

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2013p)

Amount of Visitor Spending that supports 1 Job	\$69,680
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.00

Visitor Volume (2013p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$22,760
Additional employment if each resident household encouraged one additional overnight visitor	327

Visitor Shares

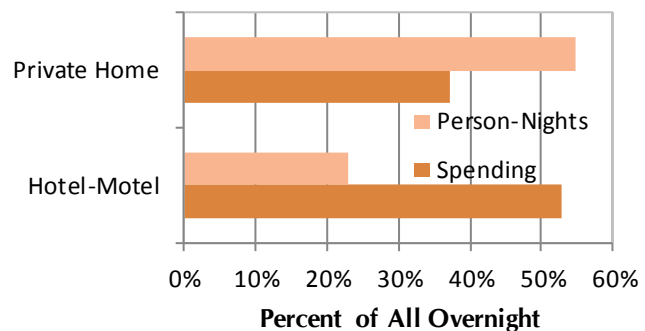
Travel Share of Total Employment (2012)*	4.3%
Overnight Visitor Day Share of Resident Population (2013p)**	5.8%

*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



2013p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,052	1,934	\$212.3
Private Home	1,541	4,646	\$149.0
Other Overnight	618	1,895	\$40.9
All Overnight	3,211	8,475	\$402.1

Lane County Travel Trends, 1991-2013p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	356.0	86.7	7,550	2,277	8,896	11,174
1992	373.6	89.6	7,280	2,495	9,547	12,042
1993	402.5	94.7	7,430	3,683	10,183	13,866
1994	412.8	98.4	7,500	4,351	10,609	14,960
1995	424.4	102.5	7,480	4,563	10,885	15,448
1996	444.9	106.7	7,540	4,858	11,043	15,901
1997	455.9	110.2	7,390	5,049	11,192	16,241
1998	458.8	113.4	7,490	5,170	11,295	16,465
1999	470.0	115.2	7,320	5,322	11,416	16,738
2000	488.5	118.1	7,380	5,480	11,891	17,371
2001	493.1	120.5	7,540	5,585	11,998	17,583
2002	506.3	125.3	7,660	5,885	12,143	18,028
2003	514.6	124.1	7,450	5,783	12,261	18,044
2004	552.1	130.4	7,660	6,185	13,375	19,560
2005	592.7	138.2	7,860	7,132	14,144	21,276
2006	628.0	145.1	8,000	7,719	14,847	22,566
2007	652.5	158.1	8,560	8,260	15,661	23,920
2008	680.9	163.4	8,810	8,470	16,198	24,668
2009	649.6	149.5	7,920	8,008	14,722	22,729
2010	693.0	150.5	7,910	7,973	15,069	23,043
2011	703.0	157.0	8,080	8,459	18,329	26,788
2012	714.1	163.9	8,190	8,828	18,772	27,600
2013p	733.6	173.3	8,510	9,391	19,466	28,856
Annual Percentage Change						
12-13p	2.7%	5.7%	3.9%	6.4%	3.7%	4.6%
91-13p	3.3%	3.2%	0.5%	6.7%	3.6%	4.4%

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, 1991-2013p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	298.9	71.0	6,040	2,151	7,648	9,799
1992	314.4	73.4	5,820	2,359	8,231	10,590
1993	341.7	78.1	5,980	3,533	8,823	12,356
1994	349.1	80.9	6,010	4,180	9,184	13,364
1995	355.9	83.6	5,950	4,356	9,370	13,726
1996	374.0	87.0	6,000	4,623	9,504	14,127
1997	383.4	90.0	5,900	4,810	9,640	14,450
1998	383.9	92.4	5,990	4,924	9,699	14,624
1999	395.1	94.3	5,870	5,068	9,833	14,901
2000	414.3	97.5	6,050	5,218	10,322	15,540
2001	416.4	99.3	6,170	5,329	10,395	15,724
2002	426.9	103.3	6,270	5,621	10,515	16,136
2003	435.9	102.6	6,110	5,536	10,644	16,180
2004	469.1	107.7	6,280	5,908	11,614	17,522
2005	505.3	114.4	6,460	6,811	12,298	19,110
2006	539.9	121.1	6,610	7,372	12,984	20,357
2007	550.0	128.3	6,880	7,879	13,465	21,344
2008	583.2	134.8	7,210	8,118	14,093	22,211
2009	558.2	122.6	6,440	7,496	12,752	20,247
2010	600.0	124.1	6,470	7,373	13,116	20,489
2011	608.8	130.5	6,670	7,846	16,158	24,004
2012	618.1	136.8	6,790	8,243	16,579	24,823
2013p	631.1	143.3	6,990	8,753	17,082	25,835
Annual Percentage Change						
12-13p	2.1%	4.7%	2.9%	6.2%	3.0%	4.1%
91-13p	3.5%	3.2%	0.7%	6.6%	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.

West Lane County Travel Trends, 1991-2013p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	57.1	15.7	1,520	126	1,248	1,374
1992	59.2	16.2	1,460	137	1,315	1,452
1993	60.8	16.7	1,450	150	1,360	1,510
1994	63.7	17.5	1,490	171	1,425	1,596
1995	68.5	18.9	1,540	207	1,514	1,722
1996	71.0	19.6	1,540	235	1,538	1,774
1997	72.5	20.1	1,500	239	1,553	1,792
1998	74.9	21.0	1,500	246	1,596	1,841
1999	74.8	21.0	1,440	253	1,583	1,837
2000	74.3	20.6	1,330	262	1,569	1,831
2001	76.7	21.1	1,370	257	1,603	1,859
2002	79.4	22.0	1,390	264	1,627	1,892
2003	78.7	21.5	1,330	247	1,617	1,865
2004	83.1	22.7	1,380	277	1,761	2,037
2005	87.4	23.8	1,400	321	1,846	2,166
2006	88.1	24.0	1,390	347	1,862	2,209
2007	102.4	29.7	1,680	381	2,196	2,577
2008	97.7	28.6	1,590	352	2,105	2,457
2009	91.4	27.0	1,480	512	1,970	2,482
2010	93.0	26.4	1,440	601	1,953	2,554
2011	94.2	26.5	1,410	613	2,170	2,783
2012	96.0	27.1	1,400	585	2,192	2,777
2013p	102.5	30.0	1,520	638	2,384	3,022
Annual Percentage Change						
12-13p	6.8%	10.7%	8.5%	9.0%	8.8%	8.8%
91-13p	2.7%	3.0%	0.0%	7.6%	3.0%	3.6%

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.

**Lane County
Travel Impacts, 2004-2013p**

	2004	2006	2008	2010	2011	2012	2013p
Total Direct Travel Spending (\$Million)							
Destination Spending	443.2	491.5	537.0	513.4	538.7	560.5	575.7
Other Travel*	108.9	136.5	143.9	179.7	164.3	153.5	157.9
Total Direct Spending	552.1	628.0	680.9	693.0	703.0	714.1	733.6
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	68.6	82.8	98.3	88.1	93.5	97.7	102.4
Food Service	122.5	135.1	145.4	147.2	151.7	160.3	167.0
Food Stores	48.0	49.3	56.3	54.8	57.6	59.5	60.9
Local Tran. & Gas	47.8	61.8	75.4	64.5	74.6	77.0	76.2
Arts, Ent. & Rec.	72.6	75.6	77.1	74.2	75.0	77.2	79.0
Retail Sales	83.6	86.9	84.4	84.5	86.3	88.8	90.1
Destination Spending	443.2	491.5	537.0	513.4	538.7	560.5	575.7
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	82.2	92.7	106.1	99.7	104.9	110.7	115.5
Arts, Ent. & Rec.	20.8	22.1	26.0	23.6	23.8	24.3	28.3
Retail**	16.2	16.8	17.9	17.4	17.9	18.4	18.8
Ground Tran.	2.9	3.1	3.4	3.0	3.2	3.3	3.4
Other Travel*	8.4	10.5	10.0	6.9	7.2	7.1	7.3
Total Direct Earnings	130.4	145.1	163.4	150.5	157.0	163.9	173.3
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,430	4,610	5,050	4,590	4,760	4,860	5,040
Arts, Ent. & Rec.	1,980	2,070	2,430	2,220	2,200	2,200	2,300
Retail**	780	780	810	760	780	790	810
Ground Tran.	120	120	130	100	110	110	110
Other Travel*	350	420	390	230	230	240	250
Total Direct Employment	7,660	8,000	8,810	7,910	8,080	8,190	8,510
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.2	7.7	8.5	8.0	8.5	8.8	9.4
State Tax Receipts	13.4	14.8	16.2	15.1	18.3	18.8	19.5
Total Local & State	19.6	22.6	24.7	23.0	26.8	27.6	28.9

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, and travel agencies. **Retail includes gasoline.

Lane County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2004-2013p

	2004	2006	2008	2010	2011	2012	2013p
All Overnight	312.5	351.7	405.2	383.4	402.1	419.5	429.7
Hotel, Motel	160.3	190.5	222.1	200.5	212.3	224.3	233.5
Private Home	119.8	129.2	141.5	142.7	149.0	153.3	153.6
Other Overnight	32.3	32.0	41.6	40.1	40.9	41.9	42.7
Campground	26.9	25.5	33.6	31.6	31.9	32.8	33.5
Vacation Home	5.5	6.5	7.9	8.6	9.0	9.1	9.2
Day Travel	130.8	139.8	131.7	129.9	136.6	141.1	145.9
Spending at Destination	443.2	491.5	537.0	513.4	538.7	560.5	575.7

Average Expenditures for Overnight Visitors, 2013p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$264	\$488	\$110	\$202	2.4	1.8
Private Home	\$82	\$249	\$32	\$97	2.5	3.0
Other Overnight	\$73	\$222	\$22	\$66	3.4	3.1
All Overnight	\$126	\$330	\$47	\$125	2.7	2.6

Overnight Visitor Volume, 2011-2013p

	Person-Nights (000)			Party-Nights (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	1,599	1,669	1,727	665	695	719
Private Home	4,498	4,550	4,539	1,759	1,782	1,781
Other Overnight	1,251	1,265	1,284	372	376	381
All Overnight	7,348	7,485	7,549	2,796	2,852	2,882

	Person-Trips (000)			Party-Trips (000)		
	2011	2012	2013	2011	2012	2013
Hotel, Motel	858	895	928	355	370	384
Private Home	1,485	1,502	1,499	576	583	583
Other Overnight	402	406	412	120	121	123
All Overnight	2,745	2,804	2,839	1,051	1,074	1,089