

LANE COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$69,360
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.80

Visitor Volume (2012p)

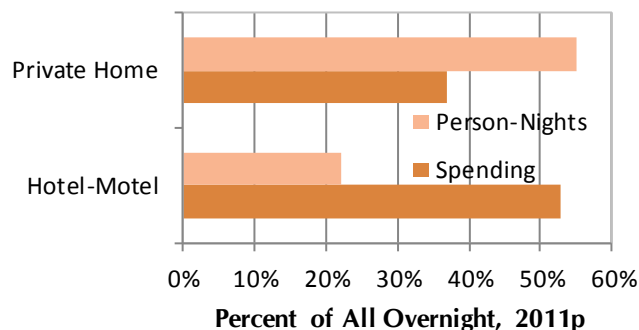
Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$22,040
Additional employment if each resident household encouraged one additional overnight visitor	318

Visitor Shares

Travel Share of Total Employment (2011)*	4.3%
Overnight Visitor Day Share (2012p)**	5.7%

*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.

2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	994	1,829	\$214.7
Private Home	1,516	4,573	\$149.9
Other Overnight	616	1,892	\$41.9
All Overnight	3,126	8,294	\$406.4

Lane County Travel Trends, 1991-2012p

	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	4,103	10,609	14,712
1995	424.4	102.5	7,480	4,329	10,885	15,213
1996	444.9	106.7	7,540	4,600	11,043	15,643
1997	455.9	110.2	7,390	4,789	11,192	15,981
1998	458.8	113.4	7,490	4,912	11,295	16,207
1999	470.0	115.2	7,320	5,054	11,416	16,470
2000	488.5	118.1	7,380	5,171	11,891	17,061
2001	493.1	120.5	7,540	5,197	11,998	17,195
2002	506.3	125.3	7,660	5,464	12,143	17,607
2003	514.6	124.1	7,450	5,315	12,261	17,576
2004	552.1	130.4	7,660	5,654	13,375	19,029
2005	592.7	138.2	7,860	6,546	14,143	20,689
2006	628.0	145.1	8,000	7,187	14,846	22,032
2007	652.5	158.1	8,560	7,699	15,661	23,360
2008	680.9	163.4	8,810	7,973	16,198	24,170
2009	649.6	149.5	7,920	7,494	14,720	22,213
2010	693.4	150.3	7,900	7,372	15,123	22,494
2011	707.3	156.2	8,150	7,916	18,478	26,394
2012p	708.3	165.9	8,240	8,062	18,856	26,917
Annual Percentage Change						
11-12p	0.1%	6.2%	1.1%	1.8%	2.0%	2.0%
91-12p	3.3%	3.1%	0.4%	6.2%	3.6%	4.3%

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, 1991-2012p

	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	3,932	9,184	13,116
1995	355.9	83.6	5,950	4,121	9,370	13,492
1996	374.0	87.0	6,000	4,365	9,504	13,869
1997	383.4	90.0	5,900	4,550	9,639	14,189
1998	383.9	92.4	5,990	4,666	9,699	14,366
1999	395.1	94.3	5,870	4,800	9,833	14,633
2000	414.3	97.5	6,050	4,908	10,322	15,230
2001	416.4	99.3	6,170	4,941	10,395	15,336
2002	426.9	103.3	6,270	5,200	10,515	15,715
2003	435.9	102.6	6,110	5,068	10,644	15,711
2004	469.1	107.7	6,280	5,377	11,614	16,991
2005	505.3	114.4	6,460	6,225	12,298	18,522
2006	539.9	121.1	6,610	6,840	12,983	19,823
2007	550.0	128.3	6,880	7,318	13,466	20,784
2008	583.2	134.8	7,210	7,620	14,093	21,714
2009	558.2	122.6	6,440	6,982	12,750	19,732
2010	599.8	123.7	6,460	6,771	13,156	19,927
2011	612.9	129.9	6,730	7,303	16,316	23,619
2012p	613.0	138.6	6,830	7,503	16,663	24,166
Annual Percentage Change						
11-12p	0.0%	6.7%	1.5%	2.7%	2.1%	2.3%
91-12p	3.5%	3.2%	0.6%	6.1%	3.8%	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.

West Lane County Travel Trends, 1991-2012p

	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	93.6	26.5	1,440	601	1,967	2,567
2011	94.4	26.3	1,420	613	2,162	2,775
2012p	95.3	27.4	1,410	558	2,193	2,751
Annual Percentage Change						
11-12p	0.9%	4.1%	-0.9%	-9.0%	1.4%	-0.9%
91-12p	2.5%	2.7%	-0.3%	7.3%	2.7%	3.4%

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.

Lane County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
Total Direct Travel Spending (\$Million)							
Destination Spending	423.5	443.2	491.5	537.0	512.7	541.0	555.2
Other Travel*	82.8	108.9	136.5	143.9	180.7	166.3	153.0
Total Direct Spending	506.3	552.1	628.0	680.9	693.4	707.3	708.3
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	65.0	68.6	82.8	98.3	87.8	93.2	95.4
Food Service	116.6	122.5	135.1	145.4	147.0	152.7	159.4
Food Stores	45.9	48.0	49.3	56.3	55.0	58.0	59.5
Local Tran. & Gas	38.8	47.8	61.8	75.4	64.4	75.2	75.9
Arts, Ent. & Rec.	70.6	72.6	75.6	77.1	74.1	75.4	76.9
Retail Sales	86.6	83.6	86.9	84.4	84.5	86.4	88.1
Destination Spending	423.5	443.2	491.5	537.0	512.7	541.0	555.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	78.3	82.2	92.7	106.1	99.5	104.7	112.6
Arts, Ent. & Rec.	20.7	20.8	22.1	26.0	23.5	23.5	24.4
Retail**	15.4	16.2	16.8	17.9	17.4	17.6	18.2
Ground Tran.	2.8	2.9	3.1	3.4	3.0	3.1	3.2
Other Travel*	8.2	8.4	10.5	10.0	6.9	7.2	7.5
Total Direct Earnings	125.3	130.4	145.1	163.4	150.3	156.2	165.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	4,430	4,430	4,610	5,050	4,580	4,820	4,910
Arts, Ent. & Rec.	2,020	1,980	2,070	2,430	2,220	2,220	2,210
Retail**	780	780	780	810	760	770	770
Ground Tran.	120	120	120	130	100	110	110
Other Travel*	300	350	420	390	240	230	240
Total Direct Employment	7,660	7,660	8,000	8,810	7,900	8,150	8,240
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.5	5.7	7.2	8.0	7.4	7.9	8.1
State Tax Receipts	12.1	13.4	14.8	16.2	15.1	18.5	18.9
Total Local & State	17.6	19.0	22.0	24.2	22.5	26.4	26.9

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), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	297.4	312.5	351.7	405.2	382.6	406.4	417.5
Hotel, Motel	150.1	160.3	190.5	222.1	199.3	214.7	221.7
Private Home	113.0	119.8	129.2	141.5	142.3	149.9	153.3
Other Overnight	34.3	32.3	32.0	41.6	41.0	41.9	42.4
Campground	29.4	26.9	25.5	33.6	32.4	33.0	33.5
Vacation Home	4.9	5.5	6.5	7.9	8.6	8.8	9.0
Day Travel	126.1	130.8	139.8	131.7	130.1	134.6	137.7
Spending at Destination	423.5	443.2	491.5	537.0	512.7	541.0	555.2

Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$278	\$518	\$117	\$216	2.4	1.9
Private Home	\$82	\$252	\$33	\$99	2.5	3.1
Other Overnight	\$75	\$228	\$22	\$68	3.4	3.1
All Overnight	\$129	\$341	\$49	\$130	2.6	2.6

Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,556	1,612	1,647	658	681	697
Private Home	4,384	4,444	4,470	1,747	1,770	1,785
Other Overnight	1,305	1,279	1,279	387	380	380
All Overnight	7,245	7,335	7,395	2,793	2,831	2,861

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	837	866	884	350	362	369
Private Home	1,448	1,467	1,476	568	575	580
Other Overnight	419	410	410	125	122	122
All Overnight	2,703	2,743	2,770	1,042	1,059	1,071