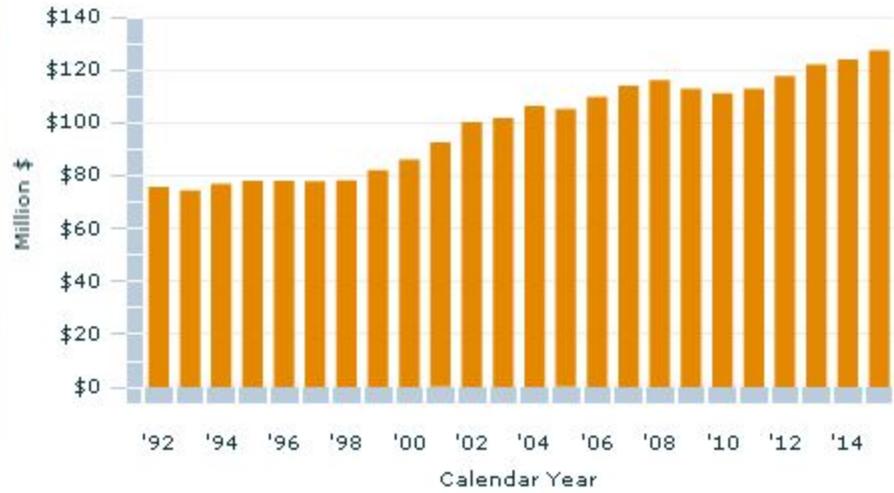
[View Definition of Terms](#)

Current Selection: **Curry County**

[Change Selection](#)

- Oregon Travel Impacts
 - Total Direct Travel Spending
 - All categories (select year below)
 - CY Totals**
 - Visitor Spending at Destination
 - Other Travel*
 - Visitor Spending
 - CY Totals
 - by Type of Accommodation
 - by Commodity Purchased
 - Total Direct Earnings
 - Total Direct Employment
 - Total Direct Tax Receipts

Curry County
Total Direct Travel Spending



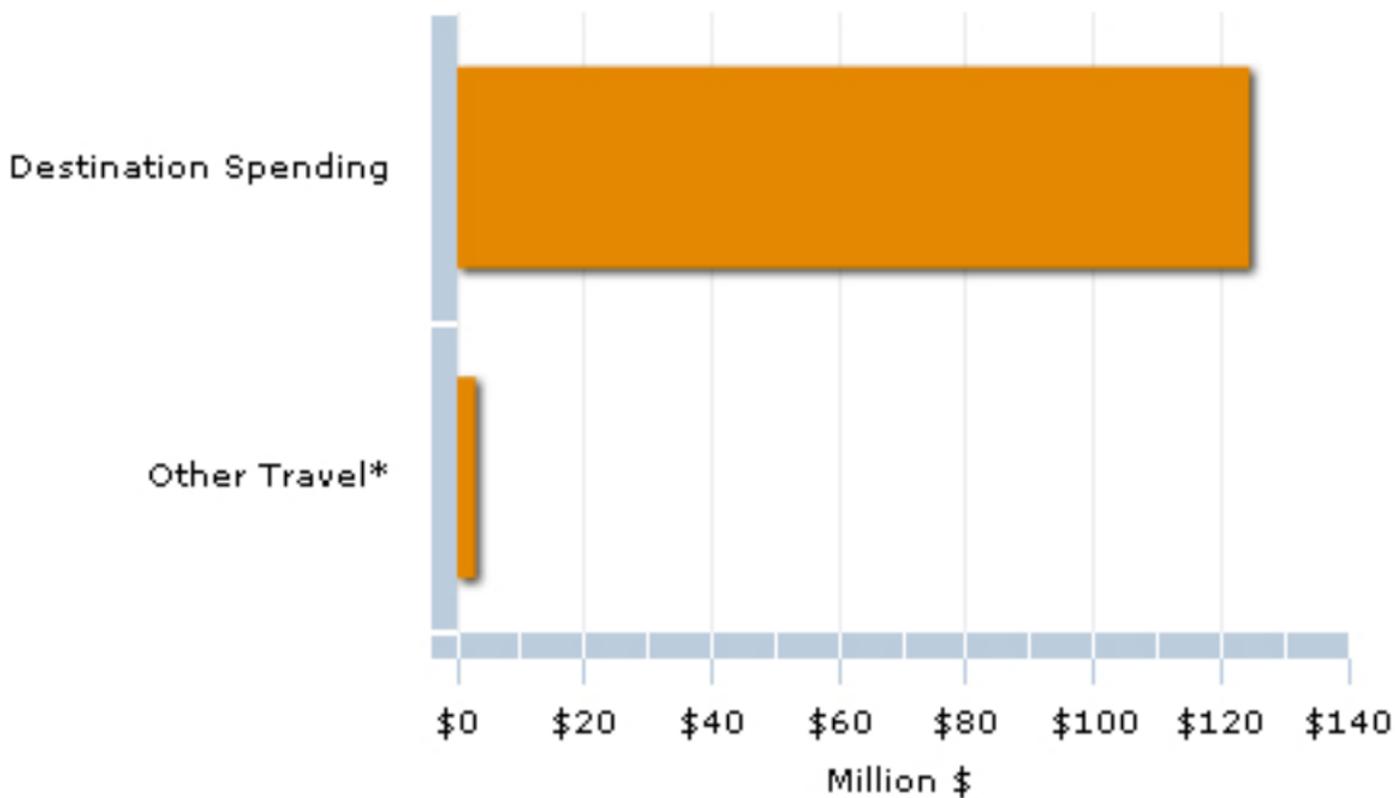
Calendar Year	Million \$	Annual Change
2011	\$112.9	1.6%
2012	\$117.7	4.3%
2013	\$122.0	3.7%
2014	\$123.9	1.6%
2015	\$127.3	2.8%

[Save / Print Chart](#)

[Save Table](#)



Curry County
Total Direct Travel Spending by Category (2015)



* Includes resident air travel and travel agencies.