

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2014p)

Amount of Visitor Spending that supports 1 Job	\$70,340
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.10

Visitor Volume (2014p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$23,870
Additional employment if each resident household encouraged one additional overnight visitor	339

Visitor Shares

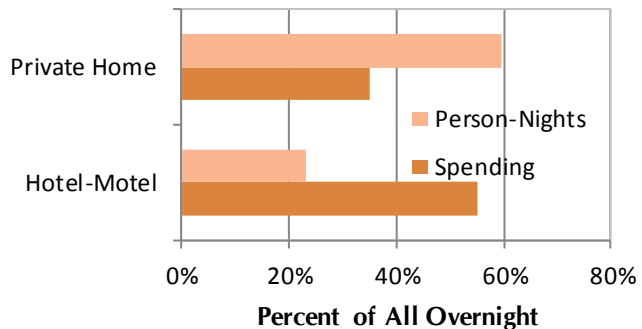
Travel Share of Total Employment (2013)*	5.0%
Overnight Visitor Day Share of Resident Population (2014p)**	5.9%

*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



2014p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	969	1,802	\$251.5
Private Home	1,520	4,604	\$160.2
Other Overnight	424	1,320	\$44.8
All Overnight	2,913	7,727	\$456.5

Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	361.1	88.6	7,650	2,277	8,998	11,275
1992	379.2	91.7	7,370	2,495	9,660	12,155
1993	408.1	96.7	7,520	3,619	10,293	13,912
1994	418.2	100.3	7,590	4,290	10,713	15,003
1995	429.9	104.4	7,570	4,507	10,985	15,492
1996	451.5	109.0	7,640	4,807	11,170	15,977
1997	463.1	112.7	7,500	5,005	11,328	16,334
1998	464.4	115.1	7,560	5,131	11,380	16,511
1999	475.8	116.9	7,380	5,281	11,504	16,786
2000	494.4	119.9	7,440	5,437	11,983	17,420
2001	499.4	122.2	7,610	5,591	12,092	17,683
2002	511.1	126.6	7,720	5,868	12,215	18,083
2003	520.5	126.2	7,510	5,796	12,377	18,173
2004	558.3	132.3	7,730	6,242	13,483	19,724
2005	601.7	142.0	8,010	7,178	14,365	21,543
2006	654.3	155.8	8,380	7,748	15,446	23,194
2007	689.1	173.0	9,060	8,317	16,500	24,817
2008	717.0	178.0	9,290	8,457	17,013	25,470
2009	677.3	161.8	8,340	7,850	15,412	23,261
2010	732.8	167.9	8,460	7,820	16,056	23,876
2011	762.4	180.9	8,830	8,391	18,606	26,997
2012	786.9	193.2	9,100	8,760	19,242	28,002
2013	811.1	205.2	9,500	9,584	19,906	29,490
2014p	849.5	218.6	9,770	10,492	20,558	31,050
Annual Percentage Change						
13-14p	4.7%	6.5%	2.9%	9.5%	3.3%	5.3%
91-14p	3.8%	4.0%	1.1%	6.9%	3.7%	4.5%

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

East Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	303.1	72.7	6,120	2,151	7,737	9,888
1992	319.1	75.2	5,900	2,359	8,330	10,689
1993	346.4	79.9	6,060	3,469	8,921	12,390
1994	353.6	82.6	6,090	4,120	9,275	13,394
1995	360.5	85.3	6,020	4,300	9,460	13,760
1996	379.3	89.1	6,090	4,572	9,615	14,187
1997	389.4	92.2	5,990	4,766	9,759	14,525
1998	388.6	93.9	6,050	4,885	9,776	14,662
1999	400.0	95.8	5,930	5,028	9,914	14,941
2000	419.2	99.1	6,100	5,175	10,405	15,580
2001	421.8	100.9	6,240	5,335	10,482	15,817
2002	430.9	104.6	6,330	5,603	10,583	16,187
2003	441.0	104.4	6,180	5,548	10,749	16,297
2004	474.6	109.5	6,340	5,965	11,716	17,681
2005	513.3	118.0	6,600	6,858	12,505	19,362
2006	562.0	130.0	6,940	7,401	13,488	20,890
2007	580.5	140.7	7,300	7,936	14,164	22,099
2008	613.1	146.9	7,620	8,105	14,770	22,874
2009	580.8	132.7	6,800	7,338	13,324	20,662
2010	632.7	138.5	6,940	7,219	13,933	21,152
2011	659.0	150.6	7,310	7,778	16,309	24,087
2012	680.1	161.5	7,570	8,175	16,892	25,067
2013	695.1	169.7	7,810	8,923	17,322	26,244
2014p	727.4	180.7	8,020	9,776	17,844	27,620
Annual Percentage Change						
13-14p	4.6%	6.5%	2.7%	9.6%	3.0%	5.2%
91-14p	3.9%	4.0%	1.2%	6.8%	3.7%	4.6%

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

West Lane County Travel Trends, 1991-2014p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	58.0	15.9	1,530	126	1,261	1,387
1992	60.2	16.5	1,470	137	1,329	1,466
1993	61.7	16.9	1,460	150	1,372	1,522
1994	64.6	17.7	1,500	171	1,438	1,609
1995	69.4	19.1	1,550	207	1,525	1,732
1996	72.1	20.0	1,560	235	1,555	1,790
1997	73.7	20.5	1,510	239	1,569	1,808
1998	75.8	21.2	1,510	246	1,604	1,850
1999	75.7	21.1	1,450	253	1,591	1,844
2000	75.2	20.8	1,330	262	1,578	1,840
2001	77.5	21.3	1,370	257	1,610	1,867
2002	80.1	22.1	1,390	264	1,632	1,896
2003	79.5	21.8	1,340	247	1,629	1,876
2004	83.7	22.8	1,380	277	1,767	2,044
2005	88.3	24.1	1,410	321	1,860	2,181
2006	92.3	25.7	1,440	347	1,958	2,305
2007	108.6	32.2	1,760	381	2,337	2,718
2008	103.9	31.1	1,670	352	2,243	2,595
2009	96.5	29.1	1,540	512	2,088	2,599
2010	100.2	29.4	1,530	601	2,123	2,723
2011	103.3	30.4	1,520	613	2,297	2,910
2012	106.7	31.6	1,530	585	2,350	2,935
2013	115.9	35.5	1,680	661	2,584	3,246
2014p	122.1	38.0	1,750	716	2,714	3,430
Annual Percentage Change						
13-14p	5.4%	6.9%	3.7%	8.2%	5.0%	5.7%
91-14p	3.3%	3.9%	0.6%	7.8%	3.4%	4.0%

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

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

	2006	2008	2010	2011	2012	2013	2014p
Total Direct Travel Spending (\$Million)							
Destination Spending	491.8	536.8	511.7	546.1	572.1	584.3	609.9
Other Travel*	162.5	180.2	221.1	216.2	214.7	226.8	239.6
Total Direct Spending	654.3	717.0	732.8	762.4	786.9	811.1	849.5
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	82.8	98.3	88.1	95.1	100.6	103.5	112.3
Food Service	135.1	145.4	147.2	154.2	164.0	170.5	179.5
Food Stores	49.3	56.3	54.8	58.3	60.6	62.2	65.2
Local Tran. & Gas	62.1	75.3	62.9	74.8	77.4	75.7	76.0
Arts, Ent. & Rec.	75.6	77.1	74.2	76.1	78.8	80.5	83.2
Retail Sales	86.9	84.4	84.5	87.7	90.7	91.8	93.7
Destination Spending	491.8	536.8	511.7	546.1	572.1	584.3	609.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	92.7	106.1	99.7	106.6	113.6	117.8	126.7
Arts, Ent. & Rec.	22.1	26.0	23.6	24.2	24.8	28.4	29.2
Retail**	16.8	17.9	17.4	18.2	18.8	19.3	20.2
Ground Tran.	3.5	3.6	3.4	3.4	3.4	3.4	3.8
Other Travel*	20.7	24.3	24.0	28.5	32.5	36.3	38.8
Total Direct Earnings	155.8	178.0	167.9	180.9	193.2	205.2	218.6
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,610	5,050	4,590	4,840	4,990	5,130	5,280
Arts, Ent. & Rec.	2,070	2,430	2,220	2,230	2,240	2,370	2,430
Retail**	780	810	760	790	810	830	840
Ground Tran.	140	130	120	120	120	110	120
Other Travel*	780	860	770	840	950	1,060	1,100
Total Direct Employment	8,380	9,290	8,460	8,830	9,100	9,500	9,770
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	7.7	8.5	7.8	8.4	8.8	9.6	10.5
State Tax Receipts	15.4	17.0	16.1	18.6	19.2	19.9	20.6
Total Local & State	23.2	25.5	23.9	27.0	28.0	29.5	31.0

Details may not add to totals due to rounding.

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), 2006-2014p

	2006	2008	2010	2011	2012	2013	2014p
All Overnight	352.0	405.1	381.7	407.9	428.7	435.9	456.5
Hotel, Motel	190.8	222.0	198.9	215.2	230.0	235.5	251.5
Private Home	129.2	141.5	142.7	151.9	156.8	156.3	160.2
Other Overnight	32.0	41.6	40.1	40.9	41.9	44.1	44.8
Campground	25.5	33.6	31.6	31.9	32.8	34.9	35.4
Vacation Home	6.5	7.9	8.6	9.0	9.1	9.2	9.4
Day Travel	139.8	131.7	129.9	138.2	143.4	148.3	153.4
Spending at Destination	491.8	536.8	511.7	546.1	572.1	584.3	609.9

Average Expenditures for Overnight Visitors, 2014p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$328	\$620	\$140	\$260	2.4	1.9
Private Home	\$87	\$267	\$35	\$105	2.5	3.1
Other Overnight	\$114	\$355	\$34	\$106	3.4	3.1
All Overnight	\$152	\$404	\$59	\$157	2.6	2.7

Overnight Visitor Volume, 2012-2014p

	Person-Nights (000)			Party-Nights (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	1,696	1,731	1,802	717	735	766
Private Home	4,567	4,525	4,604	1,822	1,816	1,851
Other Overnight	1,265	1,312	1,320	376	389	392
All Overnight	7,528	7,568	7,727	2,916	2,941	3,008

	Person-Trips (000)			Party-Trips (000)		
	2012	2013	2014	2012	2013	2014
Hotel, Motel	909	930	969	380	389	406
Private Home	1,508	1,494	1,520	592	588	599
Other Overnight	406	421	424	121	125	126
All Overnight	2,823	2,845	2,913	1,093	1,103	1,131