

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

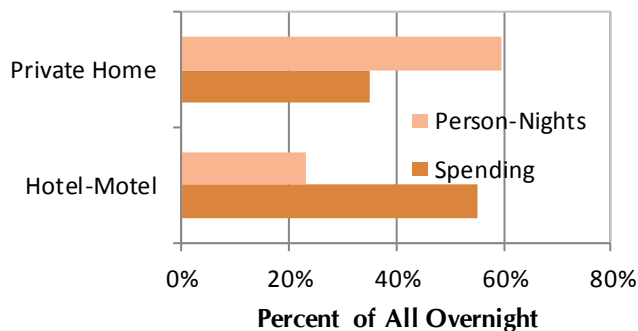
Travel Share of Total Employment (2014)*	5.1%
Overnight Visitor Day Share of Resident Population (2015p)**	6.0%

*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	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 Washington 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	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 Washington 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	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 Washington 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