

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2016p)

Amount of Visitor Spending that supports 1 Job	\$72,190
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.50

Visitor Volume (2016p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$25,560
Additional employment if each resident household encouraged one additional overnight visitor	354

Visitor Shares

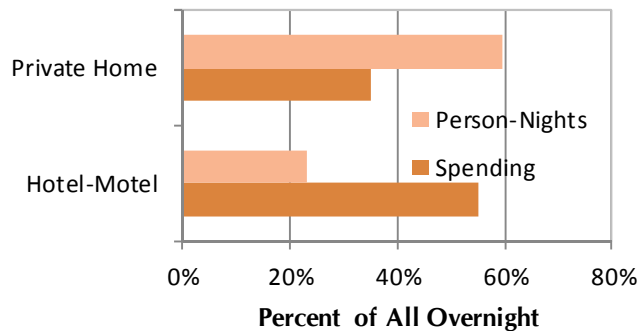
Travel Share of Total Employment (2015)*	5.1%
Overnight Visitor Day Share of Resident Population (2016p)**	6.1%

*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



2016p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel*	1,099	2,042	\$295.9
Private Home	1,574	4,766	\$165.3
Other Overnight	438	1,365	\$46.5
All Overnight	3,111	8,173	\$507.7

Lane County Direct Travel Impacts, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	494.4	601.7	732.9	870.4	930.6	6.9%	4.0%
Other	97.9	129.7	221.2	237.9	258.2	8.5%	6.2%
Visitor	396.5	472.0	511.7	632.5	672.4	6.3%	3.4%
Non-transportation	357.5	415.6	448.8	565.6	605.2	7.0%	3.3%
Transportation	39.0	56.4	62.9	66.9	67.3	0.6%	3.5%
Earnings (\$Millions)							
Earnings	119.9	142.0	167.9	239.1	262.7	9.9%	5.0%
Employment							
Employment	7,440	8,010	8,460	10,190	10,620	4.2%	2.2%
Tax Revenue (\$Millions)							
Total	17.4	21.5	23.9	33.7	37.1	10.2%	4.8%
Local	5.4	7.2	7.8	11.9	13.0	9.4%	5.6%
State	12.0	14.4	16.1	21.8	24.1	10.6%	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 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, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	419.2	513.3	632.7	743.2	794.4	6.9%	4.1%
Other	94.5	126.6	212.0	220.9	239.0	8.2%	6.0%
Visitor	324.7	386.7	420.8	522.3	555.5	6.3%	3.4%
Non-transportation	290.1	336.8	365.0	462.4	495.1	7.1%	3.4%
Transportation	34.6	50.0	55.8	60.0	60.4	0.7%	3.5%
Earnings (\$Millions)							
Earnings	99.1	118.0	138.5	197.7	217.4	10.0%	5.0%
Employment							
Employment	6,100	6,600	6,940	8,370	8,720	4.1%	2.3%
Tax Revenue (\$Millions)							
Total	15.6	19.4	21.2	29.9	33.0	10.4%	4.8%
Local	5.2	6.9	7.2	11.0	12.1	9.9%	5.5%
State	10.4	12.5	13.9	18.9	20.9	10.7%	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 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, 2000-2016p

	2000	2005	2010	2015	2016p	Ave. Annual % Chg.	
						15-16p	00-16p
Spending (\$Millions)							
Total	75.2	88.3	100.2	127.2	136.2	7.1%	3.8%
Other	3.4	3.1	9.3	17.0	19.2	13.0%	11.4%
Visitor	71.8	85.2	90.9	110.1	117.0	6.2%	3.1%
Non-transportation	67.4	78.8	83.8	103.2	110.1	6.7%	3.1%
Transportation	4.4	6.5	7.1	6.9	6.9	-0.8%	2.8%
Earnings (\$Millions)							
Earnings	20.8	24.1	29.4	41.4	45.3	9.3%	5.0%
Employment							
Employment	1,330	1,410	1,530	1,810	1,900	4.7%	2.3%
Tax Revenue (\$Millions)							
Total	1.8	2.2	2.7	3.7	4.0	8.6%	5.0%
Local	0.3	0.3	0.6	0.8	0.8	2.7%	7.6%
State	1.6	1.9	2.1	2.9	3.2	10.2%	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 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, 2008-2016p**

	2008	2010	2012	2013	2014	2015	2016p
Total Direct Travel Spending (\$Million)							
Destination Spending	536.8	511.7	572.1	584.3	609.3	632.5	672.4
Other Travel*	180.2	221.2	214.8	226.8	234.4	237.9	258.2
Total Direct Spending	717.0	732.9	786.9	811.1	843.7	870.4	930.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	98.3	88.1	100.6	103.5	112.2	124.8	139.9
Food Service	145.4	147.2	164.0	170.5	179.4	190.7	206.0
Food Stores	56.3	54.8	60.6	62.2	65.2	67.9	69.2
Local Tran. & Gas	75.3	62.9	77.4	75.7	75.9	66.9	67.3
Arts, Ent. & Rec.	77.1	74.2	78.8	80.5	83.1	86.1	90.9
Retail Sales	84.4	84.5	90.7	91.8	93.6	96.0	99.1
Destination Spending	536.8	511.7	572.1	584.3	609.3	632.5	672.4
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	106.1	99.7	113.6	117.8	127.3	138.4	149.5
Arts, Ent. & Rec.	26.0	23.6	24.8	28.4	30.1	31.5	34.2
Retail**	17.9	17.4	18.8	19.3	20.2	21.3	22.6
Ground Tran.	3.6	3.4	3.4	3.4	3.8	4.1	4.4
Other Travel*	24.3	24.0	32.5	36.3	38.9	43.8	52.0
Total Direct Earnings	178.0	167.9	193.2	205.2	220.3	239.1	262.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	5,050	4,590	4,990	5,130	5,310	5,550	5,770
Arts, Ent. & Rec.	2,430	2,220	2,240	2,370	2,420	2,410	2,540
Retail**	810	760	810	830	840	870	880
Ground Tran.	130	120	120	110	120	120	130
Other Travel*	860	770	950	1,060	1,100	1,240	1,300
Total Direct Employment	9,290	8,460	9,100	9,500	9,790	10,190	10,620
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.5	7.8	8.8	9.6	10.5	11.9	13.0
State Tax Receipts	17.0	16.1	19.2	19.9	20.6	21.8	24.1
Total Local & State	25.5	23.9	28.0	29.5	31.1	33.7	37.1

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.

Lane County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2008-2016p

	2008	2010	2012	2013	2014	2015	2016p
All Overnight	405.1	381.7	428.7	435.9	456.1	475.3	507.7
Hotel, Motel*	222.0	198.9	230.0	235.5	251.3	268.2	295.9
Private Home	141.5	142.7	156.8	156.3	160.0	161.5	165.3
Other Overnight	41.6	40.1	41.9	44.1	44.8	45.5	46.5
Campground	33.6	31.6	32.8	34.9	35.4	36.0	37.0
Vacation Home	7.9	8.6	9.1	9.2	9.4	9.5	9.5
Day Travel	131.7	129.9	143.4	148.3	153.3	157.2	164.7
Spending at Destination	536.8	511.7	572.1	584.3	609.3	632.5	672.4

Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$341	\$643	\$145	\$269	2.4	1.9
Private Home	\$86	\$266	\$35	\$105	2.5	3.1
Other Overnight	\$115	\$357	\$34	\$106	3.4	3.1
All Overnight	\$159	\$419	\$62	\$163	2.6	2.6

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	1,802	1,898	2,042	765	805	867
Private Home	4,583	4,658	4,766	1,840	1,872	1,923
Other Overnight	1,320	1,345	1,365	392	399	405
All Overnight	7,706	7,901	8,173	2,998	3,076	3,195

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016p	2014	2015	2016p
Hotel, Motel*	969	1,021	1,099	406	427	460
Private Home	1,514	1,538	1,574	596	606	622
Other Overnight	424	432	438	126	128	130
All Overnight	2,907	2,990	3,111	1,128	1,162	1,212

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